



## **Chapter Member Mentoring Program**

As Chapters with successful mentoring programs are larger and more productive than Chapters that do not, AmSpirit Business Connections strongly encourages every Chapter to consider establishing a Chapter Member Mentoring Program.

The purpose of a Mentoring Program is to utilize the experience of established members to empower newer members (and to a lesser extent, struggling members) to more quickly become productive participants in their respective Chapters, in terms of ...

- Referrals given and received;
- Bringing quality prospective members to the Chapter meeting; and,
- Overall contribution to the leadership and development of the Chapter.

### **Mentor Chairperson**

The cornerstone of an effective Mentoring Program is a committed and enthusiastic Mentor Chairperson. Although this office is not part of the standard Chapter officers, Chapter leadership is able to add this role to its list of leaders.

It is the role of the Mentor Chairperson to oversee the effective implementation and execution of the Mentoring program in their Chapter. It is, however, NOT the job of the Mentor Chairperson to mentor everyone.

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### During The Chapter Meeting

As an anointed officer of the Chapter, the Mentor Chair should give a report like any other Chapter officer. To this end, below is a script to follow:

“My name is \_\_\_\_\_, [Professional Category] for this Chapter, and as Mentor Chairperson I make sure new members, and existing members that would like one, are assigned a mentor who will pass on effective methods of building the necessary levels of know, like and trust to succeed in AmSpirit Business Connections.

“The goal is to assure that everyone in this Chapter is a productive member with respect to giving at least two referrals per month as well as receiving referrals ... bringing prospective members to visit the Chapter ... and contributing to the overall leadership and development of the Chapter.”

In addition, quickly announce new mentorship relationships in the Chapter and share success stories resulting from these relationships.

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### New Member Mentoring

Within the first couple weeks of joining the Chapter, the new member will meet with the Mentor Chairperson and give that person at least three 3 names of whom they would like to be partnered with to be mentored.

The Mentor Chairperson will then coordinate with one or more individuals indicated by the new member as potential mentor candidates to assign the new member a mentor (based on willingness, availability and chemistry).

Once the Mentor Chairperson assigns the new member a mentor, the mentoring process begins. Under this process, it is recommended that the mentor and the new member meet at a minimum of three times, once each month over the course of the first three months of membership.

As the mentoring process progresses, the Mentor Chairperson should get periodic feedback from both the person doing the mentoring as well as the new member to determine how the process is working.

As a suggestion, the mentoring process should use the following discussion format ...

- **Meeting 1:** The mentor should ask the new member to complete the *New Member Handbook* in advance of the meeting and then review this document with the new member. In addition, the mentor should review with the new member the goals and vision of the Chapter at this time.
- **Meeting 2:** The mentor should review and brainstorm with the new member the attached document entitled *Guidelines on Ways to Give More Referrals* and review with the new member the content and approach of the new member's first Chapter presentation.
- **Meeting 3:** The mentor should review with the new member after the fact his or her first presentation to the Chapter, discuss any outstanding opportunities (i.e.: improve 30 second commercial, improve quality of referrals, etc.) and work to identify opportunities to get the new member involved in the Chapter from a leadership perspective.

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## Chapter Member Mentoring Program

### Mentoring Existing Members

Once a quarter, using the *Guidelines On Ways To Give More Referrals* the Mentor Chairperson should conduct a 30-minute workshop and brainstorming session after the regular Chapter meeting for all members who are below the expected referral giving rate on average (i.e.: two referrals per month).

If an existing member is below expected referral rates after 6 months, the Mentor Chairperson should meet with the existing member one-on-one or assign a mentor to work with them. If a mentor is assigned, the Mentor Chairperson should monitor the mentoring relationship and solicit periodic feedback.

If an existing member continues to be below the expected referral rate after the completion of this mentoring process, the individual's membership should be subject to review with the Chapter at a regularly scheduled Board meeting.

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Program developed through the collaboration of ...

Duff Dyer, Area Director and financial advisor with The Willms Financial Network

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## Chapter Member Mentoring Program

### Guidelines on Ways to Give More Referrals

In addition to this list, be sure to review the **Referrals Maximization Checklist** in the *New Member Handbook*.

1. Put yourself in a “problem solving” state of mind. Solve any problem you run into, not just the issues you can make money by solving.
2. Talk about your network everywhere you go, with co-workers, family, friends, teams, professional contacts, clients, service provider, etc. Set yourself up as a resource to identify trustworthy service and product providers. Tell people to contact you if they need ANYTHING, you have a friend that can help them.
3. Use your surroundings. Put a “tag” on your emails that mentions AmSpirit Business Connections or the great network of people you know that can help your contacts. Put a note on your business card or a link on your website. Put our cards in your presentation materials or on the wall in your office. Put your Chapter’s materials on the counter in your waiting area or in thank you packets you send to clients.
4. Work with your fellow members to add questions to your client profiling process that will lead to referrals. Role-play the conversation with the member you are trying to help so it sounds natural and you can work out the details and feel more comfortable with the process.
5. Put your AmSpirit Business Card Caddy next to the phone. When you are waiting on hold, flip through the book and think about the members. The fresher they are in your mind at any time the more likely you are to make a referral.
6. After each client contact or interaction, as you make your follow-ups notes, think about the conversation and look for missed opportunities to refer. Use the AmSpirit Business Card Caddy to spur the thought.
7. Go to AmSpirit Business Connections events and look for categories not in your chapter. Cross-Chapter referrals count and having those contacts makes you a better resource to the people you know.

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8. Get to know every member of your chapter well. Don't miss a Lunch Assignment. Don't wait for a Lunch Assignment to go to lunch with someone you do not know well. The more you interact with your fellow members the better you will know them.
9. Take a Chapter leadership position, go to socials, do business with members. It's easier to give referrals to people you know, like and trust.
10. Know what each member's A, B and C referrals are and the particulars of how to best get them connected to a potential client.
11. Personally introduce referrals to fellow members. While the client is still with you, pick up the telephone and help set the appointment with the member. Take the member to the appointment. Watch the member with the new client. Learn more about what they do and how they interact with their clients.
12. Get out and meet new people. You won't be able to give referrals in a sustainable fashion if you don't meet new people.
13. Take advantage of professional and social media websites. Many allow you to search your contacts connections for categories that would be good centers of influence for members of your chapter. You can join AmSpirit Business Connections' LinkedIn group and connect with other AmSpirit Business Connections members there.

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