



Team Women
Membership
Handbook

"Building Your Business One Referral at a Time..."

Table of Contents

I	Welcome.....	page 4
II	A Message from Team Women International.....	page 5
III	Chapter Format.....	page 6
	Chapter President.....	page 6
	Past President.....	page 6
	Chapter Treasurer.....	page 6
	Chapter Secretary.....	page 6
	Chapter Ambassador.....	page 6
	Optional Board Positions.....	page 6
IV	Meeting Structure.....	page 7
	Meeting Schedule and Venue.....	page 7
	Business Cards.....	page 7
	Fliers, Brochures, Samples.....	page 8
	Meeting Structure at a Glance.....	page 8
V	Core Business.....	page 10
VI	Multiple Memberships / Other Organizations.....	page 11
VII	Fees and Dues.....	page 12
	Annual Membership Fee.....	page 12
	Chapter Meeting Fees.....	page 13
	Chapter Supplies.....	page 13
VIII	Membership Requirements.....	page 14
IX	Member Responsibilities.....	page 15
X	Attendance.....	page 16
	Procedures.....	page 16
	Guidelines.....	page 16
	Substitutes.....	page 16
	Punctuality.....	page 16
	Leave of Absence.....	page 17
	Inactive Status.....	page 17
XI	Giving and Receiving Business Referrals.....	page 18
	Referral Slips.....	page 18
	Reciprocal Referrals.....	page 18
	Minimums.....	page 19
	Cross Chapter Referrals.....	Page 19

XII	Recruiting New Members / Incentives.....	page 20
	Welcoming New Members.....	page 20
	Incentives for Recruiting New Members.....	page 20
XIII	Showcasing.....	page 21
XIV	General.....	page 22
XV	President’s Duties.....	page 23
	Attendance.....	page 23
	Meeting Structure.....	page 23
	Roster Review.....	page 24
	Chapter Split or Cap.....	page 24
	Change of Officers or Meeting Location.....	page 25
	Resolving Conflicts.....	page 25
XVI	Treasurer’s Duties.....	page 27
	Attendance.....	page 27
	Use of Funds.....	page 27
	Primary Responsibilities.....	page 27
XVII	Secretary’s Duties.....	page 29
XVIII	Chapter Ambassador’s Duties.....	page 30
XIX	Optional Board Positions.....	page 31
XX	Business Ethics and Expectations.....	page 32
XXI	Index of TWI Forms.....	page 33

I. Welcome!

Team Women International is the world's fastest growing "women only" business-referral-exchange organization. Our number one objective is supporting you in building your business in a fun and professional setting through the exchange of qualified business referrals. Remember, the most effective method of growing your business is by direct referrals and personal recommendations, which is precisely what Team Women International (TWI) is all about!

Being a member of TWI means you have dozens of highly committed sales professionals working directly for you. They become your outside sales force. Your TWI chapter also serves as a closely-knit, wide-ranging business support group. Meetings are held once every two weeks which is optimal for strong business relationship building.

Within each chapter, each business category is represented by one member only. Each member is restricted to one "core" product or service. When your company offers more than one core line, you designate the specific one you will promote. This provides for additional openings for new members of your TEAM! Each person is allowed to belong to only one Team Women Chapter.

TWI is dedicated to providing a range of activities and opportunities to grow your business. Some of our current member activities include Member in the Spotlight (monthly), chapter-hosted mixers, an online calendar of events, monthly all member calls, and Team Women University calls.

TWI is a highly focused networking organization in which building your business is our number one priority. Having fun and creating great relationships are an exciting bonus of the total networking experience and we do that too!

When you attend a TWI meeting, you will immediately feel the wonderful energy and commitment to your business success we all share. We are confident you will have great success building your business with Team Women.

Thank you for choosing TWI. Your membership and participation are highly valued and we look forward to supporting you in achieving all of your business goals.

II. A Message from Team Women International

Hello and thank you for joining Team Women!

I have been a woman business owner for over 20 years and I am passionate about my commitment to growing my businesses and helping other women to grow theirs. Team Women represents the strength women business owners bring to our economy and the unique way we do business.

TWI is the only "referral based," business-networking organization in all of North America whose membership is limited to women only. I personally believe women in business can grow and prosper in so many ways by supporting one another. Around the world, women like you are proving this premise correct with the phenomenal growth of TWI since its inception on January 1, 2005.

TWI is all about face-to-face networking, which is well-known to be the most effective method for gaining new customers, new clients and increasing sales. TWI has taken this time-tested truth and turned it into something new and exciting with the added benefits of building self confidence and forming lasting relationships. We live in an abundant universe with more than enough business for all of us. TWI provides a structure and a system for the business to flow.

TWI is a "personal" organization where everyone has a voice and where new ideas are always encouraged. In Team Women, traditional networking is enhanced by adding a healthy dose of fun, spontaneity, and trust. I have every confidence you will enjoy building your business with TWI.

Sincerely,

Judi Finneran

III. Chapter Format

Each TWI chapter will select a **President, Treasurer, Secretary and Ambassador** to serve as the board of officers. TWI expects each member to seek office at some point during her membership. Officer positions are held on a rotating basis to allow all members the opportunity to develop and apply their leadership and organizational skills.

Chapter President: The chapter President is elected for an eight month term (See President's Duties, pages 23-26.) The president can fill additional terms if approved by the chapter.

Past President: The outgoing President will assume the role of Past President (See President's Duties, pages 25.) The Past President will also assume the Chapter President position if the current President resigns and until the chapter elects a new President.

Chapter Treasurer: The chapter Treasurer is elected for a six month term. (See Treasurer's Duties, pages 27-28.) The treasurer can fill additional terms if approved by the chapter.

Chapter Secretary: The chapter Secretary is elected for four month terms. (See Secretary's Duties, page 29.) The secretary can fill additional terms if approved by the chapter.

Chapter Ambassador: The chapter Ambassador is elected for three month term. (See Chapter Ambassador's Duties, page 30.) The ambassador can fill additional terms if approved by the chapter.

The reason for different lengths of service as officers is to ensure a continuity of experience and knowledge of the board and to only have one officer change at a time. Outgoing officers will become "past officers" and train the new officers.

Optional Board Positions (page 31)

Chapter Web Site Liaison: Individual chapters have the option of having a TWI chapter web site for their specific chapter. This person manages and coordinates changes and updates for the chapter with the TWI webmaster.

Chapter Historian: Many chapters choose to maintain a scrapbook chronicling the chapter from inception, showing its growth, testimonials, member achievements, activities, etc. This person is responsible for updating and maintaining the scrapbook.

IV. Meeting Structure

Your Team Women Chapter ***is what you make it!*** Your bi-weekly meetings are your opportunity to really get to know your fellow TWI members. Meetings are structured with an agenda to ensure chapter business is handled in a professional and efficient manner. At TWI, our number one objective is for every member to have a great time building their business through direct referrals. TWI expects its members to look forward to each meeting.

"The key to powerful networking is getting to know your fellow TWI members and the products and services they represent!"

Meeting Schedule & Venue: Meetings are held every other week at a place designated by the group. Meetings run for one hour with an optional 30 minutes of open networking following the meeting. There are many types of venues which may accommodate your TWI chapter meetings. These include community centers, hotels, businesses, restaurants, coffee houses and other venues which have an adequately equipped meeting room. Some venues charge a nominal fee while others may offer a meeting room at no charge. Personal residences are not permitted. In order to minimize change of venue, it is important to select a meeting place which can accommodate up to 35 members.

Chapters may meet Monday through Friday in the morning, afternoon or evening. Meeting dates can be adjusted under certain circumstances, such as holidays. If a meeting date falls on a holiday Monday, the meeting is moved to the following day (Tuesday.) For example, chapters scheduled to meet on the Labor Day holiday on Monday would reschedule to Tuesday. For major holidays in the middle of the week, have the meeting the next week and then again the following week. In this case, you would meet two weeks in a row so rotation is not off. Meetings falling on Thursday or Friday of Thanksgiving week would be an example of this one. What a chapter should do during the weeks of Christmas and New Year depends on what day of the week they are. The goal is to adjust around a holiday to avoid not meeting for a month (4 weeks.)

Chapters may schedule socials in addition to chapter meetings. These events may only substitute for a chapter meeting if held on the normal meeting time and day.

Members must arrive promptly and all members are expected to stay for the full meeting. Members are requested to arrive 15 minutes prior to the meeting start time. Members sign in, turn in their referral slips, and pay their \$5 Meeting Fee prior to the beginning of the meeting.

Business Cards: Each chapter will have a box to hold member business cards. The dividers are labeled by core profession, such as "skin care", "jewelry", "realtor", and "business coach." This box will be kept at the sign-in station. Upon checking in, members check to make sure there is an adequate supply of their own business cards and take cards of other members to replenish their personal supply. Guests are the only ones who are permitted to pass around business cards at a meeting. This should be done when they do their introduction.

Fliers, Brochures, Samples: These can be placed at a designated location in the meeting room for members and guests to take. This information is not to be passed around at the meeting to avoid distractions and to focus on the meeting at hand. Members need to remember to pick up any of their leftover information.

Meeting Structure at a Glance:

What Happens at a Team Women Meeting?

This is the number one question we receive from prospective members. They understand it is about networking to build your business and just aren't sure how the meeting is formatted.

Team Women has a standard agenda which is to be followed in all chapters. Each chapter meeting is a little different in style, ambiance, etc based on location and who the chapter president is. The point is, you always know what to expect and feel comfortable visiting other locations.

A great benefit of being a TWI Member is the ability to visit other chapters where your core profession is open. This allows you to network with more people and enhances your membership.

The Team Women agenda is designed with several purposes in mind:

1. **To complete the meeting in exactly one hour.** As business owners, when making our schedules, we often need to fit in several different appointments. To do that we need to "know" how long we will be at each appointment.
2. To allow everyone **to share who they are and what they do.**
3. **To have a Showcase Presentation which educates and informs** the members of your chapter about your products/services so they can more easily generate referrals for you.
4. **To recognize referrals!!!!!!!** This is why we exist and seeing referrals passed and business done creates excitement and motivation to continue to seek out referrals for each other.
5. **To share testimonials:** Sharing our own experiences and those of the people we have referred builds credibility for everyone.

With chapters all over the country it is very important each chapter follow the standard agenda. Through a process of trial and error we have found what works best for our members.

If you have any questions about the agenda or need assistance in following the agenda, please send an email to and we will be there to support you in every way! Your business success is our only goal!

Team Women Agenda

- I. **Meeting called to order by president on the hour.** (Members and guests need to arrive 15 minutes prior to scheduled start time to check in, pay dues, turn in referral forms and check business card box to stock your cards or replenish your supply of other members' cards.
- II. **President Announcements** Announcements include chapter business, (e.g., an expo you may be doing) or national announcements (e.g., Team Women University Calls)
- III. **30 Second Commercials** Each member has an opportunity to introduce herself and her business for a maximum of 30 seconds per person.
- IV. **Member Showcase(s)**: The members of your chapter are there to learn how they can best refer business to you. Your team is not there to be sold to. In a showcase, choose one particular area of your business and explain it in detail. Your members are your outside sales team and business advocates, so the more they understand your business the more effective they will be.
- V. **Testimonials**: Personal referrals and networking works! When you share what a great job someone else did (either providing you with a product/service or treating your referral well) it gives them credibility. It is important for each member in a chapter to personally experience the product or services of the other members so they can speak from first hand experience.
- VI. **Passing of Referrals**: This is THE MOST IMPORTANT thing to have happen at a meeting. All referrals are turned into treasurer prior to the meeting to be tabulated and then distributed. WE DO NOT ask each person individually, "do you have referrals?" We focus on and celebrate the referrals which are passed and all are celebrated.
- VII. **Treasury Report**: Treasurers report on funds on hand and any expenses since last meeting based on balance at end of last meeting
- VIII. **Final Announcements and Reminders**
- IX. **Final round of 30 second commercials**
- X. **President closes the meeting on the hour**

V. Core Business

Members must represent a discipline which is their main business or represents a substantial part of their business activities. In instances where a member provides more than one product or service, the member must designate a **"single"** core business.

If your company offers more than one major product line or major service, you must designate one "core line." This allows for maximum participation of members with exclusive representation within TWI.

Here are a couple of examples to further clarify a single core business by product or service: 1) a member who represents Arbonne might designate "skin care" as her core business while another member from Mary Kay might designate her core business as "cosmetics" or 2) a member who is a Realtor might designate "residential real estate" and another member as a Realtor might designate "commercial real estate". In either of these examples, they are totally different products/services with different purposes.

A member may only represent herself to TWI as her "single" core business – one and only one.

When visiting other chapters, you represent your core profession only.

TWI members may not contact other members about businesses other than their core profession. The exception to this is anyone with whom you had a personal or business relationship outside Team Women.

TWI does not allow members from "Marketing Companies." This is defined as a company which is a purchasing portal site for a multitude of products and services. These companies typically offer the ability to purchase through them from many major department stores and large vendors.

In the event a current member wishes to change her core profession within the group, the request must be submitted in writing to TWI via the "Membership Change" form for approval.

If you have any questions regarding core professions or services, please contact TWI.

VI. Multiple Memberships / Other Organizations

Members are permitted to belong to only one TWI chapter. One of the unique benefits TWI offers is the opportunity to visit other Team Women Chapters in which your core profession is open. When visiting chapters other than their own, TW members may not showcase. The only exception to this policy is when a chapter president specifically invites a member of another chapter to showcase at her chapter meeting. Please check with the chapter president prior to visiting another chapter.

While TWI does not promote internal recruiting of members from one chapter into another, a member may request a transfer from one chapter to another. This requires the member to submit a Membership Information Change Form to TWI for review and approval.

Although we highly encourage each member to focus on giving business referrals exclusively to their TWI chapter members and members of other TW chapters if their core is not available in your chapter, we do not have a policy against membership with other networking organizations.

VII. Fees and Dues

Yearly Membership Fee: The Yearly Membership Fee is \$269.00 (effective 1-1-09) and can be paid by submitting a completed application to TWI via fax.

Benefits of membership include:

1. **Team Women membership is effective** – members see sales increase by an average of 20%. We guarantee you exclusivity in your core profession in your chapter, we don't mandate the quantity of referrals (only the quality) and don't make you uncomfortable by bringing colleagues to a meeting with whom you are not familiar.
2. Team Women members have the opportunity to **visit any other chapter** at no additional cost. Of course, your core profession cannot be represented in the chapter you wish to visit.
3. **Team Women University** gives members access to the best and brightest experts in the country to share their wisdom with you for free! These teleclasses are offered live monthly, and are also archived in the member area of the website.
4. Team Women has a **national, ongoing media plan** to ensure exposure and recognition for Team Women International, and in turn, all Team Women chapters.
5. Many Team Women chapters choose to join local **Chambers of Commerce**, which means members of that chapter (and Team Women in general) are also members of the Chamber and able to participate in events and other Chamber offerings.
6. The golden opportunity of Team Women is in the **power of referrals**. We have a strict definition of what a qualified referral is and emphasize quality over quantity. Because of that, most Team Women referrals lead to business and sales.
7. The most commonly mentioned benefit of membership stated by our current members is the **relationships formed with women in their chapters**. Not only are members networking and passing referrals, but also experience the support of a network of business women facing similar challenges and opportunities.
8. **The Team Women website** is consistently ranked in the top 4 on Google for "women networking groups." As a member, your business information, bio, photo, and hyperlinks to your website are all posted at TeamWomen.com, a site which gets 40-50,000 hits per month. Does your website get that kind of traffic?
9. The standard Team Women meeting agenda creates a **streamlined, business oriented meeting** which starts on time and ends on time in exactly one hour. Meetings include introductions by each person in attendance, announcements about the chapter and TWI, showcase presentations by members on a rotating basis and success stories from the members.
10. **We are here to partner with you in growing your business!**

Once you become an active member, the Yearly Membership Fee will be billed on the anniversary of your start date. Renewal notices are sent approximately one month in advance. The payment due date will be noted on the renewal notice. In the event payment is not received within 5 days of the due date, membership will be deemed to have lapsed. A lapsed membership will require a new TWI Membership Application, along with payment in-full of the Yearly Membership Fee, to be submitted for approval. The renewal fee for members renewing prior to their expiration date is \$199. All fees are non-refundable and subject to change.

In the event a member decides to cease membership with TWI, no fees are refundable. Members who wish to rejoin TWI (at their previous chapter or at a different chapter) must submit a new application and pay the full Yearly Membership Fee. The rejoining member must have left her previous chapter in good standing (to be determined by the chapter President and/or TWI), including being current on all Meeting Fees.

Chapter Meeting Fees: Meeting Fees are paid at every meeting. The Meeting Fee is \$5 per member (guests and visiting members are exempt) and is paid to the chapter Treasurer. Checks are permitted for meeting fees only if your chapter has established a checking account. Chapters may offer the option of members paying on a monthly, quarterly, or annual basis.

The Chapter Meeting Fee is NOT a "meal fee." The Chapter Meeting Fee goes into the chapter treasury and is used to cover the cost of basic supplies such as paper, photocopying, faxes, stamps, envelopes, scrapbook supplies, cash box, ledger book, etc. The remaining funds may be utilized at the team's discretion for business mixers, chapter advertising or other events to build chapter membership. Member's meeting fees are not to be used for charitable donations or non chapter building events.

All members are responsible for the biweekly meeting fee. If you miss a meeting, you must pay for the missed meeting at your next meeting. The Meeting Fee should be considered an important part of your overall commitment to your TWI chapter. Members only pay at their home meetings and do not pay a meeting fee if visiting another TWI Chapter. Guests at a TWI Chapter meeting are never asked to pay a meeting fee. Guests are allowed to attend up to 2 meetings at no cost and then must join TWI in order to continue attending.

All fees are non-refundable and subject to change.

Chapter Supplies: Your team can utilize the money in your chapter treasury for the following supplies: Paper, pens, envelopes, stamps, name tags for guests, business card case, folders for safe-keeping of forms (one for each chapter officer), sign-in sheet clip board, receipt booklet, cash box or pouch, ledger book, scrapbook supplies. TWI will furnish membership applications; marketing materials, brochures, and referral slips (a Marketing Supply form for these items is available on the TWI website).

Team Women Badge: As part of your paid membership you will receive one Custom Member Badge. The first badge is free. Any additional badges or corrections to Core Business will be the member's responsibility to replace. Any additional badges can be ordered directly by the member from the TWI website online store as setup through Town and Country Printing.

VIII. Membership Requirements

1. To be eligible for membership, a member must personally benefit financially from referrals in her core profession.
2. TWI has confirmed your core business is available in the chapter you are interested in joining.
3. TWI has received completed/signed Membership Application (including any additional required forms).
4. Member has paid the Yearly Membership Fee in full.

Locking in Your Spot: The member who submits her application first, complete with all payment information, locks in the core profession. Applications can be faxed to Team Women or submitted on line. When there are multiple applications for the same position, it is decided by the time stamp on the application as received by TWI or as received by a Chapter President at a meeting.

Resignation: In the event a member decides to resign from TWI a Resignation form must be completed and submitted to TWI. A copy of this form can be found under the member login section on the TWI website. If a chapter President resigns, members of the chapter must elect a new president at the next regularly scheduled meeting. The Past President (if one exists) will reside over this election process and act as the President. If no President is elected the chapter will be closed and current members will have the option to join another chapter, go on a wait list for another chapter, or wait for a chapter to open in her area. The member's expiration date will not change.

IX. Member Responsibilities

Your TWI chapter is as successful as you choose to make it. Attendance is vital to your success and the overall success of your team. Each member is required to show respect to the other members of the group by maintaining a sense of professionalism at all times. Members dress professionally, in line with their core professions. Only join Team Women if you are committed to attending all meetings and participating enthusiastically.

Each member MUST devote a significant amount of time and energy toward generating highly qualified business referrals and introducing potential new members to the group. This is how your TWI chapter will prosper and grow.

During the formative period of a chapter, it is important all members are focused on inviting potential new members to the group for each meeting. The more members and the wider the range of core professions represented, the greater the opportunity for business referral generation. The objective of TWI is for every member to generate more business based on receiving highly qualified referrals. You'll be amazed at what your TWI chapter can accomplish with everyone working together towards a common goal!

As a TWI member, while you are able to visit any chapter in which your core profession is open, members may not solicit other members they have not personally met (i.e. no mass emailing to members, cold calling, etc). TWI is based on **relationships**.

TWI members may not contact other members about businesses other than their core profession. The exception to this is anyone with whom you had a personal or business relationship outside Team Women.

TWI expects each member to seek office at some point during her membership. Officer positions are held on a rotating basis to allow all members the opportunity to develop and apply their leadership and organizational skills.

If you have a need for a member's service or products, contact the member directly and remember to complete a referral slip at your next meeting.

A member may share information about other events or organizations which could be of benefit to the chapter members and does not conflict with any Team Women member core professions.

Keep your membership information current with TWI and use the membership information form provided in the members section of the TWI website for this purpose. This form may also be used to request a chapter transfer or a change in your core business. Both transfers and core business changes must be submitted for approval by TWI before the change can be made. We appreciate your cooperation in helping TWI keep this information accurate and up to date.

X. Attendance

Attendance Procedures:

1. The Chapter President will send a reminder email at least 48 hours prior to each scheduled meeting.
2. **It is your responsibility to contact your chapter President personally via phone or email PRIOR** to the meeting time if you are unable to attend.
3. Failure to contact your chapter President prior to the meeting will result in an unexcused absence. Your chapter President will send attendance letter number one. A sample of first unexcused absence letters for this purpose can be found under the member login section on the TWI website.
4. In the event of a second unexcused absence, TWI's Operations Manager will send a 2nd letter stating any future unexcused absences may result in the termination of your TWI membership.
5. In the event of a third unexcused absence, TWI may issue a Membership Deactivation letter (all fees are non-refundable).

Attendance Guidelines:

Excused absences are when the chapter President has been notified in advance by telephone or email and are limited to:

- Personal or Family Illness
- Out of Town Vacation
- Out of Town Business Travel
- Jury Duty

Three excused absences in a row will also be counted as one unexcused absence. This is not meant to be punitive but to foster the relationship building mission of Team Women.

You are responsible for paying your Meeting Fee for all missed meetings. If you find you are having difficulty making the scheduled meeting times, please set up a time to speak with your chapter President regarding your options (transferring chapters, relinquishing position, etc.)

Substitutes: Substitutes are NOT permitted to attend meetings in your place. TWI is based upon strong relationship building among those members within each group. All TWI memberships are personal and may not be transferred to another individual.

Punctuality: All members are expected to arrive at the meeting location ten minutes prior to the official meeting start time. This is to demonstrate your commitment to the group and your professionalism, as well as to allow time for checking in, paying meeting fees and turning in referrals. Being on time shows respect for members and guests and avoids interruptions and distractions. Members arriving late are not allowed to participate in the introduction (30 second commercial segment.)

Continued tardiness will be addressed in a similar manner as unexcused absences and could result in termination of your membership.

Leave of Absence: A request for a leave of absence must be submitted in writing to TWI for approval. Use the Leave of Absence form found under the TWI member section of the website for this purpose. A leave of absence (LOA) allows a member to miss meetings for an extended length of time without "unexcused absences" or termination of membership status with TWI. It does not extend your membership anniversary date. A leave of absence is only for maternity leave or medical leave. LOA extending beyond 8 weeks requires additional approval. Your core business spot in a chapter will remain secured and you will stay on the roster and website. You are responsible for all missed meeting fees (\$5/meeting).

Inactive Status: A request for Inactive Status must be submitted in writing to TWI for approval. Use the Inactive Status form found under the TWI member section of the website for this purpose. Inactive Status allows a member to miss meetings for an extended length of time without "unexcused absences" or termination of membership status with TWI. It does not extend your membership anniversary date or guarantee your core business spot in a chapter. While on Inactive Status, a member will be removed from the chapter roster and website. When the member wishes to return from Inactive Status, if her core business is open she may return to her chapter as an active member. If her core business spot has been filled during IS, TWI will assist the member in finding another local chapter, but placement is not guaranteed.

XI. Giving and Receiving Business Referrals

Generating and receiving business referrals for your chapter members is the purpose and benefit of your TWI membership. This is the basis on which Team Women was built and all members are expected to provide qualified referrals for other members. You are encouraged to learn as much as possible about your team members and their specific core businesses. The more you know about your team members, the easier it becomes to recognize appropriate business referral opportunities. Make sure to always carry a stack of referral slips and your TWI business card holder. **"Teamwork makes the Dream Work!"**

There are many ways to generate business referrals for the members of your chapter. If you work primarily online, you are likely in contact with lots of people through *Yahoo! Groups* and other online communities. Use these different online forums as opportunities for referral generation. If you work for a large business or if you are in outside sales, you can actively seek referral opportunities by way of the people you come in contact with throughout your work week. Friends, relatives, neighbors, etc...are all potential referral sources. It all comes down to understanding your team members' businesses and then actively seeking business referral opportunities!

Referral Slips: All team members should carry a stack of **referral slips**. When you encounter a referral opportunity, fill out the slip and make sure to bring it to the next meeting. Complete as much information as possible for the referral. As time is of the essence in referrals, you will want to provide the referral information to your team member as soon as possible. You may contact the recipient by telephone with an email backup.

- **White copy:** Goes to the referral recipient
- **Yellow copy:** Goes to the chapter Treasurer
- **Pink copy:** Stays with you so that you may track your outgoing referrals, set personal goals, etc.

All referrals, whether they are given by phone, email, or in person, **MUST** be handed into the Treasurer at the beginning of the chapter meeting for recording and distributing.

If you purchase a product or service from a member of your chapter (inside referral), please fill out a referral slip in the same manner as a regular business referral. These are also turned into the Treasurer for tallying. **Trades are NOT permitted. You are required to pay for products and services offered by your team members. Members may offer a discount to TWI chapter members.**

Reciprocal Referrals: During your membership you may receive numerous business referrals from a team member for whom you personally have a hard time providing referrals. This happens quite commonly, and you do not need to feel as though you are letting a particular team member down by failing to generate "reciprocal referrals."

Always keep a TEAM perspective. For your group to be successful, each member must give her very best effort to generate business referrals for the group as a whole. With each member working together for the betterment of the team, your chapter will continue to grow and prosper for everyone's benefit.

All successful TWI chapters are the result of women just like you coming together for a common goal. It takes time, effort, enthusiasm and commitment. With everyone working together, your TWI chapter will become a valuable asset in building the business of your dreams.

Minimums: While there is no “minimum” number of referrals in Team Women, members should strive to bring at least one referral to every meeting. Only pass “qualified” referrals to your chapter members. TWI does not have a minimum number of required referrals specifically to eliminate unqualified leads. All referrals must contain specific contact information of the person to be contacted by the referral recipient. Also, the contact must have provided permission for the referral recipient to call and must be expecting to hear from her.

The chapter Treasurer maintains a running total of business referrals generated by each member. The Chapter President will schedule a telephone or in-person meeting with any team member who appears to be having difficulty generating referrals. The Chapter President is there to help each and every member succeed within the group format.

Cross Chapter Referrals: As a TWI member your primary focus on giving referrals is with the members of your immediate Chapter. Yet, whenever you have the occasion to pass a referral to a TWI member in another chapter then please extend the opportunity to them. Again, you would always consider the members of your immediate Chapter first for their core business. And even if you have not visited a Chapter, you might have a referral for some one in a particular line of business or locality and can consider the pool of TWI members as a professional directory. To accommodate the giving and receiving of these “cross chapter referrals” simply contact the recipient just as you would a member of your own Chapter, complete a referral slip, and turn it in to your Chapter Treasurer. You have the option to forward the original white copy to the recipient and the most important step is to make sure the referral info is passed to the receiving TWI member in a timely manner. The Chapter Treasurer will account for these referrals as an outside referral given to another TWI member.

XII. Recruiting New Members / Incentives

Welcoming New Members: The recruitment of new members is inherent to the success of your TWI chapter, especially during the formative stages of the group. It is also very important potential new members and visitors feel comfortable and welcomed when they visit a chapter. Remember, it can be a bit intimidating to be the only “newbie” at an established chapter of highly motivated networking women!

TWI takes enormous pride in its focus on building tightly knit chapters based on trust, respect and loyalty. Members are encouraged to introduce themselves to potential new members, answer any questions, and share their chapter experiences.

It is important you invite potential members whose core business is not already represented by a current team member. When a potential member is present at a meeting, she is exempt from the Meeting Fee. If the potential member is accepted into the chapter by TWI, she will begin paying the Meeting Fee at the next meeting.

A potential member (visitor) is allowed to present a description of her **core business** (if it is not represented in the chapter already) to the group (this will occur at the beginning of the meeting). Potential members should also be reminded to bring a stack of business cards to be handed out at the beginning of the meeting.

The chapter President will spend a few minutes at the beginning of each meeting welcoming any visitors and providing a brief overview of the chapter. Many chapters maintain a **scrapbook** chronicling the group’s first meetings, subsequent growth, and group events (many chapters have appointed a Chapter Historian). The President may wish to share this with potential members as a sort of “visual tour” of the unique TWI experience.

When a potential new member is present at a meeting, the President **WILL** provide the visitor with a **“TWI Membership Application”** along with any other required forms as designated by TWI.

Incentives for Recruiting New Members: For every 3 new members you refer who join a TWI chapter, you will receive \$25 from TWI. **Please use the “I Have Recruited Members” form.**

NOTE: You will only be paid for 3 members you PERSONALLY recruited – not those resulting from the efforts of the Team Women organization (e.g., an advertisement placed by Team Women, a newspaper article resulting from a Team Women press release, or an event paid for by Team Women.)

Please remember to maintain a strong code of ethics throughout the recruitment process. As a member of a TWI chapter, you must follow all rules, laws, and regulations regarding posting chapter advertisements. For example, if you decide to print fliers to advertise your chapter, you must only post those fliers where permitted. Your group is welcome to advertise in local newspapers, online ads, etc. with written approval from TWI.

XIII. Showcasing

Showcasing is an important opportunity for each member to conduct a 10 to 15 minute presentation of her core product or service to the group. This is intended to be fun and informative! The purpose of a showcase is to educate and inform the members of your chapter in regards to your business. The members of your chapter are your business and outside sales advocates. Your members are not to be viewed as your ultimate customer or client base. Please feel encouraged to bring product samples or other items to share. A brief Q&A period will follow the presentation.

TWI understands not everyone is comfortable with conducting an extended presentation to the group. Therefore, showcasing is NOT mandatory. However, showcasing is the best way to educate your chapter on your business.

Depending on the size of your chapter, there will be either one fifteen minute or two ten minute showcases per meeting.

Schedules are created in advance by the chapter President. If you are not able to showcase on your assigned date, you, as the member, are responsible for trading with another member and informing your Chapter President of the exchange. If this is not done, you will go to the end of the rotation for your next showcase.

Until a member appears on your official chapter roster, she is not considered a member. Once the application is received and successfully processed, you will receive an updated roster confirming her membership. Out of respect for confirmed chapter members, please do not schedule her to showcase or any other benefit of membership until she appears on your roster. If you have submitted an application and the new member has not appeared on the roster, forward the information to support@teamwomen.com to be researched.

XIV. General

TWI reserves the right to open multiple TWI chapters in any city or area.

TWI reserves the right to close any TWI chapter at any time at its sole discretion.

TWI reserves the right to revoke membership of any TWI member at any time at its sole discretion. All fees are non-refundable.

TWI is not affiliated with any of the members or the companies the members represent. TWI does not endorse any of the companies represented by the members. TWI is not responsible for any transaction that may occur between TWI members. Redistribution or commercial use of any graphics, photographs, or text is prohibited without expressed written permission from TWI. If you are looking to purchase a service or product from any TWI member, please consult the terms of service for that particular service. TWI will not be held responsible for transactions by members.

In the event membership is terminated by TWI, all fees are non-refundable. TWI reserves the sole right to make any and all membership decisions based on the merits of each individual case. Decisions made by TWI on any membership may or may not be considered by TWI as binding precedent.

In the event a member decides to cease membership with TWI, no fees are refundable. Members who wish to rejoin TWI (at their previous chapter or at a different chapter) must submit a new application and pay the full Yearly Membership Fee. The rejoining member must have left their previous chapter in good standing (to be determined by the chapter President and/or TWI), including being current on all Meeting Fees.

In the event of any conflict or complaint, the situation must be presented in writing (and not brought up during the one-hour meetings) to the chapter President, who will make every effort to resolve the issue in a timely manner. If disciplinary action is deemed necessary (including but not limited to termination of membership), or if the chapter President is unclear on how to proceed, the chapter President will contact TWI, whereupon TWI will make a final binding decision.

TWI does not allow children, family members or pets at meetings.

XV. President's Duties

As chapter President, you are responsible for facilitating a well-organized and productive meeting while ensuring the chapter continues to build momentum. Serving as chapter President is an extremely fun and rewarding experience. TWI expects all chapter members will at some point take the opportunity to seek office.

Attendance

As President of a chapter, you are expected to role model the attendance policy. In the event you have to miss a meeting, you are required to notify the chapter Treasurer by giving as much advance notice as possible. The Past President then assumes responsibility for running that meeting.

Chapter Presidents are required to be in attendance at least 15 minutes prior to the meeting start-time. Use this time to meet with current members and to greet any potential new members that are visiting the chapter for the first time.

Meeting Structure

Meetings represent a vital component of the overall success of your TWI chapter. As President, it is your duty to make sure meetings are well-organized, productive, and fun. Please be sure to visit the **TWI website** on a regular basis to keep up with new information, Tele-seminars, etc.

Meetings must start and end on time! There is a lot to get done in just sixty minutes and it is imperative each segment of the agenda moves swiftly and in an organized manner. As a team, work with your Secretary and Treasurer to come prepared to the meeting with copies of chapter forms to run an efficient meeting. The President brings the meeting agenda and any TWI announcements. The Secretary brings a meeting minutes template, attendance sheet and visitor sign in sheet. The Treasurer brings a Meeting Fees form and referral sheet or one combined form. As a team, keep a set of these handy in the event any one of the three officers is absent.

To ensure the meeting commences on time, the President makes an announcement approximately 3 minutes prior to the meeting start-time. At this time, business referrals and meeting dues must be passed to the Treasurer.

All chapters will use the meeting structure at a glance and agenda outlined in this handbook.

The President will open with a brief greeting. The President will ask if anyone in the group would like to introduce a potential new member. Potential new members will be directed to pass out their business card to all members of the group. During this time, the Secretary will take attendance.

If potential new members are present, the President should provide a brief overview of TWI and the benefits of becoming a member. At this time, the President will also make all TWI company announcements as provided in the President's monthly newsletter.

If there are new members present, the President should take the opportunity to formally welcome them to the chapter.

Each member, including potential new members, will give a thirty second description of an aspect of their core business. This occurs at the beginning of the meeting in roundtable introductions.

Next is **"showcasing"** (See page 19). The President creates a schedule for a minimum of six months for the scheduled showcase speaker. Speakers present in the order they joined and then on a rotational basis. New members are scheduled in at the earliest opportunity.

After the showcase presentation the chapter business items will be addressed including the Treasurer's report on funds and business referrals. The Treasurer will announce the total number of referrals generated for the two-week period. The stack of referrals is then passed around the table so each member may collect any new business referrals that have been generated for them. This is also a good time for the President to ask for testimonials.

The business section of your meeting may be closed by announcing recruitment goals for the upcoming two-week period and requesting any applications from prospective members. Close the meeting by asking for a final round of introductions. And remember, keeping the meeting on time during this closing period is as important as starting on time.

Roster Review

Each chapter will receive a copy of their Roster from TWI as membership information changes. The Chapter President should periodically review the roster with the chapter members to make sure all information is up to date and correct. Any changes required may be submitted by the member using the Membership Information Change Form.

Chapter Split or Cap

In general, TWI has determined that approximately 30 members are optimal for effective networking. When chapters expand beyond 30 members, it can become difficult to run an effective meeting in the allotted 60 minutes. It can also be challenging for new members to quickly grasp all of the core businesses offered by the group. If your chapter is reaching a level where some of these factors are becoming a concern, please contact TWI for ideas on how to best proceed.

Change of Chapter Officers or Meeting Location

Periodic changes to officers and any meeting location changes should be reported to TWI by the President. Please use the Election Results or Change of Location form found on the member section of the TWI website. Once a Chapter opens and members join, the Chapter's meeting time or day may not be changed.

If a chapter President resigns, members of the chapter must elect a new president at the next regularly scheduled meeting. The Past President (if one exists) will reside over this election process and act as the President. If no president is elected the chapter will be closed and current members will have the option to join another chapter, go on a wait list for another chapter, or wait for a chapter to open in her area. The member's expiration date will not change.

Past President

The most recent prior President will serve as Past President until a new President is elected. This position serves as an advisor to a newly elected President. The Past President will also conduct the meeting if the current President cannot attend.

Resolving Conflicts

From time to time conflicts and complaints may arise. As the president, it is your responsibility to ensure all conflicts are resolved fairly and in a timely manner. Conflicts can be minimized by following the TWI handbook. As chapter President, it is imperative you regularly remind the group of the importance of being familiar with the handbook.

As noted, all conflicts and complaints are to be presented in writing to the chapter President. They are not to be brought up during the one-hour meetings. In most instances, the chapter President will make a final binding decision. Remember, your team has placed their trust in you by electing you President. Have confidence in your ability to make astute decisions for the chapter.

All complaints and conflicts need to be resolved quickly and fairly. Although your team meets every two weeks, you will want to resolve all issues prior to the next meeting. Upon receiving a written complaint, come up with a solution and then utilize phone, email, or an in-person meeting to get the issue resolved. You are always welcome and encouraged to contact Team Women for assistance.

It is also your responsibility to monitor **attendance** requirements and **business referral tallies** (See pages 15 and 17, respectively). Not following the attendance policies seriously weakens your chapter.

Occasionally tough decisions will be in order. When disciplinary action is deemed necessary (including but not limited to possible termination of membership), or if you are unclear on how to proceed on any matter, you are directed to contact TWI. TWI will then make a final binding decision.

In closing...

As President, you'll be working closely with your chapter Treasurer and Secretary on all aspects of running a highly motivated and successful group. It is important to develop a strong working relationship built on teamwork and trust. It's also recommended you spend time together discussing the meeting format and ways in which you can improve upon each meeting. Your goal is to deliver a fun, productive, and motivating meeting -- all it takes is a little teamwork and organization. Have fun with it!

XVI. Treasurer's Duties

As Treasurer, you are responsible for collecting and allocating dues upon the group's behalf and assisting the chapter President with running the one-hour meetings. In addition, referrals will be turned in to you for recording and distribution. Your effort and professionalism are important to the success for your TWI chapter. Be sure you are familiar with the TWI handbook.

Attendance: Chapter Treasurers need to be at the meeting at least 15 minutes prior to the meeting start-time. Use this time to meet with current members and to greet potential new members who are visiting the chapter for the first time. You are also expected to role model the attendance policy. In the event you have to miss a meeting, notify the chapter President by giving as much advance notice as possible. The chapter Secretary then assumes responsibility for taking care of your duties at the meeting.

Use of Funds: It is recommended each chapter Treasurer have a cash box, receipt book, and ledger book for safe keeping and accurate accounting of chapter funds and also for petty cash purchases. The cost of these items comes out of the chapter treasury (or may be donated by a team member). There is also an option of opening a TWI checking account. Please contact TWI for instructions and required documents. The cash box, ledger book, etc. are transferred to incoming chapter Treasurers as elected.

As chapter Treasurer, you are responsible for the safe keeping of chapter funds. In the event you lose any of the group's funds under any circumstances (including fire, theft, misuse, et al), it is your responsibility to replace those funds in full by the next group meeting.

IMPORTANT: Whenever chapter funds are used to pay for items, the chapter President must authorize the items prior to their purchase. A **Petty Cash Approval** Form for this purpose can be found under the member login section on the TWI website. Any purchase over \$40 (such as group admission to a business mixer) requires a group vote.

At the beginning of each meeting, you will have two Primary Responsibilities:

1. Collecting the Meeting Fee: The \$5 Meeting Fee may be paid in cash (or check if the chapter has opened a TWI bank account) and is collected prior to the beginning of the meeting. Any members who were absent at the previous meeting must pay an additional \$5 to bring their meeting fees current. Some chapters may elect to collect the meeting fees on a monthly or quarterly basis. The Treasurer will track each member's fees and a sample meeting fee collection form is provided for this purpose on the TWI website. This form can be populated with all the members names then printed and brought to each meeting. At the end of each meeting, you will give a Chapter Treasury report of the chapter's balance. **(Note:** The Yearly Membership Fee is paid directly to TWI and is NOT collected by the Treasurer.)

2. Collecting Business Referrals: Business referrals for the two-week period are handed in to the Treasurer before the beginning of the meeting. You will log the referrals into the **Business Referral Report** form and turn this into the Chapter Secretary for inclusion in the meeting minutes. This form can be pre-populated with member's names. At the end of the meeting, you will announce the total number of both inside and outside referrals generated for the period, and distribute the referrals to their recipients.

(NOTE: In order to save time, it is recommended Meeting Fees and business referrals are collected simultaneously prior to the beginning of the meeting. A combined Meeting Fee and Business Referral Report is also included in the optional forms for the Treasurer's use and can be populated with all the members names then printed and brought to each meeting. This form can be found under the member only section of the TWI website.)

In closing...

As Treasurer, you'll be working closely with your chapter President and Secretary on all aspects of running a highly motivated and successful group. It is important to develop a strong working relationship built on teamwork and trust. It's also recommended you spend time together discussing the meeting format and ways in which you can improve upon each meeting.

Your goal is to deliver a fun, productive, and motivating meeting -- all it takes is a little teamwork and organization. Have fun with it!

XVII. Secretary's Duties

As Secretary, you are responsible for assisting the chapter President and Treasurer in many areas of running a successful TWI chapter. Serving as chapter Secretary is also an excellent way to understand what it's like to serve as President or Treasurer. Members who are undecided in terms of their desire to run for President or Treasurer can utilize their experience as Secretary to make a more informed decision.

Chapter Secretaries need to be in attendance at least 15 minutes prior to the meeting start-time. Use this time to meet with current members and to greet any potential new members who are visiting the chapter for the first time. You are also expected to have perfect attendance. In the event you have no choice but to miss a meeting, you are required to notify the chapter President by giving as much advance notice as possible. The chapter Treasurer then assumes responsibility for taking care of your duties at the meeting.

Secretarial duties include but are not limited to:

- 1. Taking Attendance:** This includes noting member attendance and collecting the guest and TWI visitor information for inclusion in the meeting. Member attendance can be noted silently during the meeting. Two optional forms to help the Secretary in collecting attendance information can be found on the member login section of the TWI website. The **Attendance Sheet** can be pre-populated with all members' names and used as a check off list. The **Visitor Sign In Form** can be used to collect guest and TWI visiting member contact information.
- 2. Meeting Minutes:** Recording, preparing and emailing meeting minutes to TWI. Please refer to the Meeting Minutes Template form for more details. This is posted in the member login section of the TWI website. Minutes are due to TWI within 48 hours after each meeting.
- 3. Other Correspondence:** Sending email notifications to chapter members about upcoming meetings, events, etc. Updating member information on chapter website (if you do not have a Chapter Web Liaison).
- 4.** Coordinating chapter events
- 5.** Filling in as needed with duties as requested by the chapter President and Treasurer

Important: As Secretary, it is your responsibility to take over Treasury duties when the chapter Treasurer is absent.

As Secretary, you'll be working closely with your chapter President and Treasurer on all aspects of running a highly motivated and successful group. It is important to develop a strong working relationship built on teamwork and trust. It's also recommended you spend time together discussing the meeting format and ways in which you can improve upon each meeting.

Your goal is to deliver a fun, productive, and motivating meeting -- all it takes is a little teamwork and organization. Have fun with it!

VIII. Chapter Ambassador's Duties

The chapter Ambassador's responsibilities include:

1. Greeting and meeting guests, making sure they sign in, and sitting with them during the meeting when possible.
2. Helping welcome new members to the chapter by making sure they meet all other members and understand all meeting procedures.
3. Following up with guests by telephone to answer any questions they may have and encouraging them to join Team Women.
4. Making sure guests have received a TWI Membership application.

XIX. Optional Board Positions

The chapter Web Liaison's responsibilities include:

1. Communicate with TWI webmaster to create and personalize the Chapter website.
2. Maintain communications with TWI webmaster according to chapter website payment plan to keep website information up-to-date re: meeting dates/times/locations, members, special events, etc.

The chapter Historian's responsibilities include:

1. Design and create Chapter Scrapbook.
2. Maintain the scrapbook by collecting photos and other materials (ie newspaper articles, etc) to chronicle the chapter from inception (if possible), showing its growth, achievements of members, activities, etc.

XX. Business Ethics & Expectations

It is expected all members will conduct themselves in a manner consistent with the level of "Team Work" TWI promotes.

However, should instances of misconduct arise, please be duly aware TWI reserves the right to revoke membership of any TWI member at any time at its sole discretion. TWI reserves the sole right to make any and all membership decisions based on the merits of each individual case. Decisions made by TWI on any membership may or may not be considered by TWI as binding precedent. All fees are non-refundable.

It is not the requirement of TWI to list all of the possible actions of member misconduct, nor the degree of severity, that could be deemed as detrimental to TWI or a TWI chapter and thus requiring disciplinary action. Nevertheless, examples of possible member misconduct include the following: **Unauthorized solicitation of members via ANY form (including but not limited to email, phone, mail); lack of decorum displayed to any member or TWI personnel; poor business conduct; promotion of a non-stated core business; failure to pay membership fees or complete required forms; failure to conform to a chapter's general requirements; failure to conform to TWI's Membership Requirements, Member Responsibilities, and Attendance Guidelines.**

XXI. Index of TWI Forms

The following forms may be used as referenced in this handbook and an example of each is available on the TWI member's section of the website.

Required Forms:

1. Membership Application
2. Meeting Minutes Template

Optional Forms use to help the Chapters:

1. Attendance Sheet
2. Visitor Sign In List
3. Meeting Fee Collection Form
4. Petty Cash Form
5. Business Referral Report
6. Combined Meeting Fee & Business Referral Form
7. Sample 1st Unexcused Absence Letters (under President resources)
8. Meeting Agenda (under President resources)

Periodic Forms to submit to TWI for various requests or changes:

1. Membership Information Change Form
2. Election Results or Change of Location Form
3. Marketing Supply Form
4. I Have Recruited Form
5. Leave of Absence (Medical Only) Form
6. Inactive Status (IS) Form
7. Member Resignation Form