



**HOUSATONIC
BUSINESS ALLIANCE**
BUSINESS NETWORKING GROUP

Member Handbook

HBA Member Handbook

Mission Statement

Our purpose is to build trust and knowledge among our members by fostering the development of strong business relationships that allow for the growth of each individual.

Goal of Networking Group

Our GOAL is to educate the members of HBA to become your effective sales and marketing team.

Core Values

As a member of HBA you agree to:

1. Provide quality services at the price you quote.
2. Be truthful and honest in your work.
3. Work to build trust with each member.
4. Follow up on all referrals in a timely manner appropriately for your profession.
5. Have a positive and supportive attitude with all members and their referrals.
6. Adhere to the ethical standards of your profession.

Remember - Building Trusting Business Relationships Takes Time, Commitment & Work

HOUSATONIC BUSINESS ALLIANCE

Meeting Agenda

7:00-7:15	Personal Networking
7:15-7:20	Introductions/Welcome Guests
7:20-7:25	Education Segment
7:25- 7:45	One-minute Marketing
7:45- 7:50	Executive Committee Reports
7:50-8:00	Break/Personal Networking
8:00-8:10	Speaker Presentation
8:10-8:30	Testimonials & Referrals
8:30	Wrap-up Out the door

Maximize your Membership

How do you get the most out of HBA?

1. Attend every weekly meeting.
2. Be active.
3. Come prepared to participate in a meaningful way.
4. Bring your own business cards for the card box.
5. Be sure that information on all members is at your fingertips so you can make referrals. Keep their business cards handy and enter their contact information into your contact list on your computer and phone.
6. Plan your weekly marketing moment ahead of time.
7. Get to know members better with individual meetings - often.
8. Be early for meetings and network.

Creating Trust and Credibility

IT TAKES TIME - If you build it they will come

At Our Meeting

- Treat HBA as your best customer
- Make it a priority
- Be on time
- Use the networking time to network
- Welcome guests - introduce yourself
- Be prepared for:
 - your marketing moment
 - your 10 minute presentation
 - referrals and testimonials
- Always have a testimonial for a member
- Be positive
- Support the Executive Committee

Outside Our Meeting

- Set up one-on-one meetings with members
- Prepare for one-2-one's to make them effective
- Listen everywhere for referral opportunities
- Carry member business cards with you
- Have member contact information in your phone
- Invite guests to spread the word
- Sponsor outside business events
- Invite HBA members to outside events
- Follow up quickly with referrals you receive
- Thank members who gave you referrals

Planning your Marketing Moment

It takes time and effort!

Goal: To train your marketing and sales team to effectively promote your business.

Each week in 60 seconds or less your job is to:

1. Educate the group about your work, services and values, and
2. Be specific in stating what would make a good referral for you this week - so they know how to help you in a meaningful way.

To effectively plan your marketing moment consider the following:

1. What are the products or services you provide?
2. What problems do you help solve? What pain of others can you eliminate?
3. What benefits do you provide to your clients?
4. What differentiates you from others in your field?
5. What are your qualifications?
 - education
 - training
 - background
 - experience
6. Where do you typically get your business?
7. Who are your clients likely to be?
8. Can you share recent or significant clients you have helped?
9. Do you have visual examples of your work?
 - brochures, pictures, samples
10. Who are your key referral sources?
11. What makes a good referral for you?

Thinking through these questions will help you develop a meaningful marketing moment every week. Pick a different small and specific idea or issue every week to highlight. Vary it each week. Be specific. Make it interesting so it will stick in people's minds.

Marketing Moment Format

1. Introduce yourself: your name, profession & company.
2. Pick a portion of your business to highlight: List various products or services you provide. Use an item from the previous page. Pick one to highlight.
3. Briefly give an example of a problem you helped resolve.
4. Ask for a specific lead you would like this week.
 - a name or company for which you would like an introduction
 - a specific type of person or professional you would like to meet or help
 - work in a specific industry for members to keep in mind for you.
 - a specific type of client
5. Close with your name and a professional tag line.

Create your tag line!

A tag line will be a memorable hook which people will associate with you and your business. Listen each week to the tag lines of others and ask for help if you are having trouble coming up with one for your business.

Ten Minute Presentation

There is no need to stress. You will have given plenty of marketing minutes by the time you give your ten minute presentation and will have observed many others.

Below is a worksheet to help you put together your first major presentation. Some of it will be very much like your shorter marketing moments.

Introduction: 1-2 minutes about yourself and your company (education, credentials, experience, unique services). Also give a little information about yourself on a personal basis - knowing what you do in your spare time, your interests, hobbies, etc. may create an unexpected connection with another member. Having found a common ground may help you build a better relationship and therefore more referrals.

Short Story: 5-6 minutes discussing a client case and a solution you provided.

1. What was the problem?
2. How did you solve it?
3. What was the end result?

Consider discussing industry myths or some of the benefits your service offers.

Referrals: 1 - 2 minutes identifying 2 or 3 types of referrals you are seeking.

Give a memory hook - your tag line - and conclude with your name and company.

Ten Minute Presentation - Cont.

Be sure to:

- Introduce yourself with personal and work information.
- Make your topic specific
- Give some examples of prior work
- Ask questions to engage the audience only - do not open to general questions
- Consider telling an appropriate funny story
- Provide a summary handout
- Ask for the referral which would help you the most
- Give facts and benefits
- Be energetic in your presentation
- ask for general questions about your topic at the end of your presentation
- Ask for one-2-one's

Try not to:

- Get too technical
- Ask for questions - you may not be able to answer them
- Ask open-ended questions which stray away from your presentation topic

Referrals

You joined HBA to grow your business. The goal of the networking group is to work together as a marketing team for each other. We do this by passing referrals. Just giving a referral of someone who might be able to benefit from the service another member provides is not enough. Referrals must be of good quality - the sort that leads to the kind of business which the members need.

Housatonic Business Alliance: Referral Log and Follow up

Date Rec'd	Referral Name	From	Date of Contact	Date of Meeting	Follow Up	Status C = Closed FU=Follow up No=Refused	Value for Closed	Offshoot Referrals

Referrals - Cont.

Random referrals - such as providing a painter with the address of a house that needs to be painted is not a good referral. So, what does make a good quality referral?

- the referral is the name of a specific person
- you have already spoken with that person about the work of the member you are referring, and suggested that the member could be helpful.
- you know that the person is in need of the service the member provides.

Where do you find referrals?

- Listen all the time:
- marketing moments
- 10-minute presentations
- one-2-one's
- networking events
- your clients, family and friends
- listen everywhere.

What do you do when you have a lead for a member?

- talk to the referral first and let them know you have someone who can help them
- ask if it is ok to have the member call or if it is ok to give them their number
- give the referral the member's card and contact information
- complete the referral form for the HBA meeting and
- during referrals and testimonials pass that referral!

REMEMBER: IT ALL TAKES TIME!

Referrals - Cont.

What do I do with those referral slips?

First: remember that the slips provide this information!

White: Give to the member to whom you are giving the lead

Pink: This goes to the Vice President/ secretary during the referrals and testimonials section.

Yellow: Keep for your files. Use it to follow-up on with the recipient. After an appropriate time period follow-up with the member to see if there is anything you can do to assist with the referral. Make contact with the referral to see if you can help facilitate a better connection. If the referral doesn't work out it may help to schedule a one-on-one with the member to better plan future referrals for this member.

Attached is a referral log to help you keep track of the referrals you give and the referrals you receive.

There are three levels of leads you will hear members talk about:

Level 1: A lead from a member of the HBA to a member of HBA. This is an inside lead.

Level 2: A lead from a member to someone who is not in HBA. For example: you give the name of an HBA member to a friend or associate. This is an outside lead.

Level 3: This is a lead where someone outside the group who was referred to you by a member - passes on your name to someone outside the group. This is a GREAT lead!

One-2-One's

Meeting with individual members gives both members several opportunities. Most importantly, when you get to know each other better on a more personal level you begin to build trust with each other. One-2-One's will help you get to know each other's business needs and try to plan way to find referrals to benefit each member.

Schedule a one-2- one: reach out to your members and schedule a time, date and location. It may work well to schedule your appointments at your office or workplace. That way while you get to know each other, you have the opportunity to see where they work and how they do what they do.

Prepare: Review your current needs and be ready to explain how your meeting partner can locate good quality referrals for you.

Share information before the meeting: if you think that it would be helpful to send information ahead of time see if you can email or send that information ahead of time.

Bring business cards, brochures or handouts

Be courteous: keep the appointment: this builds confidence and trust. If you can't make it be courteous and call to cancel.

Learn: use this time to learn as much as you can about your meeting partner.

Make commitments and set goals: discuss and see if it is possible to agree upon goals about how you can help each other. Set up introductions to potential leads. Plan any follow-up actions.

How Do I Successfully Invite Guests?

Guests are important to the group. When guests visit the group they may either need a service provided by someone in the group, or know someone who does. Most guests are also a potential new member to the group - which enlarges the potential for growth of business referrals.

Think back to who invited you to HBA. What peaked your interest so that you attended a meeting to see what if it was about and how it might help you?

Point out:

- how the structure works
- the number of referrals or quality of referrals the group has generated for you.
- what makes up the sales team working for you - people from all trades and professions promoting your business.

Explain that at the meeting your guest will:

- have the opportunity to promote their business
- meet the entire membership

An idea: invite a guest who you think could benefit from a particular service to hear a member's 10 minute presentation. Give the speaker a head's up so they can make any adjustments that might be helpful to the guest.

Occupational Points of Influence

Occupational points of influence are businesses which are related in such a way as to generate leads for one another naturally.

What are businesses that have a natural flow from that business to your own? And what businesses might be the natural recipient of business from your business?

What are businesses that support your business, or are the most likely to generate leads for you?

Look at the attached chart and make a list of as many businesses as you can think of that might naturally create business leads for you.

The following lists are but a few of the examples of occupational categories and specific occupations that make up the Occupational Common Points of Influence

Financial Services	Business Services	Real Estate	Health & Wellness	Marketing & Events
Accountants	Advertising	Alarm Systems	Air & Water Purification	Baker
Attorneys	Business Attorney	Appraiser	Chiropractor	Bridal Shop
Banker	Business Consultant	Architect	Cosmetics	Caterer
Bookkeeper	Business Machines	Carpet Cleaner	Dentist	Event Coordinator
Collection Agent	Cell Phone Sales	Electrician	Fitness Trainer	Florist
Financial Planner	Computer Sales	General Contractor	Massage Therapist	Jeweler
Insurance Agents	Computer Training	Handyman	Nutritionist	Musician
Merchant Services	Direct Mail	Inspections	Optometrist	Photographer
Payroll Services	Graphic Design	Insurance	Pharmacist	Photo Preservation
Stock Broker	Hr Consultant	Interior Design	Physical Therapy	Travel Agent
	Internet Services	Landscaper	Skin Care	Wedding Coordinator
	Office Supplies	Mortgage		
	Phone Systems	Movers		
	Sign Company	Painter		
	Staffing Services	Plumber		
	Web Design	Property Manager		
		Realtor		

The lists are endless. HBA has room for growth in many Occupational Common Points of Influence

Summary

Most importantly: Remember that developing trust and confidence takes time and hard work. Do not expect referrals to flow to you just because you have joined a networking group. Expect that it will take a number of months and maybe a year to begin to generate quality leads - after the members have begun to know you and trust you and your work.

- Understand that the key to referrals is trust and credibility.
- Make your requests for referrals as specific as possible.
- Invite guests - especially guests that would make a good member.
- Schedule one-on-one's to get to know the members personally.
- Arrange for a sub when you have to miss a meeting.
- Follow-up on referrals you receive in a professional and high quality manner.
- Give high quality referrals.
- Stand up when presenting marketing moments, and giving testimonials and referrals.
- If you do not have a referral to pass during testimonials and referrals ALWAYS give a testimonial of someone's work or help. Never say you have nothing. Put effort into thinking of something to share during this time.
- Respect others when they are presenting by giving them your full and undivided attention.
- Review the results of referrals you receive with the person who gave you the lead.
- Read the attached Policies, and By-laws to be completely familiar with the rules of the group.
- Enjoy! Be prepared to have fun and make lasting friendships!

Housatonic Business Alliance Policies

1. Only one person from each professional classification is permitted to join Housatonic Business Alliance. The Membership Committee has final authority over all classification conflicts.
2. Members must represent a single occupation, the occupation for which their membership was approved.
3. Attendance at weekly meetings is required. Members are late after 7:15 am and are expected to stay for the entire meeting; those arriving late or leaving before the end of a meeting shall receive half and absence.
4. Members shall belong to no other business networking group which allows one person per profession and whose purpose is to pass business referrals while a member of HBA. Membership in other business groups would reduce commitment to the group.
5. Members are required to bring a reasonable number of business referrals to the members of the group, and/or visitors, and/or contribute to the group in other meaningful ways to the quality and health of the group and maintenance of the membership.
6. Visitors may attend up to two meetings before applying for membership.
7. Extended absences must be reviewed and approved by the Membership Committee.
8. It is the member's responsibility to file a concern with the Membership Committee in the event a visitor conflicts with a member's classification. This must be done before a visitor is approved for membership. Absent complaint, the Membership Committee will assume there are no conflicts.
9. Members who wish to change their business classification must submit a new application for approval by the Membership Committee.
10. In the event of problems with a member (ie: with business practices or ability to commit to the policies of the group), the Membership Committee may, in their sole discretion, place the member on probation.

11. A member's classification may be re-opened in event a member has not complied with the policies and rules of the group. The Membership Committee has sole discretion to re-open the classification.
12. The Executive Committee: President, Vice President and Secretary-Treasurer, shall be credited with one-half of their membership dues the year following completion of a full year service in their position.
13. The group will devote at least one meeting annually to group training.
14. All new members must attend new member training within 60 days of joining the group and prior to being added to the speaker rotation.
15. Annual dues shall be due on the first of the month of each member's membership anniversary. All dues are non-refundable and nontransferable to another member.
16. Substitute program shall be approved by the Membership Committee.

BY-LAWS OF THE HOUSATONIC BUSINESS ALLIANCE

ARTICLE ONE: GENERAL

1.15 -- Purpose: The Housatonic Business Alliance (the "HBA") is an association established to bring together business and professional persons for the purpose of supporting each other's business development efforts through mutual referrals and networking.

1.25 -- Network Office: The business office of the HBA shall be the address of the Treasurer.

1.35 -- Fiscal Year: The fiscal year of the HBA shall be the calendar year.

ARTICLE TWO: MEMBERS

2.15 -- Members: The HBA shall have one class of members (each a "Member" or collectively the "Members"), each of whom shall be entitled to one (1) vote. A Member may be any individual approved by the Membership Committee.

2.25 -- Membership Categories: The Membership Committee shall limit membership to one (1) member from each business category as defined by the Membership Committee. Recommendations on membership categories, including subcategories of larger general business categories, shall be made by the Membership Committee after giving others in that overall general category the opportunity to give input. (For Example: for the overall general category of attorneys may have subcategories such as real estate law, litigation, trusts and estates, etc. Prior to expanding a general category into subcategories other attorney members shall be consulted before subcategories or additional subcategories are created.) In the event that a member protests the expansion of a category the matter shall be put before the membership for a vote. Memberships shall not be transferable to another individual.

2.35 -- Termination of Membership: Membership may be terminated for good cause shown by the vote of two-thirds vote of the Membership. Membership shall be terminated by a Member's resignation.

2.45 -- Membership Dues: The HBA may assess dues against Members provided such dues or assessments have been duly authorized by the vote of the Membership. At termination of Membership there shall be no refund of dues.

2.55 -- Membership Roster: The Secretary/Treasurer shall maintain a list of Members in good standing.

ARTICLE THREE: MEETINGS OF THE MEMBERS

3.15 -- Regular Meetings: Member's meetings shall be once each week for one and one-half hours at a per-selected location, as may be determined by the vote of the Membership.

3.25 -- Elections of Officers: Election of Officers for the ensuing year shall be held at on or around the first meeting of November annually. Qualified candidates shall submit their names to the Executive Committee at least three weeks prior to the proposed election date. The slate of candidates shall be presented to the Membership at a meeting at least two weeks prior to the election date.

3.35 -- Attendance: Each member shall attend the weekly meetings, provided that, in the event a member is unable to attend a meeting they may have a substitute individual attend in their place and further provided that each member shall be permitted three unexcused absences in the first six month calendar period and three unexcused absences in the second six month calendar period wherein no substitute is required. Exceptions for illness or other extenuating circumstances may be made by the Membership Committee whose decisions shall be binding.

3.45 -- Agenda for Meetings: Meetings shall contain the following agenda items, provided that exceptions shall be permissible from time to time for special programs, events or discussions at the discretion of the Executive Committee or a vote of a majority of those present at a meeting:

- a. Introduction of Board/leadership team
- b. Statement of HBA purpose
- c. Educational Presentation
- d. A business commercial by each member
- e. Individual speaker presentation
- f. Referrals and Testimonials by members
- g. Business and officer reports and updates

3.55 -- Meeting Notices: The vice president or secretary/treasurer shall provide reasonable notice of meeting changes and of meetings which are scheduled outside the normal weekly schedule, to all Members who have provided their e-mail addresses. No other notices will be given. No action taken at any meeting of the Members shall be invalid due to lack of notice.

3.65 -- Quorum and Voting Requirements:

3.6.15 -- One Vote Per Member: Each member is entitled to one vote on each matter voted on at a meeting of Members.

3.6.25 -- Quorum: A quorum consists of all Members present at any regular or annual meeting; provided, however, that a quorum shall consist of at least two-thirds of the membership. The Membership may meet without a quorum present, but no votes may be taken at such a meeting.

3.6.35 -- Majority Vote: If a quorum exists, action on a matter is approved if the votes cast by such Members voting favoring the action exceed the votes cast by such Members opposing the action, unless these Bylaws require otherwise.

ARTICLE FOUR: OFFICERS

4.15 -- Officers: The HBA's officers shall consist of a President, Vice President, Secretary/Treasurer, and such other officers as the Membership may choose to have, from time to time. The officers shall be elected by the Members annually. Terms shall be for a one year duration, and under no circumstances extend beyond two consecutive years. A candidate shall not be eligible to hold his/her prior office for two years following the expiration of their term of office.

4.25 -- Qualifications of Officers: To be eligible to be placed on the slate for the position of President, Members shall have been a member of HBA for two full years prior the election of officers. To be eligible to be placed on the slate for the position of Vice President and Secretary/Treasurer, Members shall have been a member of HBA for one full year prior to the election of officers.

4.35 -- President: The President shall be the chief executive officer. The President shall oversee all of the business and affairs of the organization. The President shall, when present, preside at all meetings of the Members. The

President may sign any contract, or other instrument that the Members have approved, unless the execution thereof shall be expressly delegated by the Members or by these Bylaws to another officer or Member. In general, the President shall perform all duties incident to the office of president and such other duties as may be voted upon by the Members from time to time.

4.45 -- Vice President: In the absence of the President, or in the event of the President's inability to act, the Vice President shall perform the duties of the President, and when so acting, shall have all the powers of and be subject to all the restrictions upon the President. The Vice President shall perform such other duties as from time to time may be assigned by the President or voted upon by the Members. The Vice President shall be an ex-officio member of the Membership Committee.

4.5 -- Secretary/Treasurer: Shall be responsible for collecting and managing all funds of the organization; and shall deposit all funds in the name of the organization in such banks or other depositories as shall be selected by the Members, and in general perform all of the duties incident to the office of secretary/treasurer and such other duties as from time to time may be assigned by the president or voted upon by the Board. The Secretary/Treasurer's duties shall include:

- a. Billing all Members;
- b. Collecting and recording dues payments;
- c. Paying all bills in a timely matter;
- d. Reconciling the organization's checking account on a monthly basis;
- e. Providing a treasurer's report (on at least a monthly basis) on account balances and availability of funds for certain activities; and
- f. Providing profit and loss statements and balance sheets on a quarterly basis.

4.65 -- Standards of Conduct: An officer with discretionary authority shall discharge such authority in good faith, with the care an ordinarily prudent person in a like position would exercise under similar circumstances, and in a manner the officer reasonably believes to be in the best interests of the organization. In discharging duties, an officer is entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, if prepared or presented by legal counsel, public accountants or other persons as to matters the officer reasonably believes are within the person's professional or expert competence.

4.75 -- Resignation and Removal: An officer may resign at any time by delivering notice to the President or Secretary. A resignation is effective when the notice is delivered unless the notice specifies a later effective date. If a resignation is made effective at a later date and the Executive Board accepts the future effective date, the Board may fill the pending vacancy before the effective date; provided the successor does not take office until the effective date. The Members may remove any officer at any time with or without cause upon approval by two-thirds of the membership.

ARTICLE FIVE: TRAINING AND EDUCATION

5.15 -- New Members: New Members shall participate in New Member Training within 60 days of becoming members and shall have completed such training prior to giving an individual speaker presentation. Such training shall include training on the purpose, structure and procedures of HBA.

5.25 -- Board Training: Each outgoing officer shall review the responsibilities and procedures for their position with the newly elected officer prior to the beginning of the new officer's term.

5.35 -- General Membership Training: Such additional member training as is requested by the Executive committee or the Membership from time to time.

5.45 -- Training committee: All mandatory training and job descriptions for Board roles shall be established by the Training Committee.

ARTICLE SIX: COMMITTEES

6.15 -- Appointment of Committees: There shall be two standing Committees: Membership Committee and Training Committee; other committees may be established from time to time at the pleasure of the Executive Committee or as determined at a meeting of the membership. Each committee shall have a minimum of two (2) Members, unless otherwise stated below. In the case of the resignation, removal or incapacity of any Committee member, his or her successor shall be elected to fill out the unexpired term at the next regular meeting.

6.25 -- Executive Committee: The Executive Committee shall consist of the officers elected at the annual meeting. Three members of the

Executive Committee shall constitute a quorum. The Executive Committee shall be empowered to act in carrying out the general policies approved by the Members of the organization; and it shall have such other powers as may be delegated to it by the Members. Meetings of the Executive Committee shall be called by the President or at the request of two (2) members of the Executive Committee.

6.35 -- Membership Committee: The Membership Committee shall consist of at least two (2) Members appointed by the membership. A majority of Membership Committee members shall constitute a quorum. The Membership Committee shall recommend membership categories, policies and procedures for approval by the general membership. It shall review the applications submitted by prospective Members and shall make recommendations on Members to be accepted for membership.

6.45 -- Education and Training Committee: This committee shall consist of at least two (2) members appointed by the Executive Committee and shall be responsible for developing and carrying out all organization education and training as required by the by-laws, with the goal toward preserving the integrity, structure and goals of the organization.

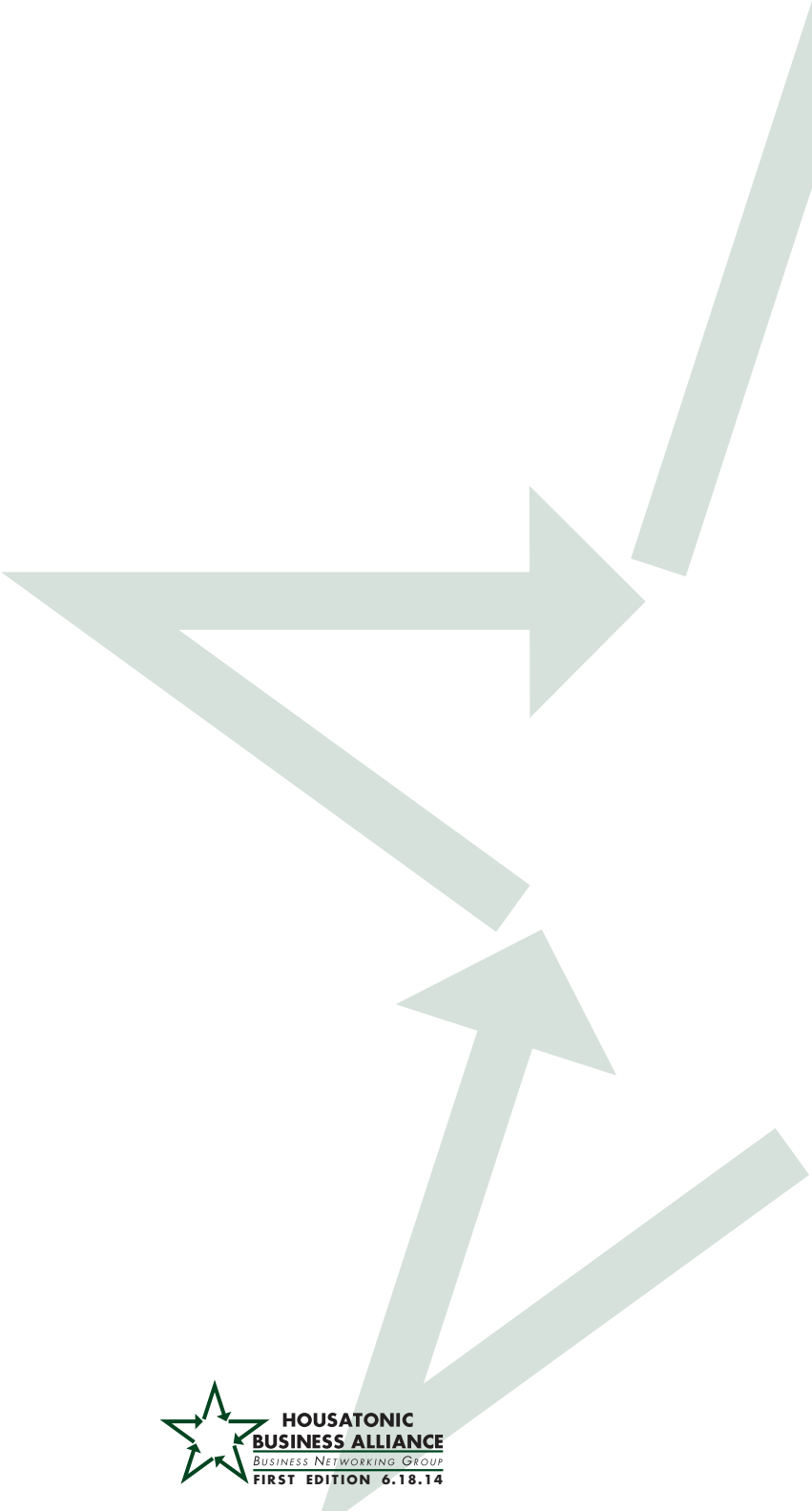
6.55 -- Limit of Committee Authority: A Committee may exercise the authority delegated to it by the Organization. Committees shall work on such issues as are within their purpose and shall make recommendations to the Membership, they shall not have authority to take binding actions independently without express authority from the Membership.

ARTICLE SEVEN: AMENDMENTS TO BYLAWS

7.1 The Membership may amend or repeal these Bylaws by a two-thirds vote of the Members at any meeting of the Organization, provided that written notice of the proposed amendment or repeal to all Members at least five (5) business days prior to the meeting at which the vote on the Bylaws will occur.

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