



Leads Group Guidelines

Latest Revision: 8/2023

Chamber Mission Statement: To promote the economic vitality of our community by providing our members access to resources, support, and connections to grow their business.

Leads Group: To generate business opportunities for Chamber members through building and strengthening professional relationships in a non-competitive and mutually supportive environment.

I. Relationship of Leads Group to the Broomfield Area Chamber

a. Leads Groups are a Broomfield Area Chamber Program

- i. The Leads Groups are a program administered by the Broomfield Area Chamber for the sole benefit of its membership, and as such, are subject to such regulation as deemed appropriate by the Chamber Staff.
- ii. The actions of the group are to be communicated to the Broomfield Area Chamber in a timely manner. Statistics are to be sent quarterly to the Chamber Staff Representative. Attendance is to be sent to the Chamber monthly.
- iii. All applications for Leads Group membership must be received by the Chamber office with payment prior to joining Leads Group or participating as speaker.
- iv. The Broomfield Area Chamber and the Leads Group Moderators and Vice Moderators will work together to enforce these guidelines.
- v. Any disputes regarding these guidelines are to be submitted in writing to the Broomfield Area Chamber office in a timely manner.
- vi. Broomfield Area Chamber reserves the right to disband groups as needed for the overall success of the program.

b. Leads Group Meetings with Broomfield Area Chamber

- i. The Membership Director and/or CEO of the Chamber will host a quarterly meeting with all Leads Group Moderators and Vice Moderators. The goal of these meetings is to share group updates, successes, concerns, review current rosters to ensure accuracy, and address upcoming Chamber events and needs.
- ii. Each Leads Group will be represented in at least 3 out of the 4 quarterly meetings. Failure to do so may result in the Moderator being replaced.

II. Conditions of Membership

a. Membership Requirements

- i. The applicant must be a Broomfield Area Chamber member in good standing.
- ii. Applicants must submit an application, along with the Leads Group fee of \$50 per year. The fee is prorated if joining a group after January.
- iii. Applications will be submitted to the Chamber, who will then forward applications to the appropriate moderator.

- iv. One chamber member per business or category per leads group without incurring additional fees.
- v. The category you represent in the Leads Group program must be the business and category under which you have joined the Broomfield Area Chamber
 - 1. As applicable, multiple categories may be represented by one individual in accordance with paragraphs b, and c for the following rates.
 - a. 2 categories represented by one business or individual is \$165.
 - b. 3 categories represented by one business or individual is \$255.

b. Possible Business Conflicts

- i. If a current member feels there is a conflict with a potential member, the current member must notify the group Moderator immediately.
- ii. Once notified, the Moderator's responsibility is to either facilitate a mutually beneficial and entirely voluntary solution between the current and prospective member, or failing that, to notify the potential member that there is no vacancy in that group. Efforts will be made to find another group for this potential member to participate in or they will be placed on the waiting list.
- iii. If the dispute is not resolvable by the Moderator, then the issue will be resolved by the Chamber representative. The decision of the Chamber will be final.
- iv. Members representing multi-level marketing companies will use the Leads Group as an opportunity to present products and services, and never the business opportunity portion of their business.

c. Membership in Multiple Leads Groups

- i. A chamber member may be allowed to join more than one Leads Group. If another chamber member from their industry would like to join a Leads Group, they will have to give up one of their memberships. The member will need to submit a second application and Leads Group fee.
- ii. A chamber member may have a co-owner or employee of their business join an additional group or category if they are the only one in the group in their occupation or category and they are an employee of a chamber member. The employee must also submit an additional application and additional Leads Group fee.
- iii. In certain cases, there may be two members from the same general industry wanting to be in the same group. In such cases, the Moderator and members involved must agree on which specialty the members represent to avoid conflict (i.e., one mortgage lender and one reverse mortgage lender, one auto and home insurance agent and one life and/or commercial insurance agent). The agreed upon specialties should be emailed to the Chamber staff to ensure correct representation on the Chamber website.

d. Rejoining Groups or Changing Categories

- i. Members may rejoin groups or change categories provided that:
 - 1. Their occupation or category is not represented by a current member of the group, and no one is on the waiting list for their category.
 - 2. The leadership of the group feels it is in the best interest of the group to allow the applicant to rejoin or change categories.

e. **Members Changing Groups**

- i. Members may change the group they are in at any point during the year. However, the following protocols must be followed:
 - 1. Members must complete a new application for the group they wish to join. No additional fees are charged.
 - 2. The member is responsible for notifying the Moderators of both groups of their intent to change groups. The Membership Director and/or CEO of the Chamber must be copied in all correspondence.
 - 3. There must be an opening for the industry which the members belong to in the new group.

f. **Denial of Group Membership**

- i. If a group decided to deny membership to an applicant, the reason(s) for the denial must be submitted in writing (email is acceptable) to the Broomfield Area Chamber.
 - 1. The Chamber does reserve the right, if necessary, to override any denial of group membership.

g. **Removal from Group Membership**

- i. If a group decides to remove a member from the group, there must be written communication between the group Moderator and said member explicitly listing the reason(s) for removal. The Membership Director and/or CEO of the Chamber must be included in the thread. If the removal is due to a member voluntarily leaving the group, the Moderator must email the Membership Director and/or the CEO of the Chamber as soon as possible. If removal is for either of the two following reasons, the Moderator will follow said procedures:
 - 1. Attendance – Email member and copy Chamber after 2nd unexcused absence. Group may choose to drop the member from the group after the third, but it must be known to the member. When dropping a group member, members must be notified via email and the Chamber must be copied.
 - 2. Lack of Participation – Depending on the individual group guidelines (i.e., passing leads are required and tracked), a group may decide to drop a member for lack of participation. However, at least 1 written warning must be delivered to the members and copied to the Membership Director and/or CEO of the Chamber. When dropping a group member, members must be notified via email and the Chamber must be copied.

III. Leads Group Fee

- a. **The fee for each member to participate in each Leads Group is \$50 per year.**
 - i. Leads Group Moderators and other leadership are charged only \$35 per year, effective 01/01/2024.
 - ii. The fee will be paid in full at the beginning of every New Year.
 - iii. New Leads Group members will receive a prorated invoice for the amount due for the current year.
 - iv. If the fee is not paid on time, at 60 days past due the member will be dropped from the group and will have to reapply for membership as outlined in II-d.

IV. Leadership Roles

a. It is Important to for the Success of the Group to have Defined Leadership Roles

- i. Each Leads Group is required to have the following positions:
 1. Moderator – Responsible for preparing the weekly agenda, leading each meeting, and communicating with the Chamber.
 2. Vice Moderator – Responsible for leading any meetings the Moderator cannot attend.
- ii. Lead Groups could add additional responsibilities to the above positions or choose to add any or all of the following roles:
 1. Statistician/Secretary – Responsible for taking attendance, tracking of points (if applicable), tracking leads forms (if applicable) and any other metric the group deems necessary.
 2. Guest Liaison – Welcoming and introducing any visitors/guests, getting the contact information for any visitors/guests, keeping and maintaining the business card book.
 3. Chamber Events Liaison – Announces all upcoming Chamber events.
 4. Growth Coordinator – Keeps track of group growth and investigates new growth opportunities.
 5. Timekeeper – Tracks the time according to the agenda.

V. Leadership Elections

a. Election Guidelines

- i. Each December every Leads Group will hold elections for the Moderator and Vice Moderator positions. Groups can choose to hold elections for additional positions.
- ii. Anyone interested in a leadership position should contact the Chamber directly.
- iii. Towards the end of the fourth quarter a Chamber representative will attend each Leads Group for the purpose of holding an election.
- iv. Leadership roles are a 1-year commitment. Moderators are term-limited to two consecutive one-year terms.

VI. Group Meetings and Events

a. Group Meeting & Event Guidelines

- i. Meetings are held weekly or bi-weekly at times and sites determined by the groups.
- ii. Meeting hosts/restaurants must be chamber members in good standing. The duration of the meetings should be between 60 and 90 minutes depending on the size of the group, and as determined by each group.
- iii. If the group wants to hold meetings at a non-member location to recruit said location for Chamber membership, their interest MUST be presented in writing to the Chamber and get Chamber approval PRIOR to meeting at said location.
- iv. Any group may choose to hold a group event (i.e., Happy Hour) outside of their scheduled meeting days/times/locations. These are encouraged but **MUST** follow the same location guidelines as mentioned above.
- v. If a group event is scheduled, the Moderator must coordinate with the Chamber at least 2 weeks prior to the event to ensure there are no scheduling conflicts with other Chamber events, and to ensure all guidelines are followed.

VII. Rosters

a. Each Group is Responsible for Maintaining Their Group Roster.

- i. All Moderators and Vice Moderators have access to a Google Sheet Leads Group Roster spreadsheet that is set up by the Chamber.
- ii. Each group will make sure their roster is always current. This helps the Chamber ensure that all members have completed an application and paid the required Leads Group fees to participate, and ensures the website is up to date.
- iii. If a member is not current on fees and/or has not submitted an application, the Moderator should notify the member in writing and advise they must complete the application and/or pay dues prior to attending another meeting or event. The Chamber should be copied on all correspondence.

VIII. Visitors and Guests

a. Guests and Visitors are Welcome.

- i. Both chamber members and non-members are welcome at all meetings without the advance consent of the Moderator. Group members are encouraged to invite guests.
- ii. Visitors/Guests may introduce themselves and give a brief description of their business.
- iii. Visitors/Guests are limited to one visit per Leads Group. Additional visits require Chamber approval.
- iv. If a visitor chooses to apply for group membership, that application should be submitted to the Chamber, and will then be forwarded to the appropriate moderator.
- v. Non-chamber visitors/guests must be reported to the Chamber within two business days, so the Chamber can contact them regarding membership.
- vi. Guest speakers on educational topics may be allowed, with prior consent of the Broomfield Area Chamber.

IX. Attendance

a. Attendance Will Be Enforced

- i. Regular attendance is required.
- ii. Members should notify the Moderator in advance if they will be absent.
- iii. Groups can choose if they want to allow members to send a representative and it not be counted as an absence.
- iv. Only four unexcused absences are allowed per quarter. Groups can choose to make this guideline more stringent.
- v. After the third absence the Moderator will notify the members of their violation of the guidelines.
- vi. After the fourth missed meeting the member may be dropped.
- vii. Leaves of absence up to 90 days may be granted to members by mutual decision of the Moderator and the Chamber. Any absence longer than 90 days will require the member to resign and reapply later as outlined in II-d.

X. Leads Group Action Items

- a. **Every Leads Group is different and will emphasize different activities.** The Chamber recommends that each Leads Group evaluate each January if the chosen activities are producing the desired results. While Moderators are encouraged to set the structure and

guidelines/requirements of their specific group, the Chamber has some possibilities listed in Addendum A that you may choose to consider implementing.

XI. Recruitment of Additional Members

- a. **A primary focus for all members should be recruitment of new members** for the Leads Group. This is the key that makes some groups more successful than others. A few examples are listed below.
 - i. **Chamber Events/Committees**
 1. Business After Hours – People attending the after-hours are most likely looking to network and grow their business.
 2. Power Partners Networking – Use these opportunities to network with those you work with the most.
 3. Ribbon Cuttings – Many Ribbon Cuttings are for new businesses who need leads.
 4. Ambassadors – Ambassadors welcome new members and help them establish contacts within the Chamber.
 - ii. **Business Contacts** – talk to your current business contact about visiting.
 - iii. **Other Networking Groups** – Chances are if someone is already a member of one networking group, they are looking to network other places.

XII. Changes to Guidelines

- a. **The Leads Groups Guidelines are meant to allow individual Leads Groups to take on their own characteristics while still maintaining a common structure.** Leads Groups should assist the Chamber in periodically evaluating these guidelines and suggesting changes that will allow Leads Groups to remain successful.

Addendum A.

a. Some Possible Action Items to Consider for Your Group

- i. **Collection of Qualified Leads**
 1. The Goal of Each Leads Group is to Pass Qualified Leads
 2. Each group should define what constitutes a qualified lead.
 3. If you have a lead and no one in your group is on that profession, you may pass the lead to someone in another group and earn points (if applicable).
 4. Each group will need to determine how they are going to track leads. This might include announcing the lead in a meeting and/or filling out a form.
- ii. **Point System**
 1. **Point Systems Help Keep Members Accountable**
 2. Each Leads Group will need to determine if they are going to follow a points system. Those groups choosing to have a points system may either choose their own system or follow the suggested guidelines below.
 - a. Member points are scored as follows:
 - 1 Point: Member-to-member business or that of a spouse or minor child
 - 2 Points: All other nonmembers-to-member qualified leads
 - 1 Point: Closed business
 - 1 Point: Bring a prospective group member as a guest to the meeting
 - 1 Point: Ongoing business per quarter
 - 2 Points: Your guest joins the Broomfield Area Chamber
 - 2 Points: Your guest joins your Leads Group
 - 5 Points: Perfect attendance in a quarter
 - 1 Point: Member meeting
 - b. Members must have at least 8 points per quarter to retain group membership.
 - c. If members do not accrue 8 points in a quarter, they will be placed on probation for the next quarter. If at least 8 points are not accumulated during the probation quarter, the member will be dropped from the group.
 - d. Points must be reported to the Chamber quarterly.
 - e. The Chamber reserves the right to translate the point system into revenue for tracking purposes.
- iii. **30 to 60-second Elevator Speech**
 1. Each Member could make a quick introduction to their business.
- iv. **Ideal Client**
 1. Each member will give a short description and specific description of who is their ideal client and why they are their ideal client.
- v. **Question of the Day**
 1. The moderator or speaker chooses a question to help the group get to know each other. It can be business related but is more effective if it's a more personal question.
- vi. **Member Spotlight**
 1. Many groups choose to spotlight a member each month. That member will have a set amount of time to discuss their business, what makes them unique, how they help people and/or why you should recommend them.
- vii. **Business Development**
 1. A member takes some time to teach the group a skill or process that will help them in their business.
- viii. **Brainstorming Session**
 1. A couple of members present to the group a problem or difficulty they are experiencing and group members offer advice.
- ix. **Goal Setting/Mastermind session**
 1. Each member sets one goal that they will work on for the week and then reports back to the group.
- x. **Guest Speakers**
 1. Leads Groups can choose to invite a non-member to speak to the group if it will benefit the majority of the members.