



## Welcome to ProVisors

We're excited to welcome you to our community of Trusted Advisors. Through your membership in ProVisors, you'll have the opportunity to leverage our proven system to receive business referrals, have access to an amazing network of trusted advisors to help you serve your current clients, build your personal and firm brand and make lifelong friendships with like-minded professionals.

You've made a great investment in yourself and your business by joining ProVisors. We want you to maximize your membership and realize a great return on that investment. With that in mind, it's important to focus on your first 30 days, and recognize that you'll get out of this experience what you put into it.

### 3 Tips to Kickstart Your Membership

- 1. Read this document!** The full Member Handbook and Code of Conduct (found at <https://www.provisors.com/resources>) will answer all your questions, but this QuickStart Guide is intended to give you enough of the key details so you can put your membership to work immediately!
- 2. Login to The Hub:** <https://hub.provisors.com>  
Complete your Member Profile – see below for more details on how to approach this.
- 3. Schedule your New Member Welcome Call** with a Member Service Representative if you haven't already – the office line is 818-382-6496.

## What You Need to Know to Get Started

### Home Group

Your Home Group is the heart of your ProVisors experience. These monthly meetings are where you will form your core relationships and live our motto of “Know. Trust. Like. Refer.” To maximize your membership and accelerate results, target 100% attendance for the year at your Home Group meetings. To get started, RSVP for your first meeting on The Hub!

## What to Expect During a Meeting

While each meeting might flow a bit differently, there are a few key elements you can expect in every meeting:

**Informal networking:** Arrive (or login) early to meet people before the meeting begins.

**Introductions:** Be prepared to share a 45 second professional introduction consisting of:

- Your name
- Your organization
- The primary problem you solve for clients
- A memorable, 1-2 sentence value proposition that includes who your ideal client is

**Testimonials:** Considered the currency of ProVisors, Testimonials follow a specific framework to recognize referrals. When offering a Testimonial in a meeting, you stand up and express your appreciation by giving a short promotion for the person who referred you, thereby elevating their brand as well as your own. The Testimonial should be genuine, heartfelt, and more about the other person than yourself.

**Needs/Deals/Wants:** If time permits, Members will be allowed to briefly share any help they're seeking on a personal or professional basis (eg. hiring a key role, teaming opportunities, etc.). Note: business-related requests can also be shared electronically through The Member Exchange on The Hub.

**Troika Assignments:** At the end of each meeting, you will be matched with two other Members to establish a time to meet-up for a Troika. A Troika is an informal, non-hosted meeting of three people (usually over a coffee, activity or virtually) scheduled during the month following the meeting, designed to foster the "Know. Like. Trust." motto.

## Other Ways to Maximize Your Membership

Be sure to read the Member Handbook for more information on other ways to maximize your membership, such as through Guesting, Affinity Groups, and Accelerator Workshops.

# Checklist

Here's our best advice on what to do in your first 30 days to set yourself up for success.

- Complete your Member Profile on the Hub as soon as possible.
  - Be sure to post your picture so we can feature you in our monthly Newsletter.
  - Create a precise and concise Short Bio so other members understand “who you are” and “what you do” at a glance. The short bio is limited to 250 characters, so include keywords in your description about your services and specialty. You can add more detailed information to your Full Bio.
  - Develop clear answers for "call me when" and "who is my ideal client."
  
- Attend an Accelerator Workshop. Your Member Services Representative can help you schedule this during your onboarding call, or you can search the Hub for the next one in your region.
  
- Connect with a mentor from your Group. If one hasn't automatically been assigned, ask your Group Leader for guidance. Mentors are magical. A good mentor can help you:
  - Prepare your introduction or powerful Testimonials.
  - Meet other members! Everyone is here to help you succeed.
  - Devise a guesting strategy.
  - Point you toward Affinity Groups that might be a good fit.
  - Answer your questions.
  
- Attend your first Home Group meeting.
  - Prepare a brief but memorable introduction so people are clear on what you do.
  - Be sure to stay for your Troika groupings to connect more deeply with other members.
  
- Start connecting with other Group members:
  - Schedule coffee or a virtual meeting with other Group members to build your knowledge of resources within the Group.
  - Become a member of your regional ProVisors LinkedIn Group to keep up with members and post your own awards and achievements.
  - Check out other members on LinkedIn and reach out as you spot shared connections.
  - Request to Guest at other meetings as often as you're able – it raises your profile!
  - Show up! Attend your Home Group meetings regularly and arrive early for networking – you'll get to know people faster and in a more meaningful way.
  - Find an Affinity Group to join. If you're in a newer region, you can attend other regions' Affinity Groups virtually. Your Group Leader will be able to offer some guidance.
  
- Create a goal for business generated through ProVisors and identify what action you will commit to in order to drive those results.
  
- Identify opportunities to make referrals – get known for being a giver. It comes back to you!

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New England New York Orange County San Diego San Francisco Seattle Silicon Valley

provisors@provisors.com (888) 684-4437