Candidate Sponsor Orientation

How to Qualify and Guide a Kettering Prospect through the Membership Process

*Version 2021-08-18*

Set of Assumptions

Sponsor Orientation

- Sponsor Responsibilities
- Qualifying a Candidate
- Membership Criteria
- Candidate Life Cycle Process
- Candidate Introductions
- Available Resources
- Guest Guidelines

Kettering Key Tenants

- The Launch of **Kettering 2020** reaffirmed our Mission and crystalized our Vision and Core Values

- Numerous process changes have evolved and are deployed to significantly enhance Kettering's value proposition for our Members, our Prospects and our Sponsors

- As Candidate Sponsors, all members should be aware of the core rebranding elements and transformational improvements of the Kettering organization

- K2020 reference information can be found here on the website. https://ketteringsuccess.org/about/

Mission

Core Values

Value Proposition
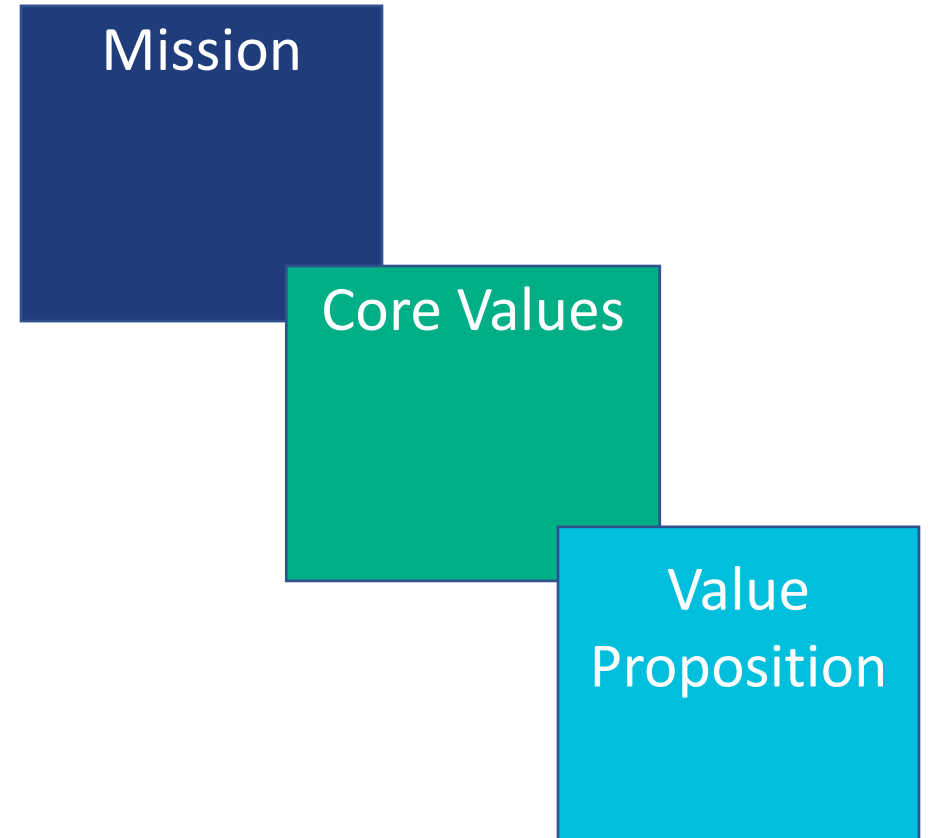
Sponsor Responsibilities

Sponsor Responsibilities

- A Sponsor is a current Kettering **_Sustaining_ Member in good standing**

- Sponsor is familiar with **Kettering 2020**
  - Mission / Vision / Core Values
  - Kettering Enhancements

- Sponsor is familiar with and carries out **Sponsor Responsibilities** for their Prospect

- Sponsor understands and is very familiar with Kettering **Membership Criteria**

- Sponsor knows the Kettering **Membership process**

- **Sponsor will coach prospect on required introductions** and **attendance and engagement expectations**

- Sponsor is responsible for **qualifying prospects** against Membership Criteria prior to nominating as a Kettering member Candidate.

- Sponsor understands and is familiar with the key stage gates in the **Candidate tracking process**

- Sponsor ensures new member completes all steps for **full membership**

Qualifying a Candidate

Candidate Qualification

Pre-Qualifying a Candidate against Member Criteria is foundational to Kettering

- Maintains **consistency** in the **quality and character** of members
- Adds **value** to our members and sponsors
- Ensures we retain **"like minded" executives** who have shared values, leadership experiences, common challenges, and a trusted peer group
- Confirms prospects are **Kettering-caliber** before engaging them in the Candidate process

How do I Qualify a Candidate?

Sponsors are expected to review the following with Kettering Guests / Prospects and validate qualifications prior to Candidate nomination:

- Kettering Mission and Core Values
- Focus on Servant Leadership and "Pay it Forward"
- Key attributes of the organization, e.g.:
  - Focus on life-long learning
  - Executive Speaker Series
  - Special Interest Groups [SIGs]
  - Strategic Partnerships (e.g. Year Up, Buckhead Club)
  - Sponsor support
  - Social activities (e.g. 1st Monday Happy Hour, Fall Sporting Event)
- Membership Criteria [validate qualifications]
- Member engagement expectations

Qualifying a Candidate: Suggestions

When Qualifying a Candidate

- Ensure candidate's resume matches LinkedIn profile.
- If Sponsor has qualification information that is not reflected on the Candidate's resume, remember the Board member interviewing Candidate will not have that information either. This can potentially impact the interview process.
- Candidate must have demonstrated "pay it forward" activities.
- Confirm Candidate's commitment level to be 'engaged' with Kettering (see website for ways to actively engage with the organization).

Qualifying Guests / Prospects - Checklist

❑ **Provide Guest with an overview of Kettering and what is required to become a member. Discuss each of the following with the guest (documents can be shared):**

- Sponsor Responsibilities
- Membership Criteria
- Kettering Mission / Core Values / Value proposition
- Membership Process

> *For clarity, the terms "Guest" and "Prospect" refer to someone who has not yet been formally submitted as a Candidate for membership. Once they've been submitted for membership, they will be referred to as a "Candidate".*

❑ **Review resume and LinkedIn profile; confirm consistency**

❑ **Register Guest for a Kettering event / meeting; attend alongside Guest to host and make introductions to other members**

- Prepare Guest for Kettering [Guest] Introductions (Refer to **Appendix** for Intro outline)
- If unable to attend the first meeting with your Guest, coordinate with another member in good standing to host Guest; Notify Membership Chair
- Ensure Guest attends at least 2 Kettering meetings / events

❑ **Confirm Guest is "Kettering Caliber" and proceed with the nomination process**

❑ **Notify Membership Chair with Nomination (via email to MEMBERSHIP@KETTERINGEXECUTIVENETWORK.ORG) and provide:**

- Prospect's name,
- Contact Information
- Resume
- Completed Membership Criteria Validation form
- Link to Prospect's LinkedIn profile

❑ **Guide Candidate through remainder of the Candidate process *(See Candidate Life Cycle Process)***

- If unable to do so at anytime, Sponsor must coordinate with another member in good standing to complete the Sponsor Responsibilities
- Notify Membership Chair

Membership Criteria

Kettering Membership Criteria

- All Kettering Candidates
    - Must be sponsored by a Kettering Member
    - Must meet the Membership Criteria to be evaluated as a "senior executive" (for membership purposes)
    - There is no longer a radius or distance component for a Candidate. They just need to be willing to be engaged with the organization and find a way(s) to pay-it-forward.

- Membership Criteria Components
    - P&L Criteria
    - Functional Criteria
    - Advisory Criteria
    - Pay It Forward
    - Compensation

- Any questions can be directed to:
    - Membership Committee Member
    - Board Member

Candidate Life Cycle Process

Candidate Life Cycle Process

	Action	Performed By	Timeline
1	Submit Candidate nomination to Membership Chair and include: • Candidate resume • Membership Criteria Validation form • Link to LinkedIn Profile	Member / Sponsor	Kicks off Process
2	Confirm Candidate has attended at least 2 Friday events (and preferably at least 1 SIG meeting)	Membership Chair	Week 1
3	Send email notification to Candidate: • Indicate receipt of nomination request • Request candidate complete membership application	Membership Chair	Week 1
4	Complete and submit membership application and pay application fee	Candidate	Week 2
5	Assign interviewer, provide resume, Membership Criteria Validation form, and link to LinkedIn profile	Membership Chair	Week 3
6	Schedule and conduct candidate interview Provide interview feedback & membership recommendation	Interviewer	Week 3 –4
7	Initiate member-wide vetting for 'approved' candidate	Membership Chair	Week 4
8	Notify candidate of membership 'acceptance'	Membership Chair	Week 5
9	Pay membership dues, attend/complete "New Member Orientation" *** take or attend New Member Orientation as last step to achieve 'full' membership*	New Member	Within 1-2 weeks
10	Order badge	New member	w/in 1 week

Candidate Introductions
(for in person meetings)

Introductions: Guest

- **Purpose**
  - Welcome Guests to Kettering & encourage networking

- **Process**
  - 5 seconds for brief introduction
  - No more than <u>two introductions</u> as a guest

- **Introduction Outline**
  - Name only

Introductions: Candidate

- **Purpose**
  - Get to know Candidate, their background and key career highlights
  - Insights into servant leadership and/or demonstration of "pay it forward"
  - Improve targeted networking opportunities

- **Process**
  - 45 – 60 second elevator pitch
    - Candidates must be respectful of the time made available and will be cut off at 60 seconds
  - No more than <u>two introductions</u> as a Candidate

Introduction Outline: Candidate

Outline

- Who Am I? [30 seconds]
  - Name
  - Sponsor's name
  - Industry
  - Role / Recent Role(s)
  - Current or prior two employers
  - Expertise (summarize in a few sentences)
- Paying it Forward – How Can I Help the Group [15 seconds]
  - How has Prospect, Candidate, and New Member demonstrated servant leadership or "pay it forward"
  - How can I be of help to this group?
- Repeat Name, Sponsor's name

Introductions: New Member

- **Purpose**
  - Refamiliarize Kettering with New Member and their background
  - Opportunity for Kettering members to Welcome new member
  - Insights into servant leadership and/or demonstration of "pay it forward"
  - Improve targeted networking opportunities

- **Process**
  - 45 second elevator pitch
    - Be respectful of the time; will be cut off at 45 sec)

Introduction Outline: New Member

Outline

- Who Am I? [30 seconds]
  - Name
  - Sponsor's name
  - Industry
  - Role / Recent Role(s)
  - Expertise (summarize in 1 – 2 sentences)
- Paying it Forward – How Can I Help the Group [15 seconds]
  - How might you demonstrate servant leadership or "pay it forward" as a Kettering Member?
  - Or, how can you be of help to this group?
- Repeat Name

Available Resources

All documents referenced can be found on the Kettering Website (member-only):

- ❑ Kettering Candidate Sponsor Instructions
- ❑ Kettering Membership Criteria
- ❑ Kettering 2020 Launch presentation
- ❑ Kettering Guest / Candidate Introductions
- ❑ Kettering Candidate Process Timeline

Types and Purpose of Guests at Meetings

- There are typically 4 types of guests that you may bring to a Kettering event:
    i. A guest who you have vetted and expect to become a candidate
    ii. A guest who has been recommended to you or wants to learn more about Kettering (this is an opportunity for you to meet and vet them)
    iii. A guest who is currently not looking to join but would benefit from the specific speaker and functional knowledge
    iv. A guest who could benefit from increased networking but is not likely a Kettering candidate – First Monday Happy Hours are a great option

- Additionally, Kettering leadership may invite guests of the speaker or future speakers to attend an event

- A reminder: if you sponsor a guest, you must attend on their first visit!

Thank You!

Questions?

Contact:

Membership@KetteringExecutiveNetwork.org