



# Professional Referral Exchange

## PRESIDENT

**"Good morning. Welcome to the (Name of your Chapter) Chapter of Professional Referral Exchange. My name is (Your name) I'm the (Your business category in the Chapter) for this Chapter and its President. We begin our meeting by reading our Mission Statement. I've asked (Name a member) to read it today."**

### DUTIES OF THE PRESIDENT:

- **Presides over meetings and activities** of the Chapter.
- Opens weekly meetings at **THE AGREED UPON TIME promptly**. It is important to **begin** your meeting **AT THE SAME TIME EACH WEEK, ON TIME!**
- Follows **structured meeting procedure**. (Area Director periodically evaluates how well Chapter follows format.)
- Chairs all **board meetings** held minimally on a *monthly basis* with the Area Director attending these meetings with minutes recorded by Chapter Sec'y.
- Assumes responsibility for (or appoints persons to) committee positions that have not yet been appointed by the Chapter organizing Director. **Re-appoints officers or committee chairs** in accordance with *PRE Organization By-Laws*.
- **Oversees** responsibilities of other **board members** and **committee chairs**.
- Names "**Glad Handers**" at each meeting.
- Handles **guest conflicts** during introductions.
- Makes member **announcements**. (open houses, etc.)
- **Concludes** meeting **promptly**.



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## VICE PRESIDENT

***"I am (Your name) and the (Your business category in the Chapter) for this Chapter. As Vice President, I take attendance. If you are going to be absent, it is important that you let me know. Since the members of our Chapter serve as a sales force for your business, you will want to attend meetings on a regular basis to give and receive referrals."***

### DUTIES OF THE VICE PRESIDENT:

(Optional practice, depending on size of chapter. Area Director must approve this, chapter by chapter)

**Calls for chairperson reports** during meeting. *Each person is asked to stand and describe their duties.*

1. **Secretary** \_\_\_\_\_ (board meeting report; referral ticket explanation; 3rd week referral report)
  2. **Treasurer** \_\_\_\_\_ (checking account balance)
  3. **Hospitality & Business Card Holder** \_\_\_\_\_ (reminds members to bring brochures for display table; reminds guests and members to supply business card holder.)
  4. **Membership** \_\_\_\_\_ (explains application procedures to guests; reports on status of prior guests)
  5. **Program** \_\_\_\_\_ (announces member speaker for next 2 weeks)
  6. **Publicity** \_\_\_\_\_ (handles social media for chapter and prepares Chapter portion of monthly newsletter)
  7. **Social** \_\_\_\_\_ (progress report on future socials)
  8. **Sergeant at Arms** \_\_\_\_\_ (maintains order at meetings; enforces professional fees)
- **Chairs** weekly meeting or monthly board **meetings** in the absence of the President.
  - Keeps **accurate** weekly **attendance records** and sends appropriate *termination letters*.
  - Phones members who are absent **every week** to tell them they were missed at meeting.



# Professional Referral Exchange

## SECRETARY

***"I am (Your name) and the (Your business category in the Chapter) for this Chapter. As Secretary, I record the number of referrals that are given and received by each member and submit the totals to PRE for our monthly newsletter that contains a scorecard. The newsletter is circulated to members and guests.***

***There are 2 types of referrals. A 1st generation referral is when we use the products or services of a fellow member within our Chapter. A 2nd generation referral is when you refer a person outside your household to one a fellow member of our chapter. Each member is asked to give 2 referrals per month.***

***The white copy of the referral ticket is given to the member receiving a referral, the yellow copy goes in our bucket and the pink copy is for your follow-up."***

### **DUTIES OF THE SECRETARY:**

- Tallies and reports weekly referral results orally to chapter when called upon by President
- Takes **minutes at board meetings** and handles appropriate Chapter correspondence.
- Provides referral information to PRE for **Monthly Referral Report** with **monthly count of all referrals** given and received. Compiles this information and submits report to PRE no later than the **6th of current month** for the previous month's totals.



# Professional Referral Exchange

## TREASURER

***"I am (Your name) and the (Your business category in the Chapter) for this Chapter. As Treasurer, I pay the bills for our Chapter and give quarterly chapter dues invoices to you 2 weeks before the end of each calendar quarter. Chapter dues are collected in advance of each quarter and paid by all members whether they eat or attend meetings. Please submit your check to me before the first meeting of the new quarter. Make checks payable to this Chapter."***

### DUTIES OF THE TREASURER:

- Opens new bank account under **Chapter name** (i.e., *PRE of Lancaster*).
- **Bills and collects quarterly chapter dues.** Bills are given to members **2 weeks before the end of each calendar quarter.** All members **must pay their fees by the first meeting** of the new quarter or a *delinquent charge of \$5.00 per week is assessed.*
- **Announces to members** that **PRE membership renewal fees** must be kept current with PRE to retain their active status.
- Pays all meal charges and bills including socials and other Chapter events.
- Keeps **appropriate records** of funds deposited and withdrawn from checking account and balances monthly bank statements.
- Submits monthly **bank statement to President** who, with **one other board member**, *reviews for accuracy and signs off.*



# Professional Referral Exchange

## MEMBERSHIP CHAIR

"I am (Your name) and the (Your business category in the Chapter) for this Chapter . As Membership Chair, I welcome guests and encourage them to apply for membership in PRE. Within each Chapter, we allow only one person who does what you do, so if you think you want to apply, please complete your paper work today. This begins the process of filling your category.

The cost of joining is \_\_\_\_\_. One of the many benefits of joining PRE is that our members serve as your sales force and are committed to using members services/products. Also, each member strives to maintain high ethical and professional conduct and performance."

### DUTIES OF THE MEMBERSHIP CHAIR:

- **Welcomes guests** and gives each guest a *Guest Packet* where available and a *Chapter monthly newsletter* before the meeting begins.
- **Sends new member applications and checks** to AREA Director **no later than the second business day.**
- Follows-up with each guest ***no later than 3 working days*** after weekly meeting to answer questions and encourage him/her to join.
- Works with the Chapter President in **formulating recruiting strategies and activities** to grow and prosper chapter.
- Works with the Area Director to **direct member prospects to other chapters** when category not open in your chapter.
- Follows up with members who have left chapter **to determine reason:** i.e. unable to keep attendance commitment, financial difficulties, low referrals received, etc.



# Professional Referral Exchange

## SERGEANT-AT-ARMS

***I am (your name) and the (Your business category) for this Chapter. As Sergeant-at-arms, I control the timed segments of our meeting and monitor the professional fees each week. The purpose of the fees is to fund Chapter activities."***

### DUTIES OF THE SERGEANT-AT-ARMS:

- **Maintains order** at weekly meetings.
- Circulates **referral bucket**.
- **Reminds members** of professional fees (if applicable):
  - \$ .25 No guest
  - \$ .25 Missed "Glad Hander"
  - \$ .50 No name badge
  - \$ .50 No business card holder
  - \$ .50 No referral (2 per Month Minimum)
  - \$ 1.00 Arriving late to meeting
  - \$ 1.00 Per minute for president running overtime
  - \$ 1.00 Leaving meeting early
  - \$ 5.00 Per week for late meal fees
  - \$ 5.00 No show speaker without 72 hours notice to Program
- **Monitors these time limits:** guest *1 minute commercial*, each member's *30 second commercial* and the 20 minute member speaker time slot.



# Professional Referral Exchange

## HOSPITALITY CHAIR

***"I am (Your name) and the (Your business category) for this Chapter. As Hospitality Chair, I greet everyone and arrange tables for guest information and our members' brochures and flyers. I also explain our meal ordering procedure."***

### DUTIES OF HOSPITALITY CHAIR:

- Arrives 20 minutes before meeting begins.
- Sets up a **table for biz card holder, brochures, name tags & guest sign in sheet.** (Should be positioned at entrance door for meeting)
- Sets up a second **table for display of member brochures and materials.**
- Provides each guest with temporary **name tag** and ensures each guest signs in.
- **Explains** to members and guests the *meal ordering procedure*, when applicable.
- **Gives the guest list to the President** at the beginning of the meeting.
- **Monitors** hospitality table for *late arriving guests*.
- **BUSINESS CARD HOLDER:** Maintains **appropriate number of cards** in business card rack *for each member* and ensures that each member is displayed.
- **Maintains Chapter supplies** *in an orderly manner* within the Chapter box.
- Re-orders forms from PRE when needed.



# Professional Referral Exchange

## PROGRAM CHAIR

***"I am (Your name) and the (Your business category) for this Chapter. As Program Chair, I assign our weekly featured member speaker(s). We have no outside speakers. To effectively act as your sales force, we need to know what you do and we encourage our members to bring flyers, brochures, etc., every week so we can learn about your products or services."***

### DUTIES OF THE PROGRAM CHAIR:

- Schedules members weekly as featured speakers.
- Assigns and maintains a **list of member speaker(s) no more than two (2) to three (3) weeks** in advance.
- **Announces *next week's speaker(s)*** during weekly meeting.
- **Uses PRE's Official Speaker Introduction Sheet to introduce** the *member speaker(s)* for the meeting.





# Professional Referral Exchange

## PUBLICITY CHAIR

"I am (Your name) and the (Your business category) for this Chapter. As Publicity Chair, I am responsible for our Chapter information on the monthly newsletter prepared by PRE and overseeing and maintaining our social media presence.

### DUTIES OF THE PUBLICITY -CHAIR:

- Completes the following **information for Secretary to include on the PRE "Monthly Newsletter Input Report" by the 6th** of the following month:
- **Socials and Chapter events**, including mini-socials hosted by members, upcoming board meetings, and other activities.
- Upon return by PRE of the Chapter newsletter 1st page, OPTIONAL = **Spotlight** on 2 or 3 of your Chapter members **on back** of PRE original newsletter. These should be rotated so each member is featured periodically. **Members who received NO** referrals during the previous month may be featured to focus on getting them business.
- Also, the Publicity Chair oversees Chapter internet presence including social media.



# Professional Referral Exchange

## SOCIAL CHAIR

***I am (your name) and the (Your business category) for this Chapter. As Social Chair, I arrange quarterly business mixers. This is an opportunity for us to invite guests, including significant others, promote PRE and attract new members who will use our services and products.***

### DUTIES OF THE SOCIAL CHAIR:

- Chapter socials may be held semi-annually or monthly, bi-monthly or quarterly. *(Most Chapters prefer a quarterly schedule.)* **No alcoholic beverages may be funded by the Chapter treasury at these events.**
- Arranges **mini-socials** as requested by Chapter members, usually after hours *at their place of business. (This is not a replacement of regular weekly meetings.)*
- Professional Referral Exchange socials are **intended for the recruitment of new members** as well as a *"significant other" get together.*
- May assist Area Director in **planning an area wide social.**
- Coordinates with *other Chapter Social Chairs* for **combined Chapter events.**



# Professional Referral Exchange

## Mentor Chair

*I am (your name) and the (your business category) for this chapter. As Mentor Chair, I help new members with orientation and training in PRE policies and procedures. I coach members in developing an effective 30 sec. infomercial and to be prepared for Featured Member Speaker opportunities. I also assist the Board of Directors in developing Chapter growth strategies so that all members have every opportunity for success in PRE.*

### Responsibilities of the Mentor Chair

- New member orientation
- Helping members who are not doing well (new and existing)
- Focus of the Week (in some chapters) Example: Spotlight a fellow member who needs help with referrals from the chapter
- Work with the Membership Chair to help members effectively recruit new members. i.e. “who’s in your pipeline right now?”
- Included when board members are introduced
- Encourage and facilitate one on ones
- Summarize the “focus of the week” at the board meeting
- Occasionally schedule member development segments using PRE material or other approved resources

#### As needed:

- Mentoring in one on ones or small groups
- Working with Secretary to stay on top of referral results
- Specific to low givers – encourage veteran members to meet with low givers, helping them to recognize referral opportunities
- Specific to low receivers - coaching/mentoring on 30 second infomercial and more one on ones

\*\* Note: Not every chapter will have the Mentor Chair do exactly the same things. As with nearly all PRE matters, this list is organic, a work in progress. Suggestions for bettering the Mentor Chair function are always welcome.



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## OUTREACH CHAIR

***I am (your name) and the (Your business category) for this Chapter. As Community Outreach Chair, I arrange quarterly activities for community participation. This is an excellent way for us to promote PRE to our area and to cultivate good feelings within our group.***

### DUTIES OF THE OUTREACH CHAIR:

- Community Outreach Initiatives should be held semi-annually or quarterly. *(Most Chapters prefer a quarterly schedule.)*
- Arrange as requested by Chapter members, preferably functions that are of no financial obligation to the Chapter but do require a time commitment. *i.e. volunteering time at a Food Bank, Animal Shelter, etc.* Professional Referral Exchange Community Outreach is **intended to enhance the relationships between members** as well as *create good feelings*.
- Coordinates with *other Outreach Chairs or Social Chairs* for **combined Chapter events**.