

## HOW TO CONDUCT THE 90-MINUTE MONTHLY MEETING (MONTH #2)

Now that you've conducted your Launch Meeting, your first two monthly meetings (i.e. this month and the previous) should allow each member to review [The W Source™ Value Proposition Worksheet](#) that 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 that half of your group present their Value Proposition during last month's meeting and half present during this 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 (like the previous monthly meeting) will be dedicated to practicing the The W Source™ Value Proposition worksheet. Half of the group will have shared their presentations at last month's meeting and the remaining half will give their presentation at this 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)