

Leads Committee

100
YEARS



PORTLAND EXECUTIVES
ASSOCIATION 1920•2020

H1 2024

TABLE OF CONTENTS

Welcome

Objectives

Understanding Leads Ratings and Interpreting the “LEADS ANALYSIS” Form

Leads Analysis Form

Revised Ratings Form (Standard 6-month Review Cycle)

Revised Ratings Form (Reduced Review Cycle)

Tips

Welcome to the Leads Committee

We are tasked with reviewing member firms every six months to evaluate their performance, learn about what's going on for said business, and identify strengths or areas that need some help. The review is for the firm, not the member.

The leads review process is intended to keep us focused and on-track for meeting standards. You'll see the standards when you review the "ratings form" which is sent out weekly.

We approach the leads review from two perspectives. "By the numbers" and subjectively. There are eight (8) categories that we score: Direct Leads, Marketing Information (previously known as 'group leads'), Turning in Leads, Attendance, Recruitment, Participation, Community Involvement and Membership Retention efforts.

When presenting a review, try not to read the question and give the answer. Weave it together to tell the story.

After the review is presented, we'll have comments and Q&A. Voting will be done in the Chat Feature of our Zoom Call. For new members, feel free to pass until you're comfortable voting. Also feel free to ask any questions.

This committee is here to help and support our members. By reviewing twice-a-year, we can be aware of how members are doing, how we can help and recognize their achievements.

Following the individual firm reviews, we typically have 1-2 members speak for 2-3 minutes about their companies in a "Leads Talk" providing background about their respective firms and informing the association, what we can do to help them.

Leads Committee Objectives

- 1. Drives accountability for each Portland Executive Association (PX) member.**
- 2. Review and evaluate the effectiveness of each PX member on a regular-basis across eight parameters:**
 - a. Direct Leads
 - b. Market Intelligence/Information
 - c. Turning in Leads and Market Information
 - d. Meeting Attendance
 - e. New Member Recruitment
 - f. Participation Factors
 - g. Community Involvement
 - h. Membership Retention Efforts
- 3. Increase the quantity and quality of business leads and referrals for all PX members.**
- 4. Increase overall membership engagement and satisfaction.**
- 5. Increase committee involvement and participation.**

Understanding Leads Ratings and Interpreting the “Leads Analysis Form”

There are eight (8) parameters members are rated on. (See REVISED RATINGS FORM)

1. Direct Leads
2. Market Information Leads (Previously known as *Group Leads*)
3. Turning in Leads
4. Thursday Meeting Attendance
5. New Member Recruitment
6. Participation Factors
7. Community Involvement
8. Membership Retention Efforts

Refer to the "LEADS ANALYSIS" form that shows the leads report for the respective member for the previous reporting period.

1. Direct Leads consists of three (3) segments:

- TYPE - lists out the 8 divisions of Portland Executives.
- LEADS - indicates the number of leads given to members by division.
- FIRMS - indicates the number of member firms that received leads.

To calculate the Direct Leads rating:

- Review how many divisions received leads.
- Review the total quantity of direct leads provided.
- Review the number of firms that received leads.
- Compare the above numbers against the ratings form, which is broken down by:
 - # Leads
 - # Firms
 - Suggested Rating
- Provide a score of (0-3) based on the results:

# Leads	# Firms	Suggested Rating
0 – 50	0 – 25	0
51 – 200	26 – 40	1
201 – 350	41 – 60	2
351 +	61 +	3

2. Market Information Leads consists of two (2) segments:

- LEADS - indicates the number of market information leads provided.
- CATEGORIES/TYPE – There are seven (7) types of Market information.
 - Online Reviews – provide an online review for a member.
 - Face-To-Face Meeting – have a meeting with another member.
 - Decision Maker Contact Information – share the name and contact of a ‘decision-maker’ for a business, trade group and/or non-profit, etc. that may be of interest to other members.
 - Real Estate – share information on any real estate news
 - Construction Planning/Permitting – share information about upcoming construction projects.
 - Business Opening/Closing/Changing – share any information about businesses (new businesses, new locations, moving, closing, changing, etc.)

To calculate the Market Information Leads rating:

- Review the total quantity of Market Information Leads provided.
- Review how many Market Information categories were utilized.
- Compare the above numbers against the ratings form, which is broken down by:
 - # Leads
 - # Categories
 - Suggested Rating
- Provide a score of (0-3) based on the results:

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

3. Turning in Leads

Perhaps one of the most important measures of member participation is submitting leads on a weekly basis. **MEMBERS NEED TO ENTER LEADS ON THE WEBSITE BY 10:00am FRIDAY EACH WEEK.**

To calculate the Turning in Leads rating:

- Review the quantity of Leads Late or Missed on the Leads Analysis form.
- If 0 leads have been turned in late or missed, the corresponding score is 2 pts.
- If there were 1-2 misses, then the corresponding is 1 pt.
- For 3 or more misses, the score is 0 pts.

4. Thursday Meeting Attendance

An important measure of member participation is attending the weekly Thursday meetings. Thursday meeting attendance has three (3) statuses:

- MEETINGS MISSED (UNEXCUSED) – Quantity of Thursday meetings missed without previously notifying the PX Executive Director or assistant.
- MEETINGS MISSED (EXCUSED) – Quantity of Thursday meetings missed while previously notifying the PX Executive Director or assistant.
- ASSOCIATE ATTENDED - Number of meetings that were attended by the firm's Associate Member

To calculate the Thursday Meeting Attendance rating:

- Review the total # of meetings missed (all statuses).
- If the member missed 0-7 meetings unexcused, the corresponding score would be 3pts.
- If the member missed 8-9 meetings unexcused, the corresponding score would be 2pts.
- If the member missed 10 meetings unexcused, the corresponding score would be 1pts.
- If the member missed more than 10 meetings unexcused, the corresponding score would be 0pts.

5. New Member Recruitment

All PX members are responsible for identifying, recruiting, and adding new members to the Association.

To calculate the New Member Recruitment rating:

- The reviewer will share the member's efforts and results of recruiting new members.
- If the member successfully recruited a member whose application was approved, the corresponding score would be 2pts.
- If the member successfully recruited a member whose application was submitted and not approved, the corresponding score would be 1pts.
- If the member has not recommended any new members, the score would be 0.

6. Participation Factors

The Participation Factor score is more subjective and based upon member feedback in the review meeting. For the participation evaluation, several factors are to be considered, including, but not limited to:

- 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)
- Division Participation
- Ad-Hoc Committee Chair
- Division Coordinator / Co-Coordinator
- Social Media Posts in Support of Members
- Leadership
 - Executive Committee
 - Directors / Committee Chair or Co-Coordinator

To calculate the Participation Factor rating:

- The reviewer will provide an overview of the member's participation including the above factors.
- Each Leads Committee member will evaluate the member's participation based on what is shared during the review.
- Scoring will be based on a 5-pt rating scale:
 - 0 pts: No Participation - The member/firm did not participate in PX at all.
 - 1 pt.: Minimal Participation - The member/firm participated to a very limited extent, contributing minimally.
 - 2 pts: Low Participation - The member/firm's participation was below average, and their contribution was limited.
 - 3 pts: Moderate Participation - The member/firm participated at an average level, making a reasonable and expected contribution.
 - 4 pts: High Participation - The member/firm participated at an above-average level, making a substantial and noteworthy contribution.
 - 5 pts: Exceptional Participation - The member/firm's participation was outstanding, going above and beyond expectations, and making a significant impact on the activity.

7. 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.

To calculate the Community Involvement rating:

- The reviewer will provide a summary of the member's community involvement.
- Each Leads Committee member will evaluate the member's community involvement based on what is shared during the review.
- Scoring is subjective and based on a binary rating of 0 – 1:
 - 0 pts: Nominal Community Involvement - The member/firm has minimal or no involvement within the community.
 - 1 pt.: Some Level of Involvement - The member/firm is involved within the community to some extent.

8. Membership Retention Efforts

In addition to recruiting new PX members, it is the responsibility of each PX member to try and retain existing members.

To calculate the Membership Retention Efforts rating:

- The reviewer will provide a summary of the member's efforts to retain existing members. Some aspects of the summary may be confidential.
- Each Leads Committee member will evaluate the member's efforts on retaining members based on what is shared during the review.
- Scoring is subjective and based on a binary rating of 0 – 1:
 - 0 pts: Nominal Membership Retention Efforts - The member/firm has shown minimal effort in retaining members.
 - 1 pt.: Some Level of Involvement - The member/firm has been actively involved in retaining members.

TABULATING AN OVERALL SCORE

To calculate the “TOTAL VALUE SCORE” for a member, simply sum all of the eight rating scores from the rating form. Potential scores for each category:

Review Category	Score Range
Direct Leads	0 – 3
Market Information Leads	0 – 3
Turning in Leads	0 – 2
Thurs. Meetings Attendance	0 – 3
New Member Recruitment	0 – 2
Participation Factors	0 – 5
Community Involvement	0 – 1
Membership Retention Efforts	0 – 1
TOTAL	0 – 20

Theoretically, total scores can range from 0 – 20. However, historically, scores range 8 – 18, with the vast majority uniformly distributed between 10-16.

Based on their respective total value scores, PX members are rated in one of three categories: (1) Exceptional Member; (2) Member Meeting Standards; and (3) Underperforming Member based upon the following value scores:

Rating	Total Value Score
Exceptional Member	16 – 20
Member Meeting Standards	10 – 15
Underperforming Member	0 – 9

EXAMPLE: Leads Analysis Form sent with the Review Document when assigned a review

Member: Showing report for: 11/5/21 - 4/8/22
 Company: Last Rating Date: 11/7/21
 Member Number: Generated On: 2022-04-08
 Company Member Since: 5/1/36
 Member Since: 10/1/98

Direct Leads

Type	Leads	Firms
Auto/Transport Div.	3	1
Construction Division	22	10
Food & Hospitality Division	44	6
Health & Wellness	20	6
Insurance/Finance Div.	83	14
Office & Services Div.	59	10
Retail Division	40	4
Sales/Communication Div.	19	3
	1	1
Totals	291	55
Previous Totals	349	56
Leads Late or Missed	0	

Last Rating Period

Rating 17

Talks

Last lead talk: 9/20/21

Last trade talk: 4/21/16

Market Intelligence & Support

Type	Number
Online Reviews	1
Face-to-Face Meetings	4
Decision Maker Contact Information	1
Real Estate	1
Construction Planning/Permitting	0
Business Opening/Closing/Changing	3
Other	1
Totals	11
Previous Totals	19

Attendance

Meetings Missed (Unexcused) 0
 Meetings Missed (Excused) 0
 Associate Attended 0

1
(0-3)

2
(0-3)

3
(0-2)

4
(0-3)

5
(0-2)

6
(0-5)

7
(0-1)

8
(0-1)

Exceptional Member
Member Meeting Standards
Underperforming Member

16-20
10-15
0-9

Total Value
Score

(0-20)

STANDARD REVISED RATINGS FORM

(6-month Review Cycle)

Website >Go to Member Information >Scroll down to Resources >REVISED RATINGS FORM (040322)

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 - 350	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

REDUCED REVIEW CYCLE RATINGS FORM

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 - 33	0 - 16	0
34 - 132	17 - 26	1
133 - 231	27 - 39	2
231+	40+	3

Market Information Leads

# Leads	# Categories	Suggested Rating
0 - 4	0 - 1	0
5 - 11	1 - 2	1
12 - 20	2 - 3	2
21+	3+	3

TOTAL VALUE SCORE

Exceptional Member

16-20

Member Meeting Standards

10-15

Underperforming Member

0-9

LEADS TIPS

GIVING A REVIEW

When you're giving a review, please be sure to do the following all listed on the leads review form:

- Identify the member company being reviewed.
- Member #
- Company representative
- Associate member, if applicable
- Division company is in
- Company classification
- Current committee assignments
- #of people submitting leads

For example:

- "Brown & Bigelow, member #26 is represented by Adrienne Hartmeier
- Brown & Bigelow and Adrienne Hartmeier has been a member since 2003.
- Brown & Bigelow is in the sales and communication division in the classification of promotional products.
- Current committee assignments include [listed on the leads review form]
- They have 1 member contributing to leads."

Then proceed to give an overview of what's happening in their company without reading each question.

LEADS FORMS AND INSTRUCTIONS

Forms and what they tell you- may be found under the resources tab on the website.

- Leads Analysis identifies how long the company and members have been part of the association. You'll receive this if you're assigned a leads review.
- Leads Review explains the purpose of the review process and outlines our core values. (Find it under resource tab - Leads Review.)
- Also includes the ratings form.

Special note: If a member firm has misses turning in leads and/or is not attending many meetings, please inquire about why that is happening. It helps us to learn how we can help our members.

See you virtually on Tuesdays at 11:00am