

NEW MEMBER "FAST TRACK TO SUCCESS" CHECKLIST

MEMBER INFORMATION

Group Name:	Start date:
Fee Renewal Date:	New Member Mentor:

FIRST WEEK

- Executive Team introduces you to the Group New Member Mentor to answer general questions.
- Register at www.Evite.com –reply wkly to market your services & provide facility & speakers with head count for set-up & handouts
- Like our Group Facebook Page @B2BFL or <https://www.facebook.com/B2BFL/>
- Receive your Business Card Holder – at the next wkly Event stock with 5 of each members Business Cards

POLICIES & PROCEDURES

- Review **Member Guidelines** online under new member
 - Membership Fees, pg 7
 - Membership Requirements, pg 8
 - Attendance Policy, pg 9 - 11
 - Sabbatical & Transfers, pg 11
 - Fast Track to Success, pg 12 -16

www.B2B-FL.com/resources The password is **referrals**

- This is a private page for current members only.
- Review Current Members Business Cards and their Categories - so you know what categories are currently represented in your group and how to contact them. A listing of your group members is also online
 - Make a list of your contacts to invite to fill Open Categories
 - Make a list of the Categories you would most want in your group as potential Power Partners

PRIOR TO SECOND MEETING

- | | | |
|--|--|---|
| <input type="checkbox"/> Download & Print Forms found online in the member resource area | <input type="checkbox"/> Complete the 30-Second Commercial & Agent Commercial | <input type="checkbox"/> Add B2B Meeting into your calendar for every week
<input type="checkbox"/> Sit with the New Member Mentor at the meeting for help in completing Referral Slips and to answer questions about our process. |
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10-MINUTE PRESENTATION

- Review the **10-Minute Presentation** Document downloaded from b2b-fl.com/resources page
- Prepare **Speaker Introduction** – Interactive Document - complete & print from the from b2b-fl.com/resources page, make a copy for your records and one to give to the Chapter Coordinator to file & read prior to your presentations.
- Advertise your Topic to members via the *Evite*, *E-mail* and during *30 second Promo's* at least 2 weeks prior so that they can invite guests to hear your presentation.
- Print **Speaker Evaluation Forms** - one for each person in attendance – ck wkly Evite for the confirmed headcount
- Prepare Handouts & related Materials to support your Topic
- Respond to Questions rec'd on **Speaker Evaluation Forms** – Member E-mail addresses are listed on the wkly Directors Recap

WITHIN THE FIRST MONTH

- Complete the 1 on 1 (**TEAMwork Form**) in preparation of your meetings with members. Save the completed document & Print 2 copies for each scheduled 1 on 1 so that you have one to use as a guide and one to give to the member you are meeting with.
- Schedule your first **1 on 1 meeting** with the New Member Mentor, a member of the Executive Team and *subsequently arrange to meet all members in chapter – this will allow you to get to know the goods/services offered by the membership & vice versa & assist all to generate Quality Referrals to increase business success.*

ONGOING

- Listen to what your contacts need and introduce your members
- Promote your group members by including a Signature Tag on your emails
- Think *Outside of the Box* for ways to assist your members in generating referrals, *be specific when asking for introductions to businesses & Individuals.*



PREPARING YOUR 30 SECOND COMMERCIAL

Impressions are formed within the first 20 – 30 seconds, of meeting someone. To maximize the effectiveness of your weekly commercials, prepare what you will say in advance so that it will be an effective marketing tool to get the referrals you are seeking. The use of approx 75 words is equal to a 30 second commercial.

Each meeting you will have two opportunities to market your business. These commercials can be the same or different depending on the needs of your business and the services/products you are marketing.

Read aloud and practice the commercial until you can present it without reading. Each member is asked to stand when giving their commercial. Make eye contact with 2-3 members as you speak. Remember members will need to hear information about your business repeatedly to get to know how they can generate referrals for you. What do you want your members to remember about you and your business when they leave the meeting?

The use of visuals in your presentation such as an actual product can make your commercial stand out!

20 Words: Who are you and what you do [your name, business name, category, services offered]

30 Words: A good referral for me is...[what or who do you want your members to refer to you? BE SPECIFIC]

25 Words: I need you to...[don't forget to ask for specific introductions]

30 Second Agent Commercial

Members Name _____

Please complete this form for your agent to read in your absence. Return this to the chapter Secretary; they will store these in the business card file box.

Use 75 words for a 30 second commercial.

Hi My name is _____, I am filling in for _____ of _____.

[Click here to enter text.](#)

One on One Prep Sheet and Guidelines

The purpose of our One- on- One Meeting is for members to exchange information with one another to learn about each other's business and how best to support one another with referrals that will increase business success.

1. Write an INSIDE Referral to the Member you wish to meet with outside of the Meeting Time. Each of the members scheduling a meeting should write a referral.
2. Arrange a time, date and location that is convenient for both parties.
3. Allow a minimum of one-hour for your meeting.
4. Prior to the meeting, complete the TEAMwork Form (found at www.B2Bfl.com in Member Resources). The form is in a Word Doc format so that you can easily save it and make changes as needed.
5. Print two copies to take to your meeting. One is for you to refer to during the meeting and the other is for the member you are meeting so they can take notes on it and have a copy for their files.
6. Re-confirm your scheduled meeting.
7. Be on time & be prepared!
8. In addition to your one-on-one forms, you should bring any literature that supports your business or samples if applicable and testimonials.
9. The most effective way to do a one- on-one meeting is to take turns going through the topics on the form. This way each member has equal time to share.
10. Be a good listener. Take notes of your members "ask".
11. Exchange ideas for developing a strong partnership.
12. Be willing to open your Rolodex of contacts. Be a Giver first, it will return ten-fold!
13. Send a thank you note; old fashioned values are still appreciated and remembered.

T.E.A.M. WORK

Together Everyone Achieves More!

Start with 1-1's to build a stronger team

- Ask the New Member Mentor Chair to do the 1st one with you during the initial weeks of your membership and subsequently schedule with every member in the group.

One fun fact about me: *[where I grew up, a hobby/interest, etc.]*

My target market is: *[Who are the people I'm trying to connect with?]*

List the services you provide that sets you apart from your competition:

List specific individuals or companies/categories you are seeking to meet:

Other methods of advertising/networking I do:

Other marketing/advertising I would be interested in teaming up w/ Power Partners

Participating Member: (Your Name)

Date of 1 on 1:

- Complete the form in advance and make copies for each participant – keep a copy for your records

During 1:1 meeting, review your forms and exchange copies



SPEAKER INTRODUCTION

Name:

Business Category:

Use this form to print or type a 30 second introduction (75 words or less) to be kept in the Business Card Box & read prior to your 10-minute talk. Speakers may bring a small giveaway to be drawn from that day's OUTSIDE Referrals.

Widget Preview

downloading documents. Your computer settings determine whether you preview or automatically download each type of document. The files will be PDF, Excel, or Word Documents.

Member Resources					
President	Vice President	Secretary	Chair Positions		All Members
Overview	Overview	Overview	New Member Mentor	Visitors Day Chair	Member Guidelines Booklet
Program Agenda			Overview	Overview	Membership Overview
Program Variations	Monthly Referral Report	Attendance Record	New Member Mentor Packet	Welcome Sign	30 Second Commercial
Meeting Recap	Excel version	Jan - Jun	One-on-One Form	Event Flyer	Agents 30 Second Commercial
as a form	pdf version	Jul - Dec			10 Minute Presentation
as a Word Doc	Wkly Report	Qtly Attendance Reminder	Greeter	Publicity	Speaker Intro Form
	Excel version	Absence Letter	Overview	Social Media Post	Speaker Evaluation Form
Monthly Challenges	pdf version		Visitor's Handout	Visitors Day Social Media Post	Getting the Most from your One-on-One Meeting
Recap Thoughts for the Week		Fee Sheet			One-on-One Form
Spin at The End	Referral Slip	Jan - Jun	Communications	Venue	Miscellaneous
		Jul - Dec	Overview	Overview	
Member Agreement		Letter of Delinquent Fees	To Prospective Members	Lunch Receipt	Tent Card with Creed
		Receipt for Payment	New Member Welcome Letter	Lunch Numbers	
Exec Team & Chair Positions		Speaker Schedule	New Member Checklist	Carrabba's Lunch Order Form	Sample Evite Replies
Executive Team Agreement					Top 50 Categories