

HOW TO CONDUCT THE 90-MINUTE MONTHLY MEETING (MONTH #1)

Now that you've conducted your Launch Meeting, your first two monthly meetings (i.e. this month's and the next) should allow each member to review [The W Source™ Value Proposition Worksheet](#) you provided in the Launch Meeting. You may choose to play the Value Proposition video during the meeting as well. Below is a suggested timeline for a lunch meeting (although this could easily be adapted for a breakfast). Depending on your group size, we suggest half of your group present their Value Proposition during this meeting and half present during next month's meeting.

TIMELINE

- 11:30 a.m. – Check-in, handout badges, and networking
- 11:45 a.m. – Lunch is served
- 11:50 a.m. – Meeting begins
 - Chapter Head Introduction (5 mins) – The Chapter Head calls the meeting to order, explains that this meeting and the next will be dedicated to practicing their “Building Your Value Proposition” assignment. The individuals that you selected in the Launch Meeting to share at this meeting will give their presentation, and the other half will present in next month's meeting.
 - Member Introductions (5 mins) – Go around the room and give each member a quick moment to re-introduce themselves to the group to remind everyone who they are and what they do.
 - The W Source™ Value Proposition Presentations (30 mins) – Give each member six minutes. Allow the member to read their Value Proposition. As a Chapter Head, remember to give a compliment. Open it up to the group for feedback.
 - Announcements (5-7 mins) – Explain that future meetings will have an opportunity for members to share a success, share a need or want, and ask for help from other members.
 - Example: "Our office will be hosting a _____ event next week. If you are interested in attending, please let me know!"
 - Example: "We are looking for a _____. Does anyone know of a good candidate?"
 - Endorsements (10 mins) – You will explain to the group that this section is an opportunity to thank a member for referring an opportunity or for taking the time to help them/their clients with a personal/business matter. Endorsements should focus on highlighting the person who offered the referral, and if appropriate, in a

case study format. Once a group is past the first three meetings, this is the section of the meeting that should ideally dominate the time.

- Example: “Sally, thank you so much for sending me a client. This client had just lost her husband a year ago and was overwhelmed with the process of setting up financial accounts in her name. Sally sent Ms. Smith my name, and I was able to begin working with her to transition the accounts properly and set up a distribution for her expenses. In addition, I was able to send her to another member of The W Source™, Jane, who updated her auto and home insurance policies to have only one driver which reduced her monthly premiums.”
- 12:45 p.m. – Organization of “One-on-Ones” (5 mins): Collect name badges from each member. Put the badges in the Selection Tote Bag (provided to you by The W Source™). Select two badges and explain to the group they are responsible to meet with each other before the next 90-Minute Meeting. Continue to select pairs from the Selection Tote Bag for the remaining members.
- 12:50 p.m. to 1:00 p.m. – Networking

EVENT CHECKLIST

Do you have everything you need? We’ve included a helpful checklist below to make sure you don’t leave anything important behind!

- Pens (at least 20, depending on group size)
- Printed copies of the Value Proposition Worksheet and Notes Pages (at least 20 of each, depending on group size)
- Retractable Banner
- Nametags
- One-on-One Selection Tote Bag
- Printed agendas for members (optional)
- Laptop (optional)
- Projector (optional)
- Cord to connect computer to projector (optional)
- Clicker with USB input (optional)