

HOW TO CONDUCT 90-MINUTE MEETING (MONTH #5)

Below is a suggested timeline for a lunch meeting (although it could easily be adapted for a breakfast).

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, shares group announcements, and introduces any guests.
 - 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.
 - Announcements (5-7 mins) – This is an opportunity for members to share a success, share a need or want, or ask for help.
 - 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?"
 - Member Showcase (5-10 mins) – This is a 5-10 minute presentation by one selected member to the group and helps the members get to know each other better (both personally and professionally). This individual typically pays for lunch for the group.
 - Endorsements (10 mins) – Explain that this time is an opportunity to thank a member for referring an opportunity, or taking the time to help them/their clients with a personal/business matter. Endorsements should focus on highlighting the person who did the deed, and if appropriate, in a case study format. ***This is the part 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."

- 12:30 p.m. – [“How to Cultivate Effective Referral Partners”](#) Now that each member of your group has crafted a powerful Value Proposition, how do you go about delivering that message to build lasting relationships that lead to referrals? Play this video to help each member deliver that message effectively and follow-up with a discussion with these [questions](#).
- 12:45 p.m. – “One-on-One” Assignments (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)
- 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)