Member Handbook

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WELCOME

Congratulations and welcome to ProVisors! You have been invited into an exceptional community of high-level Trusted Advisors. Your ProVisors membership provides you with specialized opportunities to collaborate, create meaningful connections on both a professional and personal level, learn lucrative business skills, share resources, and expand your client base.

ProVisors operates more than 180 groups consisting of 25-40 members per group. Most groups meet from 7:30 a.m. to 9:00 a.m on a monthly basis.

The meetings enable you to develop deep relationships with your peers, address specific client needs, and share information, strategies, business opportunities, resources, and contacts.

Please review this Member Handbook and use it as a resource to both familiarize yourself with ProVisors and make the most of your member experience.

We look forward to your participation in ProVisors and welcome you to call our office any time with questions, concerns, or suggestions you may have about your membership.

PROFILE OF A MEMBER

ProVisors has a specific strategy for growing and strengthening groups in order to enhance member value. The key element of that strategy involves a targeted effort to recruit new members into the organization that fit the profile of our membership and contribute to the membership at large. Not all professional contacts we make are appropriate applicants for membership.

In order to deliver a high-value experience to each of our members, several criteria must be present. History has proven that when groups do not focus on Trusted Advisors as the core members of the group, the whole group begins to suffer.

Although many types of people may bring their own set of contributions, we only consider members who fit the following profile:

Trusted Advisor: Influencer with clients who regularly seek him/her out for advice. Has the ability to make introductions to other professionals and resources both within and outside of their respective area of expertise or company/firm.

Referral Maker: Regularly makes and receives quality referrals and introductions. Professionals who are at the top of their game, as well as rainmakers with good deal/client/prospect flow who want to share and connect others. This includes younger professionals actively refining their skills at making referrals.

Professional: Reflects a high degree of competence, integrity, accountability, and accessibility. These individuals need to be in good standing, certified, and/or licensed in their respective profession.

Enthusiasm: Positive and proactive people who infuse energy, enthusiasm, and a feeling of community as well as add depth and meaning to their group and ProVisors as a whole.

You are one of these members!

MEMBER MATRIX / COMPOSITION OF GROUPS

The primary focus of ProVisors is to attract and retain the highest quality members with whom you can share business. The axiom is obvious: the more Trusted Advisors in each group, the closer the relationships and the more commerce is generated. We also know that lawyers and accountants most often serve as Trusted Advisors to their clients and maintain large active client bases. Thus, they have the greatest capacity to exchange quality referrals.

We intend to build new groups and to increase the quality of membership in the current groups. Based upon past successes and an analysis of our most successful groups, we have developed the following proposed guidelines:

Ideal Group Size: 35

5 + Accountants
15+ Attorneys
3+ Banking
1+ Consultant
2+ Financial Services
1+ HR
3+ Insurance
2+ Investment Management
1+ Marketing
2+ Commercial Real Estate

These guidelines are merely suggested numbers by category. However, more important than the quantity is the “star” quality of each member. ProVisors encourages each group to build the most effective matrix for their group

Group Leader (GL)

The role of a GL is to:

- Build and maintain a group size of 30-40 members.
- Foster the ProVisors experience, including building community and assisting members in deepening their professional relationships.

- Facilitate 12 monthly meetings annually. May replace one or two with a social/holiday party.
- Meet with his/her Executive Committee (EC) regarding membership, applicants, and the group.
- Recruit new members.
- Reinforce ProVisors' Member Code of Conduct and Ethics and Membership Policies.
- Communicate well and respectfully on a regular basis with ProVisors staff.

Executive Committee (EC)

Each group has an Executive Committee to assist the Group Leader in group leadership. Typically, the EC consists of 5 to 8 members. The GL, Host, and GLAs are almost always members of the EC.

Each EC serves similarly to a typical board of directors. Such responsibilities include:

- Inviting applicants to guest. Always having their "antennae up" to recruit new members into ProVisors.
- Meeting with candidates (EC members are put into *troikas* with candidates) and making recommendations about extending applications.
- Ensuring the proper member composition in the group in terms of senior-level Trusted Advisors/respected professionals and types of professions/specialties.
- Serving as ambassadors to greet guests and introduce new members.
- Setting an example by giving proper testimonials.
- Contacting new members and serving as mentors to help them integrate more quickly into ProVisors.
- Encouraging and stimulating commerce among members. Reminding members to think about how they can give to other members by making referrals, providing introductions, and serving as a resource.
- Recommending and deciding local policies relating to the monthly program, introduction topic, guest speakers, and joint meetings/special events.
- Providing feedback to the GL from the other members or themselves about items of concern.
- Helping to coordinate events/group social activities.
- Contacting members who are not attending or do not seem committed. Each month the GL may assign EC members to call every member who did not attend.

Group Leader Associate (GLA)

The role of a GLA is to assist in:

- Building and maintaining a group size of 30-40 members.
- Recruiting new members that meet the member profile to populate groups.
- Acquainting him/herself with all members and mentoring new members to get them integrated into ProVisors more quickly in order to maximize the first year experience.
- Fostering ProVisors' culture and reinforcing our message of accountability, sharing, and integrity.
- Emphasizing a proactive exchange of referrals, information, and resources.
- Facilitating a high-energy meeting where members have fun.
- Drawing out members who are not participating and moderating members who are monopolizing the discussion.
- Mentoring new members to get them integrated into ProVisors more quickly to maximize their first year experience.
- Following up with non-attending members and organizing group events.
- Encouraging members to regularly attend their home group and encouraging their group members to guest at other groups and special events.
- Organizing outside activities (socials, etc.) for members.
- Preparing to run an existing group or opening a new group.

GROUP MEETINGS

RSVPing

Please be courteous to our Hosts. You wouldn't show up to other professional meetings unannounced or neglect to cancel if you are unable to attend. Log onto the ProVisors website at www.provisors.com, click Group Meetings and find the meeting day for our group. Click on the acronym for our group's meeting and RSVP YES or NO if you will attend. If you are guesting, click the Request to Guest button and the Group Leader will email you back to either approve or deny your Request to Guest.

By RSVPing, you assist your GL and Host so they know how many members will be attending, how many candidates and guests from other groups may attend, how many copies of handouts to make, how much food to purchase, and how many chairs are needed for the meeting.

Introductions/Proper Testimonials

We do business with people we know, like, and trust. Your introduction or elevator speech (a short presentation of what you do) is to pique curiosity and leave the other person wanting to learn more. Include a well-crafted 20-second "mini-case story" to illustrate why a member would want to call you to help them with their client.

Testimonials are an important part of our meeting. Proper format is required. They are most meaningful when they tell a story: who referred you, what firm they are with, what they do, a brief description of the matter, and what you were brought in to do. If you and the referrer are collaborating, please elaborate to educate your fellow members about why and how your disciplines come together. Thanking your fellow members has never been so good for your business. As an example:

> *I would like to thank Bob Smith, a CPA and partner of ABC Accountants, and a member of Group ABC1. Bob brought me in on a client whose two partners wanted to take their business to the next level. Their business was lacking financial controls, and the partners were not in agreement on where the business was going and how to get there. That is why he brought us in to help. My name is Susan Jones of XYZ Consulting Firm.*

The testimonial could stop here or continue as follows: *Together with Bob, we introduced financial controls and budgeting, assisted the partners in setting goals and putting together a strategic plan, then helped them in its implementation.*

TIPS FOR A SUCCESSFUL TROIKA

At each group meeting, members and guests are assigned to a “troika,” which is a no-host breakfast, lunch, or coffee meeting of 3-4 people scheduled during the month following the meeting, designed to foster deeper relationships.

Troika Policies

- Members should always bring a business card to meetings. This is important so that the member is matched into troikas at the meetings. It is also important for Group Leaders to have a record of member attendance in order to keep track of it for overall attendance tracking and statistics for the group
- If you know that you have circumstances which prevent you from participating in a troika during a specific month, still turn in your card. Just write "No Troika" on your business card. It will still be copied on the sheet at the bottom of the troika list.
- You must attend a group meeting to be assigned to a troika. However, if you cannot be at a group meeting, you may request a copy of the troika sheets and contact members directly to ask if you may be added to a specific troika.

- If you cannot be at your group meeting, you may send another Trusted Advisor from your firm in your place.

Prepare for the Troika

- Bring your calendar to group meetings so that you can schedule a troika that day. If your secretary keeps your calendar, have a hard copy of the next month so you can make plans. It is inconvenient for everyone to email back and forth trying to find a date after the meeting.
- Appoint someone to confirm the troika a few days before the meeting. Exchange cell phone numbers so that if you are going to be late or cannot attend, you will be able to notify others.
- Never cancel a troika via email the morning of the troika. Remember, most people are not in their office at 7:00 a.m. because they are coming straight to the troika meeting. If necessary, call to cancel and send an email.
- Confirm the location and/or city of the troika. *i.e. Is it Corner Bakery in Encino or Calabasas?*
- Log onto the ProVisors website to read your troika partners' member profiles and/or log on to your troika partners' websites. This way, you will have a general idea about what they do and what more you want to know. It will help you stay focused on the conversation.
- With pre-planning you can think about how you can help fellow members and their clients, and to whom you can introduce them. You can identify other partners at their firm who have different specialties. Your troika partners will see that you took the time to find out what they do. They will appreciate it and, hopefully, model after you to do the same for others.

At the Troika Meeting

- Listen. Think about how you can help the others in your troika and how they might be able to help you.
- Be courteous and unselfish. Prepare to learn more about others first. Don't dominate the conversation. Each person should be able to discuss their business.
- Don't just say what you do. Give examples and tell stories. Most people understand and remember when they can visualize what you do. Invite your troika partners to ask you questions to help them better understand what you do, how you add value and how you could collaborate with them.
- Ask each person to describe two of their clients to further help you understand what they do.
- Ask open-ended questions. Where do you spend most of your time? Who is your typical client? Where does the majority of your business come from?

- Introductions are key. Offer to set up a meeting to introduce a member to the type of professional who would generate the most business for them. Ask them to do the same for you.
- Ask fellow members to invite their key referral sources to a ProVisors meeting. Give examples of Trusted Advisors who have an established cadre of ongoing clients who see them as a valuable advisor in more than their specific area of expertise.
- Give fellow members praise and ask if your troika partners know that person. Think of ProVisors members unknown by your troika partners who may benefit from an introduction.
- Leave an impression. Feel free to send information ahead to your troika partners as long as it is not sales material.
- Protocol is that any bill is split evenly among the attendees. If you feel what you ordered was more than what other members ordered, offer to contribute a larger amount toward the total.

Follow-Up

- If you said you were going to make a call or contact someone to make an introduction, do what you say; then, call your troika partner to let them know what you have done.
- One meeting may not be enough. Additional meetings over time will increase the probability of referrals. Send updates about your practice; new cases you have worked on to show how you can be helpful to referral sources and their clients; remind each other about professionals who help build your practices; make new introductions; and share innovations in your field.

REFERRALS

How Long Does it Take to Receive a Referral?

- Members should come prepared to share their network, including experiences, introductions, technical experience, and client referrals. Those ProVisors members who are connectors benefit faster from ProVisors relationships. We are a relationship-based organization, not leads-based. It takes time to develop relationships of trust.

Referral Etiquette

To eliminate any confusion regarding the protocol for referrals between and among ProVisors members, the following guidelines are recommended:

- Referrals are at the core of ProVisors. Dynamic and productive referral relationships are based on communication, mutual respect, and reliability among ProVisors' network of professionals. To maximize effectiveness and eliminate confusion regarding ProVisors' member referrals, please consider the following guidelines:

- Always go back to the original referrer/initiating party (IP). If at any time the client asks the referring party (RP) for a referral, it is standard protocol that the RP should go back to the IP and let them know the client is asking for a referral prior to giving a referral. That way the IP has the option of coming back to the client with their own referral. Or, the IP may offer for the RP to refer his resources to fill the client's need.

Know Your Referral Sources

- Understand the capabilities or practice of the individuals to whom you refer work. This allows you to make referrals with confidence and helps ensure a successful transaction. If you are unsure of a referral source's ability to handle a particular project, postpone any action until you can gather the necessary information to make an informed referral.

Options Are Appreciated

- Unless it is a "bet the company" kind of situation, consider providing more than one referral when possible. Your client will appreciate the opportunity to have a choice, and may find one source to be a better match for his or her personality or budget. This approach gives you the opportunity to provide potential new business to more individuals within your cadre of referral sources.

When it's Not the Right Fit

- While every referral is appreciated, not every referral is appropriate. If you are unable to meet the needs of a referred prospect (or, if during your conversation with a referred prospect you learn of an additional need), please direct the individual back to the IP. A call to the IP advising him or her of the situation is encouraged. Always give the IP the opportunity to communicate with his or her contact and the chance to readdress the initial request for assistance or provide a different referral.

Communicate Your Appreciation

- Acknowledge referrals whenever they come your way, regardless of whether a transaction occurs. Your colleagues will appreciate the recognition of their efforts to help build your business and will be more inclined to direct other prospects to you. Express your high regard for the IP to his or her referred prospects and you can help strengthen their relationships as well. Observe privacy and political protocol where appropriate.

- If the referral came from a member in another group, the best way to thank that person is to guest at their group and give an in-person testimonial to their fellow group members.

Communicate Expectations Upfront and Provide Follow-Up

- Remember that the IP, acting as a Trusted Advisor, has directed an important contact to you for service. Respect this relationship by keeping the IP informed of your progress in a timely and succinct manner. When you are the IP, be specific about the frequency of follow-up communication you require. Courtesy is the standard. Respect each other's time and "need to know" information, as well as any fiduciary and privacy requirements.

Referral Fees

- The ultimate spirit and intent of ProVisors involves the free flow and exchange of ideas and potential clients. As a result, unless otherwise customary and discussed at the time of the referral, it is not acceptable to expect or demand referral fees for prospect leads. In those cases where referral fees are customary, the fee split should be discussed at the time the lead is given.

Candidate Referrals

Wouldn't it be great to reward your best referral sources with an introduction to ProVisors? Assist our group by referring Trusted Advisors you know to ProVisors. We continue to grow by "Invitation Only" so it is important that all members bring new candidates to the organization. Please direct candidates to complete an application online or provide the ProVisors office with their contact information so they can make sure your candidates receive all information needed to begin guesting at our meeting or other ProVisors' group meetings.

How do I refer a Trusted Advisor to ProVisors?

Do you know a Trusted Advisor who you would like to introduce to ProVisors? Contact your Account Manager or MDD or a ProVisors staff member, or ask the candidate to complete an application by clicking on Refer a Candidate from the member portal on www.provisors.com. We will help them find an appropriate group with an opening for them to attend as a guest based on their profession/specialty and geographical preferences.

Before ProVisors invites your top referral sources to attend a group meeting, you will be asked to confirm that you are able to recommend the candidate as a Trusted Advisor. If you are unsure, contact the ProVisors office.

Once approved by the GL, the candidate will be invited to attend the next group meeting as a guest, at which time he/she will be placed in a troika with an EC member. As a reminder, non-members may guest up to two times at ProVisors groups over a two-month period before making a decision to join.

After the troika, the GL and the EC will determine if the candidate should be extended an invitation to join ProVisors and their group. In the event the EC feels the candidate might be a very direct competitor of an existing group member, it is suggested that the existing member speak with the candidate to see how they might collaborate. The member then reports back to the GL about their discussion and a decision is made whether or not to invite the candidate to join the group.

If the EC agrees to invite the candidate to join, the GL will ask the ProVisors office to extend membership so the candidate may join. The ProVisors staff will reach out to the candidate to activate their membership to the group by processing membership dues. ProVisors membership will begin once the membership dues are received and processed.

The GL and EC will make a decision about whether the applicant is a good fit with their group and will notify the applicant and the ProVisors office of their decision. If they believe the applicant is suitable for ProVisors, but is not a good fit for their group, then the ProVisors office will try to locate another appropriate group for the applicant to attend as a guest.

GUESTING

Guesting is participating in home groups outside of your own. Members have the ability to guest up to three times per calendar year at any other ProVisors group meeting. Guesting is dependent upon space availability and approval by the Group Leader. Your guesting allotment resets on January 1st, regardless of your anniversary date.

Why guest?

If you only attend the meetings of your ProVisors home group, you deny yourself the full benefit of membership. The opportunity to develop deep relationships with Trusted Advisors and respected professionals from many different professions and specialties, who serve as resources for each other’s clients, is invaluable.

- You can better expand your resources in terms of contacts and Trusted Advisors.
- The more the membership is familiar with your skills, expertise, and personality, the more likely they are to remember you in a needed situation.
- You can better communicate your needs in the presence of larger numbers of members and via other group meetings.
- The professional development benefit is very valuable as most meetings offer a forum, a focused presentation, or a discussion item that is applicable to all present.
- Attending additional meetings allows you to participate in more troikas and this is where the meaningful relationships often foster themselves.
- The Group Leaders are a vital part of commerce in ProVisors and having the GL familiar with you and your expertise creates a reference point for GLs to assist their members with needs, deals, and wants as they arise.

Guesting Goals

- ProVisors suggest guesting at least once per month; try to guest two or even three times per month, if you can. Highly active members target for three to four meetings a month outside of their home group.
- Bear in mind each meeting you attend will, by default, place you on a troika unless you opt out, so this is an additional time commitment from each guesting opportunity. When guesting, it is customary for troikas to be scheduled in the city of the group in which you guested, regardless of where your home group or office is located. Ex. If a member in Encino guests in Century City, he/she should expect to participate in a troika in Century City.
- Remember the responsibility we all have to attend our own group meetings as regularly as possible. **Guesting is not a substitute for your home group meeting.**

Guesting Protocol

- Look at the calendar online and RSVP to a selected meeting as soon as possible and well in advance. The popular meetings book up fast.
- Plan your guest visits so they work well for you geographically and from a time standpoint.
- Decide after you visit a meeting the first time, provided you would like to visit again, whether to attend three consecutive months in a row or if it s better to attend once every three to four months for that year. There are pros and cons to both methods.
- Notify the GL if you are unable to make a meeting for which you have RSVP'd no later than the afternoon prior if possible. You can cancel your RSVP online up to the day prior to the meeting.
- Apologize to the GL if you are unable to make the meeting due to unforeseen circumstances and do this the day the meeting has occurred if at all possible.
- Know the location and suite. Be prepared to pay for parking. Be punctual and arrive early if possible to meet with members and applicants before the meeting starts.
- Study the membership make-up on the ProVisors website/in the confirmation email before the meeting so you can learn who is a member and possibly select someone with whom you would like to troika.
- Bring your ProVisors name badge, a pen, and your calendar/phone (for scheduling your troika and sharing cell phone numbers), and dress appropriately. Remember that you are either representing your firm or your professional self; business attire is recommended.
- Bring business cards for troikas and introductions.
- Introduce yourself to the GL upon arrival and thank him or her for allowing you to attend.

- Tell the GL if there is a particular member with whom you would like to troika in advance of the meeting either verbally or by email. You can also write “see reverse” on the front of your card when you turn it in and write your requested person(s) to troika with on the back.
- When presenting yourself at a meeting, identify your name, business, and the group in which you are a member (this is important so people have a reference point to find/follow up with you). Be respectful of the “air time” afforded you. Keep it short, simple, and to the point.

In addition to participation in a home group and the ability to guest up to three times per calendar year at any ProVisors group meeting, you have the opportunity to participate in Affinity Groups.

AFFINITY GROUPS

Affinity Groups are sector or industry specific groups. They are designed to provide members with targeted opportunities to build relationships with other members working in similar fields or specific markets. Affinity Groups will have an educational component in addition to providing a platform for creating connections with other members. Some Affinity Groups provide continuing education credits.

Attendance in an Affinity Group is subject to availability and Group Leader approval.

Affinity Group meetings are listed on the website calendar and in the ProVisors monthly Affinity Group emails.

Affinity Groups include:

- Branding, Licensing & Intellectual Property
- Cannabis
- Distributors & Manufacturers
- Estate & Succession Planning
- Family Business
- Food
- Growth (For members ages 40 and under)
- Healthcare
- Human Capital
- Innovation
- International
- IT

- Lawyers
- LGBT
- Mergers & Acquisitions
- Middle Market
- Nonprofit
- Real Estate
- Tax Masters
- Transitioning Business Advisors
- Women

If you want to guest at an Affinity Group, visit the calendar on provisors.com. If, after attending the group once, you want to become a member of that Affinity Group, contact the Group Leader (whose information is posted on the event calendar) for approval.

MENTOR PROGRAM

New Member Accelerator Events: These networking breakfasts or lunches are designed to help new members integrate more easily and more quickly into ProVisors. The Accelerator portion of the meeting will include many tips, including how to get the most value from guesting, how to benefit the most from troikas, referral etiquette; how to successfully give a proper testimonial; and how to use the website to the fullest.

Mentor Program: Our history shows that member retention is higher when a new member feels their first 12-18 months of membership is successful. With GLs, GLAs, and EC members working in tandem with the ProVisors office, we hope that new members will have a better understanding of how ProVisors can be valuable to them and their clients, as well as how they can be more valuable to ProVisors. Each new member will be paired with a GL, GLA, member of the EC, or another seasoned member in their group.

Embrace this program. It's designed to assist you in integrating in ProVisors better and more quickly. Rely on your mentor to answer questions you have about ProVisors and your group. The ProVisors office can also assist and answer any questions you have.

If you have not been assigned a mentor, please contact your Group Leader. If you have received a mentor and have not yet connected, please contact your mentor to set up some time together.

If you are a mentor, this is a chance to give back and help other members have a successful experience in the ProVisors community.

EVENTS

ProVisors Special Events

ProVisors sponsored special events are large region-wide events that occur every few months. These events range from casual morning networking events, evening mixers and holiday parties to educational workshops and presentations. We encourage members to attend at least two special events each year.

Group Events

Individual group events promote unity within a home group. ProVisors believes that a greater amount of commerce is generated within a group that has the opportunity to get to know each other and to generate an atmosphere of "know, like, trust" that leads to a referral. Depending on the group, these socials are held a couple of times a year, and may be held as a joint social with another group.

Joint Meetings

Occasionally, groups will combine for a joint group meeting. These joint meetings have some of the same elements as a regular group meeting with a wider range of attendance and opportunity to meet ProVisors members from another group.

MEMBERSHIP DIRECTORY

All members have the ability to create a profile within our national membership directory, a phenomenal resource for you to connect and collaborate with members outside of your home group. In addition to learning and comparing the skills and specialties of other Trusted Advisors in your region with whom you may wish to collaborate or meet one-on-one, you may find that getting to know members in other regions will benefit your clients as well. For instance, some of our members in Boston have done business with members in Los Angeles — and vice versa!

What should go into my member profile on provisors.com?

Your member profile on the ProVisors website is accessible to all members nationwide. While you may edit your profile at any time, we recommend that you set aside a window of 20-30 minutes to fill it out thoughtfully and completely as soon as you are able.

You are encouraged to fill out all of the fields under your member profile. Leaving fields blank does you a disservice. Why? Because when a member compares you with another Trusted Advisor who does similar work, the other member will stand out. Your profile is a chance to highlight exactly why other professionals should do work with you and what makes your services unique.

Some guidelines are as follows:

Photo

A current, professional color headshot is recommended. You should be the only individual in the picture. Anything other than a photograph of yourself will be removed from your profile by the ProVisors office (this includes illustrations, photographs of objects, quotes, logos, etc.) The reasoning behind this is twofold:

1. ProVisors is a professional organization and you should want other members to view you as a high-level professional.

2. Many members use the photo list emailed out prior to a meeting to familiarize themselves with the faces of the professionals with whom they most want to connect. If another member cannot identify you, you may lose out on potential business.

In addition, your photograph should be clear — not pixelated, faded, stylized, or blurry. As a general rule, and to avoid your photo becoming cropped, please upload a high-res version of your photograph no larger than 1 MB in size. If you have any trouble uploading your photo, please call the ProVisors office for assistance.

Member Bio

The member bio section should include a succinct message that highlights your area of expertise and special niches. This should be no more than 2-3 sentences in length. You will be able to expand on your services in-depth in other areas of your member profile.

As your member bio is the snippet that appears on the photo list emailed to members prior to group meetings, you'll want to let others know, at a glance (not a novella), who you are and what you do.

Your member bio also includes a place for you to add a direct link to your company website or personal website or to your LinkedIn profile so that members can access further information about your professional services.

Be sure to add your current contact information so that others can reach you for business. You'll also want to confirm that your specialty is correct. It is possible to add more than one specialty; however, we recommend that you limit your specialties to no more than two. This will help differentiate you from other Trusted Advisors.

The Services field is a place for you to expand on your member bio and go in-depth into the types of service you provide or the transactions you oversee.

Clients Served is a place you can list the types of clients with whom you've worked or want to specialize in: i.e. "women battling custody issues" or "clients accused of tax fraud," etc.

If you work heavily with particular industries (such as restaurants, distributors, entertainment, etc.) the Industries field is where you should highlight this information. You don't need to list every single industry you've done business with throughout your career; feel free to simply list your "sweet spots" or the industries within which you'd most like to do more business.

Call Me When is a place for you to write a sentence about how you find solutions for your clients. i.e. *Call me when your client has inherited a large sum of money and needs help investing it.*

You can feel free to add a link to a digital 1-sheet in your member bio that summarizing your services as well.

MEMBER RENEWALS

All new members are on probation for the first year. Membership renewal is at the discretion of your group leader. Renewal is based on your commitment to the responsibilities of membership, which include 75% attendance at meetings and troikas, and proactive collaboration, referrals, and information sharing with other ProVisors members

ProVisors membership dues are annual. On the 10th of the month prior to your renewal anniversary month, you will be emailed to let you know that your payment will be due the following month.

When you log on to the website and go to the My ProVisors page, you will find your invoice so that you can pay your dues online. If you prefer to pay by check, please send a check made out to ProVisors to the ProVisors office.

If you do not provide payment by the 10th of the month in which it is due, your access to the member portal on the ProVisors website will be discontinued. Your membership will fully expire on the 55th unpaid day.

SABBATICALS

Occasionally, members need to take a sabbatical from ProVisors for personal or professional reasons. If you plan on taking a sabbatical, you must talk to your GL prior to calling the ProVisors office to determine the amount of time you'd like to take and when you'd like your sabbatical to begin. As a general guideline, ProVisors approves sabbaticals up to six months, although the amount of time is subject to your GLs approval. If you have RSVP'd for any events ahead of time that will take place during your sabbatical, your RSVPs will be cancelled.

In order to take a sabbatical, you must have time left on your membership. For example, if you have seven months left on your membership, those seven months will be put on hold. During your sabbatical, you will lose access to the membership directory as well as the ability to participate or guest in all groups. Once your sabbatical has ended, you must reach out to your GL for confirmation that it is okay to return to the group. At that time, you will regain access to all of our membership benefits and your membership will then expire seven months later (or however many months you had left on your membership when your sabbatical was made official), upon which your membership fees will be due.

MAKING MEANINGFUL CONNECTIONS

- Make a meaningful connection with another person by taking a sincere interest in them.
- It is not a numbers game. Running through a room of people throwing your business cards at everyone does not foster connections. However, please bring business cards for people you meet.
- Listen, ask questions, and get to know something about each person you meet.

Key Elements

• Wear your name badge on your right lapel (opposite your heart). Thus, when you extend your hand to introduce yourself your name tag will naturally move forward and will be most visible to the other person.

• If carrying a beverage, do so in your left hand. Thus, when you extend your hand to introduce yourself, you will not have to juggle your beverage, nor will your hand be cold and wet from an iced drink or hot and clammy from a hot drink.

• Make eye contact but do not stare.

• Don't just talk about yourself. Listen to the other members.

• Don't be a reporter who unrelentingly asks question after question. Allow a dialogue to take place.

• At a ProVisors event, don't try to meet everyone in the room. Try to make a few meaningful contacts and lay the foundation for a trusting relationship to develop.

Social networking is also an increasingly vital way for you to promote your business and gain a following. For more information on how to use Facebook, Twitter, LinkedIn, and other social networking tools, look for our Social Networking document on the ProVisors website under Resources.

MEMBER TIPS

Tips to Help Maximize Your ProVisors Experience

1. Print out the Photo List in advance of a meeting to take notes about attendees as they speak and to scope out specific individuals to request for a troika.
2. Set up "unofficial" meetings/troikas with members other than those with whom you've officially been placed in a troika.
3. Participate in Affinity Groups. Lawyers and LLP groups are especially powerful for attorneys.
4. Volunteer to give a "member spotlight" or speak to your group or other groups. Approval is needed from your GL.
5. Take advantage of ProVisors' LinkedIn group.
6. Take advantage of Needs, Deals & Wants and announcement options through ProVisors' website to keep members apprised of your accomplishments, as well as your firm and client needs.
7. Make yourself valuable to fellow members through referrals, strategic introductions, and as a resource.
8. Attend your home group meeting and guest at other group meetings regularly.
9. If you have a testimonial for someone other than in your home group, attend that other member's home group meeting and give them testimonial in front of their home group. Not only will that member appreciate the effort you have made, but this will ensure your own visibility at that group.
10. Keep a running list during the month to remember who to acknowledge at monthly meetings.
11. Find ways to communicate what you do to others in an interesting or memorable way; tell a story that showcases how you help your clients so others can understand how and when to refer you.
12. When you participate in a troika, make an effort to both find out and share something personal about the others at your table (hobby, family, travels, favorite restaurant, movie, etc.)
13. Always ask others in your troika how you can help them. If you promise to do something, follow through and do it. Offer to connect with them on LinkedIn.
14. Use the troika as an opportunity to explain what you do .
15. Ask others, "What are you working on?" Introduce what you do and ask when to refer them.
16. Ask your clients a lot of questions to identify needs and create opportunities to make referrals.

17. Let your client know that these are peer-level, accountable relationships, so both good and bad feedback is essential and permits you to intervene and/or control, when appropriate. Setting this expectation builds trust and respect with clients and other members.

What makes a good ProVisors member?

ProVisors members are characterized by:

- Integrity, accountability, accessibility, and responsiveness.
- Technical competence and experience in their professions.
- Attending meetings “prepared” to share valuable and timely information with the group in their area of expertise.
- Commitment to building relationships to get to know other members of the group, the services they provide, and the type of clients they serve. Proactively contacting other members (not just waiting for a troika).
- Authority to refer and to act on referrals. Regularly exchanging referrals, resources, and contacts with other members and being recognized for doing so in the “testimonials” portion of the meeting.
- Introducing and inviting other high-quality professionals to ProVisors.
- Observing referral and non-solicitation etiquette, as well as the Member Code of Conduct and Ethics and Membership Policies.
- Attending at least 75% of group meetings and participating in troikas.
- Attending ProVisors special events/mixers.
- Guesting at other ProVisors groups.

Ten Tips to Enhance Membership Experience

Member Profile/ProVisors Website
Does it clearly let people know exactly what you do — and what you don’t do? Are your skill sets, areas of expertise, and strength offerings to clients fully described? Is the content loaded with a strong presence of “key words” that can be found by a search?

Attendance
Target for 80% or higher attendance at all home group meetings/events. Arrive early/stay late. Strive for 1-2 additional group meetings per month with perhaps pre-determined troika requests. Challenge yourself over time to visit each group within the region with a plan of who you wish to meet.

Communication
Prepare for what exactly you plan on saying when called upon in any meeting. Create interest by stating your firm, name, and focus in places other than the beginning of your dialogue. Be sure that when all is said and done, people will remember what you have said and done favorably.

Troikas
Know your agenda in advance, come prepared to participate, and leave with action items for follow-up. Bear in mind that some of the best troikas actually involve only two members. Go outside the process and expedite your fostering of relationships by doing one-on-ones.

Who Do you Know/Who Knows You
Strategize by identifying your strongest alliances within the organization. Foster these relationships diligently. Get to know the Group Leaders and be sure they have an understanding of what you do. They, in fact, are the greatest facilitators of commerce within the organization.

Relationships
Track who is important to you, what you have done to the help them, and when to follow up. Let those closest to you know what you are looking for in opportunities and they will help you find it. Always be on the outlook for new members who can bring additional resources to ProVisors.

Reciprocity in Thoughts & Actions
Attentively listen and think of ways you can provide opportunities/create introductions for others. Go out of your way to provide expertise and counsel. Share experience as a resource. If you willingly give all of the time, you will proportionally increase what is bound to come back to you.

Invest in Your Investment
Know exactly what your membership activity costs in both time and money. Measure this investment in hard cost and time. Create a plan to ensure a return on your investment.

Fraternalism
ProVisors membership is fraternal in nature. Capitalize on this! Know that you are part of an organization with benefits above and beyond those you experience within your home group. Within reach to you as a member are relationships and resources in 100+ member groups comprising over 3,000 professionals in California alone. With the mere mention of being a fellow ProVisors member, our members tend to willingly engage in the fostering of relationships and make a practice of helping one another.

Perception/End Results
Much is driven within the organization by your value as perceived by your fellow members. The greatest successes within ProVisors are not so much based on who you know but, more specifically, who knows what you know how to do!

PROVISORS VALUE OF THE SEAT

Value of the Seat encourages members to have the mindset of sharing (direct business referrals, introductions, technical knowledge/resources) to deliver value and generate commerce for all members.

What is Value of the Seat?

- Access to resources
- Being relevant
- Opportunity to learn/become a Trusted Advisor
- Access to technical/market knowledge, introductions/connections
- Reciprocal environment
- Having your antennae up together with the knowledge to help others
- Access to members across the US
- Access to a robust searchable website
- Access to post to Needs/Deals/Wants
- Opportunity to develop personal branding
- Opportunity to bring in candidates who will spread your brand across ProVisors
- Leverage — other members will market for you, once “know, like, trust’ is established
- Brain trust for advice
- Strategic alliances between members
- Opportunity to start relationships so they can deepen, which may lead to commerce in the future. Ex: members get introduced to business owners who may not need a referral for selling their business until years later, but they will think of the member when they are ready.
- Community/small world
- Opportunity to grow and learn/complete marketing plan

Value of the Seat is not one size fits all. Certain points will resonate with some members, but not all. However, they all lead back to community and commerce.