



# 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. Telephone, text message or email all are OK. 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:

- **Chairs** weekly meeting or monthly board **meetings** in the absence of the President.
- Keeps **accurate** weekly **attendance records** and sends appropriate warning and termination letters.
- Contacts members who are absent **every week** to tell them they were missed at meeting. This reinforces the member commitment to attend weekly meetings.



# Professional Referral Exchange SECRETARY

***"I am (Your name) and the (Your business category) for this Chapter.***

**There are 2 types of referrals.** A 1st generation referral is when you use the products or services of a fellow PRE member. A 2nd generation referral is when you refer a third party to another PRE member. Each member is asked to give two qualified referrals per month.

I distribute our referral report every month. We review it together for results and accountability.

#### **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.



# Professional Referral Exchange

## TREASURER

***"I am (Your name) and the (Your business category in the Chapter) for this Chapter. As Treasurer, I pay the Chapter bills 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 chapter expenses 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.*
- Upon change of Treasurer of Chapter or every two years, whichever comes first, there is to be an audit of the Chapter bank accounts. This is to be done jointly by the incoming President and another Board Member.



# 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 **before the meeting begins.**
- **Sends approved new member applications** to AREA Director **no later than the second business day after approval.**
- 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.



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## 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. This includes our infomercials, the speaker segment, and the second round of comments.*

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

- **Maintains order** at weekly meetings.
- **Monitors the time limits:** guest 1 minute commercial, each member's 30 second commercial, the member speaker time slot and the second round.
- **Uses the count down cards** for the weekly speaker segment



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## 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.



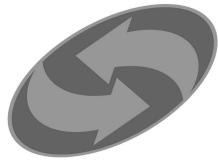
# Professional Referral Exchange

## 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 weekly featured member 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)*** at end of program segment of meeting.
- **Uses PRE's Official Speaker Introduction Sheet to introduce the *member speaker(s)***for the meeting.



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# Professional Referral Exchange

## Social Media Chair

"I am (Your name) and the (Your business category) for this Chapter. As Social Media Chair, I am responsible for our Chapter internet presence including Facebook, Instagram, MeetUp, and other social media.



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## 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.*

### 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.