

LEADS REVIEW

Review Date: _____

Member _____
Company: _____ # _____ Reviewer: _____ # _____

Company Representative: _____

Phone: _____ Email: _____

Associate: _____

Division: _____ Classification: _____

Current Committee Assignments*: _____

Number of people contributing leads: _____

Purpose of the Leads Review:

- 1. To determine if the member is "good & valuable" & supports the Core Values of the Association*
 - 2. To check on the member's business*
 - 3. To find out how effective the Association is at generating revenue for or otherwise helping the member & the member's business*
 - 4. To create accountability for the member's efforts to generate business for other members & contribute to the betterment of the Association*
 - 5. To provide ideas & feedback to the Association in how to create more value for members*
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Core Values:

Business Opportunity	We deliver values to our fellow members in the leads we provide & promote their business growth in all our actions
Collaboration	We promote & support a diverse & unified membership &, respectful of our traditions, we work together to meet our common goals
Integrity	We act with honor in what we say & do, financially, personally & professionally, exemplifying the best-of-class in an environment of excellence.
Professional Growth	We commit to the ongoing success & professional growth of each member company of Portland Executives

1. How is your business? *(What's working? What kinds of leads are most important for you? Which social media or other web sites, if any, are most helpful for you & should PX members be using to promote your business?)*

2. How & how well does PX generate revenue or value for you? *(Other than dollars, what is the value of PX to you & your company?)*

3. How are you helping your fellow PX members? *(Do you directly purchase products or services from members? Do you provide direct leads or referrals? Do you proactively seek out & contact other members to better learn about their products & services? Do you regularly provide social media referrals & reviews for other members?)*

4. PX is about helping fellow members. Are there certain members you feel you do not do a good job helping? Who are they? Why do you find it difficult to help them? Would you be more successful in helping those members if you learned more about their products, services & offerings? Can you consider ways to better learn about them? What else could you do to better provide leads to those members? *(One-on-one coffee meetings, visits to their office, private meetings prior to or after another PX meeting?)*

5. Other than submitting leads, do you regularly view the PX web site for current announcements or to view member materials posted there? Do you use the member directory to find or look up information on fellow PX members? Is your profile page current, including your photo, company logo & preferred social media site preferences?

6. What do you think the Association can do to provide more value to you & other members? *(More intertrade & direct leads? More member presentations? More "off-Thursdays" functions or events? More published announcements?)*

7. Other than leads, please describe how you participate in the Association. *(Attend division & committee meetings? Serve as board member, division or committee chair? Assist with event planning? Post relevant social media referrals or reviews? Find program speakers & act as chairman-of-the day?)*

8. PX believes that a member's non-business community involvement makes the association better and stronger by expanding its outreach and reputation. Would you please tell the committee how you participate in other organizations or causes that would reflect well on the association.

9. As new member recruitment is now part of the scoring please describe your efforts to promote & secure new members. *(Talking to specific potential member candidates? Application submitted? New member approved?)*
10. What have you done to help retain members? *(Please describe your efforts including committee work or working directly with specific new, struggling or at-risk members.*
11. On a scale of 0-20 (0=Poor, 20=Excellent), what number would you think the committee should choose to rate your performance & value to the Association? *(Please do not decline to do this as your answer will give the committee some insight into your understanding of PX & what is expected in evaluating your performance & participation.)*
12. For the committee's consideration, please explain your reasoning for this rating.

Do you have other comments you want to relay to the committee?

[CONFIDENTIAL AND ONLY FOR INTERNAL USE AND NOT FOR THE REVIEW.]

On a scale of 1-10 how likely are you to renew your membership?

If you rate a 6 or below, please explain what would help improve your chances of renewal

1	Direct Leads (0-3)	1	<input type="text"/>	See Leads Evaluation Guidelines
2	Market Information Leads (0-3)	2	<input type="text"/>	See Leads Evaluation Guidelines
3	Turning in Leads (0-2)	3	<input type="text"/>	No misses = 2 pts; 1 -2 = 1 pt; 3+ = 0 pts
4	Thurs. Meetings Attendance (0-3)	4	<input type="text"/>	0-7 misses = 3 pts; 8-9 = 2 pts; 10 = 1 pt; 11+ = 0 pts
5	New Member Recruitment (0-2)	5	<input type="text"/>	Application(s) Submitted = 1 pt; Approved = 2 pts
6	Participation Factors (0-5)	6	<input type="text"/>	Score based on member feedback in review; see page for participation factors to be considered
7	Community Involvement (0-1)	7	<input type="text"/>	Score based on member feedback in review; see next page for explanation (*)
8	Membership Retention Efforts (0-1)	8	<input type="text"/>	Score based on member feedback in review

Direct Leads

# Leads	# Firms	Suggested Rating
0 - 50	0 - 25	0
51 - 200	26 - 40	1
201 - 250	41 - 60	2
351+	61 +	3

Market Information Leads

# Leads	# Categories	Suggested Rating
0 - 7	0 - 1	0
8 - 18	2	1
19 - 30	3	2
31 +	4	3

TOTAL VALUE SCORE

0

Exceptional Member 16-20

Member Meeting Standards 10-15

Underperforming Member 0-9

MEMBER PARTICIPATION

Following are suggestions for consideration in scoring member participation.

Other factors may be discussed & considered as well.

- *Program Presentations, New Member Intros
& / or Trade Talks*
- *Secure Program Speaker & / or
Serve as Chairman-of-Day*
- *Active Committee Participant*
- *New Member Mentorship*
- *Event Participation & / or Assistance
(e.g. golf tournament, holiday auction,
spring social)*
- *Ad-Hoc Committee Chair*
- *Division Coordinator / Co-Coordinator*
- *Social Media Posts in Support of Members*
- *Leadership*
- *Executive Committee*
- *Directors / Committee Chair or Co-Coordinator*
- *Division Participation*

(*) COMMUNITY INVOLVEMENT

Non-business related community involvement contributes to the betterment of the communities in which PX members work & reside. It expands the association's outreach, awareness & footprint by broadening its network & influence. It is important for PX to recognize members' efforts in this regard as those efforts positively impact the association.