

iReferBusiness

Leads Group Guidelines

Updated April 6, 2011

Mission Statement: Through leadership and integrity, we serve and inspire our group members and the business community to create relationships, growth and opportunity.

Purpose: To generate business opportunities for our group members by providing a structure where members may pass qualified sales leads and referrals in a non-competitive and mutually supportive environment.

I. Conditions of Membership

a. Membership Requirements

- i.** New applicants must submit an application to the iReferBusiness Leads Group by going to iReferBusiness.com
- ii.** Applications will be reviewed by the Membership Committee and submitted to the group for approval
- iii.** Individuals or businesses are not required to be a member of any other local organization, such as Chambers, Clubs, etc. in order to join the Leads Group
- iv.** There are no dues or fees associated with the group
- v.** Communication is by e-mail only
- vi.** As long as there are different fields and occupations represented within the group, we may grow the membership to whatever size we feel is appropriate. In other words, we do not have two bankers, only one; or two auto dealers, only one, etc.

b. Possible Business Conflicts

- i.** If a current member feels there is a conflict with a potential member, the current member must notify the group immediately.
- ii.** Once notified the group will need to resolve the matter by vote. The decision of the group will be final.

c. Membership in Multiple Leads Groups

- i.** Members of the iReferBusiness Leads Group may not actively participate in any other type of Leads or Referral Group

d. Rejoining the Group or changing Categories

- i.** Members may rejoin the group or change categories provided that:
 - 1.** Their occupation or category is not represented by a current member of the group and no one is on the waiting list for their category.
 - 2.** Preference will be given to past members that want to rejoin the group.

3. The group feels it is in the best interests of the group to allow the applicant to rejoin or change categories.
4. Members that drop out twice or that have been dropped twice by the group because of failure to follow guidelines will not be considered for rejoining.

II. Meetings

a. Group Meeting Guidelines

- i. Meetings are held every other Wednesday of the month and sites are determined by the group
- ii. Duration of the meetings should be no more than 60 minutes depending on the size of the group and time needed
- iii. You will be asked to share information about yourself and your business at each meeting during our “30 second commercial” time. Please bring business cards to each meeting. Only one business is the “featured business” for each meeting.
- iv. Only one person is a leads group member. If you cannot attend and want to send a substitute from your company, it must be cleared with the group previous to the meeting. Leads or referrals accrue only for the member of the group, not the substitute. It is the responsibility of the member to handle any leads or referrals.
- v. Information on transactions (that occur from a lead or referral), such as amount of money made, amount sold, etc., will remain confidential, but feel free to share success stories.
- vi. A “lead or referral” is not required in order to attend the meeting or to be a member; however, it is strongly encouraged.

b. Visitors or Guests

- i. Guests are welcome to attend one meeting to see what the group is about. After that if they decide to join they will need to complete and submit the iReferBusiness Membership Registration. The Membership Committee will present applications at each meeting for the group to vote on. Applicants will be notified by the Membership Committee or the nominating member when a decision has been made.

III. Attendance

a. Attendance will be Enforced

- i. Regular attendance is required. Treat your Leads Group meeting as a business appointment. Members should notify the Group Leader or Membership Chair in advance if they will be absent.
- ii. Members may only miss one meeting per quarter. If you miss two, you will be contacted and asked to drop. Any exceptions to this guideline must be voted on by the group.

- iii. Members that have been dropped from the group may reapply after six months.
- iv. Promptness is very important. If you are late it disrupts the meeting. If you are consistently late you may be asked to drop from the group.

IV. Qualified Leads

a. The Goal of the Leads Group is to Pass Qualified Leads

- i. A qualified lead is defined as:
 - 1. The name and phone number of someone connected to a group member who has expressed an interest in purchasing a product or service represented by another group member. You must have the interested person's approval before handing out the lead.
 - 2. Complete a referral/leads slip for each lead/referral that you turn in. The white copy goes to the individual group member and the yellow copy goes to the membership chair for tracking purposes.

V. Leadership

a. Selection and Commitment

- i. The success of a group is dependent upon its leadership; therefore leaders should be selected carefully.
- ii. The Group Leader and Membership Committee will be nominated and voted on in the month of November each year and will take their position in January of the next year. These positions have a term of one year.
- iii. The group does not have a regularly scheduled business meeting. Time is given at each meeting to discuss any issues, changes, etc. that need to be addressed.

VI. Guideline Revision

Changes or additions to the Group Guidelines can be made at any time, but must be voted on and approved by the members of the iReferBusiness Leads Group.