



Welcome!

Welcome to the So Cal IT Roundtable, a business networking group for the Information Technology (IT) sector. Our experience has shown that our most valuable introductions and referrals come from other IT professionals.

Key Success Factors

The So Cal IT Roundtable involves an ongoing investment in time, energy and money. Members who honor the following guidelines contribute more to the success of the group and experience higher returns and rates of success for themselves:

- **Attend consistently** - You are able to contribute and receive the full benefit of the group only if you participate, and meetings are our primary activity. Plan to attend at least 75% of the meetings and assign an alternate from your firm to attend in your absence.
- **Invite guests** - Guests are the lifeblood of a thriving, high-energy and productive networking group, as they provide additional connections and referral opportunities.

Guests can include:

- Prospective members
- Coworkers and associates
- Industry experts and speakers
- **Make introductions & referrals** - Our primary reason for participating in the So Cal IT Roundtable is to give and receive qualified introductions and new business referrals. Historically, those members who make the most referrals tend to receive the most referrals. An introduction is not necessarily a new business referral, but rather a potentially beneficial connection. See the Referral Etiquette section below.
- **Know the members** - “Know, Like, Trust, Refer” is the evolution of a personal relationship that results in referrals, so it is essential to get to know the group members in depth. Members are encouraged to meet outside of the breakfast meetings to gain a detailed understanding of each other's' businesses, capabilities, and target clients.

Member Qualifications

Our members serve mid-market and enterprise clients. We target prospective members that are experienced professionals in their field of specialization, and are principals or rainmakers, actively involved in business development activities to grow their firms. The ideal candidate is someone you already trust and refer to your clients.

Competition

Members are non-competitive; however, it is expected that some will have overlapping offerings. Active members who feel that a prospective member's core offering is directly competitive to their own are encouraged to first meet with the candidate to determine if the firms can coexist before voting not to disapprove membership.

Meeting Agenda

- 7:30 AM - Breakfast and open networking
- 7:50 AM - Start
 - Welcome guests
 - Recognize new members
 - Announcements
- 8:00 AM - Program -- varies, and may consist of:
 - Member spotlight
 - Outside speaker
 - Working session
- 8:20 AM - Self-introductions & TWIN's
- 9:00 AM - Adjourn

Self Introductions

The most memorable and effective self-introductions are specific, concise, and describe the value clients receive by engaging you.

Our self-introductions include TWIN's. It is useful to prepare these prior to the meeting:

- **Thank you's** - recognize how members have helped you since the last meeting.
- **Wins** - cite recent wins for yourself or your firm.
- **Introductions** (not to be confused with needs) - describe introductions and referrals you have or will make to others in the group.
- **Needs** - specific requests or "asks" of the group. These may include describing the ideal introductions you would like to receive.

Happy Hours & Mixers

Approximately once a quarter, we meet after work to socialize. These events are an ideal opportunity to expand our membership. While membership in the So Cal IT RoundTable is limited to members who do not compete, the mixers are open. Please invite the following from your personal networks:

- Prospective members
- Coworkers
- Clients

Referral Etiquette

When exchanging referrals with other members, please observe the following etiquette:

- **Timing** - Make referrals and introductions at the most appropriate and opportune time. Do not wait for a meeting to do so.
- **Ownership** - The referring member owns the relationship and opportunity. When having originally received a referral from another member, and that individual or company has additional needs that you cannot fulfill, consult the original referral source before making additional referrals. They likely have other colleagues to whom they wish to refer potential new business.
- **Testimonials** -- Recognize and thank members at the meeting for referrals, introductions and other assistance you have received from them.

Roles

Billing & Website	Caroline Baccich	carolineb@globaldatavault.com	214-396-4475
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Resources

- [Networking Like a Pro: Turning Contacts Into Connections](#), Dr. Ivan Misner

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