



Office Business Center  
Association International

## ***OFFICE BUSINESS CENTER ASSOCIATION INTERNATIONAL LOCAL MEMBER NETWORK GUIDE***

### **USING THIS GUIDE**

You are about to embark on a journey that is designed to improve your leadership abilities, grow your business, increase industry awareness in your market, and strengthen the Office Business Center Association International as an organization.

We know you are a busy person, and this Guide has been designed with that in mind. Its contents are practical and can be applied, not only to the growth and leadership of OBCAI, but to the success of your business as well.

The Guide explains the role of the Local Member Network Program within the Office Business Center Association International and its importance in achieving the goals and objectives of OBCAI. It is a how-to manual describing the implementation steps that lead to a successful local OBCAI Network. The sections build on each other and cover everything from starting a Local Member Network to maintaining and growing a mature one. We have included information on available resources, guidance on how to get help, and suggestions with whom to communicate, when and why.

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Bernie O'Donnell of the Stratmar Group originally published the *Leadership Guide* in 1996, to assist OBCAI Local Member Networks. The revised *Local Member Network Guide* was updated in 2000, by Jane Booras of Executive Suite Consulting Services and by the Local Member Network Committee.

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Suggestions for improving this Guide are strongly encouraged and welcome.  
Please send your thoughts, comments, and ideas to:

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***OFFICE BUSINESS CENTER ASSOCIATION INTERNATIONAL***

***LOCAL MEMBER NETWORK GUIDE***



**Office Business Center  
Association International**

**ABOUT THE  
OFFICE BUSINESS CENTER ASSOCIATION  
INTERNATIONAL**

***building success through the power of personal leadership***

## JOIN AN ASSOCIATION? WHY?

Most every association began when a group of people looked at each other around a conference table or at a restaurant and said, "We need our own organization."

For OBCAI, that moment came in December 1990, in Dallas. Instantly, that group became the Long Range Planning Committee, which piloted Executive Suite Network (ESN) through two and one-half years of preparation, transforming the private corporation to Executive Suite Association (ESA) on July 1, 1993. Today, OBCAI is a vibrant member-owned nonprofit organization -- a vibrant force in the association industry.

Why do you suppose this forward thinking, focused group reached this decision? Because they came to the same realization as the leaders of the more than 23,000 national and 64,000 state, local and regional associations in the United States, representing every industry, profession, cause and interest. They realized that you can't do business in a vacuum!

One real strength of associations is evident in the very definition of the term. Each association is a group of like-minded individuals or companies that interact for the mutual benefit of all. Not only is there safety in numbers, there is also power. Small companies derive positive value and strength from associating with larger ones. The process works the other way, too. Larger firms find that sometimes their size works against them. Who do you think engenders more empathy when issues arise in the media -- a multinational conglomerate or the local storeowner?

### So Why Join?

Seven out of ten adult Americans belong to at least one association (more than 285 million memberships), and one out of four belong to four or more associations for access to:

- **Information.** Associations provide industry information to help members stay current and competitive. They offer practical, proven survival techniques and help with necessary revisions and adaptations in operations to keep your business on the leading edge.
- **Education.** "Associations routinely provide specialized training to millions of Americans through their courses, seminars, conferences, trade shows and technical publications," says R. William Taylor, Past President of the American Society of Association Executives. "These educational activities keep members abreast of the latest information, technology and trends. And many who attend association meetings become the trainer when they return to their company."
- **Standards.** Spending more than \$14.5 billion each year, associations set voluntary industry standards that protect safety and health, ensure product compatibility, economic fairness and raise consumers' level of confidence in products and services.
- **Ethics.** In addition to establishing and enforcing professional ethics codes, associations benefit society by contributing billions of dollars to the economy, conducting research and public awareness campaigns thereby educating members and policymakers about issues.
- **Research.** Two-thirds of all associations engage in research or statistical analysis. Businesses, government and the media depend heavily on associations for their statistical information, which is often not available elsewhere.

- **Promotion.** Associations consistently promote the industries or interests they represent. This raises the level of awareness about products and services of the association's members and creates demand for them. The growing list of benefits of office business center occupancy has been widely publicized by Office Business Center Association International. Every member company benefits from this publicity - large and small.
- **Community Service.** Association volunteers act as a kind of "private-sector angel brigade" at work in communities and across the nation, supplementing scarce public resources in an effort to help those less fortunate. Community service projects offer associations a chance to give something back to the communities supporting them. And the attention, visibility and recognition you and your association receive from the community is an added "bonus."
- **Partnerships.** Opportunities to partner with peers, vendors and even competitors abound within associations. Members are introduced to discount programs for product and services, proprietary insurance, software and buying programs and national account status with manufacturers. Also, member special interest groups often collaborate for marketing or referral networks or user groups. Many of these relationships are forged because of contacts made through association activities and events.
- **Global Connections.** With the world getting smaller and markets growing, it is increasingly important to communicate with peers and like associations offshore. Associations aid this effort by reaching out to international members and entities and aiding the networking of information and business referrals member-to-member. International members can often pave the way for entry into a new marketplace. Associations are pioneers in opening foreign markets, sponsoring trade missions and sharing foreign sales and trade data.
- **Technology.** Keeping up with changing technology is a challenge associations meet very well. Through associate (supplier) member programs, publications, technology conferences and research, associations help members cut through the maze of technology issues to identify and implement the techniques that will build their businesses.
- **Career Building.** Belonging to a professional association is often the most important career-enhancing move you can make. An association serves as the framework that supports your career, as well as your link to professional licensing, credentials, contacts and more. Increased visibility in your industry and polished leadership skills are among the classic rewards of volunteering for association work. Another is personal reward - the fulfillment realized in making a positive contribution to a field or cause important to you.
- **Values.** Associations don't just see the big picture - they help create the big picture. Although they come in all shapes and sizes, they all share the twin goals of helping members and advancing society. Associations, including OBCAI, encourage living by a set of values embodied by the visionaries and leaders of the industry. This is accomplished through the Code of Ethics, the Mission Statement and the day-to-day business activities of its members.

It's nice to have the support of your association and your peers, don't you think? Why join an association? It is invaluable!

## **OBCAI's MISSION STATEMENT**

*OBCAI advances the office business center industry by being the best worldwide resource for education, knowledge and advocacy.*

### **Long Range Goals**

#### **Goal A:**

OBCAI will be the primary resource for acquiring and delivering industry education, training, and knowledge.

#### **Goal B:**

OBCAI will be recognized as the premier organization that advances the worldwide office business center industry.

#### **Goal C:**

OBCAI will be financially strong while fulfilling its mission.

## CODE OF ETHICS

The OBCAI Code of Ethics is a means to promote and maintain the highest standards of service and personal conduct among its members. To be considered a member in good standing, adherence to these standards is required.

As a member of OBCAI, I pledge to:

- Function with integrity in all business relationships. Integrity implies not merely honesty, but conducting my business fairly and truthfully.
- Honor all financial and service agreements with clients, landlords and vendors.
- Provide shared office environments for staff and clients where they have a comfortable and effective workplace.
- Conduct business in a manner where neither staff nor clients are discriminated against on the basis of race, sex, creed, age, color, disability or national origin.
- Behave toward competitors in a truthful, straightforward and respectful manner.
- Seek new information, skills and technology relative to the office business center industry, so that high quality services are provided and maintained.
- Seize every opportunity to improve public understanding of the role of office business centers in the world marketplace.
- Build relationships with Associate Members, who may also be vendors, founded in ethical practice.
- Agree to provide services to only those individuals and companies who adhere to the highest standards of business ethics and practices.
- Support the volunteer leadership of OBCAI as they work for the advancement of the industry.

## **GETTING THE MOST FROM AN OBCAI MEMBERSHIP**

OBCAI advances the office business center industry by being the best worldwide resource for education, knowledge and advocacy.

### **MEMBERSHIP**

OBCAI membership is available to companies whose primary business is to provide office business center accommodations and business support services to in-house clients and the public at-large.

Annual dues are based upon primary locations and additional locations. The primary location membership entitles this office business center location to receive full member benefits. Each additional location added to membership, and owned by the same company will also receive the same valuable membership services, but at a discounted rate. See membership application for pricing.

*“Thank you for your interest in OBCAI. We welcome new members to participate in our dynamic association. Invest in your future and participate now. Put yourself to work for your association and your association will go to work for you.”*

Jeannine Windbigler  
Executive Director

Office Business Center Association International, Inc. (OBCAI) is a member owned not-for-profit trade association. Governance is through the care and concern of a dedicated Board of Directors, elected by the members.

We welcome the opportunity to share with you the exciting and revenue enhancing benefits of membership. OBCAI is the international trade association representing office business centers owned and operated by independent-thinking business people, like you. Busy people whose focus is on client services and business success, and who need access to resources offered by their industry's trade association.

Office business centers have quickly become a major business force in the world economy. Since 1985, the association has provided members with the resources they need to enhance professional performance, generate revenue opportunities and promote continued growth and success. With over 900 member locations worldwide, OBCAI is the leading organization in the field of office business center professional development.

Those who own, manage or staff office business centers, as well as those who provide products and services to the office business center industry, will find that OBCAI membership gives them an invaluable professional edge - The OBCAI Advantage.

***Reasons to be an OBCAI Member:***

- **OBCAI World Publication**  
The association newsletter, OBCAI World, provides members with practical, industry specific information to use in all areas of office business center operations and management. Each issue provides members with current events, as well as news about upcoming OBCAI events, programs and projects. Ten issues are published per year.
- **“Members Only” Web Site Section**  
This site contains research and information articles on the topics of Sales and Marketing, Telecommunications Products and Services, Videoconferencing, Office Furniture Rental and Sales, Internet Services, Office Products and Services, Insurance, Human Resources and much more. All members receive a User ID and password for free entry onto this site.
- **Membership Directory and Web Site Listing**  
Reach out to the national and international corporate community through your listing in the OBCAI Directory and web site. Expand your marketing efforts and revenue through member-to-member referrals! Fellow OBCAI members use the directory and web site as a reference in directing clients to member centers as they relocate or are in need of videoconferencing facilities. All members are listed on the web site with hot links to their web sites and email addresses. Companies looking for office space via the Internet use this site regularly.
- **Videoconferencing Directory**  
Member locations having videoconferencing facilities are listed on this site. This site is used by members in locating other member facilities around the world and by companies in need of these facilities.

- **Advocacy**  
Keep informed and address issues as a single voice for the Office Business Center Industry in the commercial marketplace. Advocacy issues dealing with postal regulations and the North American Industry Classification System (NAICS), formerly SIC, are a few of the issues affecting the Office Business Center Industry today.
- **Networking & Professional Development**  
Involvement in OBCAI, whether as a volunteer or participating in a Local Member Network in your area provides you the opportunity to exchange ideas and solve problems with others in the industry. Participating on a committee or task force provides you with the opportunity to test and expand your leadership skills as well as increase your professional contacts.
- **Annual Convention**  
Industry experts headline the programs and address issues raised by a consensus of the membership. Gather with peers and vendors each autumn for four days of state-of-the-art education through courses ranging from basic to advance training.
- **Public Relations & Advertising**  
Effectively publicize your business and educate the public on our industry's concept and services through use of OBCAI's NEW Press Kit. Upgrade your company's image by displaying the "OBCAI member" logo and membership certificate. As in every successful business venture, image recognition and credibility are key ingredients needed to attract clients.
- **Products & Services Information**  
Stay on the leading edge of information. OBCAI expands your training library with manuals, videos and audio tapes of educational presentations. Products and services, including Industry Production Standards are available to help you become even more profitable. Associate Members participate in OBCAI programs as corporate sponsors and exhibitors and respond to member needs through directory advertising and newsletter articles featuring special offerings to members.
- **800 Hotline**  
Quickly get answers to your operations and management questions when you contact OBCAI's 800 hotline. Specific and urgent business problems can often be solved within a reasonable time with the help of the OBCAI staff or by putting you in touch with a fellow member.

**Your Vote Counts!**

You and your fellow members determine association priorities, programs and projects and, therefore, the destiny of the very industry in which you operate.

***OFFICE BUSINESS CENTER ASSOCIATION INTERNATIONAL***

**LOCAL MEMBER NETWORK  
GUIDELINES**

*building success through the power of personal leadership*

# OBCAI LOCAL MEMBER NETWORK GUIDELINES AND POLICIES

## Compliance with OBCAI Bylaws (Required)

1. Local Member Networks are comprised of OBCAI members who meet on a regular basis to network and attend educational programs.
2. Non-members of OBCAI may attend a limited number of (LMN) meetings before joining the association. Office business center owners, managers and staff who are not members of OBCAI may attend 3 meetings of the Local Member Network before joining the association. After all, one of the objectives of the LMN is to encourage OBCAI membership.
3. OBCAI membership allows for attendance at local meetings for which the Local Network may charge, *a nominal fee to cover costs*, such as postage, printing, meal functions and speakers, but may not charge dues.
4. The OBCAI name can only be used when all Local Member Network Guidelines are followed. Networks in the U.S. should use the name Office Business Center Association International (OBCAI) followed by the name of the city or region. Networks outside the U.S. should use the name Office Business Center Association (OBCAI) followed by the name of the country. The words International and Local Member Network should be dropped from the name.
5. Local Member Networks must observe the copyright of OBCAI materials. Documents carrying the OBCAI name (e.g. newsletters and meeting notices) should be approved through OBCAI Central prior to distribution to members.
6. If it is necessary to establish a bank account, the Local Member Network should apply for their own FEIN number and be included in a group exemption established by OBCAI. The Network cannot use the FEIN number of OBCAI to establish a bank account. The Local Member Network may contact OBCAI Central or download from, [www.irs.gov](http://www.irs.gov), the Form SS-4, Application for Employer Identification Number to complete and file with the IRS. Once an FEIN number is obtained from the IRS, a bank account can be opened. The Local Member Network should use the name outlined in Guideline 4 above. OBCAI's fiscal year is January thru December. The Local Member Networks should use the same fiscal year as OBCAI and submit annual income and expense statements to OBCAI by February 15<sup>th</sup> of the following year.
7. The Network may not enter into an oral or written agreement using the OBCAI name unless approved by the OBCAI Board of Directors.

If you have questions about compliance with OBCAI Bylaws, practices and procedures at any time, please call Jeannine Windbigler, Executive Director, at (800) 237-4741.

# OBCAI LOCAL MEMBER NETWORK GUIDELINES

## Your LMN Organization and Distribution of Responsibilities

We recommend organizing a Board, or electing officers for your LMN. The following model has proven successful in the past:

**President** Presides at LMN meetings and works with all other officers to maintain a successful LMN.

**Vice President,  
Membership** Leads the effort to recruit and retain members. Along with the Program/Activities Director, may also be responsible for securing locations for meetings and completing arrangements for them.

**Program/Activities  
Director** Plans and organizes program activities with the objective of ensuring member interest. The program for each meeting has proven to be the biggest draw at LMN meetings. The more interesting and compelling the program, the higher the attendance!

**Secretary** The secretary's most important function is to compile and maintain a mailing list of all the local office business centers. Responsible for preparing and mailing meeting notices and taking reservations for the meeting, the secretary may also be asked to prepare minutes for, or reports about, LMN meetings and activities. The secretary also coordinates the production of other LMN communication pieces including newsletters & activities information. Newsletters are a very effective tool to use in place of meeting notices! Of course, the secretary can enlist help for these projects.

**Treasurer** Collects LMN program fees, and ensures all approved bills are paid in a timely manner. In absence of the President, the Treasurer and one other officer may approve bills.

**NOTE:** Officers are encouraged to form subcommittees to assign responsibilities in an equitable fashion.

***OFFICE BUSINESS CENTER ASSOCIATION INTERNATIONAL***

***LOCAL MEMBER NETWORK GUIDE***

**INITIATING  
A  
LOCAL NETWORK**

***building success through the power of personal leadership***

## **ON THE LOCAL SCENE**

This is where it all happens — at the local level. Local networks are the wheels of the organization. If they don't turn, the organization doesn't move. If they don't have good traction, the entire organization slips. Keeping the wheels turning and ensuring they are firmly grounded in reality is the job of the Local Member Network Coordinator. Each local network has its own engine dedicated to keeping its wheel turning. This section of the Leadership Guide describes how to build that engine and turn it on.

## THE LOCAL MEMBER NETWORK COORDINATOR

It is the responsibility of the Local Member Network Coordinator to provide a springboard for local market growth through the involvement of any and all who can benefit from the success of the Office Business Center Industry. This includes, but is not limited to, owners, operators, sales and service managers, receptionists, administrative support personnel, other staff, and associate members. The objectives are to:

- Promote the industry
- Convince employees they are part of a viable growing industry filled with sharing, professional people
- Unify industry members in the local community into a cohesive, dedicated team
- Provide local educational opportunities
- Notify OBCAI Central of office business center openings and closings
- Promote OBCAI and its' membership

These objectives are met through the exchange of information and experiences in network meetings and by building relationships with peers, associate members and other vendors associated with the industry.

Remember, you are not alone! Feel free to contact any of the current LMN leaders to discover how they organized a successful LMN. Just look in the LMN section of your OBCAI Membership Directory to find someone near you. And don't forget to check out the OBCAI web site at [www.officebusinesscenters.com](http://www.officebusinesscenters.com) for further information.

Most importantly, have **fun** and be **creative** with your LMN!

# STARTING A LOCAL MEMBER NETWORK

## THE FIRST STEP: *Recruit a Cadre*

As the number of members grows, the value of a network increases. Being in a network by yourself is neither a rewarding nor stimulating experience. Therefore, your best first step is to RECRUIT, RECRUIT, RECRUIT.

The key is to find individuals with the desire to grow our industry. Someone who is excited about the industry's future, is committed to increase the size of their local market and has a track record for getting things done. Whether you know them personally or only by reputation is not important. These are the people you must approach and convince to join you on the ground floor and to make your vision reality. In fact, these are the people best suited to brainstorm ideas, help refine your vision, and assist in structuring and organizing your initial network. They are the people you want in key roles such as Membership, PR, Education and Program Chairs. You might also find among them volunteers for Secretary and Treasurer positions. These are your cadre - your core group, your future officers.

Part of the challenge will be to convince these "business leaders" that no one wants to "steal their secrets" and that we are all in this together. We want them involved because they know how to get results. In return for their involvement, they are better able to:

- understand the marketplace
- expand the size of the market
- stay on the leading edge
- brainstorm common problems
- enhance skills and knowledge through educational programs,
- generate referrals . . .

See: **About OBCAI: *Getting the Most from your OBCAI Membership***

## **STARTING A LOCAL MEMBER NETWORK**

### **THE SECOND STEP: *Hold a “Founding” Meeting***

Schedule a time and place to have the first meeting with your cadre. It's okay if only one person shows up. Make it a brainstorming meeting to discuss your objectives (vision) and how to get more people to the next one. Remember you are building an organization and that takes time. As long as the wheels are rolling forward, you will get to your destination.

# STARTING A LOCAL MEMBER NETWORK

## THE THIRD STEP: *Go for the Masses*

This is THE BIG ONE. This is the meeting that is designed to generate interest, enthusiasm and members. Plan it carefully with your cadre.

### Making the First Meeting a Winner

#### 1. *Plan a single focus for the first meeting.*

Select an enticing subject. You can call upon your Local Member Network Committee representative or OBCAI Central staff for an effective, professional presentation that will draw interest and attendance from a wide group of prospective members for the Local Member Network.

If you have a special program or workshop (see enclosed notices, etc.), you simply charge enough to cover the speaker's travel expenses and fee, if any. You may want to consider opening a bank account for the Network. See: **OBCAI Local member Network Guidelines: *Compliance with OBCAI Bylaws***

We suggest each Network eventually have a Program Chair or Program Committee to plan programs three to six months ahead. Don't forget OBCAI Associate Members and other local vendors as possible speakers. Sometimes they will also sponsor refreshments for the evening.

If no program is planned, break into roundtable discussions for 30 minutes. Peer-to-peer networking is always high on the priority list of meeting attendees because they rarely get to meet each other and talk about their businesses and the industry.

#### 2. *Develop a mailing list for the Network.*

Use local resources (office guides, yellow pages, etc.). Contact OBCAI Central for a printout of active OBCAI members and member prospects in your state or area. They will send names and contact information from the OBCAI "leads list" (people who have contacted Central but have not joined) and names and addresses from their database. The mailing list must then be maintained by a member of the network and culled and updated monthly. We urge you to ask for a volunteer to maintain the list at the first meeting. Be sure to include OBCAI Central, your Local Member Network Committee representative and OBCAI Associate Members in your area on the mailing list.

#### 3. *Call the new Network a "Network."*

Please note this is a "Network Group" NOT a Chapter or Local Association.

#### 4. *Establish a meeting date.*

Most groups find they get the best attendance on Tuesday, Wednesday or Thursday evenings or Saturday morning meetings, beginning with a social hour. Some groups meet monthly, others bi-monthly. Some meet all summer, others only during the fall, winter and spring. Some have social events or meet occasionally at a restaurant for dinner. It's up to you. Try to arrange your first or "focus" event to fit a time for ongoing meetings. Then you will have a feel for probable conflicts in participants' schedules.

**5. *Establish a place.***

Meetings can be held in office business centers, restaurants or hotel meeting rooms. A popular program attraction is for a “host” to give guided tours of his or her center.

**6. *Develop and mail a mailing piece.***

Develop a mailing piece to attract prospective participants. Ask for advance registrations (sometimes at a lower price). Charge an amount to cover the costs of the meeting and meet other Network expenses (such as the initial cost of maintaining the mailing list, postage, printing, etc.).

Mail the promotional flyer about two weeks prior to the meeting. Some groups mail a reminder notice one week in advance.

Note: Document carrying the OBCAI name should be approved through OBCAI Central prior to distribution to members.

**7. *Call with personal invitations.***

Personally invite those center owners and operators who are particularly well respected and can have a high impact on your credibility and membership (and try to include them among your cadre). It’s been proven that calling the entire list of those who have not yet registered one or two days prior to the meeting boosts attendance by about 20%.

**8. *Order printed materials from OBCAI Central.***

Order OBCAI printed materials (applications, brochures, publication lists and newsletters) to give to prospective members. Please give two weeks notice. The telephone number is (800) 237-4741.

**9. *Order meeting supplies and audiovisual equipment.***

Order meeting supplies (paper, pencils, blackboard, flip chart, name tags, refreshments, cups, plates, ice, glasses, openers, etc.) and audiovisual (slide projector, screen, overhead projector) locally as required and specify times for pickup or delivery by those vendors.

**10. *Develop your agenda.***

You should have printed copies for participants available at the registration desk. Your personal copy, if you chair the meeting, will have additional notes.

Read the page entitled *Special First Meeting Considerations* for a description of the first meeting. The important points to remember are:

- Introduce every speaker and go around the room for all participants to introduce themselves.
- Send a clipboard around the room, with headings for names, addresses, phone numbers, e-mail and a column to check willingness to volunteer.
- End the meeting with an agreement for an established meeting time and probable place for the next meeting.

**11. *Arrive early to make final check.***

Arrive early to ensure the facility is set up properly and that registration table, display table, sign-in or registration sheets, refreshments, name tags, markers, etc. are in place and that program and OBCAI materials are in order. Be sure the meeting area is at a comfortable temperature and accommodations have been made for smokers, as appropriate. If meeting in an office building, for instance, special provisions may have to be made in advance for after-hours heat or air conditioning.

**12. *Appoint someone to take notes.***

Appoint someone to take notes at the meeting. These notes (or “minutes”) should be distributed to each attendee after the meeting and sent to OBCAI Central for publicity in OBCAI World. Also, complete the attached OBCAI Local Member Network Meeting/Activity Report and Attendee Report. Promptly forward these reports to the designated LMN committee person.

**13. *Appoint someone to work the reception desk.***

Make a copy of *Special First Meeting Considerations* for their use.

**14. *Start on time and control with flexibility.***

It is important to view the agenda as flexible. If the group wishes to make changes, the size of the group dictates changes, or emergencies or unexpected events occur, vary the agenda.

Participation pays off. Get attendees involved in agenda items, ask questions and discuss matters. Keep dialogue open when appropriate, but control rambling discussions by getting speakers back to the point so decisions can be made.

**15. *End on time.***

Review the meeting’s highlights, and who will do what, when, how, where and why.  
ADJOURN ON TIME.

Participants appreciate an organized meeting which begins and ends promptly on time. Meetings should not last more than two hours, unless special workshops or seminars are on the agenda.

# **SPECIAL FIRST MEETING CONSIDERATIONS**

## **Welcome**

Participants may enter the meeting room hesitantly. Those who come early may be especially nervous – with eyes darting frantically about the room – searching for a friend or a friendly greeter.

You and your cadre can make them comfortable and ease them into the group with:

- a big smile, warm handshake, eye contact
- a hearty statement: “Welcome. I’m glad you came (Name)”

## **Registration Desk**

This is the welcoming point and the first stop. Designated hosts will greet each attendee warmly, verify registration, give him or her a name badge, get full contact information and verify proper payment for registration.

## **Social Hour/Refreshments**

Attendees should then be directed to the social area and refreshments.

## **Meeting**

Introduce yourself and thank the host for the facilities and welcome the attendees. Ask each participant to stand and introduce themselves, giving name, business name and location of business.

Briefly explain the purpose of OBCAI and benefits of membership. Non-members may attend 3 meetings before being required to join the network or international association.

Explain the OBCAI Leadership and the Local Member Network structure. Point out opportunities for participation as chairs, officers or committees for:

Mailing List Maintenance  
Programs and Projects  
Membership  
Market (business) Watch

Community Issues  
Legislative Watch  
Publicity  
Network Newsletter

Ask for volunteers. Take names or pass around a clipboard for sign-ups.

## **Closing**

Discuss future meeting dates, locations, programs, dues and other business issues of the Network. Remember, these plans will only happen if:

1. You get a definite commitment from people to do specific tasks, and
2. Someone follows up periodically to make sure it is getting done.

End the meeting with a sincere “thank you” to the participants for attending:

“Thank you for coming this evening. I look forward to seeing you all again next month.”

## **STARTING A LOCAL MEMBER NETWORK**

### **THE FOURTH STEP: *Follow-Up***

Immediately after the meeting, you and your cadre should spend a few minutes to share observations about what went well and what could have gone better. Complete the attached OBCAI Local Member Network Meeting/Activity Report and Attendee Report while the meeting is still fresh in your mind. Remember to include members and non members. Promptly forward these reports to the designated LMN committee person. Who knows, your LMN may show up in our next "Network News" edition.

It is very important that a follow-up thank you note or phone call be made to all attendees. This must be done within 48 hours of the meeting. The most effective organizers of new groups complete this follow-up during the two days immediately following the meeting.

It is particularly important to follow up immediately with everyone who has volunteered. Quickly assign each of them a task. Nothing leads to failure in the organization of a volunteer group faster than not delegating tasks to volunteers. Make them feel wanted and appreciated. Remember that they want to have an impact.

Request feedback from the attendees and ask what would make future meetings more valuable for them. (This can be done in written or verbal form.) Have it handy when you make telephone calls. Add items that especially interest your group. Each Local Member Network will take on unique characteristics that benefit their members.

If you have delegated all tasks for the upcoming meetings to your cadre, then all you need to do is plan coordinating meetings or make phone calls to check progress. At that time you can thank all the volunteer workers for their part in making the organization work.

## STARTING A LOCAL MEMBER NETWORK

### THE FIFTH STEP: *Schedule and Plan Ongoing Meetings*

If you have planned an exciting "focus" for your first meeting and asked, at that time, for volunteers to help, you have a core of people to support you in planning ongoing meetings.

Ideas for speakers include:

- Local government politicians
- Chamber of Commerce and Economic Development leaders
- Brokers, landlords
- Experts within your network to discuss increasing revenue, new services, etc.
- Review Appendix for additional ideas

Just like any other successful project, a successful OBCAI Local Member Network takes time, energy, planning and commitment. The best way to evoke commitment is to get people involved in the planning and executing of events. In other words, people get out of an experience what they put into it.

#### ***HINTS:***

- Hold regularly scheduled monthly meetings.
- Invite associate members to attend. Ask associate members to underwrite the cost of a meeting. The associate member can offer services which will benefit everyone.
- Ask non-member office business centers to host a meeting. Getting members and non-members to take a part of the agenda or host a meeting is an excellent way to make them feel an important part of the group.
- Be an ambassador and visit non-member locations on behalf of OBCAI.
- Announce the meeting continually starting forty-five days prior to the meeting by phone and fax. Publish an announcement before and after the fact in the local newspapers and business magazines.
- Suggest monthly meetings in the beginning to feed the organization and help the "grass roots" take hold. Later on you may go to bimonthly or quarterly.
- Choose a member location that has a good relationship with most local operators in the area. Again, get several members involved in different parts of the agenda.
- Spend your time planning events that benefit the core group. Send a teaser piece to those who missed: "Guess what YOU missed last night . . ."

## STARTING A LOCAL MEMBER NETWORK

### THE SIXTH STEP: *Fund the Activities*

#### Covering Meeting Costs

If the meal costs are \$15.00 per person from the hotel, charge \$18.00 per person for OBCAI members and \$22.00 for non-members or guests. The differential covers postage, envelopes, etc. associated with getting the word out to your mailing list of potential attendees. This offers the attendees the opportunity to get a feel for the group and an incentive to join OBCAI. It is not a great idea to allow non-members to attend the local group without some eventual commitment to OBCAI.

Another way to ensure successful meetings is to have attendees RSVP by a certain date, then bill “no shows” and stick to your guns! Remember: you must pay for the number of meals, etc. that are guaranteed by your local group.

## STARTING A LOCAL MEMBER NETWORK

### THE SEVENTH STEP: *Promote, Promote, Promote*

#### Ideas

- Put together a newsletter for the local group and use a mailer to all office business centers in your city. Invite all centers to attend either through a mailed invitation or by faxing the invitation to all centers in advance of the monthly or bimonthly meetings.

Note: The OBCAI name can only be used with the approval of OBCAI Central, including approval for all communications (e.g. newsletters and meeting notices) with members.

- Mail a “teaser piece” with such comments as “OBCAI members participate in planned press release days on an international level” or “OBCAI members alert one another to traveling con artists” or “ my first OBCAI meeting generated an idea that put \$8000 in my pocket in ten weeks - without any investment or cost”. Follow with “Do you wonder what else you might be missing?”
- Have a Blood Drive and sponsor it as a local group.
- Jointly buy a booth at your local Chamber of Commerce trade show. Split the leads based on who works the booth or follow-up based on the part of town in which the prospects are most interested.
- Appoint two people each month to prepare and mail an industry-specific press release to the local media. Vary topics each month.

Note: Documents carrying the OBCAI name should be approved through OBCAI Central prior to distribution to members.

- Dangle a carrot...strong local network areas are chosen as sites for Educational Conferences and International Conventions.
- Local Member Networks are encouraged to promote their meetings in the OBCAI World Newsletter and on the web site by supplying OBCAI Central information, such as upcoming and previously held meeting information.

## **AVOIDING THE PITFALLS**

### **Remember:**

- Abide by the Code of Ethics - set the example.
- We, as an industry, can not discuss pricing, PERIOD, END OF STORY. This is considered collusion and is against the law. It is also known as price-fixing. Set very clear guidelines at the meetings. If people get off track and move in this direction, be sure to clearly state the importance of avoiding this discussion altogether and explain why.
- Try not to question the depth or breadth of an individual's capability or desire to share.
- Try not to compare yourselves with each other. Each of us has a unique market we attract and prospects view our benefits differently.
- If your group includes office business centers and secretarial services companies, try to meet the needs of both.
- Remember that a key goal is building OBCAI Membership - avoid treating non-members in an exclusionary fashion or making them feel unwelcome.

## HOW TO MEASURE YOUR SUCCESS

### **Options Include:**

- Track growth in OBCAI memberships
- Track growth in number of meeting attendees
- Track growth in number of active volunteers and assignments
- Track increases in local publication of articles about industry, your network, members
- Track growth in number of referrals, vendors, opportunities
- Track growth in number of associate memberships
- Track caliber of influential outside speakers and the ease of attracting them
- Track increases in occupancy rates (as practical)

***OFFICE BUSINESS CENTER ASSOCIATION INTERNATIONAL***

***LOCAL MEMBER NETWORK GUIDE***

**BUILDING  
A  
LOCAL NETWORK**

*building success through the power of personal leadership*

## PROVIDING VALUE AT THE LOCAL LEVEL

Value is provided by engaging in worthwhile activities that provide a positive return on investment. Simply stated, you must get more out than you put in. Synergy increases the return on an investment multi-fold. Synergy is the magic of combining 2 and 2 and generating 8. It is the power of bringing diverse talents and perspectives together and leveraging them to achieve a far greater pay-back jointly than could have been generated from each individual's efforts working alone.

Value is the result of activity. How valuable the activity is depends on how well you perform it. As a Local Leadership Coordinator you should use the Local Member Network to keep from reinventing the wheel, but there are still those times when personal trial and error is the best, and only, way.

Don't be afraid of failure — it is simply feedback telling you to try a different approach. So try a different approach!

### **Activities that can drive value for your local network:**

- Furnish camaraderie, advice and moral support to member centers' owners and staff and encourage communication between local members and other network levels.
- Provide education and resources through
  - speakers at local network meetings
  - seminars/workshops by industry experts and consultants
  - sharing ideas, tips, successes and failures
- Make a name in your community
  - educate local business on the benefits of office business centers
  - issue press releases to local publications and tv/radio stations
    - u industry news, trends, happenings
    - u invite them for a facility tour
  - co-op advertising
    - u yellow pages
    - u local newspapers
    - u radio
    - u local journals, magazines, airline magazines
    - u cable TV
    - u trade association journals
  - attend or speak at meetings and workshops
    - u Rotary luncheons
    - u Local colleges, universities, trade schools
    - u Chamber of Commerce luncheons
  - plan joint member participation at trade shows and chamber of commerce events. (promoting the office business center concept, not necessarily individual businesses)
  - arrange for chamber breakfasts and after hours mixer to be held at an office business center.
  - get involved in community activities, e.g. Cancer Society, United Way, Aids Foundation, etc. Offer a center's services for any of their programs. It will be great publicity at no extra cost to you.
  - ask vendors to join and support your local network by underwriting some of your meetings, or better yet, by setting up a booth at our International Convention.
  - donate conference room or daily office usage to charities or offer as "door prizes" at charitable events.

# **BUILDING MEMBERSHIP**

## **Recruiting Tools & Ideas**

- Use OBCAI promotional materials
- Develop local group promotional materials
- Get testimonials from other members or from other local member networks
- Contact prospective members personally by phone, and invite to meeting, or to lunch to discuss what you are about
- Extend your personal invitation to join

## **The Prospect Kit**

Each prospective member should be given a folder containing:

- Membership Application
- OBCAI brochure/promotional material
- Recent meeting program information
- International Convention information
- Educational Seminar information
- Copy of OBCAI World
- Testimonials from members
- Local group Biography Sheet

## **Develop a Current Mailing List**

- Create an accurate mailing list of all centers within your area. Compare OBCAI Central's list to your local yellow pages and verify that these centers still exist.
- Ask OBCAI Central for extra newsletters, brochures and educational seminar information to have available for prospective members.
- Check classifieds to see if anyone that you do not have on record is advertising.
- Stop by buildings displaying signs advertising office business centers.
- Check local commercial real estate books and magazines for office business center ads – perhaps being run by a landlord with excess space.
- Check out various web sites as well:  
    <http://officebusinesscenters.com>  
    [\\esuites.com](http://esuites.com)

## **ESTABLISHING COMMITTEES**

### **Create a Membership Committee**

- Seek out new members
- Retain current members
- Maintain a membership database

Note: Local Member Networks are encouraged to provide an attendee list to OBCAI Central and promote their meetings in OBCAI World and on the web site.

### **Create a Program Committee**

- Secure speakers
- Arrange meeting places

### **Create a Public Relations / Communications Committee**

- Promote the activities of the local network
- Develop local newsletter (fax broadcast), etc., to keep members and potential members abreast of local happenings.

Note: Documents carrying the OBCAI name should be approved through OBCAI Central prior to distribution to members.

### **Create a Local Board of Directors**

- Establish officers
- Consider including committee chairpersons

## **ESTABLISHING A ROUTINE**

### **Ideas**

- Schedule meetings for same day and time each month.
- Send announcements and reminders in advance - allow same amount of lead time prior to each meeting.
- Follow a standard format for meetings, e.g.:
  - 30 minutes -- Social Time
  - 15 - 30 minutes -- Board of Director Reports
  - 30 minutes -- Speaker / Demo
  - 15 minutes -- Action Plan Review
  - 15 minutes -- Questions & Answers / Suggestions / Close

## **COMMUNICATING WITH OBCAI CENTRAL**

### **Reports On Upcoming Events**

On a monthly basis, notification of upcoming events within your local area, as well as your Meeting Report and Attendee Report, should be sent to your Local Member Network representative and OBCAI Central.

### **New Members**

OBCAI Central should be notified immediately of new prospective members.

**Check [www.officebusinesscenters.com](http://www.officebusinesscenters.com) for Upcoming Meeting Dates**

## **BUILDING MOMENTUM**

Once your network is fully formed, the momentum will be there to seek more prominent speakers, do more joint meetings, and share in referrals.

- Invite members from other cities in your state to attend or combine efforts to hold a statewide meeting.
- Keep the vision in front of the members. Continually give them opportunities to individually make a difference.
- Create and plan a series of meetings that revolve around a hot topic so that each meeting builds on the previous. Make it like a serial. This topic does not have to be the main subject at each meeting but can be a 5 or 10 minute discussion that is a thread tying the meetings together.
- Focus on sharing great ideas and sharing common challenges.
- Continually seek feedback from the membership for ideas to be even more effective.

***OFFICE BUSINESS CENTER ASSOCIATION INTERNATIONAL***

***LOCAL MEMBER NETWORK GUIDE***

**PHONE SCRIPT**

***building success through the power of personal leadership***

## Phone Script

*The purpose of this script is to provide ideas and guidelines to inspire OBCAI members and non-members to join and participate in a local member OBCAI network. We recommend the script not be read verbatim, but that the thoughts and ideas given here be translated into your own words so it sounds natural and sincere. The Overcoming Objections section is to help you meet challenges that may arise during the conversation.*

Hello, \_\_\_\_\_, (name) \_\_\_\_\_, this is \_\_\_\_\_. I'm a fellow OBCAI member and a volunteer on behalf of our association's Local Member Network Committee. Have you got a few minutes to talk to me right now? (If not, make an appointment to talk at a later time).

Great. We are very excited about starting (or revitalizing) an OBCAI Local Member Network here in \_\_\_\_\_. By that I mean organizing a group of OBCAI members (and non-members) who are in our business to meet once a month (or quarterly etc.) to:

- Get acquainted and share information,
- Develop education programs,
- Present a unified, organized voice on local issues that affect us, and
- Motivate ourselves to become more successful.

Does this make sense to you?

I know the last thing we all need is another meeting to go to. But the local network connection has been proven over and over again to be well worth the time and effort.

*To build rapport, and stimulate conversation and interest, you might say the following - or continue directly to the next paragraph.*

Our number one business problem here at \_\_\_\_\_, these days is \_\_\_\_\_. What is yours? (Listen.) You know, \_\_\_\_\_, that's exactly why I'm calling you. There is strength in numbers, and knowledge is power.

*Continuing...*

There are things we can do as a group that will benefit us all – without ever having to compromise proprietary company information.

Some program possibilities we have thought of are:

- Local market information - like office occupancy/vacancy rates and leasing trends.
- Which services we offer require collection of sales tax?
- Who is responsible for collecting long distance resale (excise) taxes?
- General discussions on the most important business challenges that we face today.
- Technical seminars by vendors and suppliers.
- Personal and professional development programs to help us upgrade our skills.

Besides programs, there are many more benefits of interacting locally:

- First, we can broaden the base of understanding about the office business centers concept in our business community. Even today, landlords, developers and even clients don't have a clear picture of what a business center is, or the benefits of doing business with them. As an organized voice for our industry, the network can go a long way to generate positive publicity through activities like press releases, personal appearances, co-op advertising, trade shows, community sponsorships and other PR activities. There is strength in numbers!
- We'll learn more about our competitors by actually getting to know them. This will probably lead to referrals between centers, too.
- Trainers and educational programs can be secured on a more cost-effective basis than if we scheduled them individually.
- We may be able to establish some local (group) buying power for supplies and services!

There is an active OBCAI Local Member Network Committee working with us to provide resources and guidance. And of course, we are all backed by the the industry's worldwide trade association, OBCAI.

So what do you think? Will you come to a network meeting? (*Give information about date and time, or discuss alternatives!*)

The good news is that as an organized group, we'll all learn more about emerging technology, establish member-to-member relationships, generate referrals, and establish a basis for a healthy business climate in our industry.

I'll get back to you with complete details on the meeting just as soon as it's scheduled! Thanks for your time today!

## Overcoming Objections

Use these ideas as resources when objections are raised.

*Sounds great, but my boss wouldn't let me do it.*

-Why? Other industries like real estate agents, attorneys, human resources managers etc. routinely hold local meetings to exchange ideas and gain knowledge. It's been proven to be a successful way to "raise all the ships in the water." I assure you, no one will ask you for proprietary information. That's not the purpose of a networking group. The purpose is to generate interest and understanding about the entire office business center concept, so all of us will get more prospects and clients!

*By the end of the day, I'm pooped and don't need to go to another meeting!*

-I understand. We all feel that way. However I find that once I make the effort to get to a meeting, I am energized! That's why I was thinking that the best time for a meeting would be immediately after work in a central part of the city so attendees can come directly from the office. We can offer some healthy snacks and beverages, or maybe a glass of wine, and try to wind up within 1-1/2 to 2 hours so people can get home to their families, don't you think? **Or**

-Perhaps the best time to meet would be for breakfast before work. Would 7:30 to 9:00 work for you?

**Or**

-Well, we all have to eat lunch. Suppose we make our first meeting a luncheon meeting at a restaurant central to the attendees.

*Isn't it against anti-trust regulations for competitors to meet and share information?*

-Absolutely not. However, there are certain things that we cannot and must not discuss. They relate primarily to pricing. But that's not the purpose of the network. The real purpose is to exchange ideas about how to better educate our landlords and prospects and to train ourselves and help each other with ideas about how to provide better services, accommodations and technology.

*We get all the training we need from our company. We don't need outside help.*

-OBCEI believes we are all part of a larger community, and that we have a duty to give something back. So part of the reason I want to participate in a local member network is to gain from that sense of community and help others.

Who at your company do you recommend that I talk to about participation here locally?

I believe that as a leader in the industry, your company (\_\_\_\_\_) will welcome the responsibility of participation at the local level once we communicate the real purpose of the network – which is to make all the competitors more successful.

We all know it's important to know your competition! Meetings provide the best framework for that – much easier than "mystery shopping."

## **Local Network Success Stories**

### **Atlanta**

Recently, a search firm called one member to let them know of a “Hot” candidate for a sales manager position in our industry. Member #1 did not have any openings, but referred the recruiter to member #2, who did not have an opening, but referred the recruiter (once again) to a “competitor” to try and place this candidate in the industry. By the time the recruiter had talked to four or more of us, we had all said to call the other three or four! The recruiter said she had never seen such a great bunch of networking within an industry before, and was amazed how each person she contacted referred her to someone else within our own group.

The success experienced in Atlanta is due to the overwhelming support of the volunteers in our industry. Without a strong breath of life from each and every volunteer, the local organization will flounder. It is only through the efforts of these tireless individuals that we succeed as a group.

### **Denver**

The Denver Network meets regularly for breakfast at a member center. Recently, the members had the opportunity to participate in an industry-specific market study of office business centers in the city. Each member location completed a market research form giving information about the facility such as size, when opened, occupancy and equipment. The study was then compiled and shared with all the members. This very helpful information gave the group an enlightened overview of the Office Business Centers Industry in Denver, and became a helpful marketing tool to everyone.

### **Houston**

The Houston Local Network was established in 1995, and has a membership of 41 people and an associate membership of 3. Our success continues because of the active Board leadership. We have monthly meetings with a guest speaker covering topics from phone issues to customer service. Our meetings also include round table discussions where each center shares problems and how to resolve them.

This year the Houston Local Network has set goals to:

- Increase membership
- Add education programs to every meeting
- Build relationships with competitors
- Support OBCAI
- Learn Industry Production Standards

However, we aren’t always so serious. We have an annual bus tour with a progressive dinner visiting three member centers. And finally, we end each year with the election of new Board members for the coming year, and an annual Christmas party.

# OBCAI Local Member Network Meeting/Activity Report

**Note:** *This form is your official report of your Local Member Network meeting of Office Business Center Association International (OBC). It will be used to gather information about your Local Member Network for publication in **OBCWorld**, the association newsletter. Please complete the form after each meeting and email to ESCS at [askescs@aol.com](mailto:askescs@aol.com) (or FAX to 972-596-8090). **Schedule:** OBC will publish Network News in the January, April, June and September issues of **OBC World** in 2001. The deadline for ESCS to receive the information (which we compile and pass along to OBC) is no later than the 15<sup>th</sup> of each month prior to publication of OBCWorld. However, it's best to complete and submit the form **immediately** after each regular Network meeting! Be sure to include the completed Attendee Report Form! Thank you.*

1. Network Name and City:
2. Network Contact (name and phone number):
3. Date of Meeting:
4. Number of OBC members attending: \_\_\_\_\_  
Number of non-OBC members attending: \_\_\_\_\_
5. Sponsor (Vendor) of Meeting, if any:
6. Synopsis of Meeting Program (speaker, topic of discussions etc.):
  
7. Future activities planned:
  
8. Network's goals for the future:
  
9. Please add interesting information, comments or concerns shared at the meeting about the local market, or the office business centers industry in your community that would be helpful to your associates in other networks:
  
10. DATE, TIME, LOCATION AND PROGRAM FOR NEXT MEETING:
  
11. *Please include pictures from meetings or events that OBC may consider for publication.*

*Signed* \_\_\_\_\_ *Phone* \_\_\_\_\_ *Date* \_\_\_\_\_