



**CHAPTER  
LEADERSHIP TEAM  
MANUAL**



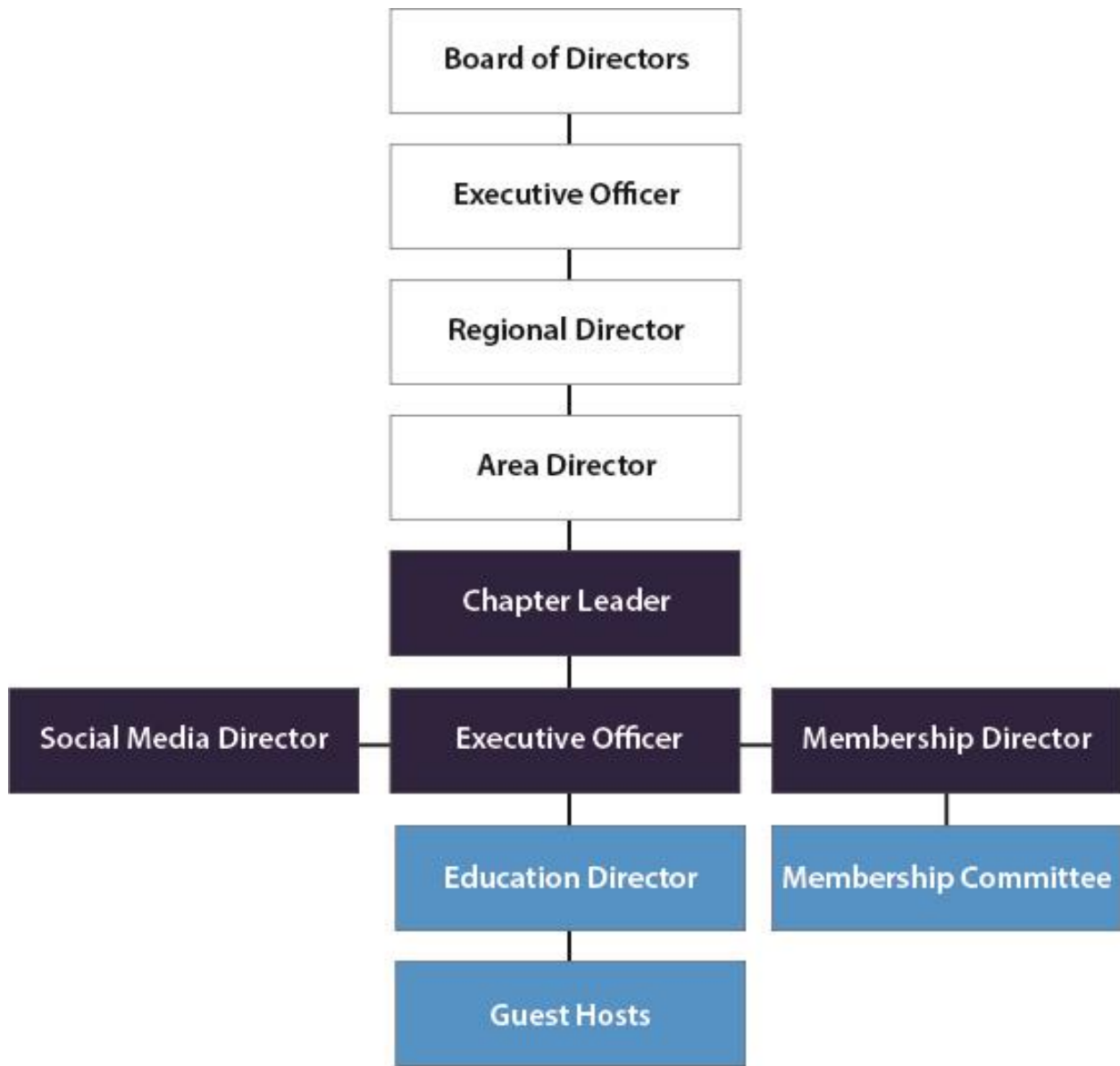


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## GBN ORGANIZATION CHART





## Section 1 - GBN OVERVIEW

### 1.1 Using the Chapter Leadership Team Manual

The Chapter Leadership Team Manual is designed to contain all the Leadership and Support Team information within one document. This PDF is searchable; you can also click links in the Table of Contents as well as throughout the document to quickly take you to the respective section. This manual is updated as needed. Be sure you have the latest version.

### 1.2 History of the Organization

Great Business Networking (commonly referred to as GBN) grew out of the belief that local business owners can improve their surrounding community through improved business relationships. Our philosophy is to focus on *Friends First. Business Second.*

We know when business friendships are improved, there will be an increase in revenue and referrals being passed between professionals. Our members develop meaningful connections through our networking Chapters and a variety of diverse events throughout the country.

The organization is setup as a 501(c)6 Business Non-Profit and was founded in 2011 by Alan Thompson, the owner of a local Marketing Agency in Charleston, South Carolina. The organization was acquired in April 2021 by Todd Cartner, a real estate agent with over ten (10) years' experience in referral networking. He currently serves as the Executive Director.

### 1.3 GBN Philosophy & Principles

Being successful in GBN means you need to be a positive and supportive Member of the organization. This requires commitment to your fellow Members as well as to live by the philosophy of *Friends First. Business Second.* We believe by becoming great friends that business will be automatically passed between our members.

#### GBN Mission Statement

The Mission of GBN is to attract like-minded professionals in the community to grow their network and business together.

#### GBN Philosophy

Our philosophy is Friends First. Business Second. We believe if we become great friends and learn to Know, Like and Trust each other, the business will come automatically.

#### GBN Vision Statement

Our Vision Statement is to be "The Most Important Marketing for Your Business."

## GBN Code of Ethics

When evaluating Members, please apply the following GBN Code of Ethics to the various situations. This is not meant to be a list of specifics but can be applied in principle to almost any conflict or complaint.

Upon acceptance to GBN, I agree to abide by the following GBN Code of Ethics during the time as a Member of the organization:

- I will follow up on the referrals passed to me in a timely manner
- I will pass only quality referrals
- I will treat my fellow members in a professional manner
- I will uphold the standards of Great Business Networking

Professional standards outlined in a formal code of conduct for any profession supersede the above standards.

## 1.4 General Policies

Member policies were created and are maintained by the GBN Advisory Council. It is the responsibility of the Chapter Leadership Team to ensure these policies are always upheld.

1. Only one person per profession is permitted to join a Chapter of GBN. The Membership Director of each Chapter has the final authority related to classification conflicts.
2. Members must represent their primary occupation.
3. The weekly meetings last for 90 minutes. Members need to arrive on time and stay for the entire meeting.
4. An individual member cannot be in a second GBN Chapter.
5. Attendance is critical to the Chapter. If a member cannot attend, they may send a substitute (not a Member of your Chapter) to the meeting. Attendance is critical. We allow our members to miss no more than three (3) meetings or have a up to three (3) substitutes in a continuous six (6) month period. It is imperative that the Chapter Leadership follow this policy to maintain a productive Chapter.
6. Members are encouraged to bring quality referrals and/or visitors to their Chapter of GBN. A quality referral includes the name, phone number, email address and a small description of what the referral is looking for. (Example: Jane Smith, 843-555-1212, jane@gmail.com, looking for monthly landscaping services to include annual mulching) The idea is to provide as much information to the person receiving the referral as possible. This ensures the person receiving the referral can put their best foot forward when contacting the one being referred.
7. Visitors may attend Chapter meetings no more than two (2) times prior to joining.
8. The only approved Leave of Absence will be a medical or maternity Leave. A member may take up to eight weeks' medical or maternity leave with the Chapter Leadership Team prior approval **if dues are pre-paid** during that period and they attempt to have a substitute during their absence.
9. It is the member's responsibility to file a concern with the Membership Director of their Chapter if a visitor "who submits an application in any way conflicts with their classification." This should be done before the visitor is approved for membership. If there are no complaints, the Membership Director will assume their consent.

10. Members who wish to change their classification must submit a new membership application and get approval from the Membership Director for that classification change.
11. In case of issues with a member, the Chapter Leadership Team may, with the Area Director approval, put a member on probation relating to the member's business practices or commitment to the Chapter.
12. A member's classification may be opened for failure to comply with the policies and/or the Code of Ethics of GBN. The Membership Director of any Chapter may open classifications in this instance. In the absence of a Membership Director, the Chapter Leader may fulfill that responsibility.
13. The Leadership Team consists of the Chapter Leader, Executive Officer and Membership Director. This does not apply to the Chapter Support Team which consists of the Event Director, Education Director and Guest Host. If the Chapter Leadership Team fulfills all responsibilities throughout their term, they will receive as consideration an exemption of dues during their tenure as a Leadership Team Member.
14. All GBN Membership list and/or directories are for the purpose of passing referrals and not for soliciting (via email, direct mail, phone, text message or other means) GBN members.
15. All new members must complete the GBN Advisor Program within the first sixty (60) days of membership. Any member not completing this within the first sixty (60) days will be subject to having their classification opened by the Membership Director.
16. All GBN Policies and/or Procedures are subject to change at any time as needed in the best interest of GBN and its' members. All proposed policy changes will be reviewed by the Advisory Council and approved by the Board of Directors.
17. Other than GBN printed materials, members may not use the GBN Intellectual Property (e.g. logos, trademarks, names, slogans, copyrighted materials, etc.) to manufacture, distribute, sell, market, or promote any product or service, or otherwise use the GBN Intellectual Property without obtaining the prior written consent of GBN Board of Directors or the GBN Executive Director. Members must agree to abide by the GBN Branding Standards for any permitted use.

## **1.5 Administrative Policies**

1. GBN may establish Chapters in every city or community with people interested in developing a referral-based business. In addition, GBN reserves the right to open more than one Chapter per city or community where demand of GBN services is requested.
2. There is an initial one-time application fee. Membership Dues are paid annually and are due by the member's anniversary date. Fees and Dues may be paid online by Visa, MasterCard, Discover, American Express, or in person via Company Check. Personal Checks are not accepted. If paying by check, it should be delivered to the Membership Director who shall mail the check to the Corporate Office no later than the following business day.
3. Membership Dues are payable 30 days prior to the due date. Members not paid by their due date are considered late and will be assessed a late charge. If dues are not paid within 10 days, the member will be officially dropped from GBN.
4. Fees and Dues are non-refundable. A certificate of credit will be given, upon request, to members in good standing for the unused portion of their time. This must be approved by the Executive Director.
5. Dues cannot be transferred from one person to another unless the dues are from the same company or organization.

6. GBN has a strict policy on returned checks. A member has three (3) working days in which to contact their Chapter Membership Director to resolve the matter. Any returned check will be assessed a \$35 returned check fee. If a member passes a second NSF check, that member will be subject to immediate removal from the Chapter.
7. The GBN organization reserves the right to discontinue a member's participation within a Chapter at any time.
8. A member requesting a transfer from their current Chapter to a new Chapter will be required to submit a New Member Application to the Membership Director of the new Chapter. In addition, if the member has less than twelve (12) months of paid membership, they must submit a renewal payment.
9. A member may change Chapters only once and the new Chapter must accept that member into their chapter.

## **1.6 Organization Guidelines**

Organization guidelines are not policies but are recommended practices that allow Chapters to run more smoothly and effectively.

### **Visiting Chapters**

- Members visiting other Chapters should announce they are from another Chapter
- Visiting members must not do or say anything that competes with a member of that Chapter
- The Chapter should be cautious of passing referrals to individuals they do not know, including visiting members
- Before visiting another Chapter, the visiting member should contact that Chapter Leader first to receive permission to attend
- Visiting members follow the same visiting policies as non-members; no more than two (2) visits allowed

### **Absences and Tardiness**

- Absences and tardiness mean less business for members; therefore, the Membership Director may give warnings to members who are consistently late or leave early. If the problem continues, the member's classification may be subject to being re-opened.
- Attendance is critical. We allow our members to miss no more than three (3) meetings or have a up to three (3) substitutes in a continuous six (6) month period.

### **Substitute Program**

- Potential substitutes include customers, friends, family members, other GBN members from another Chapter, or employees
- The primary purpose for a substitute is to represent a GBN Member. GBN recommends minimal use of a substitute. However, a member may use substitutes up to three (3) times within a continuous six (6) month period
- Members should notify a member of the Chapter Leadership Team of a substitute, so they are aware of his/her attendance



### **Transfers to Another Chapter**

- A member requesting a transfer from his/her current Chapter to a new Chapter will be required to submit a completed new Member Application to the Membership Committee of the new Chapter. In addition, if the Member has less than twelve (12) months of paid membership credit, he/she must submit a renewal payment. Upon acceptance into the new Chapter, the credit from his/her previous Chapter will be added to his/her membership in the new Chapter as well as the renewal time, if applicable. This process must go through the Area Director.

### **Business Representation**

- Only one (1) member per profession per Chapter is allowed
- Any business may have a separate member in other Chapters. For example: Bob may be in Chapter A and Sue may be in Chapter B. However, Bob cannot be in Chapter A and B
- Members agree to only represent the business classification approved by the Membership Committee
- Members of GBN who represent multi-level marketing organizations should represent their products and services to GBN and not the business opportunity element

### **Non-Discrimination Disclosure Statement**

GBN requires that Chapters review and select persons for membership in all job classifications based on qualifications without regard to race, color, gender, religion, national origin, marital status, sexual orientation, age, or disability. GBN will support no Chapter's action when in violation of this non-discrimination statement.

### **No-Harassment Policy**

GBN does not tolerate harassment of our Board, Executive Director, Regional Team, Leadership Teams or Members at the hand of another. Any form of harassment based on race, religious creed, color, age, sex, sexual orientation, gender identity, national origin, ancestry, citizenship status, religion, marital status, disability, military service or veteran status, genetic information, or any other classification protected by applicable federal, state, or local laws and ordinances is prohibited and will be treated as a disciplinary matter. GBN is committed to freedom of harassment within our organization. In addition, everyone needs to be culturally sensitive so that we can best relate to each other.

## **1.7 The Importance of Upholding GBN Policies**

Your conduct is reflective of GBN throughout the organization. Therefore, you must have a clear understanding of the Policies & Procedures of the organization. It is imperative that you educate your fellow members.

General Policies and Administrative Policies must be adhered to by the Members and equally and consistently enforced by the Leadership Team. Organization Guidelines are highly recommended practices that allow Chapters to run more smoothly and effectively. All members must be treated equally when applying a Program Guideline.



## **Section 2 – GBN Weekly Chapter Meeting Agenda**

### **2.1 Meeting Agenda Outline**

1. Open Networking
2. Welcome and Introductions
3. Promote GBN Mobile App and GBN Connect
4. Mission of GBN
5. Philosophy of GBN
6. GBN Educate
7. Executive Officer Report
8. Membership Director Report
9. Induction of New Members
10. Executive Officer provides Speaker Rotation
11. GBN Minute Presentations
12. Spotlight Presentation
13. Event Director Report
14. Referrals and Testimonials
15. Chapter Leader Report
16. Close Meeting

## 2.2 Meeting Agenda Detail

The meeting begins punctually with 15 minutes of Open Networking. The Leadership Team and Guest Host must be there a minimum of 15 minutes prior to the designated meeting time to welcome visitors. Members should stand when speaking.

**NOTE: The Chapter Leaders will make or break the quality of the meeting. Be positive, professional, and enthusiastic and be in control. Lead by example.**

1. **Open Networking** – The meeting begins promptly at the scheduled time with 15 minutes of Open Networking. The Guest Host introduces the visitors to the Membership Director who in turns introduces the visitor to the other members.
2. **Welcome and Introductions** – The Chapter Leader welcomes everyone to the meeting. Introduces the visitors then themselves, the Executive Officer, the Membership Director, Event Director, Education Director, and the Guest Host. The Chapter Leader should include the Teams position and company within the Chapter. Example: *“Good morning GBN! I am John Smith, your Chapter Leader and I am your Financial Advisor in the group. My job is to run the meetings according to our proven agenda each week.”*
3. **Promote GBN Mobile App and GBN Connect** – by the Chapter Leader
4. **Mission Statement of GBN** – by the Chapter Leader
5. **Philosophy of GBN** – Chapter Leader may call on a member to recite this
6. **GBN Educate** – The Education Director reads the GBN Education Minute
7. **Executive Officer Report** – The Executive Officer delivers the Results Report stating what the totals were for the previous week and what they are year-to-date
8. **Membership Director Report** – the Membership Director updates members regarding new members, professions still needed in the Chapter, pending applications and policies or matters of interest from the Membership section
9. **Induction of New Members** – the Membership Director inducts any new members with the GBN Member Oath
10. **Executive Officer Speaker Rotation** – the Executive Officer states the upcoming Spotlight Presentation speakers for the next four (4) weeks
11. **GBN Minute Presentations** – the Chapter Leader will select a member to begin the 60-second GBN Minute Presentations. All Chapter members will go first then the visitors will present their GBN Minute. Members and visitors should be timed.
12. **Spotlight Presentation** – the Executive Officer introduces the Spotlight Presentation speaker for the day. The speaker has eight (8) minutes for presentation and allow two (2) minutes for questions from the members
13. **Event Director Report** – the Event Director will announce any upcoming GBN events to include GBN After Hours, GBN Annual Retreat as well as any other networking events in the community where the members may benefit
14. **Referrals and Testimonials** – This is one of the most important sections of the meeting. Make sure all members always stand and participate. Members should be timed and will have 60 seconds. It is recommended all members have a referral, closed business, one-to-one and/or testimonial each week. The member should reply with one of the following:
  - a. “I have \_\_\_ referrals today...” and elaborate on ONE referral
  - b. “I have a testimonial for \_\_\_\_”
  - c. “I had a One-to-One with \_\_\_\_”
  - d. “I had Closed Business with \_\_\_\_ in the amount of \$\_\_\_\_”
  - e. Visitors, tell us, what part of GBN impressed you the most?”

15. **Chapter Leader Report** – During this portion, the Chapter Leader will thank all visitors and provide the next steps in becoming a member. They will also make themselves available for any questions from a visitor following the meeting.
16. **Close Meeting** – the Chapter Leader reminds everyone to bring visitors and referrals to the following week’s meeting. He/she then closes the meeting.

### 2.3 Large Chapter Agenda Adjustments

All times listed assume a 7:30 am start time. Please adjust your times accordingly. The ideal Chapter size should not exceed 35 members.

| <b>Members:</b>             | <b>Up to 25</b>                                                                    | <b>26-30</b> | <b>31-35</b> |
|-----------------------------|------------------------------------------------------------------------------------|--------------|--------------|
| Open Networking Begins      | 7:30 AM                                                                            | 7:30 AM      | 7:30 AM      |
| GBN Spotlight Presentations | 8 Minutes                                                                          | 7 Minutes    | 6 Minutes    |
|                             | <i>GBN Spotlight Presentations should allow 2 minutes at the end for questions</i> |              |              |
| GBN Minute Presentations    | 60 Seconds                                                                         | 45 Seconds   | 30 Seconds   |
| Referrals/Testimonials      | 60 Seconds                                                                         | 45 Seconds   | 30 Seconds   |



## Section 3 – GBN Leadership & Support Roles

### 3.1 Chapter Leader

The Chapter Leader in each GBN Chapter is the most important position in any GBN Chapter. You are the reason why the Chapter will succeed or fail. When the Chapter succeeds, so will the members businesses. Your position is one that occurs from great leadership, great energy, and a desire to grow your business. The Leader facilitates a smooth, timely meeting by following the proven GBN Meeting Agenda, ensures all Leadership and Support Team members are fulfilling their responsibilities; provides direction and motivation for the Chapter to meet its expectations; communicates regularly with the Area Director.

#### Before the Chapter Meeting each Week

- After approval for membership, call to welcome the accepted applicant to the Chapter
- Arrive 15 minutes early to the meeting
- Check on room/meeting setup
- Prepare for a successful meeting
- GBN Chapter Agenda on table

#### During the Chapter Meeting each Week

- Run the Chapter Meeting according to the proven GBN Agenda
- Ensure all Leadership Team Members are fulfilling their roles and responsibilities

#### After the Chapter Meeting each Week

- Text all visitors later in the day of your meeting the video: [bit.ly/gbnvisit](https://bit.ly/gbnvisit)
  - If your Chapter meets after 4:00 PM, do this the following morning

#### As Needed

- Do a 1 on 1 with every visitor & member and develop referral relationships with them
- Find people to fill the leadership positions in the group
- Coordinate with GBN Executive & Area Directors to assist in your group being a success
- Ensure all reports, membership apps, and other documents are up to date
- Assist in maintaining a good rapport with the venue (and find new venues if needed)
- Ensure renewing members renew their membership with your Membership Director
- Resolve member conflicts
- Watch training videos & attend Leadership Trainings
- Encouraged to attend Monthly GBN After Hours and GBN Annual Retreat
- Fill in for any missing leadership team members (their leadership section)

## 3.2 Executive Officer

The Executive Officer manages the statistics within the Chapter. He/she is a key person that helps to keep GBN corporate, and the Chapter unified. This person ensures the Chapter is utilizing the most current GBN documents. By ensuring the weekly performance numbers are accurate, you allow GBN to always know the progress of your Chapter and assist in its success.

### Before the Chapter Meeting each Week

- Arrive 15 minutes early to the meeting
- Check on room/meeting setup
- Prepare for a successful meeting
- Have Weekly and Year-to-Date Reports ready to announce

### During the Chapter Meeting each Week

- Run the Chapter Meeting according to the proven GBN Agenda if Chapter Leader is absent from the meeting
- Take Roll of the Members and record it in the GBN Mobile App
- Reward members with GBN Success Certificates

### After the Chapter Meeting each Week

- Two (2) business days following the Chapter meeting, send an email to the visitor thanking them for attending and ask if they have any questions.

### As Needed

- Do a 1 on 1 with every visitor & member and develop referral relationships with them
- Find people to fill the leadership positions in the group
- Coordinate with GBN Executive & Area Directors to assist in your group being a success
- Ensure all reports, membership apps, and other documents are up to date
- Assist in maintaining a good rapport with the venue (and find new venues if needed)
- Ensure renewing members renew their membership with your Membership Director
- Resolve member conflicts
- Watch training videos & attend Leadership Trainings
- Encouraged to attend Monthly GBN After Hours and GBN Annual Retreat
- Fill in for any missing leadership team members (their leadership section)

### 3.2.1 Speaker Rotation Schedule

The Spotlight Presentation is a benefit of membership that is very important in the relationship-building process with the GBN Chapter. It is critical each Member has access to this membership privilege. The Speaker Rotation Schedule is maintained by the Executive Officer.

Tips for Creating the Spotlight Presentation Rotation Schedule

1. When creating the speaker rotation, ask for volunteers to complete the schedule.
2. Only create a schedule for four (4) weeks in advance. The fifth week should be reserved for new members.

3. If your Chapter does not add a new member, then fill the spot with an existing member.
4. If you add two or more new members, they should fill the slot in week 5, 6 and so on. We want the new member to present their Spotlight Presentation as soon as possible according to their Chapter Advisory Program.

### **3.3 Membership Director**

It is necessary for each Chapter to have a Membership Director. The Membership Director may, at their discretion, add members to a Membership Committee. The Membership Committee should have an odd number of members. This is a volunteer service commitment that coincides with the Leadership Team's term. The Membership Committee is chaired by the Membership Director.

#### **Before the Chapter Meeting each Week**

- Arrive 15 minutes early to the meeting
- Check on room/meeting setup
- Prepare for a successful meeting
- Be ready to discuss Open and Needed Professions as well as induct new members

#### **During the Chapter Meeting each Week**

- Provide the Membership Director Report
- Induct new members that have joined since the previous meeting

#### **After the Chapter Meeting each Week**

- Two (2) business days prior to the next Chapter meeting, contact any visitor by phone. Ask them if they have any questions and invite them to the upcoming GBN Meeting
- This should be a phone call and not a text message

#### **As Needed**

- Do a 1 on 1 with every visitor & member and develop referral relationships with them
- Coordinate with GBN Executive & Area Directors to assist in your group being a success
- Ensure all reports, membership apps, and other documents are up to date
- Assist in maintaining a good rapport with the venue (and find new venues if needed)
- Ensure renewing members renew their membership
- Resolve member conflicts
- Watch training videos & attend Leadership Trainings
- Encouraged to attend Monthly GBN After Hours and GBN Annual Retreat
- Fill in for any missing leadership team members (their leadership section)

#### **3.3.1 New Member Application Review Process**

Upon receiving an application, the Membership Director and/or Membership Committee should follow the process outlined below to ensure the applicant is a high-quality business professional before accepting him/her as a Member.

## Internet Search

- Member's Business Website
  - It is professional?
  - Is it accurate and up to date?
  - Is it a good representation of their business?
- Google
  - What kudos, awards or achievements have they accomplished?
  - What other organizations are they involved in?
  - If negative information is found, please confirm its source
- Social Media Networks
  - What image is the applicant portraying on various social media networks?
  - Facebook
  - LinkedIn
  - Twitter

## Notes

- All information and research is done at the Membership Committee's discretion
- If you find negative information regarding an applicant, it is imperative that you verify the relevancy and accuracy
- Any fees incurred as a course of your research are not the responsibility of GBN
- Ultimately you will use your own judgement on what research you believe to be true and reasonable

## The Interview

Let's help to set the expectations of membership when interviewing an applicant. Keep in mind this is just a place to start the conversation. You can add any questions you feel are pertinent or applicable to your Chapter's needs.

1. Why did you decide to apply to GBN, specifically our Chapter?
2. What would you say are the strengths you bring to GBN and our Chapter?
3. What do you expect to receive from GBN and from our Chapter?
4. Will the \_\_\_\_\_ start time pose any issues with your schedule? Are you able to stay for the full 90 minutes each week?
5. GBN has a clearly defined attendance policy. I'd like to review it with you now, so you have a clear understanding of the policy. You are allowed up to three (3) absences and three (3) substitutes within a six (6) month period. These periods run from January 1 through June 30 and July 1 through December 31 each year. Do you have any questions about this attendance policy? Are you willing and able to commit to this?
6. If you cannot attend a meeting, will you be able to have a substitute present?
7. Monthly, each Region holds a GBN After Hours event. This event brings all Chapters within a region together for networking. As well, annually, GBN holds its' Annual Retreat. This Retreat is normally held in the month of October. Are you willing to attend these when you can and to invite visitors to these events?



8. In reviewing your application, we want to be sure we understand what niche you will be representing in our Chapter. What specific products or services do you offer in your industry? Is there an area in which you specialize?
9. Is a license required to practice your profession in this state? If so, do you agree to maintain that license in an Active status while you are a member of GBN?
10. What do you like most about what you do regarding your profession?
11. Have you ever applied to another GBN Chapter? If so, what was your experience?
12. Do you belong to other networking organizations?
13. All new Members are required to complete the GBN Advisor Program within the first sixty (60) days of membership. Will you agree to complete this program?
14. You may have noticed on your application under the Terms and Conditions that upon your acceptance to GBN, fees are non-refundable without exception. Your application has not yet been accepted. Is there any part of the application review process that has made you become aware that this organization may not be a good fit for you or your business?
15. Do you have any questions for me about GBN or our Chapter?

### **Reasons to Decline an Application**

The following are several suggested guidelines for declining an application. This list is not meant to be either exhaustive or binding.

1. There is an unacceptable overlap in professional classification between a prospective Member and a current Member (as determined by the Membership Committee)
2. The profession of the prospective Member listed on the application is not his/her primary focus
3. One or more objections have been filed by Members regarding the prospective Member's type of service, quality of product or service, business ethics or professionalism
4. The prospective Member does not possess the proper credentials for his/her profession, where applicable (example: required license or other certification)
5. The prospective Member provided incomplete or inaccurate information on the Membership Application
6. The prospective Member has a poor attitude or wrong dynamics for the Chapter

### **Transferring Member**

The strength of GBN is in the relationships that we build. Those relationships take time and commitment to one another to build and maintain. When someone joins a Chapter, they make a commitment to the Chapter and its Members. That commitment should be taken very seriously both by the Membership Committee and the applicant.

On occasion that commitment changes and a person may need or want to transfer to a different Chapter. Reasons for transferring include relocating to another city; their sales territory has been reassigned; changing jobs to a new classification that is filled in the current Chapter.

**GBN Administrative Policy:** A member requesting a transfer from his/her current Chapter to a new Chapter will be required to submit a completed new Member Application to the Membership Committee of the new Chapter. In addition, if the

Member has less than twelve (12) months of paid membership credit, he/she must submit a renewal payment. Upon acceptance into the new Chapter, the credit from his/her previous Chapter will be added to his/her membership in the new Chapter as well as the renewal time, if applicable. This process must go through the Area Director.

If a Member of another Chapter approaches your Chapter about transferring, please contact your Area Director so that he/she can walk you through the process. The Member can get started with the new application in the meantime.

### **3.3.2 Implementing the Attendance Policy**

Attendance is one of the most critical aspects of GBN. If a member is not in attendance at your meeting, how can they learn what it is you need to build your business? And how will you be able to help them build their business if they are not there to educate you on what they do? Experience has shown that the most successful Chapters have very good attendance, and the less successful Chapters have poor attendance. The GBN Policy is:

**GBN General Policy:** Attendance is critical to the Chapter. If a Member cannot attend, they may send a substitute (not a Member of their Chapter) to the meeting. This will not count as an absence. Attendance is critical. We allow our members to miss no more than three (3) meetings or have a up to three (3) substitutes in a continuous six (6) month period. More than this and the Member's classification is subject to being opened by the Chapter's Leadership Team or the Membership Committee.

When a Member misses a meeting the Absence Email should be sent as a courtesy. A Member may be terminated by letter after their fourth absence within any six (6) month period. If you do not follow this policy, it will weaken your Chapter. Always notify your Area Director and/or Executive Director when it becomes necessary to open a Member's classification.

To build the community through the attendance policy, it is recommended the Membership Director make a phone call after each absence and before the fourth absence in which the Member's seat is opened. Each call should include: "We missed you today! Is everything okay? What can we do to help? We value your participation in the Chapter!"

The Membership Committee also tracks and coaches Members who are consistently late and/or leave early. The Membership Director should track absences inside the GBN Mobile App weekly.

### **3.3.3 Certificate of Credit/Medical or Maternity Leave of Absence**

Legitimate personal medical leaves are allowed by the GBN General Policy. If medical or maternity leave applies and the Chapter Leadership Team approves the leave, notify the Area Director and/or the Executive Director.

**The GBN General Policy:** The only approved Leave of Absence will be a medical or maternity leave. A member may take up to eight (8) weeks' medical or maternity leave with the Membership Committee's prior approval if their fees are pre-paid for that period and they attempt to have someone substitute during their leave.

When you receive a request for a Certificate of Credit or Medical or Maternity Leave, please contact your Area Director or Executive Director to walk you through the process.

### **3.3.4 Request for Certificate of Credit or Medical or Maternity Leave**

#### **Option 1: Certificate of Credit**

A Certificate of Credit is the equivalent to the number of remaining months of a membership once a Member is dropped from the Chapter; it has no cash value. A Certificate of Credit can be issued to Members in good standing who need to leave GBN. Often, this option is taken when an 8-week medical leave is insufficient. A Member who is not in good standing due to policy or ethics violations are not entitled to a Certificate of Credit. A Certificate of Credit is valid for up to two (2) years from the Member's last recorded meeting date. When a member is issued a Certificate of Credit their membership ends, and their classification is opened for another qualified professional.

#### **Option 2: Medical or Maternity Leave of Absence**

A Medical or Maternity Leave of Absence may not exceed eight (8) weeks in length. While on approved medical or maternity leave, the membership continues, and the members' classification is held open. Members are responsible for returning to the Chapter meetings at the end of the approved time-period. If the Member does not return after the completion of the Medical or Maternity Leave of Absence and accrues their fourth absence during a six-month period, the Member automatically forfeits their used and unused membership time, as well as their classification within the Chapter.

**Instructions:** Members complete Step One, then submit the form to their Chapter's Membership Director. The Membership Committee should review the request, complete Step Two, and then submit it to the GBN Area Director for final approval.



## Certificate of Credit / Medical or Maternity Leave Request Form

### Step One: Member's Request

Member Name: \_\_\_\_\_

Chapter Name: \_\_\_\_\_

I would like to request:  Option 1: Certificate of Credit  
 Option 2: Medical or Maternity Leave of Absence

Last Meeting Date: \_\_\_\_\_ Return Date (for Leave of Absence): \_\_\_\_\_

Member's Official Renewal Date: \_\_\_\_\_ (Note: Must not precede Return Date)

Substitute Name (for Leave of Absence Option): \_\_\_\_\_

Reason for Leave: \_\_\_\_\_

### Step Two: Membership Committee Approval

Membership Committee Approves:  Option 1  Option 2

Membership Director Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Last Meeting Date: \_\_\_\_\_

Comments: \_\_\_\_\_

### 3.3.5 Chapter Bank Accounts

At no time is any member allowed to open a bank account for the purpose of GBN. Neither GBN, its' Board, Executive Director, and/or Officers will be liable for any bank account, credit/debit card that is unauthorized by the Executive Director.

### 3.3.6 Profession Grid

The most successful Chapters are typically in the most balanced. If you build a Chapter with 6 members in each of the six 6 Profession Grids, Chapters will have 36 thriving members. Your Profession Grid provides 60-70% of your referrals.

#### PROFESSION GRID

| EVENTS SERVICES | MARKETING SERVICES | BUSINESS SERVICES | REAL ESTATE       | TRADE SERVICES  | HEALTH & WELLNESS |
|-----------------|--------------------|-------------------|-------------------|-----------------|-------------------|
| Photographer    | Digital Marketing  | Financial Advisor | Residential Agent | Builder         | Chiropractor      |
| Travel Agent    | Graphic Designer   | Accountant        | Mortgage Lender   | HVAC            | Massage Therapy   |
| Caterer         | Consultant         | Banking           | P&C Insurance     | Painter         | Dentist           |
| Event Planner   | Promo Products     | IT Services       | Cleaning Services | Electrician     | Supp. Insurance   |
|                 |                    |                   |                   |                 |                   |
| Gifts           | Printer            | Commercial Ins    | Security System   | Plumbing        | Wellness          |
| Florist         | Sign Company       | Business Law      | Real Estate Law   | Interior Design | Cosmetics         |
| Event Venue     | Media Services     | Phone Services    | Title Services    | Landscaping     | Jewelry           |
| Baker           | Print Advertising  | Health Insurance  | Home Inspector    | Flooring        | Health Supp.      |
|                 |                    |                   |                   |                 |                   |
| Wine Merchant   | Copywriter         | Credit Card       | Prop. Manager     | Roofing         | Clothing          |
| Event Manager   | Videographer       | Bus. Consulting   | Pest Control      | Handyman        | Personal Trainer  |
| DJ              | Radio Advertising  | Office Machines   | Carpet Cleaning   | Windows/Doors   | Eye Care          |
| Hotel           | Embroidery         | Employment        | Moving Company    | Granite         | Acupuncture       |
|                 |                    |                   |                   |                 |                   |

### 3.3.7 Member Complaint Process

Use the following guideline in processing a Member's complaint, in the order each item appears below. Initial and date each item as they are completed. Once complete, submit a copy to your Area Director.

Date of Complaint: \_\_\_\_\_ Chapter Name: \_\_\_\_\_

1. Make Sure the Complaint is:

- In Writing Date Confirmed: \_\_\_\_\_ Initials: \_\_\_\_\_
- Based on Firsthand Experience Date Confirmed: \_\_\_\_\_ Initials: \_\_\_\_\_
- From a GBN Member Date Confirmed: \_\_\_\_\_ Initials: \_\_\_\_\_

2. Contact your Area Director prior to proceeding with the complaint process

Date Confirmed: \_\_\_\_\_ Initials: \_\_\_\_\_

3. Assign members of the Membership Committee to investigate complaint to resolution.

Date Confirmed: \_\_\_\_\_ Initials: \_\_\_\_\_

- a. Membership Director: \_\_\_\_\_
- b. Member Name: \_\_\_\_\_
- c. Member Name: \_\_\_\_\_

#### 4. Membership Director Assigns Two Members for Interviews

The party who filed the complaint. Name: \_\_\_\_\_

Interviewed By: \_\_\_\_\_ and \_\_\_\_\_

Date: \_\_\_\_\_ Key elements of the conversation:

\_\_\_\_\_  
\_\_\_\_\_

The party the complaint is regarding. Name: \_\_\_\_\_

Interviewed By: \_\_\_\_\_ and \_\_\_\_\_

Date: \_\_\_\_\_ Key elements of the conversation:

\_\_\_\_\_  
\_\_\_\_\_

Member's reaction and response to complaint: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**5. Meet to Discuss the Findings**

The full Membership Committee meets to discuss the findings. Was there a violation of the GBN Policies or Code of Ethics? Determine the appropriate course of action toward a resolution.

Coaching

Probation

Date Confirmed: \_\_\_\_\_ Initials: \_\_\_\_\_

Open Classification

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Resolution: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**6. Issue the Appropriate GBN Accountability Letter**

Create the appropriate GBN Accountability Letter; Have the Area Director approve prior to mailing/delivering the letter.

Date Confirmed: \_\_\_\_\_ Initials: \_\_\_\_\_

**7. Notify Both Parties of the Decisions**

Date Confirmed: \_\_\_\_\_ Initials: \_\_\_\_\_

Executive Director: \_\_\_\_\_ Date: \_\_\_\_\_

Area Director: \_\_\_\_\_ Date: \_\_\_\_\_

Chapter Leader: \_\_\_\_\_ Date: \_\_\_\_\_

Membership Director: \_\_\_\_\_ Date: \_\_\_\_\_

### 3.3.8 Policy Letters

- Policy Letters can be downloaded from the Leadership Resources at GBNonline.com
- These letters must be sent out fairly and consistently to all Members, without exception
- Do not alter the GBN Policy Letters
- Always use plain paper, not your business letterhead
- Always use the mailing address for the recipient's profile on GBNonline.com
- Sign the letters from "The Membership Committee"; never use an individual name
- When mailing a probation or open classification letter, they must be mailed via First Class, certified mail
- Always get your Area Director's approval prior to sending an Open Classification or Probation letter
- In all cases, these letters should be emailed to your Area Director and the Executive Director at the time it is mailed to the applicant/Member

#### Letters for Probation

- Policy Letter #05      Probation: GBN Code of Ethics Violation
- Policy Letter #06      Probation: GBN General or Administrative Policies Violation
- Policy Letter #07      Probation: Lack of Participation
- Policy Letter #08      Probation: Timekeeping
- Policy Letter #09      Probation: Disruptive Behavior in the Chapter

#### Letter for Open Classification

- Policy Letter #10      Opening a Classification for GBN Policy, Code of Ethics or Member Activity Violation

### 3.3.9 Payments for Applications (New and Renewals)

New applicants can pay by credit card or check. We prefer members to pay via credit card on the GBNonline.com/join link that is provided once their application is approved. However, some companies wish to pay via check. If a paper check is received as payment for a new or renewing Membership Application, the payment goes directly to the Membership Director who holds the check until the Application is approved. Once approved, the Membership Director forwards the check to the Executive Director either by in person or mail. NOTE: GBN only accepts company checks. Personal checks are not permitted at any time.

### 3.3.10 Membership Renewal Dues Notices

- Member received email notification 30 days prior to renewal date
- Member received email 12 days before if they have not renewed
- Member receives email 1 day before if they have not renewed
- Member receives email reminder 2 days after if they have not renewed
- Member receives Past Due email 5 days after if they have not renewed (\$25 late fee)
- Member receives Final Notice email 10 days after if they have not renewed stating their classification has officially been open for another member



### **3.4 Social Media / Event Director**

The Social Media / Event Director in each GBN Chapter is a vital part of the GBN Chapter Leadership Support Team. They are responsible for keeping the members informed about all GBN Events that take place outside of the weekly meetings and to post on the GBN Chapter Social Media accounts regarding events, promote the Spotlight Presenter weekly and to promote their Chapter meetings on a regular basis. They should also post regarding any open position the Chapter would like to fill.

#### **Before the Chapter Meeting each Week**

- Arrive 15 minutes early to the meeting
- Check on room/meeting setup
- Prepare for a successful meeting
- Be ready to discuss GBN and other networking opportunities for the Members

#### **During the Chapter Meeting each Week**

- Remind Members of the upcoming GBN After Hours and the GBN Annual Retreat
- Take photos during the meeting to post on GBN Social Media accounts
- Discuss any other networking event that would benefit the Members and their business

#### **After the Chapter Meeting each Week**

- Assist in answering any questions a visitor may have

#### **As Needed**

- Do a 1 on 1 with every visitor & member and develop referral relationships with them
- Assist in maintaining a good rapport with the venue (and find new venues if needed)
- Watch training videos & attend Leadership Trainings
- Encouraged to attend Monthly GBN After Hours and GBN Annual Retreat
- Assist in hosting each GBN After Hours and the GBN Annual Retreat

### **3.5 Education Director**

The Education Director in each GBN Chapter is a vital part of the GBN Chapter Leadership Support Team. They are responsible for providing an Education Minute during each weekly member. This portion known as GBN Educate is provided via the Mobile App. The Education Director may, from time to time, deviate from this to education the Chapter on issues they may be struggling with. This would include, but not limited to, assisting with a portion of the GBN Mobile App, navigating the GBNonline website, How to Develop the Best GBN Minute or Spotlight Presentation, etc.

#### **Before the Chapter Meeting each Week**

- Arrive 15 minutes early to the meeting
- Check on room/meeting setup
- Prepare for a successful meeting
- Review the GBN Education Minute prior to the meeting to be prepared to deliver

### **During the Chapter Meeting each Week**

- Read the GBN Education Minute and be ready to discuss the topic
- Provide any additional education the Chapter may need

### **After the Chapter Meeting each Week**

- Work one-to-one if a Member is struggling with understanding a GBN process

### **As Needed**

- Do a 1 on 1 with every visitor & member and develop referral relationships with them
- Assist in maintaining a good rapport with the venue (and find new venues if needed)
- Watch training videos & attend Leadership Trainings
- Encouraged to attend Monthly GBN After Hours and GBN Annual Retreat

## **3.6 Guest Host**

The Guest Host in each GBN Chapter is a vital part of the GBN Chapter Leadership Support Team. They are responsible for greeting each visitor and Member as they come into the meeting. They are also responsible for assisting any visitor on the membership process.

### **Before the Chapter Meeting each Week**

- Arrive 15 minutes early to the meeting
- Check on room/meeting setup
- Prepare for a successful meeting
- Greet visitors and Members as they arrive
- Walk the visitor to and introduce them to the Membership Director
- Collect two (2) business cards from the visitor
- Take one (1) card to introduce them to the Membership Director
- Take one (1) card to the Chapter Leader and provide who invited the visitor

### **During the Chapter Meeting each Week**

- Help to set the visitor expectations
- Let them know they can pass out their business cards
- Inform them the Chapter Leader will let them know when it is their turn to speak

### **After the Chapter Meeting each Week**

- Follow up with the visitor to see if they have any questions
- If they wish to join, remind them to see the Membership Director

### **As Needed**

- Do a 1 on 1 with every visitor & member and develop referral relationships with them
- Assist in maintaining a good rapport with the venue (and find new venues if needed)
- Watch training videos & attend Leadership Trainings
- Encouraged to attend Monthly GBN After Hours and GBN Annual Retreat
-

### **3.7 Chapter Advisor Program**

The Chapter Advisor Program ensures that each new Chapter Member completes the Chapter Advisor Program by assisting the new Member so they can benefit most from their membership. This is completed over a five (5) week process. Refer to the Chapter Advisor handbook.

#### **Before the Chapter Meeting each Week**

- Arrive 15 minutes early to the meeting
- Sit with the New Member to support them during the meeting
- Explain any portion of the meeting they may need help with

#### **During the Chapter Meeting each Week**

- Help to set the New Member expectations

#### **After the Chapter Meeting each Week**

- Set a time and day to discuss the next portion of the Chapter Advisor Program
- Follow up prior to the next meeting to be sure they have completed the next step
- Prepare for the next meeting and the next step in the program

#### **As Needed**

- Do a 1 on 1 each week during the 5-week Chapter Advisor Program with the New Member
- Be available by phone, text, or email for the New Member to contact you
- Be prepared to discuss your progress with the Chapter Leadership Team



**End of Manual**