MEMBERSHIP TEAM TRAINING

Internally known as the Bad Ass Recruiting Team (BART)

Training Framework/Membership Team Introduction

Recruiting is one of the most important parts of the PIE process – it differentiates us from our competition, without it we do not have a product. Recruiting is 1/3 of our business (the third leg of our stool along with BD & Delivery). We can grow each group and expand the business if we can recruit new members!

Areas of Focus:

- Getting to know PIE and Recruiting Overview
- Quick Outlook Tutorial to get through Week 1 (GROUP Training)
- Listen to Dials
- Recruiting Process
- Sourcing Techniques (GROUP Training)
- How to Pitch EAs vs. Execs
- Salesforce Training (GROUP Training)
- Recruiting on Own list with Coach for Feedback
- Recruiting Jeopardy (GROUP Training)

Starting with the Why

PIE's Mission Statement: Connecting powerful minds – making the world smarter and smaller.
As membership representatives, what we do is so much more than just a distant, impersonal outreach to strangers. Our connection with those we serve is refreshingly human. We make the world smarter and smaller by recruiting members to build communities. We are badass!

****Pin & Set Notifications to "All Activity" for the Training Channel in Teams****

BART Training Planner Review & Expectations – **COMPLETED BY END OF WEEK 3 at PIE**

You own your BART training journey. Each new BART team member has a training planner that that correlates with this training document.

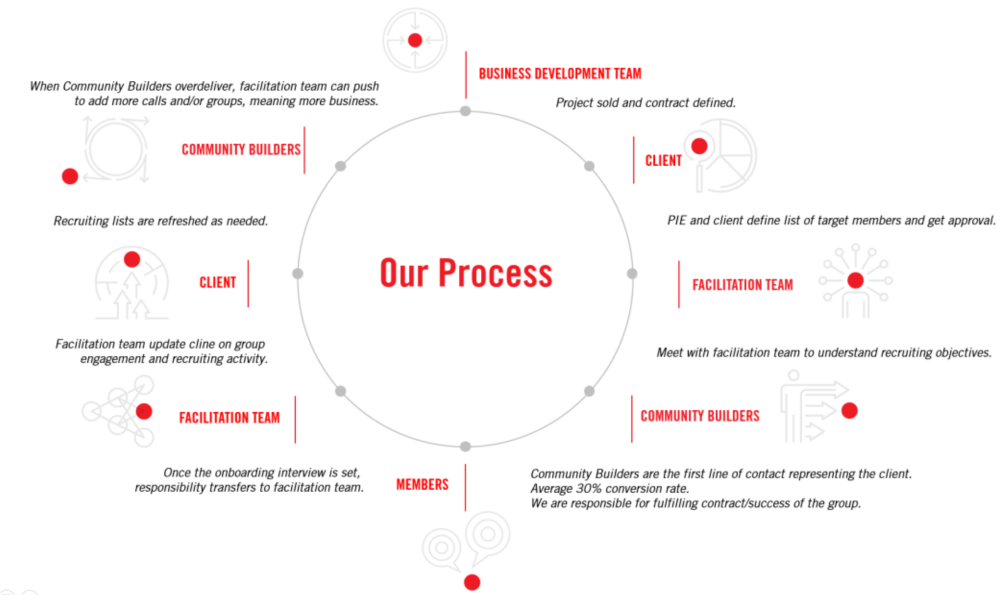
- Each day has a suggested outline of trainings to work through
    - Feel free to work ahead, but do not rush it, ensure plenty of time is spent on each section and you have a full understanding of the content before moving forward.
    - If you are falling behind schedule, please reach out to Carlie to discuss your workload priorities
- Learning in Action Areas are designed to put into practice what you have learned.
    - Once pinged by the first trainee in the group to reach a LIA point, Carlie will send out a meeting invite for everyone to connect as a group
    - During independent learning time, please write down any questions you have to discuss with the trainer in greater detail. The trainer will be expecting your questions.
- Check off completed items one you have mastered the techniques, terms, and processes to provide an overview of your progress and picture of your readiness to being recruiting.

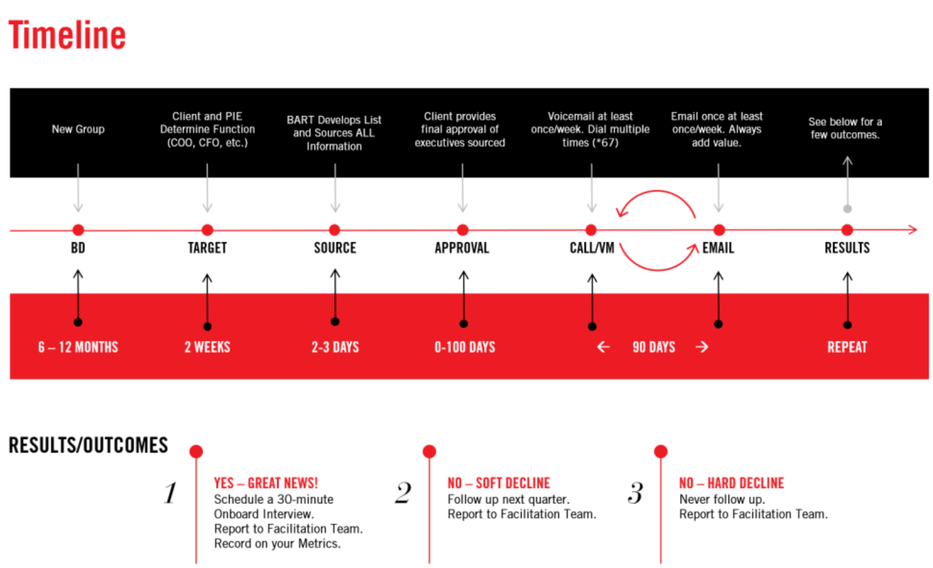
PLEASE **SAVE A COPY** OF THIS DIGITAL MASTER TRAINING GUIDE FOR YOUR USE. DO NOT MAKE CHANGES TO THIS DOCUMENT, BUT FEEL FREE TO MAKE EDITS/NOTES IN YOUR PERSONAL COPY.

RECOMMENDATION: Work out of the training guide doc! The Planner is a To-Do list you will check off. 😊
Where does my training planner live??? How do I use it????

Contents

PIE Business Model





Quick Outlook Review for Getting by in BART

Calendars

- Color categorizing/coding
    - Have you set your conditional formatting up to have invites auto-categorize (color code)?
- Examples: BART, Personal, OOO, BD, Facilitation, By-Client
- Be sure to set free/busy on calendar items (right click on placeholder)

Folders

Create Folders to keep organized – aim to have a zero inbox and use inbox as your outstanding to-do list.

- Folder to Create under **Drafts (Right click on "Drafts" – select New Folder)**:
    - !Recruiting Drafts (we will use this folder later on in training)
        - Create sub-folder under Recruiting Drafts titled "XXXGroup Name" for your future designated recruiting assignment

- Folder ideas in **Inbox**:
    - Recruiting folder with subfolders under for each group assigned to (example below):
        - Recruiting
            - KPMG CFO
            - IBM CIO

Hot Tips

- You can sort your draft folders by "Subject" rather than date to put emails in a desired order alphabetically/numerically
- You can use "Ctl + C" and "Ctl + V" to copy and paste additional versions of your drafts to ensure you keep your master draft alive
- You can use "Ctl + Shift" to select a grouping of email drafts, then right click and select "Open" if you want to open them all at once to get in a good rhythm with your outreach.

PAUSE FOR LEARNING IN ACTION:

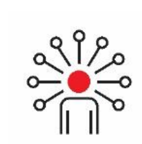
1. Categorize your calendar by color and create folders for your drafts & inbox
2. Email Carlie to inform her you're ready to schedule 15 minutes for a quick Outlook Review (inbox, drafts, can you view appropriate calendars, etc).

UNDERSTANDING THE VALUE

PAUSE FOR LEARNING IN ACTION:

1. Listen to 1-2 recordings of an interview! Please visit here: PIE Audio - Onboarding Interviews
    a. These are all onboarding interviews for Chief Human Resources Officers - Select whichever company is of most interest (noting these are all dated, but still represent an onboarding int)
2. Listen to a recording of a PIE!
    a. Please visit here: PIE Audio - PIEs
        i. Click into a client of interest (I might suggest Amazon Web Services – AWS)
        ii. Select a group of interest (ex. AWS Retail Leaders Advisory Forum)
        iii. Listen to the most recent exchange
3. Listen to each to better your understanding of the "WHY" behind why they would want to join? This is helpful for effectively explaining the group and being bought in to what it is we're working to accomplish! These calls are what we're building towards with our recruiting efforts!
    a. HOMEWORK: While listening to the interview & group interaction make note of the following items and send your answers to Carlie & Alex:
        i. What is the role of the PIE facilitator? How do they add value?
        ii. What is the role of the Client? Why do they find value in the conversation?
        iii. Why was this conversation valuable to the members/executives? What are 2 key takeaways from the call(s)?

TIPS, TRICKS, and Abbreviations



Switchboard Navigation

- *T*A for security
- *67 to block your number if calling back multiple times
- "0" for operator
- Dial by Name - Full name (Robert vs. Bob) should be used
- Execs in c-suite don't always appear in dial-by name
- If SB won't transfer to exec, try asking for assistant
- International Dialing: 011 + Country Code (44 for UK) + Number (drop first 0)

Common Abbreviations for Recruiting Notes

SF – salesforce
SS - spreadsheet
sb – switchboard
lvm – left voicemail
cj – consider join (PIE's lingo for email invitation)
scj – sent consider join
sbcj – sent blind consider join (couldn't reach by phone - no VM or conversation)
sfu – sent follow-up
fu – follow-up
sea – see email attached

smr – sent meeting request
sbmr – sent blind meeting request (couldn't reach by phone - no voicemail/conversation took place)
NA – no answer or not available
EA – executive assistant
OOO – out of office
DD – direct dial
NLP – no longer pursuing

Executive Titles Guide

C-Suite – chief executives: Chief > EVP > SVP > VP > Director > Manager

CEO – Chief Executive Officer	CIO – Chief Information Officer or Chief Innovation Officer
COO – Chief Operating Officer	CISO – Chief Information Security Officer
CFO – Chief Financial Officer	CTO – Chief Tax Officer **or** Chief Technology Officer
CMO – Chief Marketing Officer	CCO- Chief Compliance Officer
CSO – Chief Strategy Officer or Chief Sales Officer	CRO – Chief Risk Officer
CHRO – Chief Human Resources Officer	CLO – Chief Learning Officer

Recruiting Best Practices - Do's and Don'ts

DO

Know the Group You Are Recruiting For – Before making any dials for a group make sure to touch base with the facilitator. It is important to always know the following:

- Nuances of the group
- Upcoming dates (to use for follow-up)
- 1 liner on who the company is/what they do
- Host name/someone to call on behalf of (if there is one, if not call on behalf of group)
- References for leverage
- Awareness of competitive concerns within the group

Maintain the BART Philosophy – It is all about being politely persistent and knowing that what matters is total shots on goal versus perfect outreach. This is a numbers game and endurance is an effective strategy.

Emphasize True Peer Level and Include other Members in the Group – The reason executives join these groups is that they have an opportunity to connect with their true peers – executives in the same role, at a similar-sized company, doing the same work and dealing with the same challenges.

Emphasize that members drive the agenda.

Always listen to voicemail the entire way through – it may provide an EA name or phone number.

ABC – Always be Closing! Keep the ball in your court. Either close them to an interview, or they will close you on why they cannot join. Own the next action.

DON'T

Use "Participants" or "Participate" – Executives in our peer groups are always referred to as "members." Never "participants." When you ask if someone would like to join phrase as Would you be open to join? vs. Would you like to participate?

Say "Awesome" or "Cool" – We should never be saying phrases such as "awesome" or "cool." Instead, use "great" or "excellent."

Reference "Invitations" – Switchboard operators are trained to be averse to the word "invitation" and will request a mail invitation be sent. If possible, simply refer to the group as a peer roundtable and inquire about an "upcoming exchange".

Dialing - Mastering the Pitch

OFMA - On behalf, Format, Members, Ask

- This is XXXFirst & Last Name (introduce yourself)
- Calling on behalf of ______ (if well-known client or host – adds credibility)
- Calling on behalf of a group of _________ executives (in unknown client)
- OWN THE PAUSE (give opportunity for them to acknowledge what you're saying)
- The group meets by-phone quarterly
- Others in the group include _____________ (include company names - adds credibility, most important)
- Would you be open to joining? (if executive)
- Wondering what you would suggest is the best way to share the details with XX to see if ___ is open to joining? (if EA)

Things to Remember When Speaking to an Executive

- Companies have safeguards and measures to keep people from reaching these executives. They are busy and field hundreds of calls per day.
- We are not salespeople – we are not selling anything; we are offering a free service that links the executive you are calling to his or her peers.
- They are not listening when they initially answer and are likely expecting a different phone call – if it's important repeat it without referring to the fact that you already mentioned it (ex. "like I said") and be concise.
- Collect direct dial/contact details for exec and EA. Speak in their time zone when socializing dates and setting interviews and send meeting requests promptly when agreed to.

PAUSE FOR LEARNING IN ACTION I:

1. Listen to Recordings of Recruiting Pitches to Executives
    a. PIE Sharepoint > PIE Audio & Archive > Recruiting > "**Pitch to Exec"**
        i. PIE Audio - Recruiting Recordings
    b. Write out a PIE evaluation for 3 of the pitches and email to Josh/CC Carlie (what did the recruiter do that was a **P**ositive, what about the call was **I**nteresting, what could the recruiter have done **E**ven better?)
2. Complete the Abbreviations Game Crossword (without notes) and email finished doc to Carlie (APPX A - page 23)
    a. TIP – fill in answers with pen pencil and email Carlie a picture of it from your phone.

Things to Remember When Speaking to an Executive Assistant (EA)

- Do not boss this person around – ask them how they can help you get through to an executive. You need to get them on your side if they're going to do anything for you.
- Make yourself vulnerable; ask for their guidance and direction.
- Gain credibility by dropping names (company names, peer host names, sponsor names, etc.)
- Convince them you're not a salesperson, and the reason you are calling is important enough for them to share with the executive they work for.
- Close to a short meeting with the executive to talk further about the group/exchange.
- Be prepared to send an email – if they provide the executives email, ask if they would like to be copied.
- Suggest sending a write-up of information to them: "I have a brief overview detailing this information, would it be helpful to send that over to you/him/her?
- Gather relevant information and set expectation that you will follow-up.
- Speak in their time zone when socializing dates and setting interviews and send meeting requests promptly when agreed to.

PAUSE FOR LEARNING IN ACTION II:

1. Listen to Recording of Recruiting Pitches to Executive Assistants
    a. PIE Sharepoint > PIE Audio & Archive > Recruiting > "**Pitch to EA"**
        i. PIE Audio - Recruiting Recordings
    b. Write out a PIE evaluation for 3 of the pitches and email to Josh/CC Carlie (what did the recruiter do that was a **P**ositive, what about the call was **I**nteresting, what could the recruiter have done **E**ven better?)
2. Email Carlie to let her know you're ready for your 45-minute pitch review session with Josh to debrief the recordings you listened to for the Executives and EAs – share your PIE reviews and discuss the differences you noticed in the pitches.
    a. Also ask Josh to hear his mock pitch to both an EA and an Executive

PAUSE FOR LEARNING IN ACTION III:

1. View the details on the KPMG Chief Supply Chain Officer Group KPMG CSCO Pitch Notes.docx
2. Put together a pitch using the OFMA format and practice it out loud until you feel confident with the language, your tone, and cadence.
3. See Pitch Template Examples for helpful tips/wording (Appx B - page 24)

4. Record pitches using voice memos on your phone to listen back to – make note of 1 main area to improve. Send Carlie a recording and your feedback so she is aware of what you would like to work on.

Leaving Voicemails

- Give pitch (OFMA)
- Leave your name & DD
- Own the action: "I will follow up via email to share additional details on the group…"

PAUSE FOR LEARNING IN ACTION IV:

1. Listen to Recordings of Voicemails
    a. PIE Sharepoint > PIE Audio & Archive > Recruiting > **"Voicemails"**
        i. PIE Audio - Recruiting Recordings
    b. Email Carlie that you're ready to schedule 60-min to role play giving a pitch with Hillary Marchi
    c. To an executive/To an assistant/Leaving a voicemail

Checklist – What to have in Front of you when Dialing

Pitch notes	Agenda Topics/Member List	Salesforce	Metrics Sheet
Calendar of Facilitator	Common Objections	Teams Chat	Blank notebook

What do I do if Someone Declines?

- Think of other ways to loop them in - don't take "no" for an answer the first time.
- Share details about an upcoming call (date, agenda, expected attendees) & ask them to listen-in to determine value.
- Let them know you'll circle back next quarter to see if it's a better fit.
- Listen to reason why they are not interested and refer to **COMMON OBJECTIONS** sheet (page 36) to help with rebuttal
- Push back when EAs decline on behalf of executive on initial phone reach out.
- "XX asked me to share this opportunity and we want to ensure he has a chance to review the details, can we send over some information via email?"
- Ask reason why so you can report back to the group.
- Go around EA and email executive directly if you feel they have not shared the information and are choosing to decline without exec's feedback.
- Update member status in SF and forward along the auto-prompted email to Fac & PC.

How do I report an opt-out message?

Please visit Community Builder website (OPT OUT) for the most up to date process.

PAUSE FOR LEARNING IN ACTION:

1. Listen to a recording of a Decline
    a. Sharepoint > PIE Audio > Recruiting > **"Decline"**
        i. PIE Audio - Recruiting Recordings

            1. **Decline by EA**
            2. **Decline by Exec**
    b. Email Carlie a note about what you think one of the recruiters didn't try that could have been helpful in making more progress towards moving the needle in the right direction.
2. Review Susie's Crafty email – saving a member who tried to decline (Appx H - page 38)
3. Study Common Objections (Appx G - page 36)
4. Listen to other BART Members handling Common Objections:
    a. Sharepoint > PIE Audio > Recruiting > "**Overcoming Objections – Scheduled Recruiting Call"**
        i. [PIE Audio - Recruiting Recordings]
5. Review and practice common objections via the following quizlet link and/or create your own flashcards:
    a. https://quizlet.com/415397221/bart-terms-and-common-objections-flash-cards/
        i. Username: jmilakovichpie password: mila1234
6. Email Carlie to schedule 60 minutes to practice Common Objections with MJ and have him walk you through Quizlet functionality.

Next Steps for New Members

New recruits "officially" become a new member once the onboarding interview is set or they attend a PIE.

Scheduling the Onboarding Interview:

- Set 30-minute interview with facilitator.
- Work with an EA when possible.
- Set interview for at least **5 business days out** unless instructed otherwise by the facilitator (need to time to coordinate with our clients calendars as well)
- Please do not schedule interviews on mornings that the facilitators have PIEs as they'll be busy prepping

4 IMPORTANT ITEMS TO GATHER:

1. Interview time
2. Emails
3. Phone number
4. Availability for next call

Helpful Verbiage

- "Thanks XX – **this is great news**! The group will be pleased to hear that XX will join them as your/his/her schedule permits. The next step is to set an initial call for XX to connect with the group facilitator, XXXX, to gather your/her/his interests for the agendas and answer any questions you/he/she may have. Do you have your calendar handy?"
- Review availability – narrow by week, then day, then morning/afternoon, then hour.
- "Susie is fairly open the week of XXXAug 12th – is there a day that week that works best for you?"
- "Perfect – she is free in the afternoon from XXX2-5pm Eastern **(use their timezone).** What time would you prefer?"
- "Great - we will send over a calendar invitation as a placeholder – what is your email (if exec)?"

- “We will send over a calendar invitation as a placeholder – what is XXXXExec’s Email? Would you like to be copied on the invite? (if EA)
- “We will set the call up on a conference line, but if there are any troubles with the connection is there a phone number that works best for XXXFacilitator to reach you at?”
- “Last question while we’re looking at calendars – the date of our next exchange has been set for XXXXDATE – does this time also work for your calendar?”

Change status in Salesforce to member – (Remember “5 to Be ALIVE) – Update 5 Fields:

1. Member Status
2. Onboard Status
3. Onboard Interview Date
4. Onboard Interview Time - Enter interview time in time zone of member & ensure you have the time zone entered correctly
5. Join Date

***Be sure to inform facilitator/PC of the exec’s availability for the next exchange under the notes section in the auto-populated Great News from SF**

*Be sure you have copied over all contact details gathered through outreach (dds, emails, EA, etc.)

* In addition to personal + client satisfaction you can win cash prizes!!!!!! $100 for first member & more! Visit our Community Builder Sharepoint Side for a run-down of all possible: BART AWARDS

PAUSE FOR LEARNING IN ACTION:

1. Listen to recordings of a YES!
    a. Sharepoint > PIE Audio > Recruiting > “**Yes! Scheduling Next Steps**”
        i. PIE Audio - Recruiting Recordings
2. Email Carlie to schedule 45 minutes with Madeleine to Mock/Role play for setting next steps for a YES! and to also have her talk you through the following questions.
        i. How is the recruiting goal for each month determined?
        ii. What are some of the different recruiting prizes you can win by successfully recruiting new members?

Emailing

Things to Remember when Sending Emails

- Always REPLY ALL to email chain to keep the historical details below
- Copy and paste CJ in draft folder before sending so you don’t send out your original copy
- Log Email Activity into Salesforce
- People will only respond to 1 question
- Brevity – can you use fewer words to get to the point?
- Double check and then check again for correct grammar
- If using an email draft/template, ensure all highlighted or XXXXXX fields are edited before sending

- Find a way to make a personal connection after a relationship has been established

[redacted] HERE [redacted]

[redacted] BMRs [redacted]

  - *NEVER SEND OUT BMRS BEFORE RECEIVING APPROVAL FROM THE FACILITATOR!!!*
- Mail Merge – the mail merge tool is helpful when doing a date inquiry or sending a final agenda to a large group people (not for everything though). To learn more about mail merges review here (PIE\PIE - Training\Microsoft Office - How Tos):
  - Mail Merge Guide
  - Before sending your first mail merge you will want to request an experienced recruiter to walk you through the process step-by-step as we will not use this option often.

PAUSE FOR LEARNING IN ACTION I:

1. Ask 1 question per email – review Carlie's example of setting an onboard (Appx C - page 26)
2. Personal Connection/Not taking first no - review Paul's email correspondence for Oracle recruiting (Appx D - page 28)
3. *Homework*: Read through Example Email Chains and Email Responses (PIE All > Recruiting > Training Binder)
4. *Homework*: Read article on Brevity and respond to sample emails (Appx E - page 33-34). Send Carlie your completed assignment via email for review.

[redacted] HERE if [redacted]

6. Create and send Carlie a BMR based on the March 1, 2021 PIE Training Exchange invite found on her calendar. (Remember – you must first receive approval from the facilitator before you send BMRs).

Creating & Using Recruiting Drafts

At some point in the near future we will have our recruiting drafts auto populated for selection straight out of Salesforce. Until then, please proceed through the following steps to set up your drafts folder and be sure to visit our Community Builders site here for ongoing access to the most recent drafts – Drafts 2.0 link (this is for reference only – your LIA piece will follow the link below under #2:

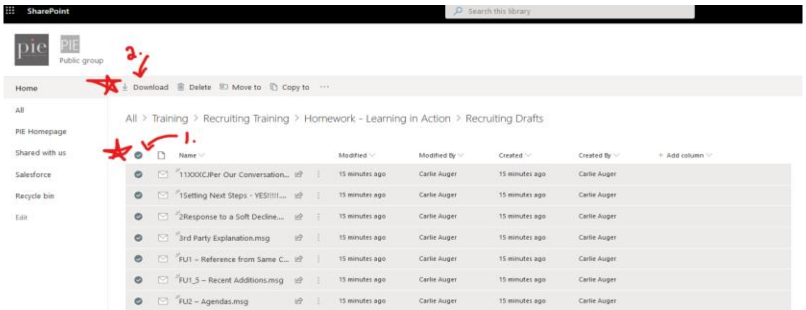
Drafts 2.0

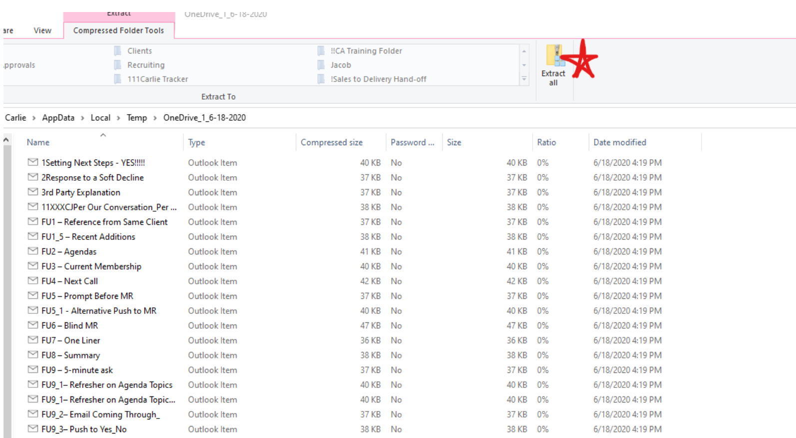
PAUSE FOR LEARNING IN ACTION II:

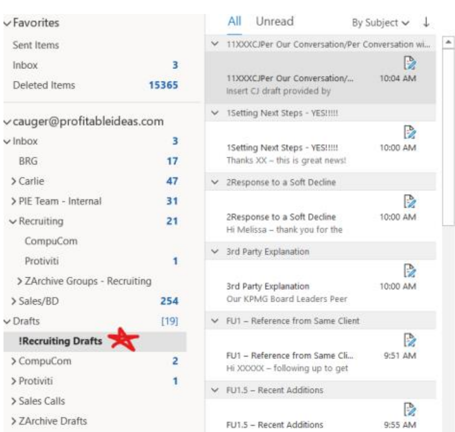
1. Create a folder on your desktop titled "Recruiting Drafts"
2. Visit Training\Recruiting Training\Homework - Learning in Action\Recruiting Drafts
   a. DRAFTS FOR DOWNLOAD HERE
   b. Download and Open the zip file – select "extract all items in this file" and save temporarily to your "Recruiting Drafts" folder on your desktop. See below for screen shots.
3. Email Carlie that you're ready to connect for 60 mins to discuss Brevity Responses and Check-in on the Recruiting Draft set-up and the use of drafts.

Commented [CA1]: SKIP FOR NOW - We are in the middle of creating a new process for sending BMRs that is owned by the facilitator & PC

Commented [CA2]: SKIP FOR NOW – same reason as above.







3. Once extracted - Open the Recruiting Drafts folder on your desktop

Use “ctrl + A” to select all drafts – and then click, drag, and drop into your !Recruiting Drafts folder you created in your outlook mailbox. They should appear as showing to the left.

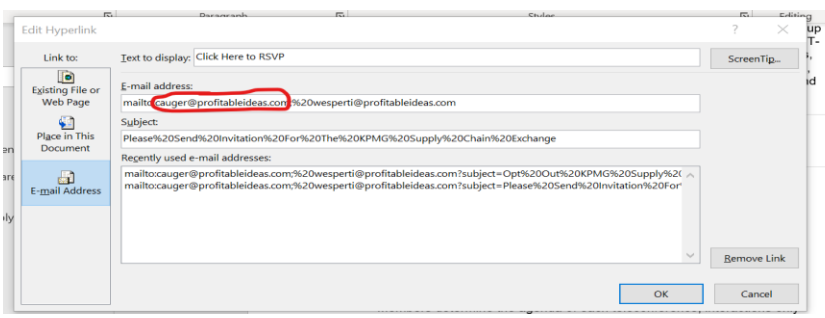
Constructing & Sending out CJs – Don’t Reinvent the Wheel

- Subject Line: Per Our Conversation/Per Conversation with XXXEAName, Per Voicemail/Your Interest/Please Advise/Response Requested

    - You will choose whichever opener best fits with the action. If you left a voicemail and then sent a CJ for the KPMG CSCO group your subject line would be:
        - Per Voicemail – KPMG CSCO Exchange
- Save in Drafts and Copy/Paste so always have your original
- Update with new members as we add execs to the group
    - If no members in the group yet and the list includes those we're reaching out to be sure to remove the company name for the target you're emailing in the list
- Use XXXXXXX or highlights to indicate areas needing edits
- Ask for a 2nd set of eyes – never hesitate to have someone proofread your emails
- View one of our Fancy CJs here: [!!KPMG CSCO Fancy CJ]

PAUSE FOR LEARNING IN ACTION III:

- Save a copy of the Fancy KPMG CSCO CJ ([!!KPMG CSCO Fancy CJ)] and email to Carlie on the tense that the two of you just spoke and she requested you send her some details about the group.
    - Things to note:
        i. The blue italicized note at the top is to customize should you speak with an EA or LVM with an EA. This will be deleted if you don't interact with the EA and go to the exec direct.
        ii. The note in black font following is to personalize to the Exec
        iii. Anything highlighted yellow will need to be edited by the recruiter – once edited REMOVE HIGHLIGHTS so you don't accidentally send a cj with highlighted content
            1. To edit the RSVP and Opt Out hyperlinks right lick on the link and select edit hyperlink. Then update the first email address to be your email (see pic below)
        iv. Your signature will be simple – DO NOT INCLUDE PIE LOGO – instead add the line beneath your name "PIE on behalf of XXXX Exchange"
        v. Every CJ requires a disclaimer. TRIPLE check that the client name is correct (ex. KPMG)
        vi. Once your edits are complete you need to copy & paste from the word doc into your CJ draft in outlook.



Sourcing

Key Resources

- LinkedIn (finding targets, confirming title, confirming if they are still with the company, city)
- RocketReach (email patterns – PIE login in Shared Services)
- Google Search (finding targets)
- Bloomberg (corporate sb number, address, about company)
- Hoovers (address, revenue, fortune rank, competitors)
- Salesforce (all PIE's stored data)
- Mail Tester (confirming email patterns – PIE login in Shared Services)
- Time Zone Converter (finding time zone) – Also see Time Zone Maps (Appx F - page 35)
- Intelius (finding middle initial for email patterns)
- Hunters (email patterns)
- PIE also has a ZoomInfo sourcing team that is trained in leveraging the ZoomInfo database – for a quick outline of this process see here: READ ME! - ZoomInfo.docx

Basic Hierarchy

- C-Suite
- EVP
- SVP
- VP
- Director
- Manager

Overview of Sourcing Process

Step	Action	Responsible Party
1.	New List Received	PC
2.	Confirm Account Rep Approval on Targets before Process Begins	Facilitator/PC
3.	Double Check for any Current Client Names on list (red flags)	Facilitator/PC
4.	Confirm Companies Meet Revenue Parameters for Group	PC/Facilitator
5.	Inform Client of any conflicting companies we cannot pursue	PC/Facilitator
6.	Transfer to Salesforce Upload Template	PC
7.	Send List to Alex	PC
8.	Confirm References to Leverage that are members of other groups	Alex
9.	Assign Recruiter	Alex
10.	Distribute to ZoomInfo Team + BART Team for Sourcing	Alex
11.	Source Missing Contacts	BART
12.	Send list to Client for Approval on Sourced Contacts if Needed	PC/Facilitator
13.	Triple check list for any Current Client Names on list (red flags)	Alex
14.	Upload List to SalesForce & Inform Alex it's ready to go	PC
15.	Schedule Meeting for Recruiters + Facilitator to discuss strategy	Alex

Sourcing a New List

Visit the Community Builders Website & Salesforce Knowledgebase to review

Sourcing Best Practices & Processes

(FOR REAL – READ THROUGH BOTH OF THESE WEBPAGES OR YOU WILL MISS VERY IMPORTANT DETAILS!)

SFKB - Sourcing for New Lists

Community Builders - Sourcing Step-by-Step

Most common errors:

Titles *spell them out – do not use abbreviations*
Phone numbers *formatted incorrectly (must use dashes)*
Email *– you cannot enter more than one email in a field, make sure there is no space before or after the email*
State *- Use the correct postal abbreviations, ex. MT, CA, NY*
Country *- Use United States, not US or USA*
SOURCE THROUGH *should be in all caps after the last name*

SOURCING LEARNING IN ACTION

PAUSE FOR LEARNING IN ACTION I – KEY RESOURCES & LOST PUPPY:

1. *HOMEWORK:* Add Key Resources from page 15 to your bookmarks and create free accounts if login wasn't already provided. Explore the different functionalities of each tool to familiarize yourself.
2. Listen to recordings of "Lost Puppy"
    a. PIE All Online (www.office.com) > PIE Audio > Recruiting > "**Navigating SB & Sourcing"**
        i. PIE Audio - Recruiting Recordings
    b. Send Carlie an email answering the following:
        i. When you would use the "Lost Puppy" approach for recruiting including what your opening line would be over the phone.
        ii. What does "Source Through" mean?
        iii. How do you enter "Source Through" in the name fields in salesforce if you can't find the right target, but have identified someone close to source through?

PAUSE FOR LEARNING IN ACTION II – SOURCING PRACTICE BEFORE LAUNCH:

1. ***WAIT TO BEGIN THIS ACTIVITY UNTIL YOU'VE COMPLETED YOUR GROUP TRAINING WITH CAITLIN ON SOURCING. IF THIS TRAINING HAS NOT TAKEN PLACE – CONTINUE TO WORK AHEAD IN THE GUIDE.***
2. Review Sourcing Instructions and complete the following IBM Energy & Utilities CIO sourcing list
    a. Instructions here
    a. Assignment here
        i. Both can be found in (PIE - Training\Recruiting Training\Homework - Learning in Action)
3. Email Carlie to schedule 30 minutes to review your completed sourcing list with Caitlin and talk through any challenging contacts and your approach. During this time also ask Caitlin if you could role-play using the lost-puppy tactic with her.
4. Contact Alex to let her know you have completed your sourcing training and see what new lists need to be sourced so you can help us start digging

Getting a New List

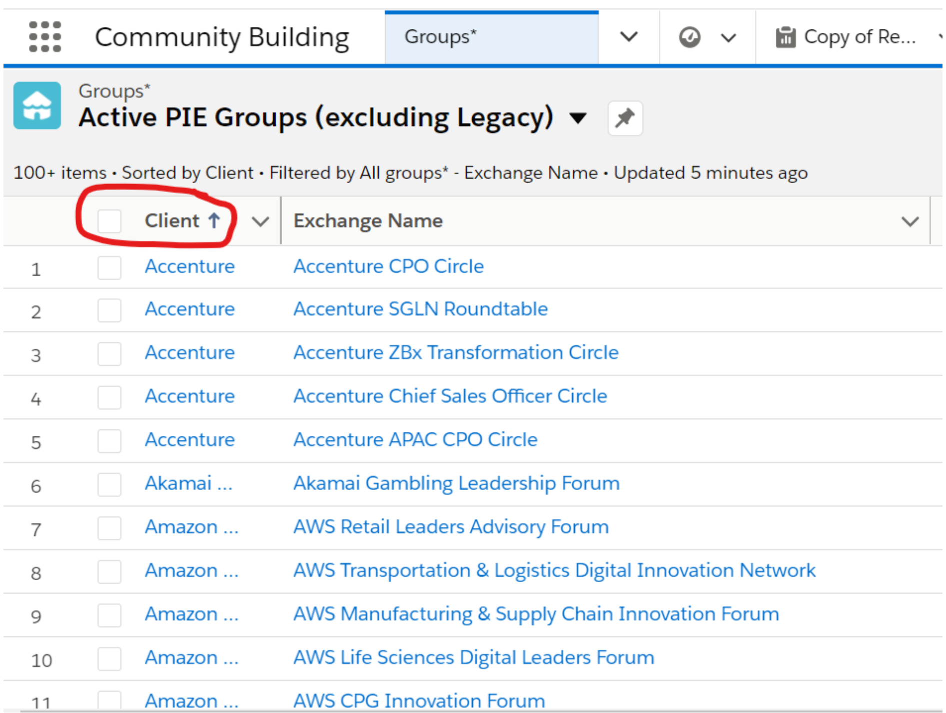
Receiving a new target list is like opening presents on Christmas morning! GET TO THEM ASAP! DON'T WAIT!!!!! Try to get at least 1 new member in first week! You receive a list to call on once it has already been sourced 😊

Time will be scheduled by facilitator and PC with recruiting team to learn ins and outs of the group.
Practice mock pitch with Facilitator, Paul, or others on the BART Team.

Red Flags – if you see any of our current client companies on your target recruiting list please stop and go speak with the corresponding facilitator and/or TBAM leader regarding next steps. They will likely need to be removed and marked NLP or the facilitator will need to reach out to their client and ask for direction on how to proceed.

PAUSE FOR LEARNING IN ACTION I:

1. Review the following Group List View in Salesforce to familiarize yourself with our groups and clients. https://823498672.lightning.force.com/lightning/o/Group__c/list?filterName=00B3t000007l1ASEAY
2. If you are curious what kind of work our clients are focused on take a moment to look them up in a google search and scan the "About Us" page.
    a. You will notice that a # of clients host multiple groups – Exchange Name indicates the industry or title focus of the group.


Community Building | Groups* | Copy of Re...

Groups*
Active PIE Groups (excluding Legacy)

100+ items • Sorted by Client • Filtered by All groups* - Exchange Name • Updated 5 minutes ago

	Client	Exchange Name
1	Accenture	Accenture CPO Circle
2	Accenture	Accenture SGLN Roundtable
3	Accenture	Accenture ZBx Transformation Circle
4	Accenture	Accenture Chief Sales Officer Circle
5	Accenture	Accenture APAC CPO Circle
6	Akamai ...	Akamai Gambling Leadership Forum
7	Amazon ...	AWS Retail Leaders Advisory Forum
8	Amazon ...	AWS Transportation & Logistics Digital Innovation Network
9	Amazon ...	AWS Manufacturing & Supply Chain Innovation Forum
10	Amazon ...	AWS Life Sciences Digital Leaders Forum
11	Amazon ...	AWS CPG Innovation Forum

Metrics Tracking

Keeping Accurate Metrics is a Top Priority for the Recruiting Team

- Salesforce will keep an ongoing tally of dials made, emails sent, and new members based on activity logged.
- Proper Metrics help PIE to determine resources needed and to properly allocate recruiting assignments to those with capacity.
- Accurate Metrics help us set reasonable goals, determine pricing for new groups, and understand what it takes to build out different executive network.
- You must make 100 dials in the month to qualify for BART Breakfast (a chance to win $100 and breakfast on PIE).

PAUSE FOR LEARNING IN ACTION:

1. You have 90 minutes already set with Jess to set up your metrics dashboard in Salesforce and to chat through the importance of metrics tracking and how you prioritize when you're calling on multiple lists. Please bring any metrics tracking questions you have to this training.

Dials

Emails

Members

Recruiting Roadmap

Reference Follow-up Drafts for language for example correspondence

	Action	Action
1	First Action	Check for Referrals in Salesforce
2	Call	Try to reach directly
3	Call/Email	Leave voicemail and SCJ
4	Call/Email	Update with new members in the group **(always use *Reply All*)**
5	Email	Update with agendas (previous topics if existing group – upcoming topics for new groups)
6	Call	Leave voicemail – circling back to get a read on if XX would be interested…
7	Email	Share upcoming dates
8	Call/Email	Share agenda and list of expected members to push to the next call
9	Email	Send blind MR for upcoming call
10	Call/Email	One-line magic - can you join us next week?
11	Email	Send summary from previous call
12	Email	5-min ask to connect with facilitator
13	Call/Email	Ask about availability for future dates
14	Email	Share updated member list
15	Declines	Push to follow-up next quarter– try not to take no for an answer on the first decline
16	Members	Set Onboarding Interview – 30 minutes

***Note this roadmap is a suggestion, but the order or outreach is flexible based on which new details you have handy….it may take longer to build a member list to share so you may hope to sending a 5-min ask draft earlier…**Steps 6-13 will REPEAT** over and over and over until you get an answer!

Where can I find details about the group I'm calling on?

- *Upcoming calls & expected members (Salesforce)* – look up the group name in the Salesforce Search Bar – for Example: IBM CHRO (GROUP w/blue tent icon) > Click on Events > Select the Campaign name that includes the date of the next exchange > Click on Campaign Members link at the top in orange > sort by "PIE Attendance" > Accepted = Expected 😉
- *Past agenda topics and summaries (PIE All)* – always saved in the Client Teams Channel (Ex. AWS > CPG Innovation Forum > Files > Completed PIEs > 11/4 Kickoff > Summary)
  - Executive Summary (always send as PDF)
  - Exchange Guide – to pull agenda header and questions out to paste in an email (we never send the entire document as it contains private information about who said what in interviews)
- *Recruiting materials (PIE All)* – within each group folder, there should be a recruiting folder where you can access CJ drafts, save your pitch notes, reports, etc.
- *Referrals that I can leverage in my outreach who are members of other groups* – Salesforce – you will receive a detailed training on this down the road.

How often do I follow-up with an executive via phone?

- If no answer – call up to two times/day (use *67 if calling aggressively).
- If you speak with someone at the beginning of the week, follow-up by end of the week/or start of the next to confirm receipt and gauge interest.
- Action item (voicemail/conversation/email) once per week is generally a good cadence.
- GOAL - Every Target on each of your lists should be hit at least once per week!!
- Follow-up when you say you will.

How do I follow-up with an executive via email?

- Have historical notes pulled up to review past outreach activity
- Click "reply all" to keep your email chain alive
- Send the next FU using your pre-made signatures/drafts (see recruiting roadmap above)

PAUSE FOR LEARNING IN ACTION:

1. Explore where you can find details for the **IBM CHRO** Exchange which is a current group:
   a. Please find and email the following items to Carlie (if you get stuck please call Carlie and she'll walk you through these steps):
      i. Teams > IBM Account > CHRO
         1. **PITCH NOTES:** Files > Recruiting > Pitch and Group Overview
         2. **FINAL AGENDA** from the **11/12/2020** Call (hint: saved under IBM CHRO Channel in the Completed PIE Folder and buried within the exchange guide)
         3. Salesforce > **NEXT DATE** for the Exchange (hint: saved under events)
         4. Salesforce > **List of expected members for the next Exchange**
2. If you have been assigned a group to recruit on and there is not one existing, create a Recruiting Folder in Sharepoint to save your pitch notes.
3. Cut out the roadmap from the last page of the training guide (Appx J – last page in the guide) – pin to your workspace for reference on what to do next in your recruiting outreach…..Use this as a checklist for success when building your communities!

Referral Process

Anytime we can reference that a common connection participates in another group, it builds credibility and increases the likelihood that they will join. Think about your personal experience here – if you learn that a good friend of yours uses XXXagent and they are pleased you are more likely to hire them as your insurance agent.

***Note: Before we're able to leverage referrals (especially in writing) we have to seek approval from the facilitator that owns that relationship.

PAUSE FOR LEARNING IN ACTION:

1. *Review the Referral Process here for finding and leveraging referrals.*
    - Review the Process Map & drafts
    - Watch the training video: here
2. Email Carlie to schedule 30 minutes to debrief what you've learned about referrals with MJ – please be sure to bring him any questions on process for leveraging this method.

Pitch Practice on Assigned Recruiting List

You should be very familiar with the common objections and also how to set onboarding interviews by now so let's get rocking! Please to get some reps in on your pitch for the new group you were recently assigned.

PAUSE FOR LEARNING IN ACTION:

- Schedule 15 minutes with each of the Packmates listed below.
    - Set as a Teams Meeting – be sure to review their availability.
- If more details are requested send through a CJ for your group that has been edited to include your signature and customizations.
- Have the facilitator's calendar pulled up for socializing available times if someone says yes and you need to schedule an onboarding interview

Call Flow:

1. Set the stage with the other person on the line:
    a. Practice Your Pitch – go off of video and "ring ring" through just like we did in our role-plays.
    b. Switch roles to hear how they Pitch and handle common objections.
    c. Debrief to gather feedback on how to continue to improve.

Everyone has been briefed on this and is looking forward to working with you! GOOD LUCK!

Practice Time Pack Members:

- Hillary
- Kelsea
- Ashley
- Caitlin
- Madeleine
- Yetta
- MJ
- Meredith

Membership Status & Other Salesforce Fields

Please visit Community Builder website (https://profitableideas.sharepoint.com/sites/CommunityBuilders) for the most updated Salesforce processes.

Legacy Notes	If group has past recruiting activity, can view outreach history here – great place to log potential SOURCE THROUGH contacts and track any BOUNCED emails
Contact	Mr. Ms. or Dr. in front of name - Ms. Kristin Horgan
Phone Format	406-585-4162 NO () or periods, only use dashes.
Time Zone	Pacific, Mountain, Central, Eastern or 7 for UK and 8 for CET
Bounced Email	Keep track of other email addresses you've tried that bounced so if passed along next recruiter doesn't re-try the same ones. Enter bounced emails under "Legacy Notes" in SF and if you don't have a working email for a contact, leave the email field blank. Ex. BOUNCED: cbauger@pie.com, carlie.breen@profitableideas.com
Member Status	Found on Group Member Page in SF…
Recruiting	Reaching out Actively
Member	Onboard Set or Joined Exchange!! Recruiter can update status in SF and then forwards the auto-populated email to Fac/PC team. Remember 5 to be ALIVE (5 things to update before saving).
Soft Decline	"Not interested at this time." Reaching out next quarter usually. Generally not reported to the client but reported to the SPC/Facilitator (if they want these details). These people you circle back to in ~3 months. SPC/Facilitator may like to know they are soft decline to keep an eye on active recruits and help make a case for more approvals if needed. If they Decline again, per the recruiters discretion, they may move to a Hard Decline if there is no hope of them ever joining. Recruiter can update status in SF ***Active SD = Someone who was a SD, but the 3 months is up and you're reaching back out ***Recruiting SD = Someone who is still on your recruiting list, but you're not reaching out yet – waiting for next quarter.
Declined	Never calling again ("not interested") – is reported to client. Include Reason for exiting and exit date and also document any additional valuable details in the notes section. Save email response if applicable. These are the folks that you don't revisit. Recruiter can update status in SF and then forwards auto-populated email to Fac/PC team
Pending Member	Interested in joining, but no onboard interview locked in or have not attended a PIE yet.
Former Member	Retired, left company, not interested in participating anymore, not the right fit/role. Note: If someone says "not interested" we select "time restraints" as our default.
Recruiting Hold	Target has been put on hold by the Facilitation Team or Client – we are either awaiting approval by the sales team, or they are a 2nd tier target we're not yet prioritizing in our reach out.
No Longer Pursuing	NLP -- for incorrect contacts or no longer at the company. Source someone new for approval and check to see if duplicate. Need to get approval for new contact from PC/Facilitator team. They will add the new contact into SF once we have the green light. Note this is not for declines, this is for people that are the incorrect contact or no longer at the company.

BART in Salesforce

We have time set with our group of recruiting leaders to review practical application of the workflow.

Salesforce + BART – Session 1 – Intro & High-Level Overview

- Accounts https://profitableideas.sharepoint.com/sites/Salesforce2/SitePages/Accounts.aspx
- Campaigns https://profitableideas.sharepoint.com/sites/Salesforce2/SitePages/Campaigns.aspx
- Contacts https://profitableideas.sharepoint.com/sites/Salesforce2/SitePages/Contacts.aspx
- Group Members https://profitableideas.sharepoint.com/sites/Salesforce2/SitePages/Group-Members.aspx
- Groups https://profitableideas.sharepoint.com/sites/Salesforce2/SitePages/Groups.aspx

Salesforce + BART – Session 2 – Community Building

- Community Builder Console (Split-View) https://profitableideas.sharepoint.com/sites/CommunityBuilders/SitePages/Console-App.aspx
- Community Builders Website https://profitableideas.sharepoint.com/sites/CommunityBuilders
- How to add Salesforce Extension for Outlook https://profitableideas.sharepoint.com/sites/CommunityBuilders/SitePages/Add-Outlook-Salesforce-Extension.aspx
- Membership Statuses https://profitableideas.sharepoint.com/sites/Salesforce2/SitePages/Membership-Status.aspx

Salesforce + BART – Session 3 – Practical Application

- Creating Your Recruiting List https://profitableideas.sharepoint.com/sites/CommunityBuilders/SitePages/Build-Your-Recruiting-List.aspx
- Logging a Dial/Call on Group Members https://profitableideas.sharepoint.com/sites/CommunityBuilders/SitePages/Logging-Activities-for-Recruiting.aspx
- Logging an Email to Group Members https://profitableideas.sharepoint.com/sites/CommunityBuilders/SitePages/Logging-Emails-with-Salesforce-Extension.aspx
- Managing Tasks https://profitableideas.sharepoint.com/sites/Salesforce2/SitePages/Tasks.aspx

Salesforce Member Status + Understanding the Membership Team's Value:

PAUSE FOR LEARNING IN ACTIONI:

1. Email Carlie your answers to the following - How would you update the member status for each recruiting target:
    a. A target who was a soft decline 3 months ago that you are ready to reach back out to?
    b. A target we're recruiting on who has retired?
    c. A target you just spoke to who said they're just too busy at the moment?
    d. A target who says they're interested, but you haven't locked in an onboarding interview yet?
2. Email Carlie that you are ready to connect with Alex for 30 minutes to discuss where the Membership Team fits into the PIE value chain.

Membership FAQs

Please review the frequently asked questions in Appx I (Page 43) – let us know if you run into any other questions while recruiting that we should document for future reference.

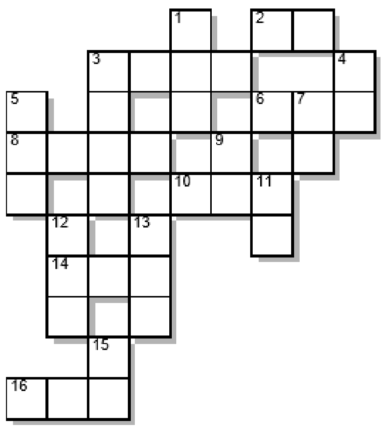
BART Jeopardy – Grand Finale!

We have time set with our group of recruiting leaders to engage in 2 rounds of Jeopardy as a final review. It is highly encouraged to study your guide prior to our contest – there is a prize on the table!

Appx A: Crossword – Abbreviation Quiz 😊

(You can fill this in with pen/pencil and email Carlie a picture of it!)

Abbreviations



ACROSS

2 Direct dial
3 Sent blind consider join
6 See email attached
8 On behalf, format, members, ask
10 Always be closing
14 Left voicemail
16 Sent follow-up

DOWN

1 Sent consider join
3 Sent blind meeting request
4 No answer or not available
5 Out of office
7 Executive assistant
9 Switchboard
11 Consider join
12 No longer pursuing
13 Sent meeting request
15 Follow-up

Appx B: Pitch Templates

Pitch to an EA

- Hi my name is __________________ and I am calling on behalf of _____________________
- We are bringing together a group of ___________________ that meets quarterly, by-phone.
- The group has requested that I reach out to ______ to see if he/she might be interested in joining. I am wondering what you would suggest is the best way to share the details with ______________?

Pitch to an Exec

- Hi my name is _______________ and I am calling on behalf of _____________________
- We are bringing together a group of ___________________ that meets quarterly, by-phone.
- Members in the group include (or if no members yet…we are reaching out to include XXXtitle from : _____________________.
- Curious if you would be open to joining as your schedule allows?

Voicemail

- Hi my name is _______________ and I am calling on behalf of _____________________. (Can include DD here and at the end of VM)
- We are bringing together a group of ___________________ that meets quarterly, by-phone.
- We are also reaching out to others such as/Members include ___________________________ among others.
- Looking to get a read on if XXXXX would be open joining as XXXX schedule allows.
- I will send you a follow up email with addition information. Please feel free to give me a call with any questions. My direct line is ___________. I look forward to hearing from you!

Setting Next Steps

YES:

- This is great news! The next step is to set an initial call for XX to connect with the group facilitator, XXX, to gather XX interests for the agendas and answer any questions XX may have. Do you have your calendar handy/in front of you so we can look to find a good time that works.
- *Make sure you have phone #, email, and cc EA?
- Great, we'll send through a calendar invitation as a placeholder
- Our next group exchange is coming up on XXX, would this time also work for you?
- Details

Topics?
Agenda is driven by the **topic suggestions and requests** of the members gathered in advance and we are currently looking to each member to suggest such topics and questions

When? At this time, we are still socializing dates
Executives will get together to **share experiences, exchange insights, and discuss challenges;** member input will drive each agenda.

"I don't have time"
We have received feedback that our members appreciate that they drive the conversation and have fingerprints on the agenda AND so the one-hour time commitment is very efficient and valuable to them

Participation is not an obligation; it is an ongoing opportunity to engage in sessions as they fit your calendar. You could also listen to the first exchange to see if it is something that interests you and hopefully you can participate in the next call

Sales? This is not sales related, only to build relationships. Hopefully in the future, both grant Thornton and the members in the group can refer business to one another in areas that are outside their expertise

What is your role?/PIE? We build agendas based around what we are hearing and we drive that conversation to cover what members expressed as topics of interest. We are a neutral, objective, third party facilitator.

Appx C: Carlie's Cognizant Email – Asking 1 Question

From: Soni, Deepa <Deepa.Soni@bmo.com>
Sent: Tuesday, April 3, 2018 6:56 AM
To: Carlie Auger <cauger@profitableideas.com>
Cc: Young, She'Ron <SheRon.Young@bmo.com>
Subject: Re: Per Ken Librot - Cognizant CIO Exchange
Carlie,
Thanks for the invite. Yes, would be interested in joining and attend as calendar permits.

Say hi to Jitin - he and I have worked together for many years.
Copying my EA Sheron - please include her in event notifications.
Deepa
Sent from my iPhone
From: Carlie Auger
Sent: Tuesday, April 3, 2018 7:28 AM
To: 'Soni, Deepa' <Deepa.Soni@bmo.com>
Cc: Young, She'Ron <SheRon.Young@bmo.com>
Subject: RE: Per Ken Librot - Cognizant CIO Exchange

Thanks Deepa – this is great news! The group is pleased to hear that you will join them as your schedule permits. The next step is to set an initial call for you to connect with the group facilitator, Tanya Reinhardt, and Jitin to gather your interests for the agendas and answer any questions you may have.

I will work with Sheron to to find 30-minutes and will most certainly tell Jitin hello for you.

Cheers,
Carlie

From: Carlie Auger [mailto:cauger@profitableideas.com]
Sent: Tuesday, April 03, 2018 8:49 AM
To: Young, She'Ron
Subject: RE: Per Ken Librot - Cognizant CIO Exchange

Hi Sheron – pleasure to meet you virtually.

Tanya has availability as follows (all listed in Central time):
April 9 – 9am-12pm or 12:30-4:30pm
April 10 – 8-8:30am, 10:30am-12pm, or 12:30-4:30pm
April 11 – 9:30am-4:30pm
April 23 – 9am-2pm – **11:30-12pm**
April 24 – 8:30am-12pm or 12:30-4:30pm
April 26 – 8:30am-12pm or 1-4:30pm – **10-10:30am, 1-1:30pm**

Please let us know when will work best for Deepa's schedule (looking for just 30 minutes). We'll send over a meeting invitation for the time you propose.

Cheers,
Carlie

From: Young, She'Ron <SheRon.Young@bmo.com>
Sent: Wednesday, April 4, 2018 3:03 PM

To: Carlie Auger <cauger@profitableideas.com>
Subject: RE: Per Ken Librot - Cognizant CIO Exchange

Hi Carlie,

Sorry, she doesn't have a lot of availability but please see below for options and feel free to send a meeting invite.

Thanks!
She'Ron

She'Ron D. Young
Executive Assistant to Deepa Soni, U.S. CIO & U.S. P&C CIO
BMO Financial Group - U.S. P&C Technology
200 W. Adams Street, 9th Floor
Chicago, IL 60606
SheRon.Young@bmo.com
T 312-461-1056

From: Carlie Auger [mailto:cauger@profitableideas.com]
Sent: Thursday, April 05, 2018 9:00 AM
To: Young, She'Ron
Subject: RE: Per Ken Librot - Cognizant CIO Exchange

Thank you, She'Ron – we will send over a meeting invitation for April 23rd @ 11:30am Central.

Is there a direct phone number Tanya & Jitin can reach Deepa at in case there are any troubles with the conference line?

Kind regards,
Carlie

From: Young, She'Ron <SheRon.Young@bmo.com>
Sent: Thursday, April 5, 2018 8:11 AM
To: Carlie Auger <cauger@profitableideas.com>
Subject: RE: Per Ken Librot - Cognizant CIO Exchange

Yes, her office line is 312-461-1049.

Thanks!

From: Carlie Auger
Sent: Thursday, April 5, 2018 8:44 AM
To: 'Young, She'Ron' <SheRon.Young@bmo.com>
Subject: RE: Per Ken Librot - Cognizant CIO Exchange

Thanks, She'Ron! Last question I promise. Our next group exchange is on the calendar for May 2nd from 10-11am Central time. Is Deepa free during this hour to join us?

Cheers,
Carlie

Appx D: Paul's Oracle CIO Email – Personal Connection/Pushing on a "No"

From: Paul Quigley [mailto:pquigley@profitableideas.com]
Sent: Friday, July 28, 2017 3:43 PM
To: Anderson, Meg
Subject: [External] Per Voicemail: Oracle CISO Exchange

Hi Meg - Oracle is forming a small group of Chief Information Security Officers (CISOs) from F500 companies in Financial Services who will meet for one hour, by phone on a quarterly basis. CISOs will come together to share experiences, exchange insights, and discuss challenges; member input will drive each agenda. CISOs members are from Regions Financial, Aflac, US Bancorp and others. The group would be pleased to have you join them as your schedule permits.

The key elements of this exchange are:

- To save time and avoid schedule interruptions, interactions take place through one-hour teleconference exchanges held on a quarterly basis.
- The group interactions are kept small (10 to 12) and come from a select list of CISOs.
- CISOs determine the agenda of each teleconference; interactions only focus on the questions and interests of the members.
- Members determine when live events are appropriate; live events will be put together on behalf of the group on specific topics of interest.
- There is no cost to join as Oracle hosts the group.

Participation is not an obligation; it is an ongoing opportunity to engage in sessions as they fit your calendar.

Would you be open to joining when your calendar allows?

Best,
Paul

Paul Quigley | Oracle CISO Exchange Facilitator
direct: +1 406-582-4992 | pquigley@profitableideas.com
From: Anderson, Meg [mailto:Anderson.Meg@principal.com]
Sent: Tuesday, August 1, 2017 8:32 AM
To: Paul Quigley <pquigley@profitableideas.com>
Subject: RE: Per Voicemail: Oracle CISO Exchange

Good morning Paul,
Can you share your association with Oracle?
Thank you,

Meg

From: Paul Quigley [mailto:pquigley@profitableideas.com]
Sent: Tuesday, August 01, 2017 10:24 AM
To: Anderson, Meg
Subject: [External] RE: Per Voicemail: Oracle CISO Exchange

Hello Meg – Oracle has contracted with our firm as the third party facilitator for the Exchange. Our objective is to ensure a valuable, robust interaction amongst your peers and to maintain objectivity in building an agenda that is of, by, and for the members.

Would you be interested in joining when your calendar allows?

Kind regards,
Paul

Paul Quigley | Oracle CISO Exchange Facilitator
direct: +1 406-582-4992 | pquigley@profitableideas.com

From: Anderson, Meg [mailto:Anderson.Meg@principal.com]
Sent: Tuesday, August 1, 2017 12:07 PM
To: Paul Quigley <pquigley@profitableideas.com>
Subject: RE: Per Voicemail: Oracle CISO Exchange

Hi Paul,
Thank you for clarifying. At this time I am not interested in participating.
Meg

From: Paul Quigley [mailto:pquigley@profitableideas.com]
Sent: Tuesday, August 01, 2017 1:46 PM
To: Anderson, Meg
Subject: [External] RE: Per Voicemail: Oracle CISO Exchange

Hi Meg – Not a problem. Perhaps we will circle back in a few months to see if it is a better fit then. We would also welcome you to join and just listen to a call to get a feel for the forum if interested.

Kind regards,
Paul

Paul Quigley | Oracle CISO Exchange Facilitator
direct: +1 406-582-4992 | pquigley@profitableideas.com

From: Anderson, Meg [mailto:Anderson.Meg@principal.com]
Sent: Tuesday, August 1, 2017 12:55 PM

To: Paul Quigley <pquigley@profitableideas.com>
Subject: RE: Per Voicemail: Oracle CISO Exchange

That sounds good.
Are you related to the Quigley's of Pittsburgh?
From: Paul Quigley [mailto:pquigley@profitableideas.com]
Sent: Tuesday, August 01, 2017 2:01 PM
To: Anderson, Meg
Subject: [External] RE: Per Voicemail: Oracle CISO Exchange

Thanks Meg – I'm not aware of any relations in PA. I'm sure we are somehow as Quigley is not a very common name. I'm located out West.

Best regards,
Paul

Paul Quigley | Oracle CISO Exchange Facilitator
direct: +1 406-582-4992 | pquigley@profitableideas.com
From: Anderson, Meg [mailto:Anderson.Meg@principal.com]
Sent: Tuesday, August 1, 2017 1:03 PM
To: Paul Quigley <pquigley@profitableideas.com>
Subject: RE: Per Voicemail: Oracle CISO Exchange

My niece is a Quigley in North Carolina. Her husband's family is from Pittsburgh. FYI 😉 Agree – not a common name but a cool one!
From: Paul Quigley [mailto:pquigley@profitableideas.com]
Sent: Tuesday, August 01, 2017 2:51 PM
To: Anderson, Meg
Subject: [External] RE: Per Voicemail: Oracle CISO Exchange

Hi Meg – Since we are basically family 😉, could I be so bold as to ask to connect for 5 minutes by phone? I completely want to respect your decision not to join this group of peers at this time, but sometimes it is just hard to communicate the value of the Exchange over email. Perhaps I can put any concerns you may have at ease.

Could we chat briefly?

Thanks,
Paul

Paul Quigley | Oracle CISO Exchange Facilitator
direct: +1 406-582-4992 | pquigley@profitableideas.com

From: Anderson, Meg [mailto:Anderson.Meg@principal.com]
Sent: Tuesday, August 1, 2017 1:55 PM
To: Paul Quigley <pquigley@profitableideas.com>
Subject: RE: Per Voicemail: Oracle CISO Exchange

I have a meeting in a few so I will just say that I heard this was being driven by the Java Security side of Oracle so didn't pique my interest.

From: Paul Quigley [mailto:pquigley@profitableideas.com]
Sent: Tuesday, August 01, 2017 3:06 PM
To: Anderson, Meg
Subject: [External] RE: Per Voicemail: Oracle CISO Exchange

Thanks for the note Meg – That makes sense. Just so you know, we won't talk about Java issues unless the consensus from participating CISOs desires to talk about Java; members dictate what is spoken about on each call. Java just happens to be the practice inside Oracle bringing the group together.

Below are some agenda topics CISOs covered in the past to give you an idea of the flavor of conversation.

Best,
Paul

Paul Quigley | Oracle CISO Exchange Facilitator
direct: +1 406-582-4992 | pquigley@profitableideas.com

***Board Reporting -** The group is interested in discussing the strategy around board reporting.*
· *How are you continuing to improve your communication with the board?*
o *What information do you cover with the board when discussing your program's maturity and success?*
o *Do you use a specific model or framework to communicate effectively with the board?*
***Multifactor Authentication -** The group has expressed interest in discussing what Multifactor Authentication (MFA) looks like within an organization.*
· *Have you seen success with your current the MFA solution or are you considering a move to a new solution?*
o *What key factors are you considering when selecting an MFA solution?*
***Compliance** - The group is interested in discussing the General Data Protection Regulation (GDPR) and its impact on organizations with operations in the EU.*
· *How are you thinking about the GDPR's impact on your organization's operations?*
· *What is your organization's strategy for coming into compliance?*
***Approaches to Data Security** – The group is interested in discussing different approaches to improving an organization's data security program.*
· *What is your approach to data classification as it relates to data security?*
· *How has BYOD impacted security management within your organization?*
What strategies are you using to strengthen the program's effectiveness?
· *What does Network Access Control look like in your organization?*

***Cyber Readiness** – The group has expressed interest in discussing the initiatives put in place to ensure cyber readiness across an organization.*

- *How are you reacting to the increasing push towards cloud-based applications and data centers?*
- *How are your responding to security risks introduced by moving operations to the cloud?*

From: Anderson, Meg [mailto:Anderson.Meg@principal.com]
Sent: Tuesday, August 1, 2017 4:47 PM
To: Paul Quigley <pquigley@profitableideas.com>
Subject: RE: Per Voicemail: Oracle CISO Exchange

Ok Paul, you pulled me in. It doesn't cost me anything to participate and I don't have much to lose…but one question, does it have to be a CISO or could it be a CISO's direct report such as a Governance, IAM, Data Protection or Cyber Ops lead?

Appx E: Brevity Exercise

Brevity Just Might Save Your Career

Kathy Caprino Contributor

I, like you, receive hundreds of emails a week, and participate in scores of meetings, phone interviews, teleclasses, and other types of forums each month. I've noticed, as the years have gone by, that if the messages I receive aren't crisp, clear, brief and to the point, they lose me in about 10 seconds. A handful of seconds is truly all I can give to reviewing a stranger's email or listening to a message or story pitch from someone I don't know (who's trying to be covered in this Forbes blog, for instance). I find I can't waste precious time on long-winded, murky emails and communications that keep me from more pressing work that has to be accomplished that day.

For me, "less is definitely more" and I find I gravitate toward – and choose to collaborate with -- people who follow that principle as well.

Turns out, I'm not alone. According to Joseph McCormack, the author of *BRIEF: Make a Bigger Impact By Saying Less*, "less is more" is now a critical mandate if you want to build a successful career. Joseph, an experienced marketing executive and successful entrepreneur recognized for his work in narrative messaging and corporate storytelling, founded The BRIEF Lab in 2013 after years of developing and delivering a unique curriculum on strategic narratives for U.S. Army Special Operations Command (Ft. Bragg, NC). He actively counsels military leaders and senior executives on key messaging and strategy initiatives.

Below are Joseph's insights on the critical need – and positive impact – of crafting your communications with more brevity and focus:

"It's time to embrace the 'less is more' mandate. Before you inadvertently run long at your next meeting, in an e-mail or on a call, remember that your livelihood might take a direct hit when you can't get to the point.

There's a growing demand for less. Professionals are consuming so much information that it's like they're drinking from a fire hose. Inundated with information, they get more than 304 e-mails a week, check their smartphones 150 times and consume more than 34GB of data a day.

They've reached over-saturation and the slow build up to the point not only adds to their woes, but also undermines careers. People get impatient, annoyed, waste valuable time and have to work overtime mentally – and they're holding those who are long-winded accountable and punishing them with delayed decisions, harsh feedback, unresponsiveness and votes of no confidence.

The unspoken expectation is that successful professionals can manage rapidly shrinking attention spans - which have dropped to eight seconds from 12 in less than a decade – and accommodate the constant rate of interruptions that fill an already busy work day.

The demands for brevity run deep and the risks of falling short are real. So what's the root cause of not being clear and concise? Is there something to do immediately to be better at being brief?

There are a variety of reasons why people have a hard time being succinct: overconfidence, fear, insensitivity with people's time and carelessness. There are three hidden tendencies, however, that derail every professional's ability to deliver a tighter message:

• **Over explaining** – sharing too much information and burying people with unnecessary details. The affliction of expertise can quickly turn initial interest into agony as people are dying for the speech to end and remind themselves to avoid the next encounter. It's a career killer.

• **Under preparing** – omitting the upfront thinking, ordering and trimming that's needed to make the communication as concise and contextual as possible. People mistakenly think that preparation isn't needed because they don't intend to talk very long. As Blaise Pascal said, "I would have written you a shorter letter if I had more time." Brevity means prep-work.

• **Missing the point completely** – continuing to drive home messages far past the moment that the point has been made. As that happens, people think to themselves, "I get it now, so why did they keep talking?" When a point's clear, it's time to stop talking.

It's not enough to recognize why these tendencies pull us down or why brevity is expected throughout the day. These are critical skills needed to craft a clearer point faster and more convincingly than a close competitor or counterpart looking for the same promotion:
1. **Map it** – draw an outline before communicating. Take out a piece paper and draw a bubble in the middle – your main idea – surrounding by a half dozen support points. That visual outline will guide what is absolutely essential. If it's not on the map, it doesn't need to be in the brief explanation.
2. **Tell it** – start telling stories and stop pushing and persuading. People love a concise narrative that explains the 5 Ws (who, what, where, when and why). Have a few standby stories that connect back to the main point you're making.
3. **Talk it** – become a conversationalist who listens more and talks less. Avoid the monologue and be a better listener. Brevity is about giving someone else a chance to process, participate and respond. There's nothing worse than a lop-sided conversation where people are waiting for their turn to speak.
4. **Show it** – use visuals that paint pictures better than words. If there's any opportunity to sketch an idea, show an image or share a short video, do it. More than 70% of people are visual learners and creating that immediate appeal builds lasting clarity.

My professional experience, spanning from working with busy corporate executives and ambitious entrepreneurs to driven military leaders, continues to confirm that they all share the same common complaint: they're praying for people around them to be brief. When that happens, they notice the difference. When it doesn't, they make those around them - and under them - pay the price.

Understand that your advancement relies on consistently delivering concise updates, succinct summaries and daily briefings that are actually brief. It's the relief that people all silently crave, yet rarely get – and it's exhausting for them to process it all mentally when the presentation is disorganized, lax and long-winded.

That's the point: being brief matters to shape and direct a successful career. Entice people with less so they want more.

In this way, brevity emerges as an essential 21st century skill that we can all learn to embrace and improve. It's not easy, yet my dealings with professionals and soldiers who are decisive and disciplined confirm the payoff.

I have seen the extra time spent preparing ways to refine the point, order a core message, cut out dead weight and straighten out a tangled storyline consistently translate into ease of consumption. When it comes time for these well-prepared speakers to explain an important idea, new strategy or complex mission, they exude confidence and conviction and are easier to understand in less time. Their overly-verbose colleagues get lost in their own words."

Brevity Activity:

Below are responses to CJs you've sent out. Respond to each of these in approx. 30-40 words, trying to focus on what information is most important and really thinking about word choice.

Thanks for the invitation but I don't have time.
Rachel

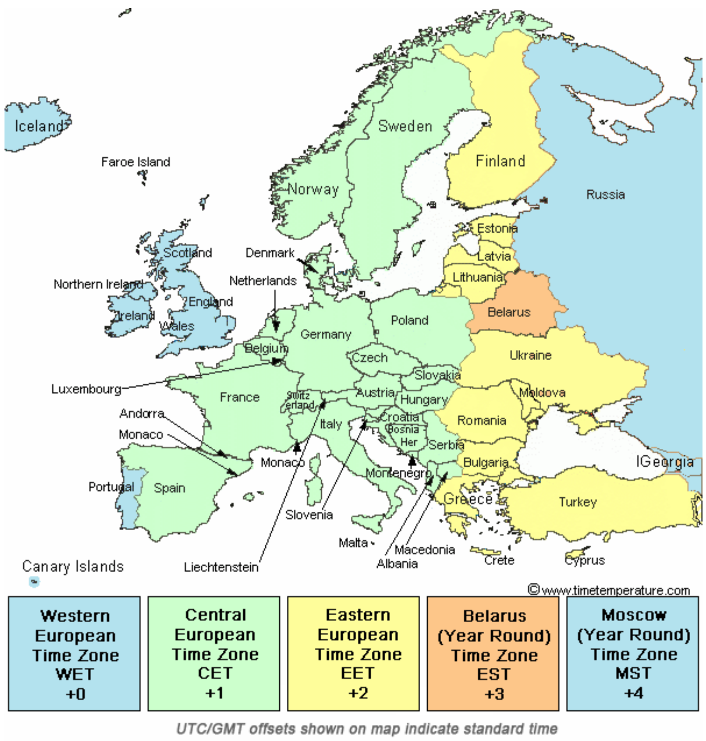
Could you clarify the relationship between your company and KPMG?
Monica

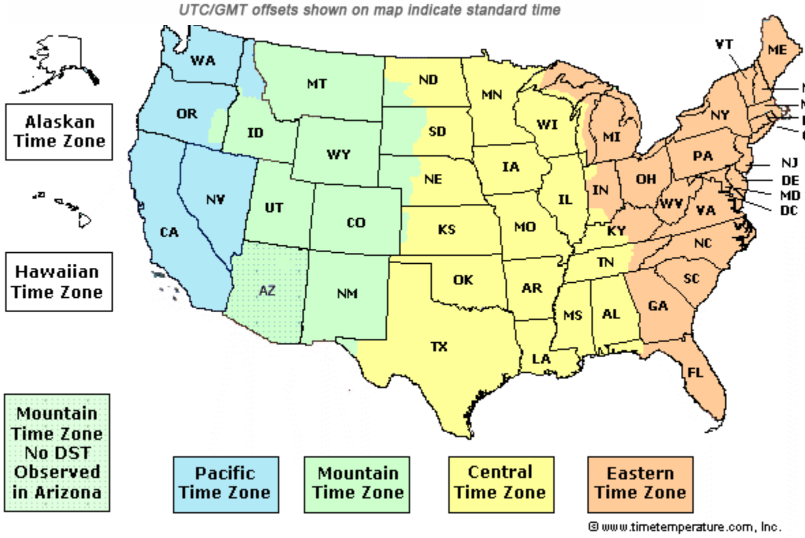
I don't have time. I'm copying my deputy who will participate in my place.
Phoebe

I'm in too many groups already but thanks anyway.
Mike

Sure, please tell me when the meeting is and I'll join.
Gunther

Appx F: Time Zone Maps





Arizona is in the Mountain Time Zone and does not observe daylight saving time except in the Navajo Indian Nation. To view the current time in Arizona select from the state menu below.

Appx G: Overcoming Common Objections – Answering Common Questions

I'm a member of several other groups already

- Many members of our group are also in other groups. What they mention they like most about this group is it (choose 1-2 items that seem most fitting depending on conversation:
    - Time commitment is minimal,
    - you're welcome to join as your schedule allows.
    - The group is cross-industry (if applicable – some are industry specific) and by phone.
    - Agendas are member driven.

I'm already a member of (industry specific) groups and get more out of that

- The feedback we've gotten from other members is that they appreciate the cross-industry perspectives that the group allows.
- We ensure the members are at a true peer level which ensures alignment on topics of interest.

I'm too busy and just don't have the time

- The group meets for 1 hour, every 3 – 4 months, and we only ask that you join when an interaction works with your calendar.

How much does it cost?

- There is no cost to join as Client Name is the sponsor of the group.

Where did you get my name and number?

- The group is self-selecting and it was suggested that we add (company name) to our membership - We did some research and found your named as the head of (executive function) and called through the switchboard.

What about privacy – what happens with the information shared on the call?

- We operate under Chatham House Rule – whatever is said on the call stays on the call; no direct attributions are made as to who said what.

What is the sponsor's role in this?

- Sponsor is dedicated to the market and finds the best way to understand it is to hear from [Exec Function] on what is important.
- HOST will be joining and participating as a peer on the group to learn and exchange insights with the group.

What about live events?

- Live events are brought together at the request of the group.

Push off (maybe in 6 months)

- We understand a busy calendar. As the group meets on an ongoing basis, we are happy to follow up next quarter to see if it is a better fit.

I'd like to attend but I'll have one of my direct reports attend for me

- Your direct report is welcome to join with you. But we are working to keep the group at a true peer level and ask that direct reports do not attend in your place.

What can you really accomplish in only an hour?

- We are able to dive pretty deep into topics in 1 hour. This is because we meet with each participant prior to the interaction to find what their priorities are and what specific questions they have.
- Whatever topics we are unable to get to, we roll forward onto our next call.

What are they going to try to sell to me?

- No selling will happen during the calls – this is truly a peer interaction/roundtable discussion
- Members determine the agenda for each conversation so we focus the hour on the topics of most interest to the group.
- CLIENT NAME will be participating as a peer, to learn and share their experience where relevant .

What company are you with?

- I work for a third-party, professional service firm called Profitable Ideas Exchange. Client Name has partnered with our organization to ensure objectivity during the exchange and ensure the conversation is focused on what is important to the members.

What is discussed on the calls?

- Members drive the agendas – we focus in on the top priorities and questions for those participating.
- We gather member input prior to each exchange to ensure a relevant and timely agenda.
- In the past, executives have discussed (list relevant examples) .

Who else is in the group?

- Participating in the group are (list companies in the group).
- If group is just being built: We are currently in the process of building the group and reaching out to include Executive Title (CIOs, CHROs, CSOs, etc) at List Companies You are Recruiting.
- We ensure that the participants are true peers.

How can you have competing companies on the call together?

- Prior to the interaction, we will let you know who is expected on the call.
- If there are competitive concerns, we can invite you and your competitor to separate interactions.
- If open to it, you are welcome to attend the same call and share what you feel comfortable sharing as you will have visibility into the agenda in advance of the exchange.

Are calls recorded?

- The calls are recorded for the purpose of creating executive summary to share back with the group. However, no name or company will be attributed to the comment.

Appx H: Susie's Crafty GT Audit Email – Saves Member Backing Out

From: Susie Krueger <skrueger@profitableideas.com>
Sent: Thursday, May 16, 2019 11:07 AM
To: Jenifer Kimbrough <Jenifer.Kimbrough@OakworthCapital.com>
Subject: Per voicemail- Following up- next steps - RE: your interest - Grant Thornton Audit Committee Exchange

Hi Jenifer – Hope this note finds you well. Bringing the note and inquiry below back to the top of your inbox should you have a convenient moment. Also- you will receive a calendar invitation for the upcoming June 13 group exchange; we look forward to your participation should your schedule permit.

Kind regards,
Susie

Susie Krueger | PIE on behalf of the Grant Thornton Audit Committee Exchange
direct: 406-585-4148 | skrueger@profitableideas.com

From: Jenifer Kimbrough <Jenifer.Kimbrough@OakworthCapital.com>
Sent: Thursday, May 16, 2019 12:47 PM
To: Susie Krueger <skrueger@profitableideas.com>
Subject: RE: Per voicemail- Following up- next steps - RE: your interest - Grant Thornton Audit Committee Exchange

Hi Susie – thanks for reaching out. This group may not work for me after all. I apologize. I am involved in several initiatives right now and having a hard time making time.

Jenifer

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Jenifer Kimbrough
Chief Financial Officer
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Timeless Values for a Modern World
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From: Susie Krueger <skrueger@profitableideas.com>
Sent: Friday, May 17, 2019 10:10 AM
To: Jenifer Kimbrough <Jenifer.Kimbrough@OakworthCapital.com>
Subject: RE: Per voicemail- Following up- next steps - RE: your interest - Grant Thornton Audit Committee Exchange

Hi Jenifer – Appreciate your thoughtful consideration. We respect the dilemma that comes with having much on one's plate and thus limited time on the schedule. All members are participating on the premise that the Exchange is an *opportunity, NOT an obligation* to join sessions as calendars and priorities align; we understand and fully anticipate that members will not be able to join *each* quarterly call. Further, the initial 1:1 call with the facilitator is not a prerequisite to participation but rather a helpful tool, when feasible on members' schedules, to ensure relevant and timely topics.

Given your demanding schedule, Stephanie will happily pass along a draft agenda in advance of an upcoming session for your optional response back with feedback/input at your convenience. She will also share a final agenda and list of expected attendees a day or so prior to the session.

All said, members would value your participation and perspectives as your schedule and workload permit.

Kindest regards,
Susie
From: Jenifer Kimbrough <Jenifer.Kimbrough@OakworthCapital.com>
Sent: Friday, May 17, 2019 9:11 AM
To: Susie Krueger <skrueger@profitableideas.com>
Subject: RE: Per voicemail- Following up- next steps - RE: your interest - Grant Thornton Audit Committee Exchange
Thank you, Susie!

Appx I: Membership FAQs

What if you learn the target is no longer at the company you are recruiting?

- NLP -- for incorrect contacts or no longer at the company. Source someone new for approval and check to see if duplicate. Need to get approval for new contact from PC/Facilitator team. They will add the new contact into SF once we have the green light.
    - Ex: Hi Carlie, I learned that John Smith is no longer with Aaron's. I did find out that the person who filled his role is named Tommy Meek. His email is Tommy.Meek@aarons.com. His mobile number is 317-999-9090.

What if a member wants to join or learn more about a group you know is dissolving?

- Email the PC and facilitator + Alex. Each situation is different, so they will let the CB team know what the next steps should be based on the group and the scenario.
    - Ex: Lauren has someone who just responded interested in the summary from the Blue Prism group that has dissolved. She'll need to let the facilitator and Alex know, as they may be able to find new home for the potential member.
    - Ex: Some groups may have very detailed contracts that prohibit us from keeping that target on board for another group – we need to confirm with the Facilitator.

What if the EA seems very interested on the phone, but is not responding to ANY emails, so you can't get them on the calendar?

- Call the EA (since she's apparently answering the phone) and let her know that you want to confirm that you have the proper email address and to confirm that your messages have come through and weren't filtered into junk mail.

What if the EA is not letting you access the Exec?

- Let her know that a change has been made to an event so you want to make sure he gets the updated details
- Go around the EA and send an email to the executive directly.

Do you use the SF outlook extension on every BMR even if you've logged your BMR prompt emails?

You have linked your BMR Prompt email to salesforce. It is also suggested that you log your BMR to salesforce using the extension. This helps to keep everything documented and ensure that you haven't missed sending a BMR to anyone on your list. *Note* - If you log your BMR it does set your last activity date as the date of the BMR which can be a bit confusing.

You answer a call and have no clue what group the person belongs to?

- Always try to have Salesforce open so you can do a quick contact search if you get the execs name.....if not coming up, you can also be very human and say something like "I'm so sorry, could you help refresh my memory - I just got out of meeting and need to gather my thoughts - which exchange was this in regards to?

What do I do if someone is taking over my list?

- You should always work on your list under the assumption that someone else may take it over. Cleaning up your list prior to passing includes making sure your note are clear, lose string are tied up and/or communicated in a brief meeting, and any tasks you set for the future are reassigned to the new GMO. Also send them over any drafts that you have already created for the group so they don't have to recreate themselves.

What do I do if I am taking over someone's list?

- Make sure you have a brief meeting scheduled with the person + Facilitator to understand group nuances, target nuances and any upcoming exchanges. Ask about the NLP process, source-throughs, recruiting target priorities to be aware of, if they want you to email or call first or if it matters, etc. Request any email drafts the former recruiter already prepped.

What do I do if someone passes the invitation along to another contact without our approval?

- Wait to respond until you confirm process with the facilitator. In many cases we will need to get client approval before proceeding.
  - Ex. Carlie reached out to invite Dave Tabachnik, the CFO at Upserve, to join our Protiviti Technology CFO Exchange
    - Dave copied in Ken Saunders, the CFO at Social Solutions and said that given the other companies in the group Ken would be a great fit and recommends he joins.
      - Carlie forwarded the email to Stephanie, the facilitator, to ask her approval. Stephanie replied that she has to check with her client first for approval.
        - Carlie Responded to Dave with the following note to buy some time while waiting for approval:

Hi Dave – thank you for the response and recommendation. We would be pleased to loop in Ken once approval is received to proceed. Given the group is self-selecting and we are a third-party facilitator, we just want to confirm with the membership before setting next steps. I will circle back as soon as we have the green light.

Kind regards,
Carlie

What do I do if I call a cell phone number and things don't go as planned?

- Erin reached an exec by calling their cell phone (pulled from ZoomInfo) and it turns out that he JUST retired from the company IBM is interested in. This is difficult as we're not aware of the reason for leaving (perhaps fired) or maybe they still want to join but are no longer an applicable target.
  - Learning 1: Double check that the exec is still at the company before calling a mobile number. Often times you can catch this at the SB b/c they will tell you, or if it's automated, the directory might no longer have them listed. The best place to look is on their LinkedIn profile to see if they're still currently with the company.

- ***Verbiage for navigating this conversation:*** *"oh I'm sorry my info was out of date. The group is keen to have the CDO of XYZ company represented. We did a little research and came to your name. Do you happen to have a recommendation for who currently fills this position that we should reach out to..."*

Appx J - Recruiting Roadmap

Reference Follow-up Drafts for language for example correspondence

	Action	Action
1	First Action	Check for Referrals in Salesforce
2	Call	Try to reach directly
3	Call/Email	Leave voicemail and SCJ
4	Call/Email	Update with new members in the group **(always use *Reply All*)**
5	Email	Update with agendas (previous topics if existing group – upcoming topics for new groups)
6	Call	Leave voicemail – circling back to get a read on if XX would be interested…
7	Email	Share upcoming dates
8	Call/Email	Share agenda and list of expected members to push to the next call
9	Email	Send blind MR for upcoming call
10	Call/Email	One-line magic - can you join us next week?
11	Email	Send summary from previous call
12	Email	5-min ask to connect with facilitator
13	Call/Email	Ask about availability for future dates
14	Email	Share updated member list
15	Declines	Push to follow-up next quarter– try not to take no for an answer on the first decline
16	Members	Set Onboarding Interview – 30 minutes

****Once you've gone through every step in this roadmap you* ***repeat steps 6-13*** *until you get an answer. If you've only tried going through an EA the first round, next round try the exec directly & vice-versa.*