



Leads Group Guidelines

Mission: The Leads group is designed to help members' businesses grow and prosper through a mutual commitment to continually promote each other's businesses by recommending one another to prospective clients and customers.

Objective: The Leads Group is a networking referral group. They meet twice a month with the purpose of exchanging qualified referrals among our members.

Investment: Membership to the chamber is the only fee required to be a member of the Leads Group.

Membership:

- A. In order to participate in The Leads Group, one must first be a member in good standing with The Chamber of St. Matthews. If not currently a member of The Chamber of St. Matthews, the company must join the chamber. Information on membership fees can be found at www.stmatthewschamber.com.
- B. To become a member of a the Leads Group, the prospective member must complete an application. The Leadership Committee, which consists of the chamber's Director of Operations and Director of Membership as well as the president and vice president of the Leads Group. They will review the application submitted. Once approved by the Leadership Committee, the company will be offered a seat in the group.
- C. The Leads Group seat belongs to the member company. If an individual of a member leaves the company for any reason, the seat remains with the company and they may reassign the group seat to another employee or vacate the seat.
- D. Only one representative from each business category is permitted.
- E. Members should only represent their primary business focus; therefore, allowing the group to grow by bringing in new members to represent more business categories. A focus on one's main business and area of expertise cuts out confusion over members who may represent various categories, and opens the door for more members to come into the group resulting in more potential contacts and more referrals being passed.
- F. When a question arises as to a possible conflict in categories, the current member in the category in question will be consulted for input to address

any concern privately.

G. Attendance Requirements

Attendance is extremely important to the group's success and being a member is a privilege.

1. A member must be in attendance for the entire meeting to receive attendance credit.
2. A member is allowed 2 absences per quarter.
3. If a member cannot attend a meeting, he/she can send a substitute in his/her place. The member will be responsible for providing his/her substitute with a script for the 60 second presentation, and any referrals, outside meeting group, or business dollars to turn in on the member's behalf. This will not count against the 2 absences allowed per quarter.
4. A member cannot miss more than 2 consecutive regularly scheduled meetings.
5. If there are more absences than allowed, the Leadership Committee will review the member's participation in the group before determining a course of action up to and including loss of leads group membership.
6. A member may request a leave of absence for 3-12 consecutive weeks which will be considered and decided upon by the Leadership Committee. This does not include "busy season."

H. The average group size is expected to maintain at least 20 members. If the membership drops below 20 members, the group will have 90 days to grow back to the acceptable level.

I. A seat becomes vacant when (1) someone resigns from the group, (2) when someone does not meet the guidelines on referrals, code of ethics, and/or attendance and is removed from the group, (3) if the member does not renew at the yearly renewal time or (4) if the member's company is no longer in good standing with The Chamber of St. Matthews.

J. Visitors are encouraged to attend meetings. Members are encouraged to bring guests to meetings. Guests can be members of The Chamber of St. Matthews OR non-members. If a non-member is interested in joining the Leads Group, he/she will first need to have his/her employer become a member of The Chamber of St. Matthews before submitting an application for the referral group.

II. Leadership Committee

A. President Responsibilities

1. Presiding over regular meetings, including but not limited to introductions of members and guests, presentations, old and new business.
2. Ensure meetings follow appropriate protocol.
3. Conduct special meetings as needed.

- B. Vice President Responsibilities
 - 1. Fulfill president's role in his/her absence.
 - 2. Maintain schedule of speakers.
 - 3. With the assistance of the chamber's Director of Membership process new member applications
 - 4. Will fulfill presidential role when current president's term has been completed.
 - 5. Keep membership roster
- C. Secretary Responsibilities
 - 1. Record member referrals.
 - 2. Record member attendance.
 - 3. Record meeting activity.
 - 4. Report weekly, monthly, and yearly activity to the group.
 - 5. Will email monthly tracking numbers to The Chamber of St. Matthews staff liaison by the last Friday of each month.
- D. The Leadership Committee shall convene no less than quarterly.
- E. The Leadership Committee as a whole is responsible for reviewing new member applications, reviewing current members' participation and contribution to the group, conflict resolution, upholding the Code of Ethics, leading the group by example, and any and all other things to be determined necessary by the Leads Group.
- F. Leadership Committee Appointments and Election Terms
 - 1. The initial Leadership Committee of a newly formed group will be appointed by The Chamber of St. Matthews for the first year. Thereafter, the positions shall be elected by the members of the group, with the exception of the president's role which will be fulfilled by the vice president.
 - 2. Members of the Leadership Committee are to be elected annually. There is a term limit of 2 years for each Leadership Committee position. The term year starts in August and ends in July. The vice president takes over the role of president once the term is completed.
 - 3. Nominations can be made by any member of The Leads Group in the month of May, which will be one month prior to the elections. The person nominated must approve of the nomination. A member may self-nominate.
 - a. To be nominated for vice president, the member must have been on the Leadership Committee for at least 9 months the previous year.
 - b. A nominee must have at least 3 months of membership with The Leads Group prior to time of nomination. He/She must also be in good standing with the St. Matthews Chamber.
 - 4. The members of the Leadership Committee will be elected annually in

July one month before the new term year starts in August.

5. The voting will be done by ballot and will be counted by The Chamber of St. Matthews staff.

III. Meetings

- A. Meetings shall be held twice a month at a location to be determined by the staff at a time to be determined by the group's Leadership Committee.
- B. Each meeting will be approximately 1 hour.
- C. Meetings are to include a brief 60 second commercial/introduction from each member. The member may only promote the product or services in the business category under which he/she is a member, as to not encroach upon another member's category.
- D. Meetings are to include a 10 minute presentation by a member of his/her business, or other business interests as determined by the group. The member may only present on the products or services in the category under which he/she is a member, as to not encroach upon another member's category. The presenting member must have at least 90 days of membership with the Leads Group in good standing.
- E. After introductions and announcements, each member shall be provided an opportunity to submit referrals, outside meeting group, business dollars, and visitors in attendance. In lieu of a referral, members can give a testimonial about a fellow member of the group, or positive feedback from a referral. Every member is responsible for contributing to this portion of the meeting because of its importance.

IV. Guests and Prospective Members

- A. Guests will be given a brief period to introduce themselves and their business. If their business category is not yet represented in the group, they will be allowed the same 60 second presentation as the members to talk about what they do and possible contacts they are looking for.
- B. Guests may attend up to 3 meetings at no charge before requesting an application for membership with the group as well as the chamber (if they are not a chamber member).
- C. A new member's application will operate on a first-come, first-approved selection process if two or more guests would like to occupy the same business category. The first application submitted for review under the guidelines stated in Section IV-B will be considered first. If for whatever reason the application is denied, the next application submitted will be reviewed in sequential order until the chair of interest has been filled.
- D. To become a member, refer to Section IV-B.
- E. Guests and prospective guests may not accept requests to meet with other

members for the purpose of referring business until the Leads Group membership has been secured.

V. Referrals

- A. A qualified referral is giving the name of a person, or business, and contact information to another member and the referred person, or business, is expecting the call. We also encourage personal introductions to establish a qualified referral. You do not have to wait until the meeting to give the referral. Referral slips will be completed at each meeting; however, they cannot be given to the recipient until the referred person, or business, has been contacted.
- B. There is no guarantee that the referral will meet with the member to whom he/she was referred or do any business.
- C. Each member is required to give a minimum of four referrals per quarter.
- D. Members who fail to provide sufficient referrals may have their membership reviewed by the Leadership Committee to determine a course of action up to and including loss of membership. Any and all recognizable efforts made by any members in question will be taken into consideration. Examples of such efforts are outside meeting group, attendance, participation, etc.

VI. Complaints and Disputes

- A. All complaints must be submitted in writing or by email to the chamber's Director of Membership for review by the Leadership Committee.
- B. Complaints will be addressed by the Leadership Committee and responded to in writing or by email in a timely manner by the Director of Membership.
- C. If the resolution is not satisfactory to the complaining member, or if the complaint involves a member of the Leadership Committee, then the issue may be escalated to a meeting between all parties and The Chamber of St. Matthews Staff. The decision and resolution issued by the staff is binding and final.

VII. Other

- A. The Chamber of St. Matthews will provide referral slips, Referral Group binder, and business card holder.
- B. The Chamber of St. Matthews will keep the waiting list of members wanting to join a group.