



Leads Groups Operational Responsibilities Effective 1/2023

1 Leads Group Purpose

The Leads Group program is administered by GFW Inc. for GFW Inc. members. These Leads Groups allow for members of GFW Inc. to get more out of their membership by offering the chance to connect and do business with fellow GFW Inc. members. Leads Groups are open to active GFW Inc. member/investor companies. In order to effectively run Leads Groups, officers must be elected to manage the groups and ensure smooth internal operations.

While elected officers are responsible for the internal responsibilities of the meeting, such as running the meeting, tracking attendance and leads, GFW Inc. has a responsibility of oversight and financial management of Leads Groups at large.

This document outlines the responsibilities of officer positions and GFW Inc. to ensure full transparency of operations.

2 Officers

Each Leads Group shall elect its officers on an annual basis. These officers will serve a one-year term beginning at the start of each calendar year. Officers for Leads Groups typically include chairperson, vice chair, and secretary (optional); however, individual groups may determine if they require additional officers. All officers are bound by the standard Leads Group policies and procedures along with the responsibilities outlined below.

2.1 Chairperson

The chairperson is generally responsible for the internal workings of each Leads Group. They are ultimately responsible for reporting any progress or issues to a GFW Inc. staff member. The responsibilities of the chairperson include, but is not limited to, the following:

- Run group meetings
- Ensure or delegate that the following group duties are completed at each meeting:
 - lead reporting
 - tracking attendance
 - administering prospect applications
 - keeping meeting minutes and updates (optional for group use)
 - contacting new potential members received by GFW Inc.



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- sending meeting reminders to group members and copying the appropriate GFW Inc. representative on all communications keeping them in the loop
- Remind all group members of annual dues
- Attend officer meetings or send representation
- Follow up with prospects from GFW Inc. and visitors
- Ensure that the election process takes place for prospective members and application is completed and forwarded to GFW Inc.:
 - Receive application
 - Vote on prospective new member
 - Send voting results via email, along with application, to GFW Inc.
- When running low on leads slips, inform a GFW Inc. staff member so more can be provided
- If you meet at the GFW Inc. office, please let the office coordinator know if your Leads meeting is cancelled (*24-hour notice recommended*)

Please note:

Reporting attendance and leads to GFW Inc. is a vital part of ensuring the success of the Leads Group program at large. These statistics help GFW Inc. gauge its economic impact in the community and how they are helping members grow their businesses. Since these figures are vital to GFW Inc., they must be submitted after every meeting to the appropriate GFW Inc. staff member. It is the chairperson's job to ensure this is completed.

2.2 Vice Chair

The vice chair is elected to support and back up the chairperson. While it is technically a backup position, there are certain tasks that the vice chair should assume to ensure the effective function of the group. The responsibilities for the vice chair include, but are not limited to, the following:

- Track attendance
- Sales/leads tracking
- Review and approve roster changes. For example, when a member leaves your group, send an email to GFW Inc. staff making them aware of a member's departure
- Follow up on absent members
- Coordinate with chair:
 - Follow up with prospects from GFW Inc. and visitors
 - Contact new potential members received by GFW Inc
 - Fill in for chair when chair is unavailable.



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- Assist chair as needed

2.3 Secretary

The secretary is an optional position for each Leads Group. Since this is an additional role, the secretary duties are assigned by the group chair.

3 Social Media

Group officers may decide to host a social media group in order to allow for real-time interaction among group members. If the need for a social media group is determined (i.e., on Facebook), officers are responsible for ensuring that any social media channels used for GFW Inc. Leads Groups adhere to the following conditions:

- Must be marked 'private'
- Must have, at minimum, two admins (one must be a GFW Inc. staff member)
- Messages and communications in the group must align with GFW Inc. professional values (i.e. no hate speech, respectful communication, no inappropriate content)

Any groups found not following these guidelines will be taken down by GFW Inc. immediately.

4 GFW Inc. Responsibilities

Since this program is administered by GFW Inc., the staff has a responsibility to manage the collection of dues, invoicing, and any other financial obligations directly related to the operations of the Leads Group program at large.

4.1 Billing

GFW Inc. is responsible for the overall administration of billing and payment collection of Leads Group dues. GFW Inc. will invoice, track, and communicate with members regarding the status of their dues. In the event of member nonpayment, a GFW Inc. staff member will communicate this with the member that they are removed from the group. Furthermore, GFW Inc. staff will provide a heads-up to the appropriate group chair as to the removal of the non-paying member.

- New Members:
 - Prospective members apply directly to GFW Inc. for Leads Group membership
 - New members will receive an invoice for their membership upon being elected
 - New membership dues are due within 30 days of being elected to the group
- Renewing Members:



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- Each January, each Leads Group member will be invoiced a renewal due of \$50 per group via email by GFW Inc. for the next calendar year's membership
- A GFW Inc. representative will notify the appropriate chair when a member is 30 and 60 days past due; the chair may wish to communicate with the member on this manner, but this is not compulsory
- At 90 days past due, a GFW Inc. representative will contact the member and ask them to leave the group; the group chair will also be notified of the member's departure

4.2 Oversight

- Visit each Leads Group at least twice per year to ensure visibility and guidance for the group
- Administration for Leads Groups: collect payments, produce invoices, document monthly leads and track attendance
- Catalyst for the groups by promoting the program through GFW Inc.'s website and GFW Inc. communications, to create awareness of the Leads Group program
- Maintain current roster on GFW Inc.'s website
- Ensure each Leads Group member receive personal invitations (via email) to upcoming ribbon cuttings and groundbreakings
- Provide business card holders for each group member in order to keep fellow group members cards "handy" when referral opportunities arise
- Provide lead slips for the groups



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5 Conclusion and Acknowledgement

I, the undersigned, acknowledge that I have received a copy of GFW Inc. Leads Group Operational Responsibilities. I understand as an officer of a GFW Inc. Leads Group, I am responsible for fulfilling my role to the best of my ability. If I am unable to do so, I will contact my fellow group officers and GFW Inc. in order to make other arrangements. I also understand that the Leads Group Operational Responsibilities are subject to change at the discretion of the Leads Group officers and GFW Inc. representatives.

Printed Name

Signature

Date

Officer Position

Group Name