

IMI Script Top Executive

Our Organization is a secret weapon for making better decisions and accelerating your personal and business evolution.

Let me explain with a metaphor. In Atacama, Chile, there is the world's most powerful telescope, which is actually a system of several antennas pointing in different directions and distances. When INTEGRATED, they generate a comprehensive image no other telescope can detect on its own.

Similarly, REF connects you to a circuit of 12 business leaders, or “antennas”, each with different experiences and approaches. Together, they can detect opportunities, dangers, and early signals that none of them could detect on their own.

At REF, we call this integrated image “Collective Intelligence”.

To elaborate, REF is a global organization founded in the US 30 years ago. It’s composed of CEOs and company presidents who can join by invitation only and are organized into Groups of 12 Members from non-competing industries.

These Groups meet confidentially one morning a month, where Members help each other make better decisions to reach their next business and personal levels.

Essentially, Members present their biggest dilemmas in an environment of total transparency, and the other Members tell them what they would do if they were in their shoes. Gradually, Members come to see the Forum as an irreplaceable space and an antidote to loneliness at the top.

Additionally, when Members first join, they tend to use the Forums for business dilemmas, but over time we found that when a Member wanted to bring another case to the Forum, they would tell us: "I could present a company-related case, but what really keeps me up at night is a personal issue". For example, an issue with their eldest child, with their partner, that they are no longer motivated by what they are doing, etc.

This showed us that for business leaders to truly be successful, they must master both the languages of business and personal growth and that our methodology works equally well for both business and personal cases. That’s why our purpose is to empower business leaders to be a positive force in the world by accelerating their personal and professional evolution.

Before we continue I’d like to ask you some questions to get to know you and your company a bit better.

General Information

- In one sentence, what does your company do?
- How long have you been with the company, and how did you get there?
- How many employees do you have, and what are your expected sales this year?

Cave of the Dragon

- What is your ONE main challenge in the next 12 months? / What dragons do you have to slay to overcome this challenge?
- What would happen if you don't overcome it?
- Who's in your corner? Who supports you?

Qualification

- What part of your experience do you think is unique and would add value to a peer advisory board?

Thank you for sharing that with me. Let me continue and tell you how the Forums are structured.

As I mentioned earlier, we are made up of Groups of 12 non-competing CEOs who gather one morning a month. These meetings are confidential and led by a Forum Leader certified in our methodology.

During the first hour of the Forum, we have a quality conversation with an expert on a topic of interest to the Group. For the rest of the morning, up to 3 Members bring forward their major dilemmas. These are presented in a case structure to get feedback from the other Members based on their experience and expertise.

In other words, we connect you to the Collective Intelligence of 12 Members who provide you with a disinterested, unemotional, and intelligent perspective to make better decisions.

As a result, the Forum Group evolves into an advisory board and Circle of Trust of high-caliber peers who become close friends, share their best practices, and feel comfortable showing themselves as they truly are.

Your Membership also connects you to a global network of thousands of Members. This enables you to engage with business leaders in your industry or with your same interests to share best practices, expand relationships, conduct business, and more. In essence, you gain access to a Collective Intelligence that extends well beyond your immediate Group.

For example, if you are facing an issue in another country, you can schedule a case and discuss it with a local Group.

As for the duration of your Membership, it's open. Members can leave whenever they want, but they tend to stay for long periods, because the better their peers know them, the more value they get from their Forum.

Finally, regarding the REF Membership value, we see REF Membership as a high-value alternative to an advisory board. If you think about it, it is very difficult and expensive to bring together 12 CEOs. The average fee of an external board member is a minimum of \$1,000/month, while our Membership comprises an enrollment fee of \$800 and a monthly fee of \$800. This includes a seat in a Forum and access to the global network.

Based on what I've told you, do you see yourself being part of a Group and our global network?

Closing of IMI

For an EXISTING Group:

- Schedule Preboarding, a 30-minute meeting, with no obligation, to request basic information about their company in order to later present them with a Group and confirm whether they would be a fit or not. If the prospect has time, conduct the Preboarding session immediately.

For a NEW Group:

- Schedule Preboarding, a 30-minute meeting, with no obligation, to request basic information about their company in order to later (when you have another 10 interested candidates) present them with a Group and confirm whether they would be a fit or not. If the prospect has time, conduct the Preboarding session immediately.

YOU CANNOT LEAVE WITHOUT SETTING A DATE FOR THE NEXT MEETING

Preboarding Meeting

- Ask for information to make the First Introduction
- Optional: Do a DISC assessment to figure out managing style.
- Set a date to introduce to the Group and for Closing
 - To add them to an EXISTING Group, set a date as fast as possible
 - To add them to a NEW Group, let them know you will contact them when the Group is set up or set a date for 1-2 months. This depends on how long you think it will take you to get the other 9-11 candidates.

Closing Meeting & Onboarding

- Present the Group
- Prepare/show First Introduction
- Closing
 - If they are still having doubts, offer a full refund after 4 sessions in case they want to quit at that point.
- Give Life Line instructions.
- Explain the 6 values of the organization
 - Authentic: We show ourselves as we are
 - Connected: We communicate openly, we share best practices
 - Committed: To life-long learning and to the forum
 - Open minded: To see reality is more important than being right or wrong
 - Visionaries: We challenge and help each other reach the next level
 - Balanced: The real success is bilingual: personal and professional

- Fill in the membership form
- Let them know that they will be charged the Membership Fee first, and then the quarterly membership at the start of each calendar quarter
- Explain that in their first forum they will have 20 minutes to go through their First Introduction and another 20 minutes to do their Life Line
- Schedule upcoming forum dates

Instructions for Life Line Exercise

On a cardboard or whiteboard, the member draws a graph, and marks the most important emotional highs and lows of their life. Once the marks are done, they connect the dots with a line. The line goes up during periods of time remembered as positive and it goes down during bad or difficult moments. They can also bring it on a Powerpoint presentation, ready to be shown.

Once the graph is ready, the member will take approximately 15 minutes to explain their life line. They will speak uninterrupted, describing the various marks in their life line and the behind the scenes. At the end we can allow for 5-10 minutes of questions.

Optional: The member can bring pictures representing each moment in time and these can be projected by the Forum Leader to support the timeline.

