

REFERRAL NETWORK GROUP
HILTON HEAD & BLUFFTON
HANDBOOK

Dated March 7, 2006

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“The Business Leads group that generates new business through networking with fellow members by attending regular scheduled meetings and getting to know the services and products they represent.”

1. WHO IS THE REFERRAL NETWORK GROUP?

We are dedicated professionals geared towards quality service, and customer retention in an ethical manner. Each business is represented by only one representative from that profession. Conflicts of interest are not permitted.

Are you seeking new and unique ways to expand your business? Looking for a new avenue to expose your business, services and product? Well then, you should seriously consider joining our Network.

The idea is simple – members gather twice a month for regular networking meetings. We enjoy a meal while learning about each other’s businesses and professions, as well as exchanging leads and contact information. Network business is then discussed and a report is given on new leads that have been generated in the last few weeks.

2. MEETING SCHEDULES

Meetings are held twice a month (see details below). Meetings run approximately one hour with additional allotted time following the meeting for those who wish to continue networking. The schedule listed below is the normal schedule for the group’s meetings except for roundtable events, holidays, the Annual Chamber Business Expo or any other special meeting (socials) scheduled during the year. Special invitations are given to guests for attendance at these group meetings (includes breakfast or lunch being paid for by the group).

HILTON HEAD GROUP MEETS:

LOCATION: Boathouse II
Squire Pope Road
Hilton Head Island, SC

WHEN: 1st and 3rd Tuesday of each month

TIME: 12 noon – 1:15 PM

BLUFFTON GROUP MEETS:

LOCATION: Hilton Garden Inn

WHEN: 2ND and 4TH Tuesday of each month

TIME: 8 AM – 9 AM

3. BENEFITS OF MEMBERSHIP

- Each business is represented by only one representative from that profession.
- Conflicts of interest are not permitted.
- Network members' trade highly qualified leads via a leads tracking program within our network.
- Establishing Long-Term Friendships.
- Professional business meetings twice a month.
- Loyalty within our group to our fellow members.
- High ethics and standards within our membership base.
- Quarterly Roundtable Meetings with guest speakers on educational subjects pertaining to increasing business and improving business skills.
- Network members are listed on the Referral Network website.
- The Referral Network Group is linked to the Chamber of Commerce web page.
- Chamber membership through the Referral Network Group.
- Networking opportunities at the Referral Network Group's booth at the Chamber Expo held annually.

4. STRUCTURE OF MEETINGS

Members are encouraged to arrive promptly to meetings as food orders are placed as soon as everyone is seated. The meeting begins immediately following the placement of food orders. Food orders are normally for one entrée. In the case of a lunch meeting, soups and salads are an additional cost to those who wish to order them if they are in addition to their entrée.

The Business Promo of an individual member is presented to the membership for approximately 5 – 10 minutes followed by a question and answer period for the general membership to inquire further about the member's business and services.

A short business session follows the Business Promo where everyone introduces themselves and tells the group in a few sentences what their business is about, describes their ideal client and/or their target market. Business cards are passed around, the minutes of the last meeting are approved, announcements concerning future events (Roundtable Session, Business Expo or a social), old and new business is addressed.

The Referral Network Group maintains a business card book containing each member's business card which is passed around for distribution for those attending.

Business referrals are announced while giving the introductions at the beginning of the meeting. The referrals are noted on a Business Leads Form and given to the Secretary to tally and track for effectiveness of the group.

The President should wrap up the meeting no later than one hour and fifteen minutes from the designated starting time.

5. CORE BUSINESS

Members must represent their main business or represent the one product/service that is a substantial part of their business activities. In instances where a member provides more than one product or service, the member must designate **"one single core business"**

In the event a current member wishes to add or change their core business within the group, the request must be submitted in writing to the Referral Network's Board of Directors. The Board of Directors will review for potential conflicts of interest and presented to the membership for a vote. A member can represent a maximum of two core businesses provided approval of the Board of Directors and the general membership as well as pay dues applicable for both businesses. Only one meals statement will be issued for both businesses but annual dues must be paid for both core businesses.

The Referral Network Group does not allow core services/products from the following:

- Adult content (including but not limited to lingerie, Adult Home Parties)
- The Referral Network Group holds the explicit right to disallow and revoke membership in the Referral Network Group for any reason.

If you have any questions regarding core services/products, please contact the President of the group.

6. MULTIPLE MEMBERSHIPS/OTHER ORGANIZATIONS

Members are not permitted to belong to more than one of the Referral Network Groups. A waiting list will be established for any core business who wishes to join the group, but that core business is already represented at the time. The waiting list will be maintained by the Vice President of the group and reviewed on a regular basis.

7. MEMBERSHIP REQUIREMENTS

1. The Referral Network Group has confirmed that your core business is available with no conflicts of interest.
2. The Referral Network Group has received a completed and signed Membership Application, a photo and a short paragraph about the core business for the website.
3. Potential Member has included payment of the Yearly Membership/Website Fee as well as quarterly dues or pro-rated dues at the time of the application to the Membership Chair or Treasurer.
4. Membership application is voted on and approved by the group.

8. MEMBER RESPONSIBILITIES

- Attendance is vital to the success of both your core business as well as the overall success of the group. A member is expected to attend a minimum of 4 of the 6 meetings in a quarter. If you are unable to attend,

you may send a representative of your business to network for your core business.

- Only one individual per core business is considered “the member” of the group. If you wish to have others from your business attend a meeting simply bring a check for the amount designated by the particular Referral Network Group for the expense of that meeting which will save on the expense of invoicing. You may wish to contact the Treasurer of the group to find out the amount to bring for the second person attending for that core business.
- Cell phones are to be put in the vibrate mode or turned off as not to interfere with the meeting being presented.
- Appropriate business dress is encouraged.
- Each member’s goal is to always devote time and energy towards generating business leads and introducing potential new members to the group. The more members and the greater the range of core businesses represented, the greater the opportunity for business referrals. One of the primary objectives of the group is for each member to gain new business in a fun and professional setting.
- Each member is encouraged to learn as much as possible about their fellow Referral Network Group members and their specific core business products/services.
- You should be actively seeking referral opportunities by way of the people you come in contact with throughout your work week. Friends, relatives, neighbors, you name it – the possibilities are limitless. It all comes down to knowing your fellow members then actively seeking business referral opportunities.
- Member is expected to pay annual and quarterly dues in a timely manner. Annual dues which include a web page on the Referral Network Group’s website are due and payable January 1 of each year and considered delinquent if not paid by January 15th. Quarterly dues are also due the 1st of each quarter: January 1, April 1, July 1, October 1 and considered delinquent if not paid by the 15th of the month due.
- Bringing children or family members to regularly scheduled meetings is discouraged. There are several events each year where family members are invited and encouraged to participate.

9. ATTENDANCE GUIDELINES:

- It is your responsibility to contact the President or Vice President personally via phone or email prior to the meeting time if you are unable to attend, preferably one day in advance.
- Examples of an excused absences are: Vacation, Maternity Leave, Business Travel or Personal/Family Illness.
- A substitute person from within your core business may attend in your absence to network for your business.
- Excessive absences may jeopardize your membership status

- Punctuality is expected in arriving at the meeting location prior to the beginning of the meeting in order to avoid interruptions and distractions. Also, introductions of each core business is first on the agenda, and each member should not miss the opportunity to present their core business.
- Leave of Absence: A request for a leave of absence for specific reasons must be submitted in writing to the President of the Referral Network Group. Maternity leave will be granted for a period of twelve weeks. If a longer absence is needed, please contact the President.

10. BUSINESS PROMO GUIDELINES

Presenting a Business Promo is one of the most important benefits of being a member of the Referral Network Group. Each member signs up to give their "Business Promo" to the group at a regularly scheduled meeting.

A business promo should be a presentation of the core business product or services offered to the group and why the membership should be referring your core business to others. Feel free to bring handouts, product samples, brochures, promo items for handout at the meeting. A sign up sheet will be available (both before and after the one-hour meeting) and will let each member know when their turn to do a business promo is upcoming. Giving a business promo is not mandatory but is encouraged as this really helps others to understand exactly "what you do" in your business and how you can benefit others with selecting "you" to do business with.

11. RECRUITING NEW MEMBERS

Recruiting new members is critical to the success of the ongoing networking of the group. It is extremely important that every effort be made to make potential new members feel as welcome and comfortable as possible. It is important that potential members be immediately introduced to the Referral Network Group's unique way of "personal" networking.

It is important that you only invite potential members whose core business is not already represented by a current team member. When a potential member is present at a meeting, she/he is extended a complimentary meal. If the potential wishes to visit for a second time to assure themselves that they "do" want to join they may pay the cost appropriate for the meeting.

Potential members should be prepared to present a description of their core business to the group and may hand out their business cards at the beginning of the meeting. Normally, business cards are passed around so that everyone may have your business card.

Potential new members will be provided with a Membership Application at all meetings and a Referral Network Group Manual and bylaws so they may view the group's goals as a whole.

12. RECIPROCAL REFERRALS

It is important to note that you may receive numerous business referrals from a fellow member that you simply are unable to generate a lead for. Each member should give their very best in generating leads for the group as a whole. If each member is working to promote as many individuals as possible, the group will continue to be successful and everyone will benefit.

Business Referral Leads generated should be turned in to the Secretary for tallying and reported at each regularly scheduled meeting.

13. REFERRAL SLIPS

When you encounter a referral opportunity, fill out a referral slip and make sure to bring it to the next meeting and present to the Secretary of the group. Business leads to fellow members may be given to the member prior to turning in the lead. The referral slip is in triplicate and should be distributed as follows:

- White copy: Fellow RNG member receiving the referral
- Yellow copy: Present to the Secretary of the group
- Pink copy: Your copy for your own personal tracking.

Regardless of how the lead is received – a referral slip must be handed in to the Secretary at the group's regularly scheduled meetings.

If you also use the services of any of the RNG members – a referral slip should also be filled out and turned in. Trades are not permitted. You are required to pay for products and services offered by your fellow RNG members.

14. OFFICERS' DUTIES

The officers of the Referral Network Group will be selected by a Nominating Committee consisting of the Immediate Past President and 3 other members chosen by the officers. The Nominating Committee will organize by mid-October to schedule time to select officers that will serve the group well by their attendance and leadership.

Officers will assume their role January 1st of each year and terms will run for one year terms. Additional terms may be consecutive if the desires of the membership. Establishing new officers gives others an opportunity to serve in a leadership role and is encouraged annually.

The Immediate Past President will serve on the new board for a period of one year in an advisory status.

15. PRESIDENT

The President's primary role is to run a well-organized and productive meeting within the allotted one hour schedule while ensuring that the Referral Network Group continues to be productive and successful in generating leads for its members.

As President of the group, you are expected to have perfect attendance which is not always possible. In the event you have no choice but to miss a meeting, you are required to notify the Vice President to be certain that someone will be there in your absence and to coordinate the agenda and any business that must be discussed at that meeting.

The President should be present at least 5 to 10 minutes prior to the meeting. This time should be to meet with current members as well as greet any potential new members that are visiting the group for the first time.

The President should inform the membership that any new business must be first presented to the President for the board's review prior to bringing before the membership.

A receipt for any purchases made for the Referral Network Group must be presented to the Treasurer for payment.

Meetings must start and end on time! Keep in mind that some members of your group are on extremely tight schedules and cannot afford to have the meetings run over. There is a lot to get done in just sixty minutes; hence, it is imperative that each segment moves swiftly and in an organized manner.

To ensure the meeting runs smoothly and on time, the President should have a typewritten agenda for all members and guests to be able to follow.

The agenda should include a welcome to guests at the beginning of the meeting followed by brief introductions from each person present. This is an excellent time to make sure every member has a business card from everyone else in the group. Potential new members will be invited to pass out their business card to all members. At this time the Secretary will pass a sign-in sheet for those present at the meeting. Attendance should be maintained by the Secretary so that the board can monitor who is in attendance at the meetings and be aware of absences of members.

If there are new members present, the President should take the opportunity to formally welcome them to the group.

Referrals should be stated while giving introductions of each member's core business products and services. Referral slips should then be distributed to the Secretary and the referral recipient

An 8 to 10 minute Business Promo will be presented as well as a short business session.

16. RESOLVING CONFLICTS

From time to time conflicts and complaints will arise. As President it is your duty to make sure that all conflicts are resolved fairly and in a timely manner. Any conflicts that arise during a regularly scheduled meeting should be minimized so as not to discourage potential members from becoming a member of the group.

Remind the group members to read the manual regularly or at least refer to it for answers to any questions that may arise.

Any conflicts and complaints should be presented in writing to the group President and should not be brought up during the one-hour meetings.

All complaints and conflicts should be resolved as quickly as possible. Although the group meets twice a month, you should take it upon yourself to resolve all issues prior to the next meeting. Upon receiving a written complaint, you should do your best to come up with a solution and then utilize phone, email, or an in-person meeting to get the issue resolved.

It is important that you develop a strong working relationship built on teamwork and trust. Board meetings are encouraged as needed to keep the group activities and roundtables organized and to monitor the progress of the group.

Your goal is to deliver a fun, productive and motivating meeting.

17. VICE PRESIDENT

The Vice President of the group works closely with the President to ensure that the meetings are interesting and productive. You will serve as the acting President in the President's absence. The President is to give you direction for the meeting in his or her absence.

The Vice President will be responsible to collect applications from prospects who wish to be voted into membership. The applications will be forwarded to the appropriate board members as well as the Treasurer.

The Vice President will serve in the Treasurer absence to pay for the meals or meeting fees as appropriate.

The Vice President will maintain the email list of all members and email a notice of the next upcoming meeting approximately 4 to 5 days in advance as a reminder to the membership.

As Vice President you will coordinate chapter events with the President and Board of Directors prior to presenting to the general membership.

18. TREASURER

As Treasurer, you are primarily responsible for collecting and allocating dues upon the group's behalf.

The Chapter Treasurer is expected to have perfect attendance. In the event you have no choice but to miss a meeting, you are required to notify the chapter Vice President by giving as much advance notice as possible. The chapter Vice President will assume the role of paying for the meals or meeting fees as appropriate. If the Vice President must also be absent from this meeting – the Treasurer will provide a check for a signor of the group who will be able to pay for meals or fees as appropriate.

The Treasurer is responsible for maintaining the accounting for the group. Problems with collections should be brought before the Board of Directors for review as well as a Profit and Loss and Balance Sheet as requested by the President or Board of Directors.

As Treasurer you are to count the number of persons in attendance and assure that the bill presented for payment of meals is correct prior to payment.

The Treasurer at no time will issue a check to themselves. Any checks for bookkeeping services will be written by the President after presenting an invoice for services.

Any purchases other than payment of meals for regularly scheduled meetings should be approved by the board such as brochure printing, monies sent to charities at Christmas, etc prior to writing a check.

19. SECRETARY

As Secretary, you are responsible for assisting the chapter President by taking the minutes of each meeting, typing the minutes and presenting for review and approval at the next scheduled meeting.

You are also expected to have perfect attendance. In the event you have no choice but to miss a meeting, you are required to notify the chapter President by giving as much advance notice as possible. You must also contact a board member to have them fill in during your absence.

You are to collect the referral business leads slips and give a report at the next scheduled meeting or business generated by the members.