HOME GROUP LEADER TOOLKIT

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Helpful tips/tools referred to throughout the document:

- Tip: Using Your Social Event Budget
- Tool: Candidate Tracking Tool (Group Matrix)
- Tool: Group Vacancy Checklist

Introduction

Congratulations on becoming a ProVisors Group Leader! Welcome to the club!

We created this Toolkit to provide you with a springboard for success. We encourage you to read it in its entirety so you have a good understanding of the role of a GL as well as the processes and resources you will leverage to be successful. We also hope that as you settle into your role, you'll find it helpful to return to specific sections/documents for ideas on how to keep the group thriving.

A bit of additional context about this Toolkit:

- The content is organized into three primary sections:
    - Leadership Foundations
    - Recruiting & Retention
    - Effective Meetings
- At the end of the Toolkit, you can find an Appendix corresponding to each of the three sections which contains more "actionable" documents such as checklists, templates, self-assessments, etc.
- The resources you'll find in this Toolkit align to the most critical functions (and most common challenges) you may face, but they are by no means exhaustive.
- We made a deliberate decision to frame this Toolkit as "recommended practices" as opposed to "best practices" because there is no single path to your success with the group you lead.
- Working within the parameters of our mission and values, GLs are encouraged to put their own personality on things; for that reason you may see different practices "in the wild" than what we've outlined here.

Many thanks to the Group Leaders who contributed their time, thoughts and documents to the creation of this Toolkit. Their generosity (and yours!) is what makes this community so great. If you have questions or challenges that aren't addressed in these pages, we encourage you to reach out to your Regional Director – they are here to help you succeed!

Group Leader Toolkit

Leadership Foundations

What It Means to Be a Great Group Leader

Congratulations on becoming a Group Leader! The goal of this section is to help you understand why we've chosen you and the ProVisor Community's expectations beyond the technical items outlined in the Group Leader Handbook.

Why You?

We're extremely selective when accepting someone as a Group Leader because they play an important role in creating the magic that makes ProVisors special. When evaluating prospective GLs, we look for people who are passionate about our mission and have the leadership, organizational and relationship skills to bring it to life in a way that's fun and meaningful for our Members. We create the structure and framework for the experience and our GLs make it happen.

How You Bring the Mission to Life

Our value proposition, in a nutshell, is to curate a meeting of trusted advisors who grow to know, like, and trust each other so that they can confidently make and receive referrals.

There are processes and metrics in place to help you recruit qualified Members and drive commerce among Members. The more challenging aspect to standardize – which is the lynchpin that moves this from a transactional business arrangement to something far more meaningful – is your ability to foster a sense of community to drive authentic connections and friendships. If you're able to do THAT, the rest will fall in place.

What You Give Members

Our Members join ProVisors and look to their Group Leaders for:

- Commerce: new business from Member referrals
- Resources: a portfolio of other professionals so that they are even smarter and more valuable in helping their clients' solve their problems
- Exposure: an opportunity to elevate their personal brand by being known both in and beyond the group
- Relationships: treasured friendships and camaraderie by fostering an environment that is fun and safe

As part of GLs promoting the ProVisors mission, it's important that you model our core values and ensure Members embody them:

- Members First Mindset
- Personal Accountability

- Mutual Trust and Respect
- Open and Honest Communication
- Safe and Fun Environment.

What You Get

GLs have a unique opportunity to build relationships with and among Members and exchange information and business opportunities among one another, thereby promoting and enabling collaboration for the benefit of GLs, Members and their clients. This allows you, the GL, to broaden the GLs business network by being the centerpiece of the group.

What Does Success Look/Sound Like?

Since it's possible to be technically proficient and still run a group that fizzles, we think it's helpful to paint a more colorful image of success so you know what you're really chasing.

If you're a great Group Leader, people will describe you as:

- A natural leader
- Inspiring + passionate
- Amazing energy – a lot of fun
- Great at making other people feel really special
- Organized + a good delegator

Some additional skills/traits that correlate to Group Leader success include:

- Collaborative + team player
- Good listener
- Accountable
- Creative
- Chameleon-like ability to relate to all people

Here's what Members will say about your meetings:

- We all leave feeling energized and heard.
- I left feeling like I've made two more friends.
- There was never a dull moment – and it ran like clockwork.
- I felt like I was a star – I got some great kudos.
- I learned something interesting or helpful.
- It was a great use of my time.
- I got to see my friends.

And here's the impression the group will make on Guests:

- That was a really smart, interesting group of people – a team of advisors.
- There was a real sense of brotherhood/sisterhood among them – genuine friendship.
- I was a bit intimidated by their strong relationships – but I want to be part of it!

While that may sound like a lot (and it is!) the good news: you're not in it alone! In fact, to hit a homerun as a Group Leader, it will be important for you to build and manage a strong Executive Committee.

To get started, we recommend you familiarize yourself with the primary **Measurements of Success** (see the next section) in your role, and then give some thought to your plan for success as a Group Leader.

Measurements of Success

Your Targets As a Group Leader

If you've read the previous section (**What It Means to Be a Great Group Leader**), you should have a good sense of your role and a picture of what it looks like when done well. Our ProVisors community expects Group Leaders to deliver:

1. The number of Members in the group: 35+
2. The diversity of the Members in the group: a well-rounded group will create diversity of thought and referrals by including people from different professions, genders, ethnicities, religions, etc.
3. Your Member retention rate: 80% or more, year-over-year; which provides continuity in the group and helps Members build relationships.

These expectations are important because they reflect a formula for success that we've honed over time. To deliver on our value proposition, we need to make sure we are bringing together enough high caliber people, with a variety of specializations, to create a community of trusted advisors. That won't happen if you fall short in any one of these three targets, which is why they're so critical.

Support Structures & Resources

We accepted you for this role because we believe you inherently have the traits and skills to be a standout Group Leader, and – if left entirely to your own devices – would probably build out a great group! However, we don't want you to reinvent the wheel and we want to make sure some aspects of the Members' experience are consistent across all groups, so we provide a few key resources to help you:

- **Your Regional Director** = your partner and coach. They share your goals and bring a wealth of knowledge about the organization, experience driving Membership, and tips/best practices for successful groups. In addition to attending some of your meetings and providing feedback on the fly, they will meet with you annually to help you assess various aspects of the group/leadership and help you assess opportunities or additional resources to support your ongoing evolution.

- **Other GLs** = your peer group. Your RD will host regular GL meetings to address key issues and create community, but we encourage you to establish strong relationships with a handful of GLs you can lean on and turn to as mentors.

- **This Toolkit** = your springboard. We've pulled together some resources to address the most common challenges and questions that arise for Group Leaders. It's not comprehensive, but rather intended as a starting place. On the next page of this document we've highlighted some of those documents as they relate to common challenges associated with each of your key metrics.

Common Challenges + Resources

You will maintain 35+ Members in the group.

Challenge	**Potential Solution + Resource**
I don't know where to look for new Members. The group has exhausted its referrals.	Develop an ongoing pipeline See: **Proven Recruitment Strategies**
Candidates disappear or don't convert.	Track your Candidates more closely See: **Candidate Tracking Tool** Expedite the process – extend offers quickly See: **Recruitment Process Overview**

Your Members will be diverse and high-quality professionals.

Challenge	**Potential Solution + Resource**
I don't know where we have gaps or what other categories we should be targeting.	Regularly assess the group for diversity See: **Group Vacancy Checklist** Be intentional with your recruitment strategy See: **How to Achieve Diverse Membership**
I worry that in our push for Members, we might let quality slide	Use a consistent interview/selection process See: **Candidate Interview Questions**

You will retain 80%+ of your Members each year.

Challenges	**Potential Solution + Resource**
We get blindsided by non-renewals.	Plan for and manage renewals proactively See: **Staying Ahead of Renewals** See: **Renewal Management Spreadsheet (Tab 2 in Group Vacancy Checklist)**
People aren't invested or committed.	Set the tone with a strong onboarding See: **New Member Onboarding Process** Make sure they're fully engaged See: **Helping Maximize Memberships**
Your meeting attendance is flagging.	Make sure your meetings aren't a turn-off See: **How Effective Are My Meetings?** If you see room for improvement See: **Running an Engaging Meeting**

ProVisors

Building and Leveraging an Effective EC

A great Group Leader understands that their currency is building meaningful connections, and that starts with assembling and leveraging a powerful Executive Committee. We encourage you to think of yourself as the CEO of the group, and to build and manage your Executive Committee the way you would inside your own company.

Three Reasons You Need an Executive Committee

1. Running a successful group requires more time and effort than one person may want to dedicate – a skilled EC will significantly lighten your load.
2. You need thought partners and ambassadors. A dedicated EC shares in the ownership of the group's success so you aren't in it alone.
3. It ensures attention to key measurements of success. While you focus on the overall experience of your Members, you need people managing the details to ensure the group achieves Membership levels, diversity and retention.

Tips for Selecting People

- Get clear on which roles are your top priorities and what you really need from someone in that role. You should be able to clearly articulate your hopes and expectations before inviting someone to serve.
- Once you're clear on the roles you want to fill and the functions you need performed, think about the desired skill set. (Eg. If you want your Membership chair to manage a spreadsheet and ensure Candidates move through the process seamlessly, you may want someone who is highly structured and has strong attention to detail.)
- Look for people who are already engaged and enthusiastic – who want to be a fellow volunteer and then follow-through on their commitments. Create a short-list of these people, then think about their skills and which roles might be the most natural fit.
- Discuss the role with them. Be clear in establishing expectations so they have a clear sense of what the role will entail – and then ask them to honestly assess if they will have the continued interest and bandwidth to deliver.
- As a best practice, when someone accepts a role on your Executive Committee, we suggest that you have an open discussion about what information you need from them and on what sort of timeline, and how you'll hold them accountable and share feedback if you're not getting what you need.

Top Tips for Leveraging + Managing Your EC Effectively

- Delegate effectively – let them own their functional area:
    - Set clear expectations.
    - Communicate the results you need to see (and set explicit timelines).
    - Let them own it – they should feel empowered to run with things.
    - Track and follow-up on their commitments to create a culture of accountability.

- Don't avoid difficult conversations.
  - If you notice someone struggling, ask how you can help.
  - Rotate people off the EC if they're unable to deliver what you need.

- Meet with them regularly as a team:
  - While each person should own their functional area, the sum is greater than its parts, so you'll want to foster a sense of collective community.
  - Create a standing agenda so people know what to contribute. (See below.)

- Make sure it's fun and rewarding – not just a grind!
  - Express heartfelt appreciation and recognize their contributions.
  - Create opportunities for them to shine in front of the group – making special announcements.
  - If you notice that a role requires a lot of work (eg. Troika Manager) consider appointing two people to the position so they can alternate and rest.

- Formalize their role as ambassadors for the group.
  - Encourage your EC Members to guest and to invite 2-3 Members to join them in guesting at other meetings. (This helps raise visibility for the group and for their personal brand.)
  - Leverage them as mentors for Members of the group each quarter, helping improve elevator pitches and maximize Membership.
  - Ask them to email approved Guests ahead of the meeting to confirm their attendance and minimize cancellations.

- Consider creating subcommittees under key functions.
  - By involving other Members of the group, it can help foster a community of leadership, allow Members additional opportunities to shine, and lighten the load to help prevent your EC from burning out.
  - It also allows you to see who steps up, which can create a valuable pipeline for future EC roles.

Key Roles for an EC

Think about which roles are most important for the group. We find that the most effective ECs aren't so large that they're unwieldy, so usually around 6-8 people. If you're on the smaller side, you may need to think about combining some responsibilities under one role. It's important to remember that the local Regional Director is also part of the EC of each group and should always be invited to attend meetings. Here are the most common roles:

- **Group Leader Assistants (GLA)**: 1-2 people who function as your right-hand(s). This is someone you trust to step-in as your proxy to run meetings, make decisions about Candidates, and approve applications. Additionally, this should be someone who ProVisors could consider selecting to lead a group if/when an opportunity arises.

- **Recruitment Chair**: Closely monitors the Group Matrix, proactively identifying and reporting out on gaps/needs, renewals, and Candidates in process. May take the lead on guesting to request referrals, or create a recruitment plan so others are clear on their role in supporting the group's recruitment efforts. NOTE:

While this person is the ongoing driver of recruitment efforts, the primary responsibility of ALL Members of a group's EC is to recruit and build out the group.

- **Mentor Manager**: Matches each new Member with a qualified mentor to ensure they maximize their Membership through activities such as creating a compelling introduction, learning how to make and receive effective referrals, and developing a guesting strategy, as well as getting integrated into their home group quickly.
- **Missing Member Chair**: Tracks attendance and follows-up with non-attending Members to help drive engagement, proactively identify issues, and ensure Member retention/renewals.
- **Welcome Chair**: Calls Candidates before they visit a meeting so they have a friendly face to connect with when they attend. They explain the flow of the meeting and let the Candidate know how to participate. At the meeting, the Welcome Chair should go out of their way to say hi, introduce the Candidate to other EC Members, and ensure they've connected with the Group Leader.
- **Host**: When meeting in-person, ensure that the room and food is available 30 minutes prior to the meeting starting; provide copies of Troika sheets for all Members and Guests attending.
- **Troika Manager**: Creates Troikas with intention and tracks pairings to ensure everyone gets a chance to mix with as many other Members as possible over the course of their Membership.
- **Programming Chair**: Proposes topics or activity ideas to the Group Leader to keep the content portion of the meeting fresh and fun. Once an idea is selected by the Group Leader, the Programming Chair will plan and organize that portion of the meeting, preparing speakers or activities to ensure they dazzle.
- **Care Chair**: Calls or sends cards to group Members on behalf of the EC or group in general when they have notable life events, such as birth, death, weddings, etc.
- **Social Chair**: Plans and organizes events outside regular meetings. They need to have a knack for fun but also capable of managing the details (securing a venue, signing agreements, working within a budget, driving communication and RSVPs, etc.) that make an event successful.
- **DEI Ambassador:** This Member represents the group in the region's DEI committee. They help create awareness of DEI, support the GL to create an environment where all Members feel welcomed and support the Recruitment Chair by looking through the lens of diversity when identifying new prospective group Members.

While each Member of the EC has a specialized area of responsibility, EVERYONE on the EC should consider:

- Always having their "antennae up" to recruit new Members into ProVisors.
- Engage RD in the Candidate process.
- Meeting with Candidates (EC Members are put into Troikas with Candidates) and making recommendations about extending invitations to join the group.
- Ensuring the proper Member composition in the group in terms of senior-level Trusted Advisors/respected professionals and types of professions/specialties is present.

- Serving as ambassadors to greet Guests and introduce new Members at the meeting.
- Assisting the GL during a meeting to ensure it runs smoothly.
- Setting an example by giving proper testimonials.
- Contacting new Members and serving as mentors to help them integrate more quickly into ProVisors.
- Encouraging and stimulating commerce among Members. Reminding Members to think about how they can give to other Members by making referrals, providing introductions, and serving as a resource.
- Recommending and deciding local policies relating to the monthly program, introduction topic, Guest speakers, and joint meetings/special events.
- Providing feedback to the GL from the other Members or themselves about items of concern.
- Helping to coordinate events/group social activities.
- Contacting Members who are not attending or do not seem committed. Each month the GL may assign EC Members to call every Member who did not attend.
- Above all, the Executive Committee Members are expected to lead by example and demonstrate adherence to the ProVisors Member Code of Conduct & Ethics and Membership Policies at all times.

Group Leader Toolkit

Recruitment & Retention

Recruitment Process Overview

There are many ways to move a Candidate through the recruitment process. Below is one workflow that has significantly increased conversion rates. NOTE: The steps in this process are also reflected in the **Candidate Tracking Tool**.

BIG IDEA: Because a Candidate's interest is highest immediately after they attend a Group Meeting when they see the magic in action, this process is designed to front-load the Candidate Troika/interview process so a decision can be reached + an offer extended immediately after they attend a meeting.

1. GL connects briefly with the Candidate to gauge interest and start the process or provides the name to the RD (depending on how the Candidate was identified.)
2. The RD speaks to the Candidate and provides an overview of the organization and the process to become a Member.
3. If the Candidate is interested, RD lets GL know to schedule an initial call.
4. GL has a call/meeting with the Candidate before they attend a Troika.
    - Note: If you involve other Members of the EC in your interview process, ensure they Troika with the Candidate before they attend a meeting – and get their feedback prior to the meeting so that if all goes well, you won't need to meet again to reach an offer decision.
    - See: **Recruiting & Retention – Appendix A** for optional screening questions.
5. RD invites and schedules the Candidate to attend a meeting.
6. Immediately after the meeting, the GL has a quick call with the RD to share thoughts and make a recommendation: extend an offer to the group, connect with a different group, or pass.
    - If the GL is on the fence or wants to reconnect with other Members of the EC for feedback before reaching a decision, this should happen within 48 hours of the meeting.
7. Within 48 hours of attending a meeting, the Candidate should receive a clear next step (ideally an offer) from the RD.
    - If the offer is communicated via email, the RD will copy the GL. If it's extended verbally, the RD will loop in the GL so you know the current status. GL will be notified automatically that the Candidate has joined as soon as they've paid their invoice.

Proven Recruitment Strategies

Whether you're starting a new group or just trying to backfill a few seats that will be vacated through the renewal process, it can feel like an uphill trek if you don't have a strong recruitment strategy. Use these tips to ensure the group reaches (and stays at) capacity!

Create a culture of recruitment.

- Set expectations with your EC and group Members that they are responsible for helping generate Candidates who will benefit the group.
- With your EC, you may want to consider:
  - Holding regular strategy meetings to brainstorm potential Candidates and agree on next steps to advance them through the process.
  - Establishing guesting goals.
  - Assigning them ownership/recruitment responsibility for specific professional categories and giving them 90 days to fill any open positions.

Get clear on who you're targeting.

- Review the **Group Vacancy Checklist** to identify what professions you specifically want/need to recruit to ensure the group's diversity.
- Once you've established your targets, use the **Candidate Tracking Tool** to capture the names of prospects you and your EC have brainstormed for those professions.
- Notice what gaps you still have and generate a list of the professions where you need referrals to get the process started.

Establish a way to track, manage and proactively fill your pipeline.

- When you're just getting started and juggling multiple Candidates, it's easy to lose sight of where someone is in the process and for people to slip through the cracks. To avoid that:
  - Use a tool like the **Candidate Tracking Tool** to make sure you keep everyone in motion moving forward through the process; AND
  - Work closely with your Regional Director – it is their job to help drive this process and support you to lighten your load!
- After your initial ramp-up period, use your Candidate Tracking Tool as a way to assess your pipeline so you can see at a glance where you may need to generate names. You'll find that recruitment is easiest if it's a consistent, ongoing focus rather than something you do in response to open seats.

Start with the group Members.

- As mentioned above, asking your EC and group Members for referrals is the best place to start. It can be hard for people to think of referrals in a general sense, so share your list of targeted openings – it can help spark ideas!
- Ask the EC to regularly create/share a list of openings with the group via email.
- Ask for targeted referrals during the Needs/Deals/Wants part of your meeting.

- Use testimonials to recognize Members for providing you with referrals.

Ask other groups for help.
- Create a guesting plan with your EC to cover as many other groups as possible, using your introduction time to ask for targeted referrals.
- People may run out of referrals for their own group because they've been asked so many times, but they probably know well-qualified professionals in other markets.
- Make sure your RD knows what you're looking for so they can help look/ask for referrals!

Collaborate with other Group Leaders.
- Group Leaders are among our most connected Members and they know the difficulty of trying to fill an empty seat, so they can be a great resource – ask for referrals.
- Guest at their meetings so you can get a feel for their group, then proactively send them referrals who might be a nice addition to their group. It will come back to you!
- Team up on outside networking events – agree to scout not just for your own group, but for each other.
- When you decide to pass on a Candidate for the group, if you think they would be good for ProVisors in general, be sure to let your RD know <u>and</u> refer them to another GL.

Search outside ProVisors.
- Attend industry-specific or general professional networking events where you can meet other professionals. Collect their business cards and assess if they're a potential fit for the group. If so, loop in the RD and start the process. If not, share their information with other GLs who may have a need.
- Use LinkedIn to search by profession and zip code - then look for people where you (or other Members) have a shared connection who can introduce you.
- Don't be afraid to cold call well-known firms that expect employees to be rainmakers. You might reach out directly to the employees, or start by connecting with the Managing Partner and marketing department for the firm to share ProVisor's value proposition and ask if there's anyone they would like to nominate from their firm. You're offering them a revenue-generating opportunity, so it shouldn't feel like a sales call!

The Importance of Diverse Membership

How We Define Diversity
When we talk about diversity, people generally think about race, ethnicity, gender, religion, etc. We certainly want our groups to reflect diversity in that sense, because we believe that the more varied the perspectives, the richer the experience, so we encourage you to be mindful in creating a group that represents multiple perspectives. One aspect of diversity that is critical to our success and unique to our model is an intentional cultivation of diverse professional experience within our groups. For the sake of this discussion, we will focus on what that looks like and how to achieve it.

Recommended Professional Composition of a Group

15+ Attorneys	2+ Financial Services Executives	2+ Investment Advisors
5+ CPAs	1 + HR Professional	1+ Marketing Executive
4+ Bankers	3+ Insurance Executives	2+ Real Estate Professionals
2+ Business Consultants		

Why Diversity Is Important in This Context

ProVisors has a specific strategy for growing and strengthening groups in order to improve the Membership value of ProVisors for all Members. The value of each ProVisors Member is his/her ability to serve as a referral source and as a professional expert for other Members. For this reason, it's important that we design groups with a range of complementary skill sets and client bases.

How to Achieve It

- Be intentional! Since "like attracts like," without deliberately cultivating diversity, it won't happen on its own.
- Regularly review the **Group Vacancy Checklist** and highlight the professional categories where you have gaps so you're always aware of the Candidates you should be targeting next.
- Be consistent. Don't bring it up at one meeting and expect that everyone will act. Make sure to make this a regular part of your meetings.
- Be direct. If you want action, it's often better to ask a person directly than just put a request out to the masses. When you ask a group of people for something, people assume someone else will handle it. When you ask someone specifically it creates more accountability and follow-through.
- Pay attention to the Needs/Deals/Wants in your meetings – what expertise are people repeatedly seeking that can't currently be satisfied by a Member of the group?
- Be strategic in your recruitment efforts (see section: **Proven Recruitment Strategies**).
- Don't allow more than one person from a firm/organization to join the group, but don't be afraid of competition in the group. ProVisors does not guarantee exclusivity, and while many professionals work in the same field, they don't have overlapping networks. Some of the best referring sources can be from competition!
- If you have any Members that you know will not be renewing, consider how you can use that opening to increase diversity in the group.

Assessing Fit: Process Overview

Before Your GL Conversation

- If applicable, review the information sent to you by your Regional Director.

GL Conversation Agenda

- Discuss ProVisors in general, and nuances of the group, covering:
  - Know, Like and Trust – ProVisors provides you the platform
  - Membership benefits (Home Group, Troikas, Guesting, Affinity Groups, Social Events)
- Vet them for experience and fit. (See Appendix for <u>optional</u> **Candidate Questions and Scorecard**.)
- If appropriate, ask your RD to set up a Pre-Troika for them with Members of your EC (or if you do it, please inform the RD so they know where the Candidate is in the process)

EC Troika

- Get enough information to determine if you feel they would be a good fit with the group, if you would be comfortable referring business to them, and if you feel they are a good referral source – see Questions and Scorecard below for ideas
- Answer their questions
- Share your feedback/recommendation with the GL

The Rest of the Process

- If you and your EC are interested in moving forward, let your RD know
- Your RD will invite them to attend meeting, covering:
  - General meeting structure
  - Their role + how to participate
  - How we arrive at a decision and when they can expect to hear from us
  - Pricing
- Check out the **Recruitment Process Overview** (in the previous pages) to understand the other steps in the process and how to expedite things so you can convert strong Candidates into Members quickly!

New Member Onboarding Process

Upon Joining

When you receive confirmation that a new Member has joined and paid their dues:

- ❑ Send an introduction email to the Group introducing the new Member; and
- ❑ Send a welcome email to the new Member, attaching an onboarding checklist so they are clear on their next steps and how to drive the process. (See Appendix for **Communication Templates**.)

First 30 Days

One month after they join, your Mentor Chair (or another Member of your EC tasked with new Member engagement) should provide an update on the following:

- ❑ Have they been connected with a mentor?
- ❑ Have they built out their profile on The Hub?
- ❑ Have they attended their first Home Group meeting?
- ❑ Are they scheduled to attend a New Member Orientation?

First 60-90 Days

Check progress to ensure:

- ❑ Have they attended a New Member Orientation?
- ❑ Have they joined an Affinity Group?
- ❑ Have they Troika'd with Members of your EC?
- ❑ Have they guested another meeting?

Note: An important part of bringing new Members into the fold smoothly and quickly is ensuring they attend a robust New Member Orientation. You may also want to design a workshop that is specific to the group to supplement this, but at a minimum, all new Members should attend a New Member Orientation to ensure they have all the information. Connect with your RD for the schedule.

You can find a sample **New Member Orientation Agenda** in the Appendix.

Helping Members Maximize Membership

Here's what we've heard repeatedly as the reasons people renew their Membership:

- They get business through referrals & exposure.
- They have friends in the group.
- They like belonging to an elite club.
- They look forward to meetings.
- They appreciate having a network of experts.
- They enjoy referring business to others.

As you can see, there are two main things people want from their Membership: commerce and a sense of belonging. With that in mind, below are some tips for helping Members maximize their Membership. Commerce, aka Testimonials, is the currency of ProVisors, but in keeping with our business model ("Know. Like. Trust. Refer."), you must first set the groundwork to get to the referrals, which is why we're focusing first on...

Fostering a Sense of Belonging/Community

- Help them get involved and connected quickly: remind them to attend a New Member Orientation, ideally within 30 days of joining.

- Provide them with tips on how to take the reins on making connections such as:
  - Set a coffee date (can be virtual) with everyone in the group within the first three months to build your knowledge of resources within the group.
  - Check out other Members on LinkedIn and reach out as you spot shared connections.
  - Guest in other meetings as often as you're able – it raises your profile!
  - Show up! Networking is key. Attend your Home Group meetings regularly – you'll get to know people faster and in a more meaningful way.

- Keep them on your radar. Pay attention to their attendance and reach out if you see that they aren't attending regularly.

- Suggest Affinity Groups they may want to join to expand their network. Work with your RD if you need suggestions. (If you're in a new region, they can attend other regions' Affinity Groups – you'll start your own when your region hits 200 Members.)

- Foster connections and camaraderie with other Members in their group.
  - Connect them with a mentor in the group and ensure they have a plan for how frequently they'll connect and how they'll use their time. (See below.)
  - Ensure each Member of the EC has connected with them in some way during their first 3-4 months.
  - Ask your Troika Manager to be extra-attentive in matching them up with some of the group's "super connectors" during their first few months.
  - Consider creating small group happy hour events (even virtually) with new Members for more intimate opportunities to get to know each other.

- Be strategic when using your Social Event Budget.
  - Every group is granted an annual social event budget (amount and reimbursement details are outlined in the Group Leader Manual).
  - The social event budget is intended to allow you to bring the group together, outside of a typical meeting format, to reinforce the "Know. Like. Trust." aspect of the group.
  - The majority of the budget should be used throughout the year (recommended quarterly) on events that the majority of your Members will be able to enjoy. A small portion may be used for EC lunches, honoring Member life events, Guest speakers (again, all details are outlined in the manual).
  - While the budget is "use it or lose it" and cannot be rolled from year-to-year or used to pre-pay events for the following year, we ask that you NOT save it for an end-of-year splurge – it's far more effectively spent over the course of the year for ongoing bonding opportunities.
  - Successful GLs recommend using it to:
    - Host a quarterly "Happy Hour." Throw down a portion of the budget on appetizers and drinks. Close the tab when you've hit that amount and Members can pay for their own drinks if they want to keep going.
    - Find a fun activity (ex: bowling) and contribute a portion of the budget to the event to cover some (or all) costs, depending on the activity.
    - Use a portion of the budget to cover the appetizers or beverages for a summer barbeque at a Member's home.
  - Tip: Do not wait until the very last minute to make a plan. Not only is December already packed with activities (which means the event planning can be stressful and turn-out tends to be lower) but as a means of helping the group connect, this money is better spent in intervals throughout the year.

Driving Commerce

- After a new Member attends a New Member Orientation, ask their mentor to confirm:
  - Their website profile is complete.
  - They have a succinct and memorable introduction.
  - Their "call me when" and "ideal client" statements are clear.
  - They have a guesting strategy and someone to "buddy" with initially.
  - They can deliver a powerful testimonial.

- Keep them on your radar. Use your Testimonial Tracker to see that they're both giving and receiving referrals. If they haven't seen success in this area by the six month mark, ask their mentor to do a deeper dive to understand how they're looking for referral opportunities.

- Provide them with tips on how to take the reins on driving commerce:
  - When creating your business plan, create a goal for business generated through ProVisors and identify what actions you will commit to in order to drive those outcomes.
  - Identify opportunities to <u>make</u> referrals – get known for being a giver. It comes back to you!
  - Prior to promoting Needs, Deals and Wants to the general Membership, first reach out to your Home Group to generate commerce from within.

- Make sure to present your best personal brand to your Home Group Members and when guesting at other groups by clearly establishing "call me when" and "who is my ideal client." Focus on your Profile and make sure it presents your expertise.
- Read “The Go Giver” by Bob Burg and John David Mann.

As the Group Leader: Consider establishing a "sister group" with an open door that allows priority guesting and joint events. Commerce increases when groups partner on events and have time to network with more Members.

The Role of the Mentor

You've probably noticed that a mentor plays a key role in helping new Members come into the fold and maximize their Membership. Here are a few more recommendations for what that partnership might look like:

- Set clear guidelines so both parties are clear on expectations:
    - How long does a mentorship last?
    - How many times are they expected to meet?
    - What will they cover when they connect?

- In addition to ensuring they're set up to drive commerce, the mentor's main role is in taking the new Member under their wing and helping them make connections:
    - Introducing them to other Members of their group that would benefit from collaborating.
    - Creating a guesting strategy:
        - Reinforce the power of guesting.
        - Help them to develop a guesting approach – set expectations of how often to guest and hold them accountable.
        - Buddy System: Mentors should guest and go to events with new Members. "I'm going to....come with me." This makes it easier for a new Member to walk in the room. Only takes a few buddy moments to get the new Member on their way.

- A mentor often serves as a coach and accountability buddy, working with them to set goals and follow-up on their progress.

Staying Ahead of Renewals

One of your measurable goals as a Group Leader is to maintain a diverse Membership of 35 Members. It's easy to focus on this when you're in the early stages of forming a group and your primary goal is recruiting new Members. Once the group is up and running, it's important to shift that focus to retention for two main reasons:

1. A group's success comes from its sense of community/connection, which is built over time.
2. Speaking practically: retaining Members is less work than finding new Members!

So, how do you stay ahead of the game?

Tip 1: Know your numbers.

- When Members join, add them to the **Renewal Management Spreadsheet** (2nd tab on the Group Vacancy Checklist) so you can see at a glance when Memberships will renew.
- Review this spreadsheet monthly with your EC:
    - Look at newer Members and discuss their onboarding – are they engaged and thriving? If not, who might need special attention?
    - Has anyone told you they plan not to renew? Turn their name blue and indicate it in the numbers at the top of the column. (Ask if anyone else in their organization would be a good addition to the group!)
    - Look at the month that's "on deck" for being 90 days out from renewal (example: if it's January, you would want to assess people up for renewal in May since that's the group your RD will email you about next). Do a quick review of all Members:
        - Are the known non-renewals accurate and up to date?
        - Are there any Members you or your EC feel shouldn't be invited to renew?
        - For the other Members, do you have a strong sense that they plan to renew?
        - Are there any wildcards you're worried about?
- Given the number of people you anticipate not renewing, how many gaps will you likely need to fill to maintain Membership of 35 people?

Tip 2: Hatch a (Re)Engagement Plan.

- For anyone you identified as potentially disengaged (either new Members who never fully got integrated into the fold or upcoming renewals that seem to be less than active), create a simple action plan with clear next steps assigned to Members of your EC to drive engagement.
- Examples of action you might take:
    - Perform an informal check-in call to ask how they can help them get more from their Membership
    - Assign a mentor or buddy with a specific goal
    - Invite them to guest with you or another Member of the group
    - Ask another Member to reach out to them for a networking coffee
    - Ask for their input for a meeting topic they would want to attend

  - If they're not a match for the group, find out why, then try to keep them with ProVisors by suggesting another group for them to guest at where they might have more chemistry, or where the timing might work better with their schedule
  - Ask them for Referrals to gauge their interest and make their experience "stickier" by bringing a friend into the mix

Tip 3: Always be recruiting – even if you don't anticipate any drop-offs.

- Worst case? You become a referral source for another GL or you create a wait-list for your own group!
- Each month let your Members know what professional categories you are targeting to diversify the mix of the group. (Use the **Group Vacancy Checklist** or **Candidate Tracking Tool** to identify where you need help.) The more specific your referral requests, the easier it is for Members to think of someone – and if they know it's an ongoing ask, they'll view it as part of their responsibility to contribute names.
- Refer back to the **Recruitment Strategies** portion of this Toolkit for ways you can passively recruit.

Tip 4: Use your spotlight wisely.

- DO celebrate new Members and anniversaries each month so people get an extra boost of recognition during months when they commit and recommit.
- DON'T announce departures – they can become contagious!
- DO use testimonials to thank Members for successful Candidate referrals.

The Renewal Process in a Nutshell

→ 90 Days Before Expiration

- Your RD will provide you with a list of Members coming up for renewal
- You will provide the RD with two lists of names:
  - Members not recommended for renewal
  - Members who have expressed that they don't intend to renew

→ 60/30/15 Days Before Expiration

- ProVisors will email Members (except those submitted by you as ineligible) to remind them to renew their Membership
- For Members you're not recommending for renewal, work with your RD to determine who/how that will be communicated to the Member

→ Renewal

- You'll be notified once someone has renewed and paid their dues
- Anyone who hasn't paid dues will still be able to access the Hub, but with limited functionality, so they can pay their invoice
- Lapsed Members aren't allowed to attend meetings or socials; if this happens, contact your RD immediately
- Anyone who doesn't renew within 30 days after expiration forfeits their seat

Group Leader Toolkit

Effective Meetings

Running an Engaging Meeting

Good meetings don't happen by chance: they require planning.

- Be intentional in selecting the structure/format of the meeting – try to vary it from month to month to keep things fresh.
- Make sure the content/discussion topics are relevant to as many people as possible.
- For things like Member spotlights or content-driven programming, ask the EC to review the content in advance and provide feedback to punch it up and keep it tight.
- Look at your overall agenda and make sure there is an opportunity for everyone to get their voice in the room.

Set clear expectations in advance.

Provide an agenda in advance so participants know what to expect – and what's expected of them. (Indicate what actions you would like participants to take and what you are hoping they will contribute during the different sections.) Tips:

- If you're expecting group participation on a topic (even an icebreaker) send it in advance so people who need time to process can prepare.
- Give people a sense of the time limits that will be imposed on them for introductions or testimonials so they can prepare accordingly.
- If you have a large attendee list and won't be able to do full-group introductions, let them know in advance when/how they will get to introduce themselves to level-set expectations.
- **Note:** you can find **Sample Agendas** for both in-person and virtual meetings in the Appendix.

Get everyone's voice in the room.

- As you review your agenda, make sure you've created opportunities for everyone to participate in some way – whether through an introduction, a testimonial, an activity, or a special role. People attend because they want to be visible.
- For large groups (we've seen some with 90 people!), think about how/when you can use breakouts so that everyone gets a chance to be heard.
- Let Candidates go last so they can see how it's done before they're asked to speak.

Maximize your time together.

- 90 minutes isn't much time especially if you have a lot of attendees or a well-established group with a lot of testimonials to share.
- Use the 30 minutes before the meeting for fun or structured networking. (Get some ideas from the **Meeting Activities** in the Appendix.)

Do the math, watch the clock and keep things moving.

- Know how much time to allocate to each person and each activity.
- Ask for testimonials before the meeting so you can plan appropriately.
- Start and wrap promptly.
- Communicate time limits upfront – both when you send out the agenda and during each section of the meeting.
- In a perfect world, you don't want to cut people off or "buzz" them to keep things moving, tap on EC Members to go first to model brevity and set an example. If you aren't able to create a "concise culture" then you may want to make a timer a fun (rather than punitive) element of the segment.

Establish roles for other people.

- As the Ringmaster, try to put on a captivating show – to do that you'll need to enlist the help of your EC and others so you can stay focused on the overall flow and engagement.
- If the group isn't yet good at self-managing time around introductions or testimonials, appoint a Timekeeper and make it clear how they'll help people stay within their limit.
- Lean on the Group Monitor to manage the technical issues so you can be fully present. You should not be admitting people, muting or unmuting, checking attendance, or creating your own breakouts – it's a distraction and slows things down.

Bring your A-Game.

- Be mindful of your energy – your energy will set the tone for the entire group.
- Give yourself a few minutes before the meeting to shift gears and "arrive" so you can be fully present.

For Zoom-specific tips, keep reading!

Leading Virtual Meetings Using Zoom

Set your "Max Registrations" and close your meeting to Guest requests when you hit it.

- This isn't a contest. Our goal is to provide the best experience for our Members.
- Ensure that you feel you can lead a successful meeting with the number of Members you have attending.
- Work with your Regional Director to help you manage this.

Don't let the virtual format of the meeting change the things that matter most.

- Testimonials are the currency of ProVisors. Make sure you allot enough time to share – this is a critical part of each meeting.
- Make sure your newest Members feel the love – find time to highlight them.

Be present.

- We've appointed Group Monitors so you won't have to sweat the technical details… let them monitor the chat and handle muting/unmuting so you can keep your attention focused on the Members.
- Keep an eye on the overall energy and dynamic of the meeting. Look for opportunities to engage participants through questions (using chat or asking people to raise their hands so they can be called on).
- Coordinate with the Group Monitor on the different agenda items so they know when/how you would like to use chat, hand-raising or unmuting to engage participants and bring their voices into the discussion. Get creative!

Keep people engaged.

- Chop up the meeting time to keep people engaged (introductions three different times, multiple activities).
- Use the Socratic method (asking questions to draw people out) and spot introductions to keep people on their toes.
- Try the polling feature! Quiz people on how much they know about other Members, followed by a discussion.
- Find fun activities. To get started, check out the **Idea Sheet** in the Appendix.

Be mindful of when/how you share your screen.

- People are here to network, so remember that every time you share your screen, you are limiting the number of faces they will be able to look at.
- A screen should only be shared when it is needed to make a point or provide a visual example. Once that is done, stop sharing and switch back to the video-view.

Manage the chat.

- We wouldn't speak during an in-person meeting, so we shouldn't be using chat.
- Chat is appropriate for questions and issues, but should not be used for banter during the meeting – it's distracting.
- The Hosts/Co-Hosts can limit the chat functionality in each meeting. If it's getting out of control, turn it off. *Click here to see how*.

- Consider disabling the “private chat” function at the start of the meeting so people aren’t distracted by chatting behind the scenes.

Have a Troika plan.

- We recommend having the Troika Manager add “Troika Manager” after their name on the Participant List so people can easily find and chat him/her.
    - Note: they can rename themselves by clicking on the “participant” menu at the bottom of the window. It will pop-up a list of all participants. They should then find and hover over their name. Select the button that says “rename” and edit to include Troika Manager.
- Since Troikas usually involve a bit of in-person organization, talk with your Troika Manager in advance and hatch a plan for how you will handle this virtually.
- A few options:
    - At the beginning of the meeting, ask anyone who does NOT want to be placed into a Troika to send a private chat to the Troika Manager. The Troika Manager can create the Troikas during the meeting, then:
        - Announce them at the end of the meeting; and/or
        - Email out a list of the Troikas after the meeting.
    - Pre-plan Troikas. In the email sent before the meeting, ask attendees to email the Troika Manager with requested Troikas. The Troika Manager can set up the Troikas in advance. They can use the participant to realign on the day of, if someone doesn't show up.
    - Do “Instant Troikas” using the breakout room feature immediately after your meeting.
- You can be creative! Try something new - and if it works well, please share with us so we can continue to update our community with great ideas!

Group Leader Toolkit

Appendix – Leadership Foundations

Appendix A: Sample EC Meeting Agenda

Recruitment Updates

- Review Membership Matrix (available online)
- What's our current Membership count?
- What renewals are coming up in the next 90 days?
    - How confident are we that they will renew?
    - Are we aware of any potential drop-offs?
- In what areas do we need to actively be recruiting to maintain diversity?
    - Do we have prospects for those, if not, how will we identify them?
    - What is our recruitment plan?
        - How will we obtain referrals?
        - Do we need to go out-of-network to source some new people?
        - How can we lean on our Members to help?
- What Candidates do we have in process and what are the next steps?

Member Updates

- Any life events our Care Chair needs to recognize?
- Attendance Report – anyone we need to reach out to?

Programming Updates

- Determine the topic/plan for the next meeting
- Debrief on the last meeting – what worked well, what could be improved?

Social Event Updates

- Anything upcoming we need to discuss?

Other?

Appendix B: Getting Started

Advice from an Established Group Leader

One of the key things that helped build the group was to have full team Strategy meetings. We started doing these every two weeks in the evening with wine and cheese (the first ones were at a restaurant, then at our host location). Make them fun and social.

I started these when it was just four of us, then it grew to 6 and so on. I included prospective Members who I wanted to join even before they were Members because once they started to interact and have skin in the game, they quickly became Members. I basically ran this like a startup and gave everyone 'stock' in the company. It changes their whole mindset and personal ownership of the group.

We used a ***Candidate Tracking Tool*** *(available online) so we were clear on where people were in the onboarding process and what role we each needed to play. It is the Regional Directors job to get things done, so it's helpful for you to stay in contact with your RD on a daily basis as things are getting started – otherwise people fall through the cracks because at some point both of you will have so many names running around in emails, it's easy to forget something. Keep a very tight handle on things!*

Manage the process like you're managing a client project. The way we did this allowed everyone to see who we were considering for each role. We would discuss the roles and potential Members line by line in our strategy meetings.

I would edit the Candidate tracking tool during the meeting and then afterwards, I would send the team an update so everyone was clear on their commitments.

Source: Chris Abato, Menlo Park 1

Appendix C: Preparing to Lead Worksheet

Instructions: Now that you've heard OUR vision and what it takes to have a great group, it's time for you to give some thought to how you'll execute on that and make it your own! Reflect on the following questions (and/or discuss with your Executive Committee), then share your thoughts with your Regional Director.

- In what ways can you leverage your role to leave Members feeling inspired?
- What can you do to ensure you show up to every meeting and Member interaction with amazing energy?
- A successful group requires intention and design. When will you set aside time each week or month to attend to the success of the group? What will you do with that time?
- What can you do, or what help might you need from Members of your Executive Committee, to ensure:
    - Your meetings run like clockwork?
    - You feature interesting, meaningful content each month?
    - Everyone gets a chance at the mic in your meetings?
    - People have FUN in your meetings?
    - Testimonials are concise and meaningful?
    - People walk away with a valuable new connection or friend?
    - New Members are quickly brought into the fold and feel a sense of belonging?
    - The group maintains a healthy size (35 Members) and diversity?
    - People find value in their Membership and rave about the group?
- When you read through all that successful GLs do …
    - What feels like it will be EASIEST for you to deliver based on your strengths?
    - What feels like it will be most CHALLENGING?
    - What's your plan to leverage others to help offset those challenges?

Group Leader Toolkit

Appendix – Recruiting & Retention

Appendix A: Candidate Questions

Question or Quality	Listen For
Why do you want to join ProVisors? What are you looking for? What are your hopes or expectations?	Are they clear on what we offer and is their interest aligned? Do they intend to give as much as receive?
Have you been part of a networking group before? Tell me what you liked and didn't like about that experience. How else do you network?	Are they an experienced and skilled networker? Is this what they're looking for?
How many years have you been in this line of work?	Are they established or just starting out? How long have they held a relevant credential?
What's your specialization? Who do you serve and what problems do you solve?	Do they cover an existing gap in the group? Do they satisfy a need that arises frequently?
Tell me about a client or two where you've had a great impact or earned rave reviews.	Do they struggle to come up with success stories, or is it easy and can they offer specifics? Can they easily demonstrate the quality of their work?
Who are some of your best strategic partners? How do you know you're viewed as a trusted advisor?	Do they understand what we mean by "trusted advisor?" Do they have that standing?
What are a couple examples of referrals you've made or received in the last six months.	Do they have a track record of referring business both in and out? Is it easy or do they struggle to come up with examples?
What would it take for you to refer a close friend and client to anyone? What are the primary qualities you would look for? How do you know if they are any good at what they do? How do you know they will put your client's interest first?	Will they be able to make the type of connections that will allow them to feel comfortable giving referrals? Do they seem like someone you would trust with a referral?
What do you think you will need to do to start getting referrals from other Members of ProVisors? How long do you think that will take?	Have they given this serious thought? Are they coming with the intention of investing in relationships?
Ask for two references you can contact, if this Candidate was not a personal referral from a Member or if you have any concerns.	

Source: Based on a document created by Sharon Rich, GL Westside

Appendix B: Candidate Scorecard

Instructions: If helpful, after interviewing a Candidate, step back to assess them in the following categories, using a scale of 1-5, with 5 representing your highest endorsement, then compare notes/scores with other EC Members.

Score	Category	Explanation
	Established Professional	Reflects a high degree of experience, competence, integrity and accountability. Needs to be in good standing, certified and/or licensed in their profession.
	Professional Presentation	They come across as professional in-person, online, and in written correspondence. They are impressive.
	Trusted Advisor	An influencer whose clients regularly request advice and request introductions to other professional resources within and outside of their own profession.
	Referral Maker	Regularly makes and receives quality introductions and referrals.
	Connector	Builds consensus, infuses energy and enthusiasm into the group and connects other professionals to potential resources. Connects at the highest level of decision- making with C-Suite Executives, Investors and Members of Boards of Directors.
	Markets Served	Principally services middle market companies and clients, established professional service firms and high net worth individuals.
	General Likability	This is someone the group will be able to know, like and trust. They will come into the fold quickly.
	Diversity	Brings distinct professional expertise or otherwise addresses a gap in the composition of the group.
	← TOTAL SCORE	***Determine your minimum threshold score for consideration.***

Appendix C: Communication Templates

New Member Onboarding

EMAIL INTRODUCING THE NEW MEMBER TO THE GROUP

Dear <GROUP NAME>!

It’s my pleasure to welcome <NAME> as the newest Member of <GROUP NAME>!

<INSERT A BRIEF BIO – THREE SENTENCES>

- Name + Title + Organization
- Description of person’s job function
- Description of typical client

Here is more about <NAME>:

- <INSERT LINKEDIN PROFILE LINK>
- <INSERT CONTACT INFO FROM EMAIL SIGNATURE>

<PERSON’S NAME> – we’d like to formally welcome you to our amazing family! We’re thrilled to have you as our newest Member.

Welcome!
<GROUP LEADER>

EMAIL TO THE NEW MEMBER

Hi <Member Name>,

I'm connecting you to <NAME>, our Mentor Chair for <GROUP NAME>, who will help you get up to speed with the group specifically and ProVisors in general. I'm also cc'ing the group's Executive Committee since they're a resource for everyone, and in particular, new Members. Here's who's on our EC:

- Group Leader: <NAME>
- Group Leader Assistant: <NAME>
- Host: <NAME>
- Troika Manager: <NAME>
- *Any Other EC Roles the Group Has*

I'm also including a New Member Onboarding Checklist that you can use to drive your onboarding and orientation process. I encourage you to work through those items in the next 30 days so you can maximize your Membership.

As you'll see on the checklist, the first action is to schedule an introductory call with <NAME>, our Member Services Representative (MSR) from the ProVisors Headquarters in Sherman Oaks – see if you can do that this week!

I'm always available if you have any questions.

We're thrilled to have you join our group!
<NAME>

ONBOARDING CHECKLIST FOR NEW MEMBER

Instructions: *Edit the <FIELDS> below, then copy and save as a PDF or MSWord document to share with your new Members. This is a TWO PAGE document – be sure to include the "important fields" information on the next page.*

Welcome to ProVisors!

The following is intended to be a self-guided checklist to help you navigate the onboarding process. We recommend working through it within your first 30 days to maximize your Membership. If you hit any roadblocks, please reach out to a Member of the Group's Executive Committee.

- ❑ Schedule an Onboarding Call with our Member Services Representative <INSERT NAME + EMAIL>.
- ❑ The Member Services Representative will provide a brief overview of the website (called "The Hub") and how to navigate its functionality.
- ❑ Upload your profile into the ProVisors system. (See Page 2 for a checklist of the critical fields.)
- ❑ Connect with the Mentor Chair <INSERT NAME + CONTACT INFO> – by phone, video or (when things reopen!) in person. New Members will be Troika'd with <NAME> within the first several meetings.
- ❑ Attend a New Member Orientation within your first 60 days – this is critical for maximizing your Membership. Here's how to find one: <INSERT>
- ❑ Review the Members Handbook and our Code of Conduct.
- ❑ Connect with your Mentor/Buddy to guest at another group's meeting or attend an Affinity Group. Find a list of meetings here and use the calendar function on the Hub!
- ❑ Go out and create some new commerce – and some new friends and colleagues!

Your Provisors' Profile – Important Fields

Note: a recent, professional photo is one of the most critical aspects of your profile. We use it to announce your Membership on LinkedIn and include you in ProVisors News. (We don't do either until we have a photo.) And most importantly, you'll show up on the photo lists with an image!

- ❑ Name and Title
  - First and Last Name
  - Certifications
  - Title

- ❑ Phone and Email
  - Call Me When (describe your ideal client/engagement)
  - Account Phone
  - Mobile
  - Email

- ❑ Demographics
  - Profession
  - Specialities (select 2-3 from the options that apply to you)
  - Company
  - Company URL
  - LinkedIn URL (make sure your LinkedIn Profile is up to date)
  - Colleges
  - Graduate Degrees
  - Short Bio (very important – max of 250 characters including spaces)
  - Full Bio
  - Clients
  - Services
  - Industries
  - Speaking Engagements
  - Social Clubs
  - Organizations
  - Charities

- ❑ Mailing Address
- ❑ Billing Address

Appendix D: New Member Orientation Agenda

Below is our NMO agenda along with talking points. You may reach out to Lisa Meredith, lisa@provisors.com with questions!

Mission: ProVisors is a community of professionals who serve their clients as trusted advisors and share the highest standards of integrity, performance, and accountability. ProVisors promotes and enables relationship building, information-sharing, and collaboration among its Members for the benefit of their clients and one another.

Presenter Introduction, a brief overview of subject matter, meeting etiquette

Introductions: An opportunity to perfect the 30-second intro-Virtually vs. In-Person
- What are the three things that differentiate you? RENAME (2 words)
- Virtual Backgrounds (Marketing tool)
- Executing Effectively (Strategic/Deliberate use of photolist)

Guesting and Troikas: Increase your Visibility
- National stage/Strategy (Demo-Calendar, Group Search, Upcoming/My Registrations)
- Approval Process
- Business as usual (Dress Up, Show Up, Speak Up, Follow Up)
- ARRANGE YOUR TROIKA/DO YOUR RESEARCH
- Identify an Affinity Group
- No Show/Cancel policy

Referrals & Testimonials: PV Community currency
- Describe proper "Know. Like. Trust. Refer." etiquette
- How to make/receive an impactful referral (Dos/Don'ts)
- How to prepare/deliver a testimonial (80/20 rule)

Essential Business Development/Marketing tools
- PV Business Opportunities -in meetings and weekly emails
- PV Member Thought Leadership Portal-Demo
- Member Spotlights (What/Why)
- Regional PV LinkedIn Groups

Q&A & Reminder to review the 30-Day Checklist

Group Leader Toolkit

Appendix – Effective Meetings

Appendix A: In-Person Group Meeting Agenda

For a Content- or Activity-Focused Meeting

Group Name + Date of Meeting

ProVisors is a community of professionals who serve their clients as trusted advisors and share the highest standards of integrity, performance and accountability. ProVisors promotes and enables relationship-building, information-sharing and collaboration among its Members for the benefit of their clients and one another. Know, Like, Trust and Refer.

Agenda **times are suggestions/approximations, assuming a morning meeting timeline*

7:00*	**Arrive & Network**
7:30	**Housekeeping Reminders + EC Introductions** List your Executive Committee on the agenda (name + role) Each person will provide a brief intro + a brief networking tip (vary the tip topic monthly)
7:35	**Introductions + Testimonials** Determine how much time to allocate based on RSVPs Decide if you want to include a quick prompt/question for people to answer in their intro Proposed sequence: ● Guests with testimonials for a group Member will go first: intro + testimonials ● Any Member with testimonials will go next : intro + testimonials ● Anyone who hasn't yet spoken will go: intro ● Candidates will go last: intro
8:25	**Panel/Presentation/Activity**
8:50	**Needs/Deals/Wants + Troika Assignments** Include a list of the open seats you're recruiting for on the agenda
9:00	**End Meeting**

Upcoming ProVisors Events

List any social events, Affinity Groups. or other Regional Groups' meetings.

Source: Richard Wang - GL for Mountain View 1

Appendix B: Virtual Group Meeting Agenda

For a Content- or Activity-Focused Meeting

Group Name + Date of Meeting

ProVisors is a community of professionals who serve their clients as trusted advisors and share the highest standards of integrity, performance and accountability. ProVisors promotes and enables relationship-building, information-sharing and collaboration among its Members for the benefit of their clients and one another. Know, Like, Trust and Refer.

Agenda **times are suggestions/approximations, assuming a morning meeting timeline*

7:00*	**Fun & Games** Icebreaker/Networking Activity
7:30	**Meeting Kick-Off** ● Read/reference mission statement ● Share ground rules or housekeeping reminders for meeting conduct ● Share a slide with the names/groups of any Guests (if too many to introduce) ● Quick group photo
7:35	**EC Introductions – moderated by GL** 60 seconds each, ideally with a key group update relevant to their role ● EC Role: Name + Profession
7:40	**GL Introductions – moderated by GL** 30 seconds each for any Guesting GLs **New Member + Candidate Introductions – moderated by GL** 45 seconds each
7:50	**Testimonials – timed and announced by GLA** 45 seconds for 1 testimonial, 90 seconds for multiple testimonials people are muted automatically at the time limit
8:05	**Content/Presentation** ● 8:25 – send into small group breakouts to discuss the topic ● 8:40 – full group debrief
8:50	**Needs/Deals/Wants**
9:00	**End Meeting OR Send People Into Insta-Troikas**

Source: Richard Wang - GL for Mountain View 1

Appendix C: Meeting Activities – Introductions

Ideas Collected from Various Group Leaders

We want people to get to know each other, and yet without a bit of clever planning, introductions can become a low-impact part of the meeting, when people may tune out. Here are some ways to keep it fun and engaging, compiled with the help of various Group Leaders at the annual GL Summit.

Activities – In-Person or Virtual

Meaningful Photograph
In advance of a meeting, ask each Member to email a photo of themselves that depicts them doing something they love to do, a family photo, a high school picture, enjoying an extreme activity, etc. The images are shared to the group and everyone needs to guess which of their fellow Members are in the photo. See who gets the most correct. After everyone has had a moment to guess, one by one, the Member in the photo talks about the significance behind the photo.

Jack and Jill
Start the activity by saying "Jack and Jill went up the hill, fell down and....." selects someone and they add the next sentence to the story. Try to imagine a great order based on the professions in the group. For example, the first storyteller may be a personal injury attorney who says "So the parents called me, sent the medical records and we learned they tripped over a brick", next point to the Insurance person in the group, "so it turns out that the company had insurance......" and so on. Each person adds to the story by applying their professional skill set. Boosts creativity and fun as each Member adds to the story.

Meaningful Song
Ask Members to email their favorite song to one contact in the group. The contact downloads snippets of each song to a media player. In the meeting the snippets are played. First - Name that Tune, Second - guess which Member is associated with the song and Third - Have the Member tell everyone why that song is meaningful to them.

Stick Figure
Each Member takes a quick minute to draw a stick figure depicting what their profession is. Very simple and creative. The group is shown each figure - Members guess the profession. Then the Members describe what the picture intended to show and adds a nickname to the drawing.

Myth Busters
Each profession has commonly held misconceptions. Each Member makes a short list of 5 items - 3 myths and 2 truths. The group must guess which items are myth and which are real. Each Member can take a moment to address the misconceptions.

RSVP Scramble
Take the photo-list and separate the photos from the descriptions. Let the group try to match the photo with the right description. See who makes the most matches!

Member Jeopardy
Read Member descriptions aloud and have the group match the description to the Member. A great way to see if the Member's message clearly reflects their personal brand. Play Jeopardy music for added fun.

Family Feud
Group Leader puts a selection of questions together (about Members using information from their bio) in the format of a favorite game show and then creates teams to go up against each other.

Thanksgiving

Request Members to send in a picture that reflects something they are grateful for. Sometimes it's something wonderful and sometimes it's a struggle that was overcome. Transformational life events. Very emotional.

7 Words Distill
What you do in a 7 word pitch! Very funny.

Open Up
Each Member talks about their Biggest Failure and what they learned from it. An exercise in vulnerability and insightfulness.

The Hot Seat
Pass out numbers to all Members. Randomly choose a number and that person is now on the Hot Seat. Pre-curate a number of 'get to know' questions and have the Member answer a randomly selected question. This exercise helps to learn more insight about each Member.

Are You Smarter Than a <Fifth> Grader?
Invite a young relative (ideally someone between 11-13) to the introductions portion of the meeting. Tell Members they have 30 seconds to introduce themselves and explain their profession in a way that this 11yo Guest can understand. After each introduction, the young Guest can give a thumbs-up or thumbs-down if they understood what the person does for a living. Keeps it moving and forces people to find simple, funny ways to explain what they do.

Press Release
Invite a PR professional to the group. Breakout in small groups and help each other write a short Press Release. Share with the PR professional for feedback. (If you do this in a virtual meeting, you'll need to use Zoom breakout rooms.)

Introduction Prompts - In-Person or Virtual*

Instructions: Pick one and send it in advance of the meeting so people can reflect and form their thoughts. Let them know how much time they'll have to answer so they know how brief to keep it – and what else you'd like them to include: eg. "Share your name, business and specialization, then respond to this question. Each person will get about two minutes in total." If you have a lot of people attending or if you choose a topic that's likely to elicit a longer response, consider using breakout rooms.

"The worst thing you write is better than the best thing you didn't write." Tell us briefly about the best thing you haven't yet written, or, alternatively, the best (or worst) thing you have.

The Dalai Lama wrote in his autobiography, "I found, as every teacher does, that there is nothing like teaching to help one learn." Briefly share one thing which you've learned through teaching, either students, your children, your employees, or elsewhere.

I've been reading a lot of books lately, and find something pleasantly nostalgic about the one that's not on my phone or iPad, but rather real paper pages. Tell us briefly about something you fondly recall from your younger days, which seems to either be gone – or is going to be gone – soon.

Briefly share a favorite story your parents or siblings always tell about you. Nothing political, and modesty not allowed.

As a basketball coach starting his career, my son has been navigating difficult but typical waters. He's far more knowledgeable than some of those over him, but it's a competitive environment, and he has to pick and choose when and where to contribute for the good of the team. Each of us has had moments when we've decided to speak out beyond our pay grade. Briefly describe a time you've taken the leap to speak out in your life and the results.

A moment in your early life which defines something important about you today.

The rain can be distressing – driving, the cold, leaky roofs. But the payoff is in brilliant days, green hills, and stunning flowers. Tell us about how a 'rainy day' turned out to be beautiful for you, either personally or in business.

How you met your best friend (other than spouse or significant other) and what made it stick. What quality does that friend possess with which you would like to be better?

We're a week into Spring, traditionally a time for cleaning after the long winter. If you were to pick one thing to clean up in your world this Spring – business or personal – what would that be?

Novelist/essayist Arthur Koestler, in The Act of Creation, wrote, "True creativity often starts where language ends." Tell us briefly about one thing you do to underscore what kind of person you are, which doesn't involve the written or spoken word.

*Source: Prompts created by GL Richard Clayman

Activities – In-Person Only

Cinco de Mayo

Place 3 sombreros on the floor next to each other and then create an outer circle of Members. Each sombrero has trivia questions in them (questions should rotate) and if a Member tosses a coin into the hat and answers the trivia question, they win a prize.

The Envelope
Break into groups of 6 or 7. Give each Member an envelope and have them write their name on the outside. Everyone passes the envelope to the left. Using Post-It notes, each Member writes one word on the note that they feel best describes the person listed on the outside of the envelope and then places it in the envelope. Pass the envelope to the left. Continue to leave notes in each envelope until your envelope returns to you. Take a moment to read and reflect on each word in your envelope. Take the one word you appreciate the most and share it with the group. This exercise helps Members measure how others see them and to gauge whether they need to work on their outward persona.

The Penny
Gather a handful of pennies (find ones with appropriate dates that all Members can relate to) and scatter them around the room on seats, tables, etc.. Each Member should select a penny and when called upon, talk about what was going on in their life during that year. Good, bad, interesting.... and personal moments are shared. Many memories are shared and everyone gets to know each other a bit better.

Fortune Cookies
A fun activity in January/February (so it corresponds with the Chinese New Year) is to bring fortune cookies for each group Member. Place one at each seat. When the meeting starts, instruct people to unwrap and crack the cookie but not open it or read the fortune yet. Then when you're ready for introductions, go around and ask each person to introduce themselves, then quickly open the cookie, read the fortune out loud and say the very first thing that occurs to them.

Charities
Members at the meeting contribute funds to a 'pot.' Go around the room and each person talks about a charity that is important to them and why. All business cards are also put in a pot and one is selected. The funds collected are donated to the charity of the Member whose business card was chosen. Wonderful way to learn more about each Member and a charity.

White Elephant Book Exchange
Each Member brings a book that has had a meaningful impact on them. Choose a random order for Members to select the book that they would like to have. The Book can be 'stolen' up to 3 times by other Members. If 'stolen', the Members who had to give up their selected book get to choose another book. This continues until each Member has a new book to read.

Appendix D: Zoom Breakout Ideas

Ideas Collected from Various Group Leaders

While we're eager to resume in-person networking, there are ways we can creatively leverage Zoom's breakout rooms to make our virtual meetings more engaging and foster meaningful connections. (If you're new to breakout rooms, watch this brief video to see how to establish and manage them.) Once you understand the technology, here are a few activities you might want to use breakout rooms for.

Choose Your Own Adventure

To simulate real life open networking where everyone chooses who they want to talk to, come up with some preset topic options and ask people to chat in their preferred topic – then create the breakout rooms based on what people have selected. (You might have multiple breakout rooms on the same topic if it's popular!) Some ideas for the topic offerings:

- Fun: Name that Tune, Trivia, Gossip, General
- Fun: Movies, Concerts, Theatre
- Fun: College Sports, Professional Sports, No Sports
- Fun: First Job, Worst Job, Dream Job
- Professional: Lessons Learned, Current Challenges, Goals & Aspirations
- Professional: Needs, Deals, Wants

Networking Bingo

Before the meeting:

- Use this link to create customized categories for the Bingo card. (Note: it's free for up to 30 people and only $10 total for up to 100 players.)
- Provide everyone with instructions to generate and download/print a Bingo card for themselves before the meeting.

Create a slide with rules for Bingo to share on your screen during the meeting so everyone is clear on how to play and how to win. (eg. It's important to clarify that they can only use one person one time on their bingo card, so they'll need to be strategic.) During the meeting, you'll drop 3 people into breakout rooms of 3-4 minutes each. Rotate them into as many breakouts as needed until someone gets Bingo. If someone gets Bingo quickly, you can switch the game to blackout and give people a few extra minutes in each breakout to share more details with each other.

Unbroken Chain - How Else Might We Have Met?

Drop 4-5 people in a breakout room and give them 15 minutes to complete this task. The goal is for them to create an unbroken chain of how they are connected outside of ProVisors and its Members. As an example: "John worked for Hart & Hart law firm, and the partner (Don Hart) is one of Mary's clients. Mary graduated from Cornell, where she had the same B-school advisor as Bob. Bob…"

More Extensive Introductions

If you have too many people in your meeting to cover introductions with the full group, use breakouts to provide people with a chance to introduce themselves and connect with a few other Members. When you use it in this instance, we recommend putting more people in each breakout (6-8), giving them clear instructions with regard to how much time each person gets the floor and a discussion prompt to respond to.

Small Group Discussion

When you use a portion of your meeting for a presentation or panel discussion, create a few discussion questions then send people off into small breakout groups (3-4 people) for 15-20 minutes to continue exploring the topic. When you do this, consider using chat to post the questions/instructions so people are clear on how to use the time and what to discuss.

Speedy "Troika Consulting"

Drop three people into a 15 minute breakout. Ask them to identify who has a challenge they'd like help with – this person becomes the "client" and the other two people are the "consultants." The client then has a few minutes to share their challenge while the consultants listen. After that, the consultants can spend a few minutes asking clarifying questions. The consultants then offer their advice and recommendations, while the client sits quietly and takes it in. To wrap things up, the client can share what they heard that seemed most helpful or valuable.

Instant Troikas

Since people are unable to get together for their Troikas, one time-saving tip is to wrap the meeting by sending people off into their Troikas using the breakout rooms. They might stay for five minutes to schedule their actual Troika, or they can stay on and have their Troika right then. Note: whoever is hosting the Zoom meeting will need to keep the meeting open until the Troikas are finished, so be sure to set an "end time" for people who decide to Troika after the meeting. To save time, you can have the Group Monitor build out the Troika assignments in Zoom's breakout menu before the end of the meeting (assuming you don't have other breakouts in that session).

ProVisors

Appendix E: How Effective Are My Meetings?

A Self-Assessment for Group Leaders

Instructions: Assess yourself honestly so you can identify where you may have an opportunity to improve the effectiveness of your meetings. We've structured this around the three pillars of effective meetings (Organization/Planning, Time Management, and Engagement) to help you look for patterns so you can address your greatest opportunity. After completing this assessment, review your results and choose ONE thing you can work on that will impact your meetings.

ORGANIZATION & PLANNING

	Never			Always	
I thoroughly plan my meetings in advance.	1	2	3	4	5
I send a meeting agenda in advance so people know what to expect.	1	2	3	4	5
I enlist help from my EC in planning the group meetings.	1	2	3	4	5
We take a hands-on approach to preparing speakers/presenters.	1	2	3	4	5

TIME MANAGEMENT

	Never			Always	
People are succinct with their introductions.	1	2	3	4	5
Testimonials are concise and engaging.	1	2	3	4	5
We start on time and wrap promptly.	1	2	3	4	5
I know how many testimonials we have heading into each meeting.	1	2	3	4	5
I'm confident stepping in as needed to keep things moving.	1	2	3	4	5

ENGAGEMENT

	Never			Always	
The meeting format varies each month.	1	2	3	4	5
We experiment with different tools/technologies/activities to drive engagement.	1	2	3	4	5
Everyone's voice is heard at some point during the meeting.	1	2	3	4	5
I hear positive feedback from Members on activities on or after the meeting.	1	2	3	4	5
I let other people handle the technology so I can be fully present.	1	2	3	4	5
I notice when people have disengaged and am able to bring them back.	1	2	3	4	5