

Policies and Procedures



Background

It is a privilege to welcome you to Elite Leads Networking. It is a life process of helping others achieve their dreams and establish their quality-of-life issues.

You are obviously someone who enjoys working with positive professionals and can visualize yourself embracing the role of a moderator, facilitator and support system for entrepreneurs, then Elite Leads Networking will be an adventure that is like living your dream.

Originated in 1991, Elite Leads Networking was established by the Founder, Sharyn Abbott. The name change to Elite Leads Business Development (ELBD) took place in 2000 to better describe what sets ELBD apart from other leads organizations.

Our motto is: "We gather to exchange qualified business leads to assist in the growth of each of our member's businesses."

Leads are generated by members who share information that is beneficial to other members. Participating members are assured of receiving information about companies who are expanding, moving, downsizing, divorcing franchises and similar trends that would effect their business directly.

Elite Leads rapidly became a recognized small business advocate. After two years, there were 150 members, who were all referred by members. The word spread rapidly. When a business needed valid information, they could count on Elite Leads to provide that information, or the sources that would generate what they needed.

We began to offer educational workshops, the first one by a Tom Hopkins associate on Sales Excellence. Skills improvements workshops became an integral proponent of the membership benefits.

A lending library of books, cassettes and videos became a valuable addition for Elite members. They were able to access sales, marketing, public relations and self-improvement materials, simply by attending meetings. "Use your drive time for prime time!" became the standard for members rather than the exception as with most business professionals.

There are currently 500 members in the greater Bay Area in Northern California. Our aggressive expansion plans include the Sacramento Valley and Southern California within the next year.

The more responsibilities a person assumes, the more likely they are to rise up to meet them.

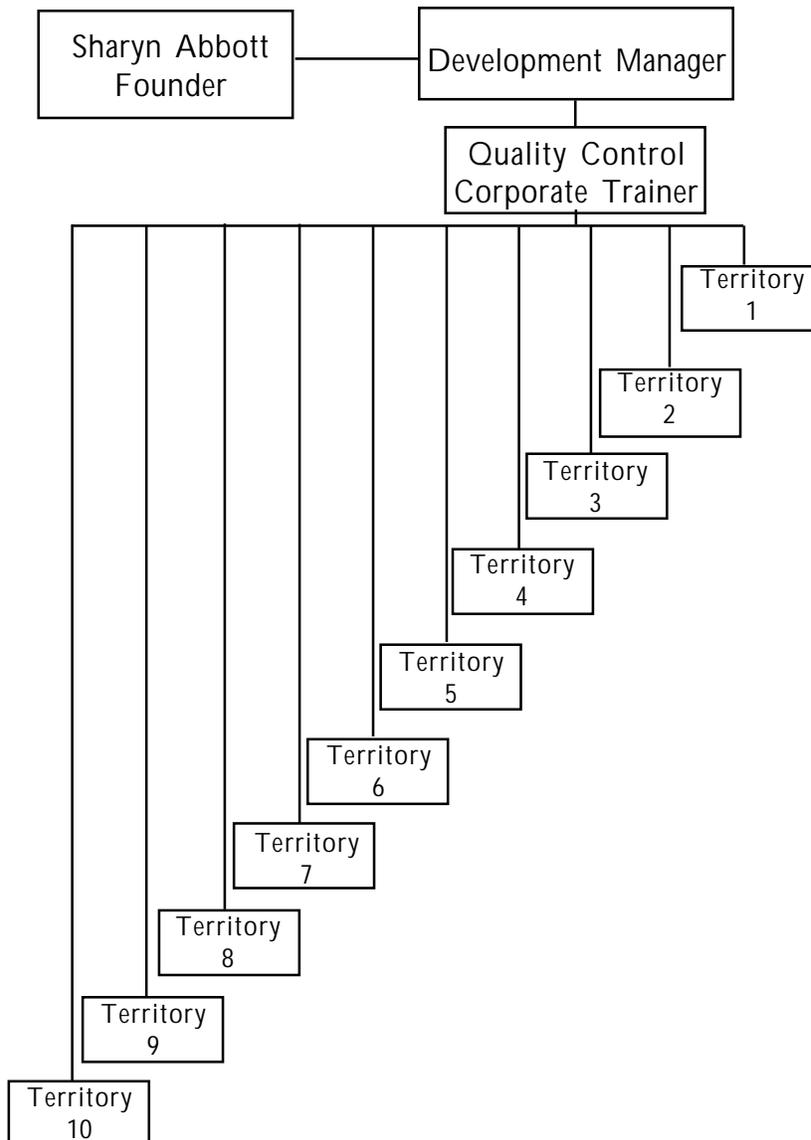
Anonymous

Elite Leads Business Development Policies and Procedures

Definition of the Business

Elite Leads Business Development is a business to business leads organization dedicated to assisting entrepreneurs and professional sales people in creating quality lead sources. We assist the members in creating valuable professional relationships. The meetings provide an environment where skills education is readily available for the members through the monthly educational workshops.

The following chart diagrams the Division structure for a Region that includes six (6) territories, eighteen (18) groups with thirty (35) members each with a Consultant overseeing the initial marketing.



"Twenty years from now you will be more disappointed by the things that you didn't do than by the ones you did do."
- Mark Twain

The Meeting

The Consultant establishes a territory consisting of 18 groups with 30 to 35 members per group. Meetings are held once a month for one hour. Members are recruited to provide skills improvement workshops twice each month. The groups are designed to provide leads for entrepreneurs and corporate sales individuals.

As the facilitator of the meeting, you will greet the guests as they arrive, introduce them to members and make them feel welcomed. You will ensure that the meetings follow the structure of the business agenda. Each person offers a short 8 second introduction of themselves, two members provide a 7 minute in-depth presentation of their business so the members will better understand how they can create solid leads for them. Other networking events are announced, members request Power Partner introductions and leads are shared.

As the facilitator, you will provide information pertaining to economic development, share industry specific introductions, provide referrals to members in other groups and maintain the database for your territory.

The meeting lasts one hour and is conducted by the Consultant. Each Licensee should choose a moderator to help facilitate the second portion, beginning with the member's presentation. This will help groom members to take over groups at times when you have emergencies.

There should be no more than one hour, no less than 30 minutes between each meeting.

"A journey of a thousand miles begins with a single step."

- Chinese Proverb

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Tasks Description

Each week you prepare for 7 to 8 Elite Leads groups, which includes:

- Sending email and email broadcasting notices
- email and email absence reminders
- Reminder calls for those who owe fees
- Reminder calls for previous absentees
- Setting up for the meetings
- Facilitating each of the meetings

These meetings will typically be scheduled between the hours of 9 am and 3 pm, Tuesday, Wednesday and Thursdays. Attendance is more consistent on those days.

Monday mornings you'll prepare for the meetings, send efax and email broadcasting setups, absence notices and call for those who have fees due. Monday afternoons make yourself available for members to talk with you.

Tuesday, Wednesday and Thursday afternoons are spent returning phone calls from members who will have an unlimited supply of questions regarding the meetings. (Refer to the "Membership Policy Agreement" (W8).

Fridays are spent calling perspective members, predominantly from the leads you receive during the week. You may also set aside specific hours during Friday that members can reach you directly for answering questions.

I suggest that you read the Business Times and other business publications, to create leads for members, and Friday late afternoon is a great time to input the information into your "Leads" database.

Spend at least four hours per day conducting approach calls until groups have reached capacity. After groups have 35 members, no less than 6 hours each week should be spent pursuing new members and following up on leads.

The first of each month, update the Time Management Calendar (PM40) to know which forms to create for the various tasks that need to be completed: Roster Lists, Workshop Sign up sheets, forms for meetings, call all members renewing their membership who haven't paid and update any changes to the database as well as other tasks listed. Direct all inquiries, communication and outside territory group visits to ELBD management.

Do not contact members outside your territory without first obtaining permission of ELBD management.

Complete and return all reports, analysis and summaries requested within the management's specified time.

"People of mediocre ability sometimes achieve outstanding success because they don't know when to quit. Most men succeed because they are determined to."

- George Allen

THE REQUIREMENTS

A. System Requirements

The amount of time you will save by having the fastest personal computer available is well worth the investment. It's best to invest in the equipment up front so you will be able to start without the hassle of trying to figure it out at a later date.

It is my recommendation that you have no less than a 128 Mg RAM, 900 mg, 10 gig hard drive and Windows 98. You will also need to have DSL access rather than dial up.

B. Microsoft Access

This is one of the most flexible database management software packages on the market. It has letter writing, mail merge, data base management, report writing, spell check and form development. It is also extremely versatile and one the easiest ones to learn. The help feature is always accessible with "?" and the basics are noted across the bottom of the screen.

C. Microsoft Word

Word is one of the most widely used word processing programs, it's simple to use and integrates well with Access. Any application that you will need for the Elite Leads meetings has step-by-step instructions listed in the appropriate section.

If you're not familiar with Word, it would be wise to take a Word training class at your local Community College to understand all of the capabilities.

D. Adobe PageMaker 6.5

There are more than 45 forms that we use for the Elite Leads meetings and development of the groups. These forms are too complex for simple word processing programs. PageMaker is a sophisticated typesetting program, generally used by graphic designers. It offers extreme control of characters, line space and positioning.

Most of the static forms are available on the website.

"There are no guarantees.
From the viewpoint of fear,
none are strong enough. From
the viewpoint of love, none
are necessary."

- Emmanuel

E. EFax

You'll want to set up an account with EFax. It's free and the best way to communicate with your members to send documents from any program. Go to their website: <http://www.efax.com/> and follow the prompts.

F. Email

Your email account is yourname.eliteleads.com until we have duplicate names. You will also use email broadcasting whenever possible to keep members aware of meetings and workshops.

G. Library

You will create the Lending Library as you develop your groups. Materials are donated by members.

H. Basic Requirements

Make sure you are added to the mailing lists of the various chambers, networking organizations, Business Times and national workshop conductors to provide various events to members.

Performance requirements are mandatory to warrant the success of your charter. You will establish two new groups each month until you have 18 groups with a minimum of 30 paid members.

You will be required to attend all group meetings and workshops. In the event of illness, car trouble or other such interruptions in your attendance, there will be at least two alternate moderators appointed for each group. You will supply them with leads forms, generic agenda and newsletters prior to the meetings.

It is important that you follow the weekly planned schedule. Failure to attend meetings and/or workshops without notifying your alternate facilitator, not processing collected funds in a timely manner or any conduct unbecoming a professional environment may result in termination.

"Twenty years from now you will be more disappointed by the things that you didn't do than by the ones you did do."

- Mark Twain

Finance and Collections

You will be responsible for collecting checks from the guests who wish to join.

All guest and workshop fees collected will be deposited daily. Attendance sheets, deposit receipts, and expense reports will be faxed each Friday.

Your compensation checks will be based on collected funds received by the 1st and 15th and mailed within 5 days.

When guests do not pay, but show up at the second meeting, you will hand them their second invoice and immediately request their payment. If for any reason they do not remit, you will need have a detailed conversation with them at the end of the meeting. Be sure to point out in front of the group that you want to talk with them before they leave.

You will not discuss finances of the company with anyone at anytime for any reason.

"Success is not to be pursued,
it is to be attracted by the
person you become."

- Unknown

Training: What to expect

Training for the Elite Leads groups involves on-site group facilitating, the training manual, computer training and practicing telephone techniques.

If you need help for any reason, ask. Our primary focus is to ensure your success.

The training manual is a comprehensive source that explains each facet of each operational component required to facilitate the leads meetings:

- Where to find the sources for potential members
- How to create additional groups
- How to create a balanced group
- Practice scripts
- Complete scheduling outline
- Printed form images for easier comprehension
- Recruiting members for workshop presentations

After the first three groups are established, ongoing training is crucial to the success of the Consultant. Periodic supervisory site visitation will help to support the Consultant's territory expansion and consistency in growth.

The training also includes:

- Familiarization with the computer programs
- Elite Leads group development
- Accountability reports
- Monitoring the growth of the Territory

"Dreams are renewable. No matter what our age or condition, there are still untapped possibilities within us and new beauty waiting to be born."

- Dr. Dale Turner

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Materials

	1	Territory Director Agreement	_____
n/c	100	Business Cards-Slick	_____
\$120	1000	Business Cards-4 color	_____
	100	Newsletters	_____
	20	Attendance Forms (PM4)	_____
	1000	Lead forms	_____
	50	Guest Folders	_____
	(R)	Leads Tracking Exp (PM13)	_____
	50	Vinyl Bus Card Sheets	_____
	50	Free Business Times (PM6)	_____
	50	(L) Elite 1-panel brochure (PM5)	_____
	50	Welcome (W10)	_____
	50	Power Partner List (PM8)	_____
	50	Organization List (website)	_____
	50	Policies (W8)	_____
	100	Meeting Tracking (PM7)	_____
	3	Plastic meeting materials folders	_____
	9	1" White binders	_____
		Index Separators	_____
		Spine Sheets	_____
	1	Library Folder	_____
		Library Material	_____
		Library List	_____
		Library Check-Out Forms	_____
	50	Thank You Notes	_____
	9	Index boxes for storing the group leads	_____
	24	9 x 12 Envelopes & pre-address Env	_____
Folders with Meeting Materials (included on disk):			
	1	Time Management Calendar (PM40)	_____
	40	Phone pages (W1)	_____
	1	Paper Cutter	_____
	1	3-hole Punch	_____
	1	1" White Territory Director Handbook	_____
	1	Originals Binder	_____
	1	Telemarketing Manual	_____
	1	1" Events & Members Binder	_____
	1	Sales Training Manual	_____
	1	Speaker's Training Manual	_____
	1	Phone Log Book	_____
		PageMaker files eliteleads.com/forms.pdf	_____
		Access files	_____
		Microsoft Excel files	_____
		Microsoft Word files	_____
		Typefaces	_____
		The Calendar Binder Video	_____
		The Elite Leads Meeting Video	_____
		The Speaker's Training Video	_____
		The Sales Training Video	_____
		The Writer's Training Video	_____

"Destiny is not a matter of chance, but of choice, not something to wish for, but to attain."
- William Jennings Bryan

Signature

Date

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Compensation and Benefits

The guests and new members pay \$500.00 for a year's membership. For each member paying, you will receive 50% of what is paid. The exception is of trades that you agree to, where you will still be responsible for remitting \$250. Reconciliation will be mailed within 5 days after the 1st and 15th respectively.

You will not be required to work January 1st, Good Friday, Memorial Day, July 4th, Labor Day, the week prior and including Thanksgiving and the third Friday in December until the first Tuesday in January.

Additional compensation programs have been established for you and include but are not limited to the Elite Association memberships, bonuses and programs that will be added as benefits to members.

Insurance benefits are made available through several resources. Please discuss this with management.

"When one door closes, another opens. But we often look so regretfully upon the closed door that we don't see the one that has opened for us."

- Alexander Graham Bell

Elite Leads Business Development
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Acceptance

ELITE LEADS BUSINESS DEVELOPMENT (ELBD) is pleased to share with you certain proprietary and confidential information regarding ELBD's business operations under the condition that you agree to:

Hold all information supplied to you in strict confidence and to limit disclosure of the proposition and data to ELBD management personnel.

While examples concerning financial projections of ELBD were prepared with care and accuracy, Elite Leads Business Development neither warrants nor assumes responsibility for its accuracy or adequacy. Your actual earnings will be based on your efforts.

Any employee revealing information causing damage to Elite Leads Business Development will be held liable for damages to said business plus attorney's fees.

Any employee who uses information to compete with or attempt to procure business from said business will be held liable for damages plus attorney fees.

I have read and agree to the above information as well as the material included in the Policies and Procedures manual.

Signature

Date

"When choosing a life purpose, few are able to live their dream. "

- Sharyn Abbott

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