



New Member Handbook

WELCOME

Welcome to **AMSPIRIT BUSINESS CONNECTIONS**. We intend for this to be a productive experience, both personally and professionally.

To this end, we are providing you with this *New Member Handbook*. This is designed to be a tool you can use to “jump start” the effectiveness of your **AMSPIRIT BUSINESS CONNECTIONS** membership.

Please take the time to review this *New Member Handbook* in its entirety and work through the exercises provided. Although we know you are busy, this will be time well invested as it will enhance and accelerate the referral process for you.

In closing, best wishes for a long and productive experience in **AMSPIRIT BUSINESS CONNECTIONS**.

THE FIRST STEP

The link between you and the remainder of the members in **AMSPIRIT BUSINESS CONNECTIONS** is your Chapter’s Area Director. The Area Director is a member just like you, but in addition to his or her chosen career or business, this person also serves as a leadership and support figure within the framework of **AMSPIRIT BUSINESS CONNECTIONS**.

It is important that you meet your Area Director as soon as possible. Although generally your Chapter Area Director will visit your Chapter each month, please take a moment to introduce yourself via e-mail (their name and e-mail address is listed as part of your Chapter’s information in the Network Directory section of the **AMSPIRIT BUSINESS CONNECTIONS** website (www.amspirit.com)). This will initiate contact with this important individual and will serve to immediately enhance the extent of your network both within and outside **AMSPIRIT BUSINESS CONNECTIONS**.

THE QUALIFIED REFERRAL

One of the many unique features of **AMSPIRIT BUSINESS CONNECTIONS** is the quality of referrals our members are committed to exchange. In **AMSPIRIT BUSINESS CONNECTIONS**, we strongly advocate that any and all referrals you give be qualified.

What this means is that when you give a referral, the contact target should be expecting a call from the fellow member being referred.

Please understand that nothing in the **AMSPIRIT BUSINESS CONNECTIONS** definition of Qualified Referrals guarantees that actual business will result from the referral. It does, however, imply that when you give someone a referral, he or she will be contacting someone that is expecting their call and that person will be reasonably receptive to what is being offered. In essence, the focus of **AMSPIRIT BUSINESS CONNECTIONS** is to put one another in “the right place at the right time.”

SUCCESS IS A FUNCTION OF WHAT YOU DO

It is vital that you each reflect on your primary purpose for participating in **AMSPIRIT BUSINESS CONNECTIONS** – to receive more and better quality business referrals.

Certainly you must look to others to provide you with these. You must bear in mind, however, that you are ultimately responsible for generating your own qualified business referrals. Thus, you each must present yourselves in a manner that will maximize the chance that others will refer your product or service.

Below is a checklist for accomplishing that and serves as a guide to assist you in undertaking the actions necessary to be successful in your Chapter and **AMSPIRIT BUSINESS CONNECTIONS**:

- ü **Give Without Expectation:** The Golden Rule of Networking is “give first, get second”, thus if you focus on giving to others in you Chapter, referrals to you will certainly follow. How do you give to others? What do you give? Simple. Just ask them. They will tell you. Take a genuine interest in their success and well being and you will have a friend for life.
- ü **Specific Requests:** You should make simple, concrete requests of your fellow members for potential clients and customers that can benefit from your product or service. You should avoid using vague words like “anybody, everybody or somebody.” You are better served to illustrate specific examples or scenarios. For example, an attorney that says “*A good referral for me is anyone that needs legal services*” will generate fewer and less quality referrals than an attorney that says “*A good referral for me is a couple with a newborn child. They likely need to revise their wills.*”
- ü **Distribute Materials:** You should provide members with brochures and handouts that will help them understand your product or service. When your fellow members have materials of yours, you remain in their thoughts and they are better empowered to serve as your virtual sales force.

Ü Take Prompt Action: To keep the referrals flowing, you should take prompt action in servicing the ones you have been given. When you do so, you send a strong message to others that you value and appreciate their efforts. If you don't, they assume you really don't need the referrals and they will lose their enthusiasm for helping you. Get after your referrals.

Ü Have Consistent Attendance: To ensure that you remain in the minds of your fellow members, you must plan to be in attendance each week. This is not to say that you should forego vacations or completely avoid servicing clients during this time. Take your vacations; you have earned them. And feel comfortable using this time to meet with clients in rare emergencies. Know, however, that the more meetings you attend, the more likely you are to receive referrals.

Ü Come Early; Stay Late: It is the time before and after the weekly meetings that you have the best opportunity to develop one-on-one relationships with others.

It is these relationships that create the vital "knowing, liking and trusting" between you and your fellow members. From these three elements, referrals will flow to you. So, be sure to arrange your schedule so that you can be at the Chapter meeting 10 to 15 minutes before it starts and stay for 10 to 15 minutes after it ends.

Ü Associate Outside the Meeting: You can use occasional telephone calls, informal luncheons, and joint client meetings as a great way to solidify relationships with your fellow members. As much of each Chapter meeting is not conducive to cultivating one-on-one relationships, these gatherings outside the weekly Chapter meeting serve to round out your networking efforts.

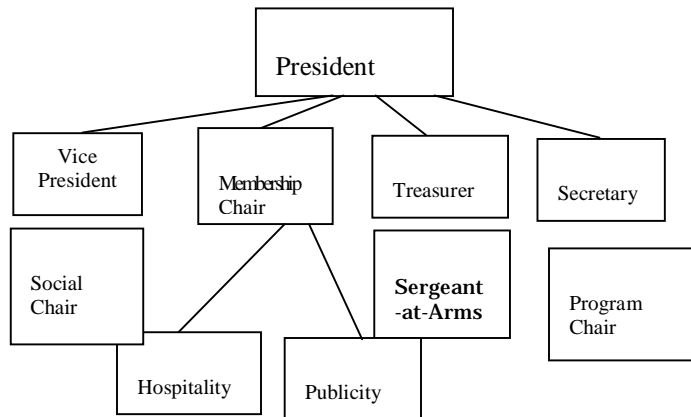
Please think about the membership of your Chapter. Who are the three members you would most benefit from having lunch one-on-one with?

- 1) _____
- 2) _____
- 3) _____

Ü Get Involved With the Chapter: To increase your exposure to other members, you should serve as an Officer or Committee Chair in the Chapter. Arrange an opportunity to speak with your Area Director, Chapter President or any other Chapter Officer and express an interest in helping the Chapter behind the scenes. An active, developing Chapter will find a productive use for your time and talents.

To assist you in understanding the basic officer positions in your Chapter, below is a description of each:

An Overview of Chapter Officers



President: Presides over the weekly Chapter meetings and chairs monthly board meetings of Chapter officers.

Vice President: Monitors the attendance of members at the weekly meeting and calls on Officers for their reports.

Membership Chair: Explains the costs and benefits of joining *AmSpirit Business Connections* and follows up with each guest to encourage them to join.

Secretary: Takes minutes at Chapter's monthly board meetings and summarizes referral information each month.

Sergeant-at-Arms: Maintains order at weekly meetings, which includes monitoring the time limit of Chapter Programs.

Treasurer: Invoices and collects local Chapter meal or social fees and maintains a Chapter banking account.

Program Chair: Assigns members weekly as the featured speakers and arranges for or facilitates periodic training programs.

Social Chair: Schedules, coordinates, and promotes activities outside the Chapter meeting.

Hospitality Chair: Ensures that guests are appropriately greeted and introduced to Chapter members.

Publicity Chair: Works with the Membership Chair to promote the Chapter.

ü Present Yourself Well: When you have an opportunity to present to the Chapter, you should use it as a tool to arm members with a better understanding of your products or services as well as whom they could benefit.

While it is not necessary to develop a full-blown PowerPoint presentation, you are highly encouraged to take seriously any opportunity you have to present to your

Chapter. Remember, your fellow members are your virtual sales force. So, ask yourself, how would you appropriately empower and motivate a sales force for your business.

With most Chapters, your first time you have an opportunity, you will be allotted 20 minutes to present details on your business. Below is a suggested outline that you can use to prepare and present an effective first program to your Chapter.

INTRODUCTORY MATERIAL: 2 MINUTES

- Indicate your name, company name, and position;
- Make a single-sentence statement about your company's primary business; and,
- Make a credibility statement about your company, such as, "We have been in business since ..." or "We have NNN employees in NNN office ..." or "We are the largest/newest/leading ..."

PRODUCT OR SERVICE OVERVIEW: 3 MINUTES

- Provide an overview of your primary products or services and a categorization of your secondary product or service offerings; and,
- Establish your company's competitive advantage, i.e., state reasons customers choose your product or services or what you are most proud of regarding your product or service.

SPECIFIC EXAMPLE DISCUSSION: 12 MINUTES

- Provide three or four detailed examples as to what members should look for in trying to find you referrals (e.g., for a property casualty insurance person, ask them to be on the lookout for individuals with collections as this can often provide an avenue for getting an insurance person involved);
- Offer suggestions as to how members should create a discussion regarding the situation (e.g., returning to the example, coach them to ask "how do you have your collection insured?"); and,
- Give them additional information that might intrigue the target to talk to you more (e.g., if you are unsure how your collection should be insured, you should talk to a friend of mine ... Can I have her give you a call?).

QUICK SUMMARY & ANSWER QUESTIONS: 3 MINUTES

- Quickly summarize the first three items and offer to address any questions.

While in subsequent presentations you should devote some time to giving background information on yourself and your business, over time you should educate your virtual sales force on three things:

- 1) Recognition:** What are the situations in which your fellow members should recognize that there should be a good referral for you?

For example, a financial advisor might tell the Chapter that it should recognize that when someone changes jobs, there is an opportunity to assist with rolling over a 401(k).

- 2) **Segue:** Once a member recognizes a situation that presents a referral opportunity for you, what should the member say to the target to transition or segue the conversation toward your profession?

In the prior example, the financial advisor would instruct the Chapter to simply ask “What are you doing with your 401(k) monies?”

- 3) **Hook:** Once the conversation has been transitioned, what should members say to connect or hook the target to you?

Continuing on the prior example, once the discussion turns to 401(k) monies, the financial advisor would instruct the Chapter that if the target does not have any plans to rollover the 401(k) the members should say “You should get your 401(k) rolled over. I know a great financial advisor that can help you. Can I have her call you?”

ü Patience Is Key: You must keep after your networking efforts, remembering that strong, long-term networking relationships are forged over months and years of interaction. Your membership in **AMSPIRIT BUSINESS CONNECTIONS** is akin to “planting seeds” and not simply “picking fruit.” Do not get caught up measuring the effectiveness of your membership solely on the number of referrals you receive in the short run. These will come in time based on your performance on the other activities in this section. Rather, focus on all that your membership brings to you: new connections, enhanced confidence, better business insight and many other benefits.

In summary, if you ensure that you fulfill each and every item on this checklist, you will maximize your opportunities for referrals. Remember, your success as a member in **AMSPIRIT BUSINESS CONNECTIONS** is simply a function of what you do.

REMEMBER THE A, B, C’S OF REFERRALS

You joined **AMSPIRIT BUSINESS CONNECTIONS** to grow your business or at least increase the amount of business you are doing. Generally when you think about this, you think about connecting with great, new clients or customers. So each week, as you pitch a request to your fellow Chapter members (e.g., “A good referral for me is ...”), you might be tempted to focus on those clients or situations that would best benefit you.

While this is natural and, in a certain sense, smart business, within your **AMSPIRIT BUSINESS CONNECTIONS** Chapter this singlemindedness may create limitations. How? Consider the following true story:

There was once a member in a Chapter who sold computer equipment. Just before joining **AMSPIRIT BUSINESS CONNECTIONS**, he had sold dozens of computers to a local school system. Apparently, the state legislature had earmarked millions of dollars for school systems to upgrade their computer equipment and this particular member had come across an opportunity to tap into a small piece of these allocated funds.

After joining, this individual was eager to use the contacts in his Chapter to identify more school systems that he could sell upgraded computers to. As these opportunities represented major transactions for him, each week he focused his infomercials on seeking contacts and inroads into local school systems.

Although articulately said, nothing came from his requests. The problem was that no one had legitimate contacts into school. After a year of trying, the member stood at the Chapter meeting when it was his time to speak and proceeded to resign his membership, stating that he had just not gotten any referrals.

This announcement troubled much of the Chapter. This individual was a good member. He had consistent attendance. He gave a respectable amount of great referrals. And he was well liked. Several people expressed their feelings.

With regret a member said, “I am sorry to hear that you are leaving the group – you will be missed. I wish we could have got you some referrals, but I just don’t know anyone in a school system and I don’t know anyone that needs 30 computers. I would have loved to have used you – we just bought a new printer last week.”

The resigning computer salesperson was stunned, but instinctively replied, “I could have sold you a printer. In fact, a good part of my business is selling a single computer or an individual peripheral, like printers and monitors.”

Several other members then muttered that they did not realize this. And still others indicated that they could have gotten the computer salesperson referrals. Obviously, opportunities had been lost.

The story has a happy ending. The member did not leave the Chapter. He did, however, stop focusing entirely on selling computers to school systems and did quite well asking for and getting referrals for a computer here and a printer there. And occasionally, he got a referral that gave him an opportunity to sell a dozen or more computers like he originally requested.

The moral of the story is that you should not get so caught up asking for that referral that will make your month, that you forget that most of your success in business is achieved by making lots of relatively small sales. In fact, from week to week there are three general categories of referrals you should be seeking, graded as A, B or C.

Ø **Grade A:** This is the referral you realistically hope for when you have an opportunity to daydream about your business. That is to say that it is entirely possible that you could receive a referral like this, but they do not come around everyday and you certainly should not pin the existence of your business or your membership in **AMSPIRIT BUSINESS CONNECTIONS** on them.

From time to time, you should ask for these types of referrals as it is not beyond the realm of possibility that you would get one and so it is important that you let your Chapter know that you would be interested. Take some time to briefly list two or three potential Grade “A” referrals for your business:

- 1) _____
- 2) _____
- 3) _____

Ø **Grade B:** These referrals would represent the types of business and clients that you generally see from day to day and week to week in your business.

A great majority of the time, you should be asking for referrals that fit in this classification. Take some time to brainstorm five to 6 potential Grade “B” referrals for your business:

- | | |
|----------|----------|
| 1) _____ | 4) _____ |
| _____ | _____ |
| 2) _____ | 5) _____ |
| _____ | _____ |
| 3) _____ | 6) _____ |
| _____ | _____ |

Ø **Grade C:** These referrals represent the bare minimum type of business that you are willing to accept. In essence, when you ask for these types of referrals you are saying to your fellow members, “Although I am not going to build my business long term on these types of clients, I am willing to work with them as a means of establishing a relationship and hoping that it leads to more and better business down the road.”

Like the Grade A referrals, this should not be the focus of your weekly request for referrals. You should remind your fellow members, however, from time to time about these potential opportunities that you seek. Take some time to briefly list two or three potential Grade “C” referrals for your business:

- 1) _____
- _____
- 2) _____
- _____
- 3) _____
- _____

Finally, like anything these standards are not fixed. Your business is constantly growing and improving. As such, what you define as a Grade A will and should change – what was once a Grade A referral will someday become just a Grade B referral. Additionally, your definition of Grade B and Grade C will change as well. For this reason, you need to revisit this exercise at least once a year and then apprise your fellow Chapter members whenever modifications occur.

Although there is nothing wrong with asking for those once-in-a-lifetime referral opportunities, remember to make these requests sparingly (and the same holds true for those referrals you are willing to work, but not overly eager to have). Remember, by way of analogy, while it is a nice feeling to hit the ball out of the park from time to time, you can score a whole lot of runs by just consistently hitting singles.

DON'T FORGET ABOUT WHOLESALE REFERRALS

Whether you are making a request for a Grade A, B or C referral, you have a certain hope or expectation with respect to the referrals you will be receiving. You hope and expect that these referrals lead to customers or clients that will immediately or directly result in new business. In short, you are hopeful of connecting with the end consumer. At **AMSPIRIT BUSINESS CONNECTIONS**, we generally term these as “Retail Referrals.”

For example, the financial advisor seeks individuals to invest money. The mortgage lender looks for someone seeking to purchase real estate. The real estate agent requests to meet people that are looking to sell their house.

While this is and should be the primary objective for you as a member involved in **AMSPIRIT BUSINESS CONNECTIONS**, the true spirit of this organization is to help one another succeed. Achieving this can and should involve potential benefits and opportunities that are broader in scope than just merely the Retail Referrals upon which you might tend to focus.

Thus in seeking referrals from your fellow members, you should consider “thinking outside the box” and brainstorming for various other opportunities we at **AMSPIRIT BUSINESS CONNECTIONS** term “Wholesale Referrals.”

These are referrals not intended to immediately or directly result in new and additional business. Rather, Wholesale Referrals are intended to indirectly result in new business for potentially several new clients or customers over a period of time. In short, with this type of referral, you would not hope or expect to be connected with the end consumer. Rather, you are hopeful of being connected to someone that can connect you to end consumers.

Below are some examples of Wholesale Referrals that you can consider asking for. This is, however, by no means a complete list. When it comes to Wholesale Referrals, you must remember that you are only limited by your creativity.

Ü **The Rainmaker:** Ask for an introduction to someone that comes into continual contact with people needing what you have to offer. For example, a financial advisor requests to be introduced to executive recruiters who potentially know of lots of individuals with retirement funds to reinvest; or, a mortgage lender would ask to be connected with any real estate agent not satisfied with his or her options for getting financing for their buyers.

Please take some time to brainstorm three or four potential “Rainmakers” for your business, for which you could ask the members of your Chapter to connect you with. These could be a general business category (i.e., attorneys, mortgage lenders, etc.) or special individuals (i.e., Fred Smith, president of ABC Company).

- | | |
|----------|----------|
| 1) _____ | 3) _____ |
| 2) _____ | 4) _____ |

Ü **Inroads To Thought Leadership:** The more you are known in your marketplace as an expert in your business or profession, the better you position yourself to be successful. In **AMSPIRIT BUSINESS CONNECTIONS**, we refer to this as being a “Thought Leader.”

In an effort to position yourself as a “thought leader” in your business, ask for opportunities to speak or present to an appropriate group or organization on your area of expertise or perhaps write an article for a newsletter or trade publication. For example, a wellness consultant asks for an opportunity to address individuals interested in information on living healthier; or, an attorney requests an opportunity to write a monthly column for any business trade publication.

Please take some time to brainstorm each of the following:

- Three or four potential topics upon which you would be willing to write articles or make a presentation.
1) _____
2) _____
3) _____
4) _____
- Three or four potential groups, organizations or publications you would be interested in writing articles or making presentations for.
1) _____
2) _____

3) _____

4) _____

IMPORTANT NOTE: For every United Way, Red Cross or other large not-for-profit organization, there are literally 100's of smaller groups and organizations that would welcome and value the contribution you could make for them. **DO NOT** quickly dismiss these potential opportunities. They can and will result in new business for you.

ü The Next Closest Thing: Often times, you may not know who is the ultimate consumer. Or you may know who the ultimate consumer is, but you do not have a connection to that person and a cold call would be fruitless. In these situations, you can and should request assistance from your fellow Chapter members.

In these situations, you should ask for contacts or information that might allow you to get to or get closer to the ultimate consumer. For example, the owner of a sign company may ask the Chapter for an introduction to anyone in the local Fortune 500 company in an effort to work her way up or over to the person responsible for building signage. Or, the gift basket person may seek information on dates and locations of area summer festivals in an effort to find opportunities to have a booth to sell her wares.

Please take a moment to brainstorm for yourself two or three situations where you would like to better network yourself so that you could connect with an ultimate consumer or decision maker.

1) _____

2) _____

3) _____

IMPORTANT NOTE: Nothing about Wholesale Referrals advocates **AMSPIRIT BUSINESS CONNECTIONS** altering the definition of Qualified Referrals. We continue to advocate that referrals should only be formally written up and given when the person a member is being referred to will be expecting the call. The essence of Wholesale Referrals is to advocate that you think in a broader sense with respect to referrals.

The mission of **AMSPIRIT BUSINESS CONNECTIONS** is to assist our members in becoming more successful through networking. If you focus on Wholesale Referrals from time to time, you will be that much closer to achieving that success.

DO SOMETHING EVERY WEEK

Under **AMSPIRIT BUSINESS CONNECTIONS** guidelines, you are asked to give within your Chapter two Qualified Referrals each month. Please understand two things with respect to this guideline:

First, the “two referral per month” guideline should be considered an average. Some months you will find yourself giving three or four or more referrals. And other months you may only have one or less.

Second, although this guideline may seem ominous as a new member, please rest assured that as you get to know, like and trust your fellow members, with a little bit of effort you will find yourself easily generating two referrals per month.

Aside from the Qualified Referral guideline, we recommend that you make it your goal to do something each and every week for someone in your Chapter. Perhaps one meeting you give someone an actual Qualified Referral. Then perhaps another meeting you do something else – something that does not necessarily rise to the level of a Qualified Referral but something that adds value to the Chapter nonetheless.

Here are some examples:

- Thank a member for a referral they have given;
- Compliment a member for the way in which they handled a referral you gave; or,
- Bring a guest to the meeting.

NEVER ENDING GROWTH

Have you ever seen a fully grown, live tree? No, you have not. This is because a tree continues to grow until it dies.

You should be no different, especially with respect to your networking skills. To this end, periodically visit the **AMSPIRIT BUSINESS CONNECTIONS** website (www.amspirit.com) and read the Quarterly Newsletters and other material related to networking.