

Follow-up on the Meeting



Elite Leads Business Development

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10.1

FOLLOW-UP OF MEETING

A. Enjoy the Success

It takes me about an hour to come down from the high-energy level of the meeting! Now you know why this is so much fun!

Take the time to enjoy it! It's one of the greatest rewards of this kind of business!

B. Guests who were absent

Call anyone who was not at the meeting, make sure they know when the next meeting is.

There are several different conversations I have with people who don't make the first meeting when they have told me they will.

Often they tell me that a client asked for an appointment to do business and business comes first. Great, but should prospective clients control their time? They are often the client who never commits to anything!

"The members view these meetings as though they are a regular business meeting. Your credibility is at stake when you don't take it seriously enough to keep this appointment. It is viewed as how you typically conduct business!"

Get to know what their story is. I've had people tell me 3 times they would show up! At the "Code" designation on, remove the "G" (guest) eligibility after the third time. I figure, Elite Leads membership won't work for them or the rest of the group if they can't show up by then.

Place the date "Last" "Message:" Field, and note whether you talked live "T" or left a voice mail message "VM".

C. Follow-up on your leads

Call your leads and don't forget to ask for a referral from each one of them. Enter the information into the data base, whether you reach them or not.

"The real measure of your wealth is how much you'd be worth if you lost all your money."

-Anonymous

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You're now ready to get your fourth, fifth and sixth group going for next month!

Refer back to Chapter 3 page 2. The next location should be about 30 minutes or more from the first location. Most areas warrant three to five meeting locations.

D. Email- for 2nd Meeting Missed

On the Monday after the previous weeks meetings Open Access Click on Design Queries in Access 07-Email List.

✓ Design

At the bottom of the form click on the slide bar until you see the field "Code". On the 5th "criteria" line, enter the group number, make sure that you enter it between the quotes "xx*" ("01")

✓ View to go to Datasheet View

✓ Tools ✓ Office Links, ✓ Analyze with Excel, which

will take you strait the the Excel Spreadsheet (after the first time the message "07-Email List already exists, do you want to replace file?

✓ Yes)

Remove all names of those who were are the meeting:

✓ Highlight line ✓ Edit ✓ Delete

✓ File, ✓ Save As, ✓ ✓ Save as type: ✓ CSV ✓ Save

In: ✓ Desktop ✓ ✓ My Documents, ✓ Save, ✓ Yes Message appears "Message appears: "07-Email List may contain features that are not compatible with CSV, Do you want to keep workbook in this format? ✓ Yes, ✓ File ✓ Save

✓ Outlook Address Book, ✓ Main Identity, Delete all addresses ✓ File, ✓ Import, ✓ Other Address Book, ✓ ✓ Text File ✓ Browse, ✓ Look In Desktop, ✓ My Documents ✓ File Type CSV, ✓ 07-Email List.csv, ✓ Open, ✓ Next, ✓ Finish, ✓ OK, ✓ Close Address Book Tool.

✓ Internet Browser and Open <http://www.eliteleads.com/00131.htm>, (30 more than the original group number), ✓

File, ✓ Send by Email. At the email, ✓ Cc:

✓ Your Name to To:> and then the first name, scroll to last name, while holding the control and shift keys to highlight all and send to Bcc:> ✓ OK, ✓ Send -

✓ Send if some pictures are not available.

Scroll down, ✓ Send Now

*"If you can count your money,
you don't have a billion
dollars."*

-J. Paul Getty

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E. Attendance

To Open the Database in Access:

Click [✓] Start, ✓ Program

✓ ✓ Microsoft Access from the Menu

✓ ✓ to open "Elite"

✓ at the top corner to make the frame larger

✓ Forms

✓ ✓ Database Input Form

Control "F" for find, Type the name of the guest you are looking for.

✓ Match: ✓ Any part of Field

✓ Find Now

Advance to the second column, "Attended" strike the space bar to fill the check mark

✓ Close X

F. Record Paid Fees

✓ Forms

✓ ✓ Accounting Record

Control "F" for find, Type the name of the guest you are looking for.

✓ Match: ✓ Any part of Field

✓ Find Now

In the "Code" Field, remove the "G" if they are a new member

Delete the numbers in each field: "Fee Due", "Group" and "Guest for Group"

Enter "Member Number", "Rate of Fee" and the "Month Paid" as "0600" for June 2000

In the "1st or 2nd" field, enter "1st" if they paid between the 1st and 15th and "2nd" if it's between the 16th and 31st.

Enter the "Paid Amount" "\$250.00" or the amount a renewing member paid or the workshop amount.

At the "Group Number" (which comes up next), enter the number of the group they're in

Use the Spacebar (adds a "✓" in the field) to confirm their name will print for your "Phonebook" Query

*"I'd like to live as a poor man
with lots of money."*

-Pablo Picasso

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Enter current month "0600" for "Join Date" and "the next month "0700" if it's before the 20th of the month, two months later "0800" if it's after, for the issue that their name will appear in the newsletter.

Enter "250.00" for LTEarned Fee unless it's for the Speakers, Sales or Master Mind groups - then input the appropriate amount.

Enter the amount for the "LT Fee" earned (your %)

In the "Credit Card" Field, use the Spacebar if they paid by credit card.

Move up the the appropriate "Group X Fee" and again enter the amount that was paid, "Enter" and enter today's date.

Notice who they were "Referred by:" Move to the first field and Type Control "F" for find, Type the name of who referred them.

✓ Match: ✓ Any part of Field

✓ Find Now

Move to the "Referrals" Field, Type the name of who they referred. Then "\$25.00" in the "Referred Amount" unless they've referred someone before during the same billing cycle, in which case you'd add the name and the amount.

This is a good time to make sure you enter the email and website of the new member.

✓ Close ✗ when you're finished.

G. Thank you

Thank You's are extremely important to your credibility and to set an example for others in the groups. I pick up colorful Thank You notes at the paper houses and hand-write the note.

"Thank you for taking the time to introduce Jeff Rubin to Elite Leads. Jeff attended our Tuesday group and will be joining in the near future. Thanks for your thoughtfulness!"

"Money may kindle, but it cannot by itself, and for very long, burn."

-Igor Stravinski

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Microsoft Access should still be open.

- ✓ Queries
- ✓ 'Thank You's-47" ✓ Design
- ✓ Slider bar until you see the "CONTACT DATE" Field, Type ">#6/1/00#", in the 5th line down at "CRITERIA"
- ✓ View to go to Datasheet View
- ✓ File ✓ Save, ✓ Print, then ✗ Close

H. Follow-up to Corporate

Copy and fax a copy of the Agenda and Attendance forms for each of the meetings on Friday.

I. Termination Letter

I rarely have to send the a termination notice, "Termination-37" as it's usually managed by phone!

You might try to find if there is a better day or time before sending the termination letter. Try to avoid either causing a conflict or alienating them. Also, if they decide they do want to continue with Elite Leads, you'll need to assign them to a different group.

Refer to Item 6 of the Membership Policies. To be Reinstated, they must have two hours with a time management or organizational coach.

This will enforce the seriousness of the commitment of the group.

The Termination Letter requires a 2-step process:

Microsoft Access should still be open.

- ✓ Queries
- ✓ 37-Note ✓ Design
- ✓ Slider bar until you see the "FullName" Field, Type "memername", in the 5th line down at "CRITERIA"
- ✓ View to go to Datasheet View
- ✓ File ✓ Save, ✓ Close ✗
- ✓ Reports
- ✓ 37-Termination ✓ Preview ✓ Print ✓ Close ✗

"Time is money."

-Benjamin Franklin
