

CARe Report Pro Guide

For WA DnA Team- Notes from Caroline Armstrong

Care report traffic lights should be used as ranking system to prioritize Ambassador, DC and LT engagement with a new member.

- There is usually a natural flow from starting at Red and ending up at Green by the 7–10-month mark, this is normal.
- This shows us that newer members usually need the most support.
- Following the traffic lights of the CARe Report will help keep the focus on members needing highest levels of nurture at any time. As new members keep onboarding, it can be easy to forget that members we have become familiar with but may still be needing some help even if they look like they are OK or on the right track at meetings.
- The CARe Report also highlights when new members are failing to engage, build reciprocal relationships or thrive in a chapter and may need urgent intervention outside the usual processes.

First Phase: Application to 3 months. *(Usually Red, requires most support)*

1. Assign a Personal member mentor/buddy from the existing membership who could guide them and be a clear contact in the first year of membership.
2. Focus on completing the MSP within 60 days – Best practice is within 30 days.
3. Work with Personal member mentor/buddy and the NMMC/Ambassador to understand Passport program and have them taking the first steps before they attend the MSP.
4. Welcome a new member with a special welcome celebration after they have completed the MSP. (Different from the first meeting code of ethics induction.)
 - a. This is the official welcome; they are no longer a trainee/new member but a fully fledged chapter member.
 - b. This can be combined with their first 10 min presentation.

- c. Inducting members should be encouraged to bring guests and visitors from their friends, family, and networks to help them celebrate. – Three or more is best practice.

Pro-Tips for the First Phase:

- Assign a Personal member mentor/buddy at the application approval step so they are ready to meet the new member on their first day.
- Book the MSP as part of the application approval process.
- Send someone else from the chapter with the new member to the MSP
- Carefully create the New Member Welcome Celebration to be an attractive part of your chapter's member benefits.
- Use the New Member Orientation Checklist to support you.

Second Phase: 3 to 9 months *(Usually Orange, requires guidance and accountability)*

1. Maintain the relationship with the Personal Mentor.
2. Encourage new members to Go for Green by being 100% accountable for the weekly actions they can control to build good habits:
 - Attendance
 - 121s
 - CEUs
3. Focus on their understanding of the GAINs exchange to discover both referrals and referral partners not just 'sell' their product.
4. Help them to be more referrable in the 60 seconds and 121s

Pro-Tips for the Second Phase:

- Offer recommendations for CEUs that focus on giving referrals and sponsoring a member into the chapter.
- Use the Personal Vision the new member set in their orientation to re-direct them back to activities that support their engagement.

- To help them sponsor in a new member, ask them who they know that is like them who would benefit from being a member too and encourage them to bring them along.

Third Phase: 9 – 12 months (*Usually Green, requires encouragement and celebration*)

1. Invite the new member to be part of the Visitor Host Team.
2. Encourage the new member to track their own traffic lights and work towards 100 points as a stretch goal.
3. Help them manage high level of referrals to prevent overwhelm:
 - a. Encourage them to track referrals received in the app to give other members feedback on the quality of referrals they receive.
 - b. Provide other members with direct feedback on the quality of referrals they are receiving.
 - c. Connect them with a business coach that can support them with growing pains in the business to prevent overwhelm.
4. Set personal BNI goals for the next 12 months.

Pro-Tips for the Third Phase:

- Have a curated list of CEU ideas that mature and develop their understanding of referral marketing and how long-term commitment grows bigger results.
- DCs or LT to present personal achievement awards to individual members monthly or weekly to showcase outstanding achievements of members and members reaching milestones.
- Develop the unique member experience of your chapter to create added value to your chapter's members.