

# **AmSpirit**

## **BUSINESS CONNECTIONS**

### **Monthly Chapter Performance Report Procedure**

Part of the service of *AmSpirit Business Connections* is to assist any active Chapter in producing a monthly performance report (see sample). The Chapter Performance Report is an extremely useful tool for keeping a Chapter productive as it allows the members the opportunity to praise those giving many referrals and to focus attention on those who have received fewer than two. To prepare a Chapter Performance Report follow these instructions:

- 1) Log onto the *AmSpirit Business Connections* website ([www.amspirit.com](http://www.amspirit.com)) and click on the “Member Services” and then the “Administrative Services” toggles.
- 2) Select the “Download Chapter Performance Report Input Form” from the menu and then click on “Download Current Referral Input Form.”
  - One suggestion is to right-mouse click on “Download Current Referral Input Form” and select “Save Target As”. Then save this appropriately on the local system, where it can be accessed directly.
  - NOTE: A message may appear asking whether or not macros should be enabled. If so, click YES.
  - If you get an error message about macros not being enabled, try the following:
    - Open Microsoft Excel;
    - From the menu select “Tools”, then “Macros”, and then “Security”;
    - Select a security level of Medium and click “OK”;
    - Close Microsoft Excel and click on the “Download Referral Form” link; and,
    - When prompted click “YES” to enable Macros
- 3) Click on the drag down Chapter name menu under where it says “Select Chapter” and select the appropriate Chapter name.
- 4) **IMPORTANT:** Click the Refresh button once the appropriate Chapter name appears – this will pull in current information.
  - NOTE: The information that appears is the official current active membership.
- 5) Either print this form or save it for recording Chapter referral activity throughout the month.

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- Be sure to enter the appropriate referrals given and received by each member on a weekly basis.
  - For referrals generated or received by non-member (those simply visiting or those who have not yet joined), summarize this information in the “Non-Member” row. If you have an individual who will be joining but has not yet done so by the end of the month, write or type the new member’s name in the blank spaces at the bottom. He or she will then receive credit for the referrals once he or she has become an official member.
  - For referrals generated to other Chapters in the organization, summarize these in the row indicated as “Cross-Chapter Referrals”. Think of the Cross Chapter Referral row as a row that represents all other AmSpirit Chapters, in the same way that the row with your name represents you. When another Chapter ‘receives’ a referral from your Chapter that referral is listed under ‘Cross Chapter Referrals Received’. When another Chapter gives someone in your Chapter a referral that referral is listed under ‘Cross Chapter Referrals Given’.
  - Note, if someone in the Chapter has referred a new member to the organization (in any Chapter) and is entitled to 10 referral bonus points, we will generate these referrals automatically based on information on the joining members application.
  - **Another Note:** If someone in the Chapter brought a guest to the Chapter, they should write up a referral ticket (the guest is treated as a referral) and place a yellow copy in the bucket. In accounting for this (on the referral input form), please do the following: (1) Indicate a referral given under the appropriate week; (2) Mark a tally in the “Non Member/Cross Chapter” box as a referral received; (3) Mark a tally in the Chapter Guest Box next to the name of the member that brought the guest (to cross reference this information, see guest registration form, which Membership has).
- 6) Either fax the completed Referral Input Form to (614) 476-6699 or e-mail an electronic version to [admin@amspirit.com](mailto:admin@amspirit.com) by clicking on File and Send Page by e-mail.
  - 7) Once AmSpirit Business Connections headquarters has received the completed Referral Input Form (whether via fax or e-mail), we will produce a Chapter Performance Report that will be returned via e-mail.
  - 8) Consider personalizing the Chapter Performance Report by developing and producing information unique to the Chapter (such as member spotlights, articles or success stories) on the backside of the newsletter.
  - 9) Distribute the Chapter Performance Report to Chapter members via e-mail or hard copy.
  - 10) At the Chapter meeting, review the results of the newsletter with the Chapter. Some suggestions for doing this are:
    - Provide the appropriate accolades for members giving a significant amount of referrals in the prior month or year-to-date;

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- Focus attention on members who have received no or less than two referrals during the prior month; and,
- Compare the actual results with the monthly referral goal that the Chapter has established for itself (and depending on the results over a period of time, consider adjusting the monthly referral goal appropriately).

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