



Referral Roundtables

- Guidelines -

1. Mission.

The mission of Referral Roundtables is to increase the business of Newport Beach Chamber of Commerce members by building relationships and through the exchange of referrals.

2. Organization.

- A. Referral Roundtables (“Roundtables”) are included within the Membership Division of the Newport Beach Chamber of Commerce.
- B. Each Referral Roundtable group will be governed by a Leadership Team. The Leadership Team will consist of that group’s: (1) Chairman; (2) Vice Chairman; (3) Membership Chairman; (4) the Chamber’s Membership Services Director; and (5) the Chamber’s Membership Council Chair.

3. Referral Roundtables Leadership Team.

- A. There will be three officers for each Referral Roundtable group: (1) Chairman; (2) Vice Chairman; and (3) Membership Chairman.
- B. Terms. Officers shall be elected by Members of their respective Referral Roundtable (“Members”) by the last meeting of the year. Officers shall serve a one-year term beginning January of each year.
- C. The Chamber’s Membership Services Director and the Chamber’s Membership Council Chair will also serve as an integral part of the Referral Roundtables program.
- D. Altogether, each group’s Chairman, Vice Chairman, and Membership Chairman alongside the Chamber’s Membership Services Director and the Chamber’s Membership Council Chair will serve as the Referral Roundtables Leadership Team (“Leadership Team”).
- E. Chairman.

Chairman duties include:

- 1. Prepare a written agenda in advance of each Referral Roundtable meeting and copy the Leadership Team.

2. Send an Outlook calendar invite to all Members and a separate Outlook calendar invite to all Guests at least two (2) days prior to each meeting.
3. Set up and maintain the Referral Roundtable Speakers Schedule.
4. Conduct each Referral Roundtable meeting remembering to start and end the meeting promptly.
5. Oversee/support the duties of Vice Chairman and Membership Chairman.

F. Vice Chairman.

Vice Chairman duties include:

1. Serve in the absence of the Chairman.
2. In cooperation with the Chamber's Membership Services Director, track leads given, one-to-one's, and closed business for each Referral Roundtable meeting, quarter, and year. Communicate these stats to the Chamber's Membership Services Director.
3. At each meeting, be prepared to give a report of leads, one-to-one's, and closed business statistics.
4. Regularly review one-to-one's, leads, and closed business to ensure compliance with Referral Roundtables Member Responsibilities. Routinely consult with the Leadership Team to address Members who fail to meet membership requirements/expectations.
5. In cooperation with the Chairman and Membership Chair, ensure that a quarterly after-hours social for the group is planned. Additionally, coordinate a joint annual after-hours social with all other Referral Roundtable groups. Communicate all proposed dates for Referral Roundtables socials to the Chamber's Membership Services Director.

G. Membership Chairman.

Membership Chairman duties include:

1. In cooperation with the Chamber's Membership Services Director, maintain an up-to-date roster of all Referral Roundtable Members.
2. Track attendance at each meeting.
3. Send a copy of the updated attendance roster with Guest information via email to the Leadership Team after each Referral Roundtable meeting.
4. Regularly review meeting attendance to ensure compliance with Referral Roundtables Member Responsibilities. Routinely consult with the Leadership Team to address Members who fail to meet membership attendance requirements.

5. Greet and assist all Guests at meetings.
6. Email each Guest after their initial visit to a Referral Roundtable group, sending the form Guest/Applicant email. Follow up and send application materials if necessary.
7. Participate in the Referral Roundtable Member Selection Panel.
8. In advance, assign the role of Greeter if unable to attend a meeting.

4. Member Qualifications.

- A. Referral Roundtables membership is limited to one Member per business category (corresponding with Referral Roundtables Membership Categories) per group. Members must choose one (1) "Primary Category," defined as 70% of the Member's revenue/income. The Leadership Team may occasionally authorize a Member to temporarily occupy a second Primary Category provided there is not a Member currently occupying that Category, and until the Category is filled by a separate Member. In order to represent a specific Primary Category in a Roundtable group, the Member must be listed under that Category with the Chamber.
- B. Only one representative per business may participate in a specific Referral Roundtable group.
- C. A Member may only be involved in one Referral Roundtable group.
- D. The Chamber reserves the right to deny the membership of any representative based on that representative's past performance in another Referral Roundtable group and/or a negative experience(s) with a Member of Referral Roundtables.

5. Member Selection.

- A. The following steps will be taken upon an Applicant expressing interest in joining the Referral Roundtables:
 1. Application and Guidelines provided to Applicant by Referral Roundtable Membership Chair.
 2. Completed Application and Guidelines signed and returned by Applicant to the Membership Chairman and the Chamber's Membership Services Director.
 3. Chamber confirms with Applicant whether an open spot in the Applicant's Primary Category is available.
 4. If a Primary Category spot is available, the Member Selection Panel begins review of Applicant/completes Selection Matrix.
 5. During the review process, Applicant must attend at least two (2) group meetings. The Referral Roundtable Chairman will include the Applicant on the Guest Outlook Calendar invite.

6. Member Selection Panel advises Applicant of selection if applicable. If an Applicant is approved for Referral Roundtables and joins the Chamber, he/she will become an active Referral Roundtables Member and may attend meetings, receive group emails, and participate in the SlackApp.com communication portal.
 7. An Applicant must be a Chamber member in good standing in order to be selected to Referral Roundtables. If Applicant fails to become a member of the Newport Beach Chamber of Commerce within five (5) business days of being selected for Referral Roundtables membership, Applicant forfeits his/her spot and the Primary Category will be made available to other Applicants.
- B. Selection Criteria. Selection in Referral Roundtables is highly competitive. Member selection will be based on the following criteria:
1. Application;
 2. Interviews with the Member Selection Panel;
 3. Membership and Participation in Chamber (current members only); and
 4. Participation and Leadership in Outside Organizations.
- C. All Applicants will be evaluated according to the above Selection Criteria. This includes the following categories of prospective members: (1) One Applicant for Primary Category; or (2) Two or more Applicants for Primary Category.
- D. In the event that two or more Applicants both apply for the same Primary Category, the Applicant with the highest score will be selected. In the event of a tie, the Chamber's President, Referral Roundtables Chairman and Vice Chairman will meet with the Referral Roundtable Member Selection Panel and decide.
- E. Every effort will be made to accommodate and place all Applicants into the Referral Roundtables program. However, Applicants must understand that there are a limited number of available Member spots in this program.

6. Member Responsibilities.

- A. During each quarter, Roundtable Members must attend five (5) out of six (6) Referral Roundtable meetings. A representative of the Member's business may attend a total of two (2) meetings per quarter in the Member's absence, but the intent is for the Member to establish his/her own relationships in the group.
- B. During each month, Roundtable Members should refer at least one (1) lead to other Roundtable Members or to the Chamber. Members may bring a prospective Chamber and/or Referral Roundtables Member to a Referral Roundtable meeting, which will count as one (1) lead. Leads to Members of other Referral Roundtables groups count towards a Member's lead requirements, but Members may not divert leads which could be given to their own group Members to Members of competing groups, i.e., providing a lead to a CPA in a competing group instead of providing a lead to the CPA within your own group. Timely leads to prospective members who have applied and are accepted into the Referral Roundtables program count towards a Member's lead requirements.
- C. During each month, Roundtable Members must complete at least two (2) one-to-one meetings with other Members of their Referral Roundtable. One-to-one meetings

which include more than one Member count as one (1) one-to-one for each participating Member. Meeting with a Guest of your Referral Roundtable counts as a one-to-one.

- D. Roundtable Members should respond to all leads within twenty-four (24) hours.
- E. A Roundtable Member's request for a leave of absence will be reviewed by the Leadership Team on a case-by-case basis. If granted, a leave of absence will serve to hold the Member's seat in their respective Primary Category for a certain length of time.

7. Member Expectations.

Referral Roundtable Members are expected to:

- A. Be punctual, as respecting the group's time will establish credibility.
- B. Be prepared to briefly introduce yourself and your business and share what is a good lead for you.
- C. Be prepared to thank other Members for leads resulting in potential or closed business. Closed business must be reported to the Leadership Team.
- D. All Members are encouraged to give a 5 to 10 minute presentation (including Q&A) on his/her business at least once per year. Members must understand that by accepting a presentation slot, they are taking that opportunity away from other Members. Accordingly, once assigned a presentation date, Members must come prepared to speak.
- E. Do not wait until Referral Roundtable meetings to present leads, but always complete a Lead Form to ensure proper credit and documentation.
- F. Bring an ample supply of business cards to each Referral Roundtable meeting.

8. Accountability.

- A. If a new Roundtable Member does not meet the minimum requirements in their first full quarter of membership, he/she may be automatically dropped from the Referral Roundtables.
- B. If a veteran Member does not meet the minimum requirements in any quarter, the Member will be immediately subject to review by the Leadership Team.
- C. The Leadership Team will routinely monitor each Member's adherence to these Guidelines and communicate a Member's failure to meet the minimum requirement with that Member.

- D. Dropped Members are eligible to reapply for Referral Roundtable membership subject to the Leadership Team's sole discretion.

9. Meetings/Events.

- A. If a Referral Roundtable meeting is scheduled during mealtime, Roundtable Officers can consider whether to encourage Members to bring their own breakfast and/or lunch.
- B. Once a quarter, each Referral Roundtable group is encouraged to host an after-hours social at a Chamber member business, to be paid for by Roundtable Members.
- C. Once a year, all Referral Roundtables groups are encouraged to host a joint after-hours social at a Chamber member business, to be paid for by Roundtable Members.

10. Guests.

- A. Prospective members of the Chamber and/or Referral Roundtables may attend two (2) meetings of a Referral Roundtable group. If you wish to invite a Guest to a meeting, first speak to the Chairman to obtain approval.
- B. Chamber membership is required before joining a Referral Roundtable group.

11. Group Communications.

- A. Group emails may only be sent from the Chamber office and/or from the Leadership Team unless pre-approved by the Leadership Team.
- B. All Referral Roundtable Members are encouraged to participate in the SlackApp.com platform.

12. Definitions.

- A. One-to-one's.

A one-to-one is a meeting scheduled, separate from the Referral Roundtable group meeting, with another Roundtable Member to get to know that Member on a personal level. These meetings should typically last 45-60 minutes in length in order to allow both Members to become more familiar with one another.

- B. Leads.

A lead is an introduction of a Roundtable Member and/or their products and/or services to a prospective client and/or professional contact by another Roundtable Member. All leads must be tracked and reported to the Referral Roundtables.

A lead should introduce a new business opportunity or professional contact to another Member of the Referral Roundtables. Before making a direct email introduction

between a Member and a potential lead, confirm with the Member that he/she is interested in the potential lead.

The following are examples of appropriate leads:

“I would like to introduce you to the owner of Joe’s Sports Shop. Joe needs marketing services and I told him about your marketing business. Joe agreed that the two of you should talk.”

“I would like to introduce you to Jane, Esq. You mentioned that you are interested in an introduction to an immigration attorney in order to develop a strategic partnership. I told Jane, Esq. about you and she is interested in meeting you.”

The following is an example of an inappropriate lead (this lead can be given, but will not count towards a Member’s monthly lead requirement:

“I saw that ABC Grocery is opening a new location in Newport. You should try to meet the owner and see if he/she could use your services.”

C. Closed Business.

Closed business is defined as the fees/commissions/profit paid to the individual Member for a sale as opposed to the gross value of the product/service/asset. For example, if a financial advisor secures a \$1 Million account, only the financial advisor’s anticipated fee paid to him/her for that account would count as closed business.

13. Disclaimer.

Any leads exchanged among the Referral Roundtables in or out of Referral Roundtables meetings are not the views and/or opinions of the Newport Beach Chamber of Commerce. The Chamber cannot recommend any product and/or service, but can provide a list of current Chamber members that provide specific products and/or services.

14. Acknowledgement/Agreement.

Referral Roundtables are dependent upon full and active participation of their respective Members. Because Referral Roundtables membership is limited to only one Member per Primary Category, Referral Roundtables membership is highly competitive. Accordingly, failure to abide by these Guidelines will subject the Member to review by the Leadership Team and could potentially lead to dismissal from the Referral Roundtables.

By signing below, I confirm that I have read and understand the Referral Roundtables Guidelines and agree to abide by the Guidelines to the best of my ability.

Signature

Date

Print

Referral Roundtables Group

Chamber Member Business/Organization

*Referral Roundtables are another member service of
the Newport Beach Chamber of Commerce.*

For more information contact:

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