Revised: 1/9/2019

SALES LEAD ROUNDTABLE (SLRT) GENERAL POLICIES

Mission

The Midland Business Alliance (MBA) Lead Program exists to help sales lead members increase their business through a structured word-of-mouth referral program, share qualified business leads, motivate professional growth and provide information regarding the business community. To achieve this, attendance and active participation is required from each member for the success of the program.

The best candidates for a sales lead roundtable: holds a sales/marketing/business development position, have one other employee who can attend meetings in their absence, are a team player, actively promote other members and find ways to grow the group.

Guest Procedures and Application Process

- When a guest inquires about joining a SLRT, The MBA liaison checks to see what SLRT groups have an open category the guest's company would like to promote. The MBA liaison then contacts the Chair of the group to inform him/her a guest will be present at an upcoming meeting. After the guest attends the first meeting and fills out an application and turns it into the Chair, the SLRT leadership team is responsible for all remaining communications with the guest.

- At the beginning of every meeting, the Chair of the group reads the mission statement for the SLRT program and explains how it operates. This refreshes the current members about policies and procedures along with ensuring all guests have a full understanding of the group.

- The Chair informs guests at the beginning of the meeting to pick up an application and general policies sheet if they are interested in joining the group. It is best if applications are turned into the SLRT Chair but may be turned into the MBA, which lengthens the on-boarding time.

- The guest fills out the application and turns it in to the Chair. The selection committee approves or denies the applicant. Applications are reviewed on a first-come, first-serve basis. If approved, the selection committee signs off on the application and turns it into the Chair. The Chair signs off on the application and turns it into the MBA. Once the application is completed, the new member will be invoiced and added to the group. The secretary adds the new member to the blank lines provided below the original group members on the attendance sheet. The Chair will add the new member to the group's email correspondences. (Chairs- if the new members name tag does not appear the next week in the SLRT area, please remind the MBA liaison).

- When the Chair receives an approved or denied application, they must turn the application into the MBA liaison within two weeks of it being submitted to the group.

- Guests are encouraged to visit the SLRT and may visit twice before deciding to join. SLRT members must be current Midland Business Alliance members.

General SLRT Procedures

1. The SLRT groups meet at the MBA in the A/B conference room at their assigned times. If a group is going to meet off-site, the Chair must inform the MBA liaison by including them in the weekly email sent to the group which states the group's upcoming location. This ensures the MBA can direct SLRT guests and current members to the correct location when questions arise.

2. Each roundtable consists of a Chairperson, Vice Chair and Secretary Leadership team which also serves on the selection committee along with up to three general members of the SLRT group.

3. Leadership positions are held for 6 months or a one-year term starting February 1st. Leadership positions will be voted by members who self-nominate themselves to take on the leadership responsibility.

4. The roundtable is designed for 20 to 35 members. If attendance falls under 20 active members, the MBA will step in and do what is best to bring value to the members of the group and the MBA's sales lead program.

5. The same company may have up to two representatives in the same SLRT group with each person promoting a different category. The same company can be in all SLRT groups with a different employee representing each group if the category is open. SLRT membership belongs to the member company, not the individual person. The only exception is if the Individual person purchases their own MBA membership as in the example below.

   Example: Bank A is a member; they may replace someone's spot on the SLRT. John Doe works for Bank A and has a personal membership with the MBA underneath of Bank A. John Doe joins the SLRT under his personal membership and leaves Bank A and rejoins the MBA under a new business. John may keep his position on the SLRT if he chooses before his category is open and it does not belong to Bank A because Bank A did not pay for the membership.

6. Only one person per specific professional classification may join each roundtable. This policy ensures that SLRT participants are not competing against each other for referrals. Each SLRT member will fill out an application for **one** specific category for the Sales Lead Category List. If a company offers more services than its specific category, the SLRT member can promote the additional areas of their business. When a new member would like to join a group in a category that is not already assigned, they **will not be declined** when a current SLRT member is promoting this category as an extra benefit to its company. The member who was promoting their one category and extra areas of its business **will immediately stop** promoting the extra areas of business. They may only promote the original one category they were accepted to join the group under. The MBA has final decision regarding category assignments. As of 3/31/2011, some SLRT members have been grand-fathered in and still promoting two categories. They have signed a contact explaining what they are allowed to promote and once they leave the group, these categories will remain separated for other members joining a group.

7. The MBA will add additional categories if a member's business categorization is not listed and does not compete with other categories. When a member signs up and is approved for a category they get to promote the entire category. It is up to this SLRT member if they would like to share the category and make an agreement with another person to split the category and each person promote a portion of it. When either of the people splitting a category leaves the group, the remaining member receives full rights to the category and previous internal agreements are void. Internal agreements must be noted on the SLRT application of the second person promoting a single category.

   Example: Beth is a SLRT member in Tuesday's group and is assigned to the Accounting Services category. Joe would like to join the group to promote that he offers tax services. It is Beth's decision if she would like to share her Accounting Services category with Joe. Since Beth does not offer this service, she allows Joe to share her category and Joe joins the group. Beth later moves from the area and leaves Tuesday's SLRT. Joe now has full rights to the entire Accounting Services category.

8. Starting 1/1/2015, All Sales Lead Roundtable groups will meet the 2nd, 3rd and 4th weeks of each month except June, July and August. There will be no meetings on the 1st or 5th weeks of any month. In the following example: Tuesday meets the 14th, 21st, 28th. Thursday meets the 9th, 16th, 23rd.

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

The Chair of each group will determine which two weeks their group will meet during June, July and August (scheduling around holidays) and inform their group members and the MBA no later than May 31st each year. No groups will meet the week of Thanksgiving, Christmas, or New Year's Day. Taking other holidays off will be at the group's digression and the Chair will inform their group members and the MBA of these dates. A group may meet during an off week if needed and attendance will not be recorded.

9. Attendance is **required** to remain in the SLRT. If a member is going to be absent, he/she must notify the Chair (or other appointed group official) in advance of the meeting. ***Four absences (excused or unexcused) within a six-month period are allowed***. Absences are reset to zero on 2/1 and 8/1 each year. Attendance will be tracked from February-July (average of 17 meetings) and August – January (average of 16 meetings). Missing more than 30 minutes of the group's scheduled meeting time will result in an absence.

10. Attendance procedures: Notify the Chair (or designated representative) if you will not be able to attend a meeting. Sales Lead members should have an alternate person who can attend meetings in their absences. If your business is the type that has last minute clients that you must service or you are away for business frequently which will cause you to be late or miss frequent meetings, have another representative designated to attend your SLRT meeting to meet the attendance policy. Leave of absences will be taken into consideration. The MBA has final decision regarding attendance.

11. After the **third absence**, the SLRT Leadership team will contact you. After **four absences**, you **forfeit** your Sales Lead membership within your assigned group. If desired, you may apply to rejoin the group at a later time by refilling out a Sales Lead Roundtable application and paying the $25 SLRT membership fee. If you decided to leave the SLRT, please inform your Chair or the MBA who will disable your automatic billing and allow other members an opportunity in the SLRT Group.

12. Participation is based on passing leads, bringing guests, scheduling guest speakers, giving testimonials and attendance. These statistics are reviewed on a continual basis and recorded by the secretary of the group. Group statistics for these items are reviewed by the leadership team and will be reviewed by the MBA staff monthly.

13. The proper way to gain qualified referrals for fellow roundtable members is to put them in a proactive position by asking the client if he/she would mind if the roundtable member called him/her. The opposite would be to ask the client to call the roundtable member, which leaves the roundtable member in an inactive position waiting for a phone call that may never materialize.

14. Some roundtable members consider “cold calls” to be qualified leads because of the nature of their individual business. If that is the case, that member should let the group know that s/he will accept “cold calls” as leads. If someone wants to pass a “cold call”, s/he should identify it as such and provide whatever information possible to assist the Roundtable member in pursuing the lead.

15. Complaints may arise from time to time. They may include bad leads, poor attendance, unethical business practices, etc. These problems should be handled professionally and in a timely manner. Keep in mind the best solution is for the members to work out solutions between themselves. A member can be dismissed for unethical business practices only upon recommendation of the roundtable leaders to the Midland Business Alliance President and CEO.

Additional Information

- Visit **www.mbami.org/sales-lead-roundtable**, then select your group (bottom of the page). Anyone accessing the MBA website will be able to email a SLRT member and view the directory listing by clicking on the business name. Please ensure the MBA has current email addresses on file so potential clients can contact SLRT members.

- Each SLRT has its own procedures for scheduling speakers, frequency of meeting during holidays and breaks, networking breaks, etc. For specific internal SLRT procedures, please contact the current Chair of the group.

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Name Date

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