Sure

Affiliate & Partner Guidelines

1. AFFILIATE

- a. **Definition:** A group of business owners, salespersons and/or professionals, each representing unique business categories, whose goal is to build trusting relationships with one another for the purpose of business growth through the passing of referrals and by being a positive presence in the local community.
- b. Forming a new Affiliate: A new Affiliate of beSure must be founded with no fewer than six Partners who have completed the beSure application, chosen a membership term, provided their investment and have been interviewed and selected by a beSure local Representative.
- c. Choosing a Venue: All beSure Affiliates must select a meeting venue with the guidance of the beSure local Representative. Each venue must have an area that allows for private, uninterrupted meetings to be held, and accommodate no fewer than 25 Partners, to allow for growth. Venue locations must be located within a unique zip code from that of all other active beSure Affiliates.
- d. Naming the Affiliate: Each Affiliate will be named "beSure in Zip Code" where "Zip Code" will be substituted with the city or town where the meeting venue is located. For example, if the Affiliate meets at a venue in Lancaster, Ohio (zip code 43130) then the Affiliate's name will be "beSure in Lancaster." If the Affiliate's venue is located within a larger city containing multiple zip codes, then the area of the city can be substituted for the city itself. For example, if the Affiliate meets in Los Angeles, California (zip code 90027) then the Affiliate should be named "beSure in Hollywood."
- e. **Meeting Day & Time:** Each Affiliate will have the flexibility to choose which day and time they will conduct their "formal" in-person meetings, with the guidance of the beSure local Representative. Each Affiliate will also be responsible for scheduling alternative meetings during weeks where formal face-to-face meetings are not scheduled. The options for the Formal Meeting schedule include Weekly, Bi-Weekly or Monthly. Affiliates may, at the discretion of the Executive Team, with guidance and approval from the beSure local Representative, choose to substitute an alternative type of meeting in lieu of a Formal Meeting as long as they maintain the minimum requirement of one Formal Meeting per Calendar Month.

f. Meeting Options

 Formal Meeting: This meeting is attended by all Partners within the Affiliate, in-person, at the designated venue and occurs either weekly, bi-weekly or monthly.

- ii. Video Meetings: This meeting is attended by all Partners within the Affiliate and follows the structure of the Formal, in-person meetings while saving the commute to the venue.
- iii. **Department Meeting:** This in-person meeting should be attended by all Partners within a particular Parent Category and held at the time & location of the group's choosing. The purpose of the Department Meeting is to encourage growth among the most natural, organic business Partners. Examples of business groups include Finance, Real Estate, Advertising, Computer Services, Legal, Health & Wellness, etc.
- iv. **Partner Meeting**: An in-person meeting between two Partners only.
- v. Business Showcase: This is an event attended by all Partners within the Affiliate. The venue should be a meeting room, conference room, restaurant, catering hall, country club or large enough space to accommodate all Partners plus invited guests. The purpose of the Business Showcase is to

introduce the Affiliate and its members to the community.

- vi. Social Event: This type of meeting can be attended by any or all Partners. Examples of a Social Event include a lunch, happy hour, karaoke, bowling, golf outing, or any other format in which Partners can gather and enjoy themselves. The focus of a Social Event is less business oriented and more on enjoying each other's company and building relationships in an informal setting.
- g. Formal Meeting Structure: Please see APPENDIX A for meeting structure
- Weather Policy: To ensure the safety of Partners, guests and the h. general public, all meetings other than Video Meetings may be cancelled for weather-related reasons. Each Affiliate will follow the school schedule from the town in which the meeting is scheduled to determine if the meeting should be cancelled. For example, if a Formal Meeting is scheduled at a venue in Gaithersburg, MD then if Gaithersburg public schools are closed, the meeting is cancelled. If weather causes a delayed opening of the local public schools, then the meeting will take place if it is scheduled at a time after the schools have already opened. For example, if schools have a delayed opening until 10am, an 8am Formal Meeting would be cancelled that day but a 6pm Social Event would still take place. If a meeting is scheduled on a weekend when schools are closed then the Affiliate's Associate Partner will consult with the beSure local Representative and together they will determine if a weather-related cancellation is necessary.
- Emergency Policy: To ensure the safety of Partners, guests and the general public, meetings may be cancelled for Emergencies that are not

- necessarily weather related, including but not limited to Fire, Flood, War, Disease, Power Outage, or Act of God.
- j. Contingency Plan: If there is a predicted meeting cancellation due to weather or other emergency, a Video meeting should be scheduled in its place.
- k. Language: Affiliates of beSure should conduct their meetings and events in the language spoken by the majority of the Partners. If the language chosen is NOT the most common language spoken within the country, then the Affiliate's chosen language should be publicized accordingly, for the benefit of potential guests and clients as well.
- I. Cultural/Religious Accommodations: Should a group of professionals have any specific Cultural or Religious requirements (such as dietary restrictions or selective meeting days/times) beSure LLC will be happy to establish an Affiliate to accommodate these needs. Guidelines 1A-1K will still apply to these Affiliates. In addition, the Affiliate will not be permitted to restrict membership to only Partners who follow these Cultural or Religious requirements. As in every beSure LLC Affiliate, membership will be made available to anyone who qualifies and is chosen by the beSure local Representative.

2. PARTNER

a. Definition: A member of one beSure Affiliate, chosen by the beSure local Representative, to represent a unique business category or categories within the Affiliate.

b. Requirements:

- Full-time employment in the Partner's chosen business category(ies)
- Sufficient and proficient experience in the applicant's chosen business category(ies), to be determined by the beSure local representative.
- iii. Willingness to serve on the Executive Team and/or a committee.
- iv. Attend mandatory beSure Partner Education within 30 days of joining their Affiliate.
- v. Complete online profile in the Member Portal within seven days of attending beSure Partner Education
- vi. Achieve 1000 points on the beSure Activity Scorecard each month (see *APPENDIX B* for beSure Activity Scorecard).
- vii. Wear beSure lanyard, including Partner Identification, at all Formal Meetings, Business Showcases and Social Events.
- viii. Read all beSure related emails and text messages and respond as needed.
- ix. **CALL** all referrals given to you within a 24-hour period
- Participate in all activities to promote the success of the Affiliate including but not limited to attending meetings,

- showcases & events, utilizing the beSure Partner Portal, engaging in social media marketing, supporting your fellow Partners, etc.
- xi. Be current on individually chosen Investment into beSure. (1-time, Quarterly or Monthly investment)

3. INVESTMENT

- Term: Partners choose to invest in either a 6-month, 1-year or 2-year a. membership in beSure and have the option to remit their investment either monthly, quarterly or completely upon application approval.. The 6-month investment in beSure is reserved for incoming Partners who are currently paying for membership in another competing business networking organization and have provided the local beSure Representative with proof of said membership. The term of the Partner's membership in beSure begins on the Partner's Membership Date. The Partner's Membership Date is determined by the date of the Partner's application. For applications dated on the 1st through the 15th of the month, the Membership Date will be the 1st of the month in which the application was dated. For applications dated after the 15th of the month, the Membership Date will be the 1st of the month immediately following the date on the application. For purposes of membership renewals, a Month is defined as "The time from any day of one Calendar Month to the corresponding day of the following Calendar Month" and a Year is defined as "The time from any day of one Calendar Year to the corresponding day of the following Calendar Year." Investment options are indicated on the beSure Partner Application and are subject to change at any time.
- b. Payment Schedule: Upon approval of the Partner's application, initial payment is collected. If applicable, remaining monthly or quarterly payments will be collected on the same day of the month that the initial payment was collected, until the remaining investment balance is satisfied. For example, an initial monthly payment collected on June 4th will be followed by the second payment collected on July 4th and so on. An initial quarterly payment collected on June 4th will have a second payment collected on September 4th and so on. Due to the month of February only having 28 days, any payments that would have fallen on February 29th, 30th or 31st will be collected on March 1st instead.
- c. Multiple Business Categories: Should an applicant request to represent more than one business category, an additional investment will be required.
- d. Returned/Declined Payment Fees: If at any time or for any reason an automated payment is denied or returned to beSure a \$25 service charge will be added to the current monthly, quarterly or 1-time investment. This service charge is to cover any fees incurred by beSure

- for the Returned/Declined transaction. This fee will be assessed each and every time a transaction is Returned/Declined.
- e. Obligation: The Partner is contractually obligated to pay for their entire chosen membership term. By applying for membership in beSure, the incoming Partner understands that a portion of their investment will be used to promote the success of their Affiliate, and should they choose to vacate their membership in beSure a refund of their investment will not be given.
- f. **Membership Renewal:** Partners who wish to retain their membership in beSure are required to remit their renewal investment at the end of their chosen term. Partners will be granted a 14-day grace period to remit their renewal investment. If the renewal investment is not remitted to beSure or the beSure local Representative within 14 days of their renewal date then the Partner's business category is deemed vacated within their current Affiliate. Once vacated, the Partner is not permitted to participate in Affiliate meetings, activities, events or the like because the Partner is no longer covered by beSure LLC's insurance policy. Should the Partner desire to renew their investment in beSure after the 14-day grace period has expired, it will be at the discretion of beSure LLC including, but not limited to, the local beSure Representative. If beSure LLC and/or the beSure local Representative choose to permit the Partner to once again be a member of beSure (in either their previous Affiliate or another) the Partner's membership will be considered NEW for purposes of earning beSure Rewards.
- g. Meal & Event Fund: \$600 per year will be collected from each Partner and will be used to cover the cost of meals and events. The Partner will have the option of choosing a payment term for the Meal & Event Fund that suits their budget. This fee is subject to change at any time, based on rising food costs, changes in venue, etc.
- h. Additional Costs: Should the Affiliate desire to host any additional meetings or events that exceed the Affiliate's budget, the Partners along with guidance from the beSure local Representative will decide if an additional contribution should be required from the Partners at that time.
- i. Ownership: Once chosen by the local Representative, a beSure Partner owns their individual membership within beSure. If the Partner vacates their membership, the Affiliate, along with the local Representative will seek to fill the vacated business category with a new Partner who will be required to contribute their own investment in beSure.
- j. Transfers: A Partner may request a transfer to another Affiliate at any time. This transfer request must be made directly to the beSure local Representative and approval of the transfer is solely at the discretion of the beSure local Representative. Upon approval of the transfer request, the Partner will be permitted to join the new Affiliate without any additional investment.

k. Sponsorship: Partners are encouraged to refer business owners, salespersons and professionals to beSure Affiliates and beSure local Representatives in order to increase membership within beSure. When a new Partner is chosen to participate in beSure, the referring Partner becomes their Sponsor and will earn beSure Rewards. Please see APPENDIX C for beSure Rewards Schedule.

I. beSure Rewards:

- i. Earning Rewards: beSure Rewards are earned by sponsoring new Partners who join beSure LLC. The incoming Partner may join any Affiliate in order for the sponsor to earn the applicable Rewards. beSure Rewards equal a percentage of the investment made by the incoming Partner within their first membership term. Please see Appendix C for beSure Rewards Schedule.
- ii. Receiving your Rewards: beSure Rewards are credited to the Sponsor on a Semi-Annual basis, on the 1st of May and the 1st of November. The Reward amount credited on May 1st of each year will be a percentage of the incoming Partner's investment that was collected from November 1st of the previous year thru April 30th of the current year. The Reward amount credited on November 1st of each year will be a percentage of the incoming Partner's investment that was collected from May 1st of thru October 31st of the current year.
- iii. Value: beSure Rewards have no monetary value. Rewards can instead be exchanged for Products or Services within the beSure online Rewards Catalogue.
- iv. Restrictions: beSure Rewards accrue and are paid to the Sponsor based on the incoming Partner's initial chosen term only. Should the new Partner complete their initial membership term and choose to renew their membership, the Sponsor will NOT receive any further beSure Rewards. beSure Rewards must be used during the Sponsor's membership term only. Once a Partner's membership expires and they fail to renew within the 14-day grace period, all accumulated beSure Rewards will be forfeited. If a Partner fails to achieve 1000 Activity Points for three consecutive months and their membership is terminated, all accumulated beSure Rewards will be forfeited.
- m. beSure Rewards Catalogue: The beSure Rewards Catalogue can be accessed through the beSure Partner Portal. The Catalogue contains a selection of products and services added by beSure LLC as well as by Partners themselves. Partners earning beSure Rewards can exchange any or all of their Rewards for products or services listed in the Catalogue at any time. Partners are encouraged to add products or services that represent their chosen business category. Partners are

also encouraged, although not mandated, to offer some type of discount or incentive when listing their product or service in the beSure Catalogue. The beSure Rewards program and accompanying Catalogue are designed to increase the growth of the Affiliates and further support the Partners who add their products or services to the Catalogue. Catalogue Product or Service examples are as follows;

- A Photographer lists a \$300 family portrait session for 300 beSure Rewards.
- ii. A Massage Therapist typically charges \$120 for a 1-hour session but instead charges 100 beSure Rewards.
- iii. A contractor offers a Gift Card for \$500 off a service and charges 400 beSure Rewards.
- 4. EXECUTIVE TEAM: Each Affiliate will be managed by a group of Partners, chosen by the beSure local Representative, each demonstrating a proficiency in their individual role. Each Executive Partner will serve a minimum tenure of one calendar year unless the beSure local Representative has sufficient cause to shorten an Executive's term. The Executive Team will be chosen by the local beSure Representative and will assume their role immediately. beSure LLC will inform the Executives of all Affiliates when Executive roles will be transferred to new Partners, typically on an annual basis. Members of the Executive Team are as follows;
 - **Associate Partner:** Each Affiliate of beSure will have a Partner chosen a. by the local beSure Representative to act as Associate Partner. This Partner will be the point-of-contact for communication between beSure management and the Affiliate. The Associate Partner will act in the interest of beSure, enforce beSure established guidelines, and support the decisions made by beSure management. The Associate Partner is required to maintain an open line of communication with the beSure local Representative for purposes of managing the Affiliate, training the Partners and planning events. The Associate Partner will act as the liaison between beSure management and the Affiliate. In exchange for acting in this capacity, the Associate Partner's beSure investment will be suspended during their tenure. If the Associate Partner has prepaid any portion of their membership term (either Quarterly or as a single One-Time payment), the prepaid portion will be used by the Partner following their tenure as Associate Partner.
 - b. General Manager (GM): Each Affiliate will have a General Manager whose responsibility is to lead both the in-person as well as the Video meetings. In exchange for acting in this capacity, the General Manager will receive 200 beSure Rewards upon renewal of their membership. To be eligible for the 200 beSure Rewards, the Partner must serve a minimum of 12 months as General Manager and achieve a minimum 1000 Activity Points in at least nine of the twelve months served.

- **Vice President of Recruiting:** The Vice President of Recruiting is C. responsible for recruiting new Partners to join the beSure Affiliate. This VP will assist the current Partners with the steps needed to acquire guests and will meet with the guests to explain the Why's and the What's of membership in beSure LLC. PLEASE NOTE THAT THE VP of RECRUITING'S ROLE IS TO ASSIST ALL THE PARTNERS IN RECRUITING FOR THEIR AFFILIATE. beSure REWARDS WILL ONLY BE AWARDED TO THE VP OF RECRUITING FOR GUESTS THEY **PERSONALLY** INVITE TO THE AFFILIATE. THE VP of RECRUITING WILL NOT EARN REWARDS FOR HELPING RECRUIT PARTNERS INVITED BY OTHERS. In exchange for acting in this capacity, the VP of Recruiting will receive 200 beSure Rewards upon renewal of their membership. To be eligible for the 200 beSure Rewards, the Partner must serve a minimum of 12 months as Vice President of Recruiting and achieve a minimum 1000 Activity Points in at least nine of the twelve months served.
- d. Vice President of Operations: It is the responsibility of the Vice President of Operations to monitor the productivity of the Partners within the Affiliate for purposes of Partner recognition, training & growth. The VP of Operations will report on such metrics as Partner Activity Scorecard, Referrals Passed, Closed Referrals (quantity as well as value), and beSure Rewards. In exchange for acting in this capacity, the VP of Operations will receive 200 beSure Rewards upon renewal of their membership. To be eligible for the 200 beSure Rewards, the Partner must serve a minimum of 12 months as Vice President of Operations and achieve a minimum 1000 Activity Points in at least nine of the twelve months served.

5. **DEPARTMENTS**

- a. **Definition:** A Department is a group of three or more Partners within a beSure Affiliate who share the most logical, organic Partnership with each other. The goal of each Department will be to support clientele who may have the need for several Partners' products or services within the Department. Examples of Departments may include Contractors, Finance, Health & Wellness or Real Estate, to name a few.
- Meetings: The Department Meetings are attended by the Partners
 within each Department for the purpose of business development. Each
 Department will conduct a monthly Department Meeting at the venue of
 their choice. The agenda of each meeting is as follows;
 - Success Story: Each Partner will have two minutes to share a recent success story about a client, event, opportunity, etc.
 - ii. Speaker: At each meeting a Partner will be given up to 30 minutes to present to the Department about a relevant topic that can provide a benefit to their business. Questions &

Answers should also be incorporated into the 30-minute timeslot. Should 30 minutes expire without all questions being addressed, it is recommended that Partner Meetings be scheduled with the speaker at a later date.

- iii. Freestyle: Before concluding the Department Meeting, each Partner will have one minute to talk about anything they choose. This can be an ask of the Department, information about a new product or service, details about a sale/special offer or whatever else they feel is valuable.
- 6. COMMITTEES: A beSure Committee consists of at least one Partner and is created to accomplish necessary tasks to ensure the success of the Affiliate. Examples include Event Committee, Recruiting Committee, Community Outreach Committee, etc.
- GOALS: The goal of each Partner is to follow beSure LLC's standards for Service, Unity, Relationships and Enterprise as described below;
 - **a. Service:** Provide our clients with an experience that is truly exceptional.
 - **b. Unity:** Work together for the greater good of our Affiliate, our local community and beSure LLC.
 - Relationships: Build rapport with our clients, the local community and fellow beSure Partners.
 - **d. Enterprise:** Grow our business the right way.

8. REFERRALS

- a. Definition: You or someone you know has a need that one of our Partners can assist with and they are expecting to hear from the Partner today.
- **b. Expectations:** There are three expectations regarding referrals that are passed within our organization.
 - i. The first expectation is that the Partner passing the referral sufficiently prepares the client for the referral process. This consists of explaining the Partners' trusted relationship with each other and supporting the excellent service that the client will receive.
 - ii. The second expectation is that the Partner receiving the referral provides the client with a truly exceptional experience.
 This includes calling the client promptly upon receipt of the referral, following up with the client regularly, and providing a quality product or service at a competitive price.
 - iii. The third expectation is that the Partner receiving the referral keeps the referring Partner "in the loop" as they take care of the client, and ask for assistance with contacting the client or servicing the client properly, when needed.

9. GUEST

- a. Definition: A business owner, salesperson or professional who is interested in becoming a Partner of any beSure Affiliate and attends a beSure meeting or event.
- b. Requirements: A guest of a beSure meeting or event is required to register for the meeting/event beforehand whenever possible, or simply provide contact information on the day the meeting/event is being held. Contact information can be provided either on a manual sign-in sheet, an electronic registration form, or by simply providing a business card. Contact information should consist of the guest's name, business name, mobile phone number and email address, minimally. Guests contact information will be captured for insurance purposes as well as to facilitate the recruiting efforts for beSure LLC.
- c. Affiliate Requirements: A guest of beSure should always be welcomed, and treated with the dignity and respect that they would come to expect from all beSure Partners. If the guest's business category is available within the Affiliate, the active Partners are encouraged to pass referrals to the guest as an example of how the Affiliate conducts business, and to encourage the guest to apply for membership. If the guest's business category is unavailable within the Affiliate, then the guest should be introduced to the beSure local Representative who will assist the guest in locating a more suitable Affiliate.
- d. Invitations: When inviting a guest to attend a beSure meeting or event, Partners should utilize the Guest Invitation feature in the Member Portal whenever possible. This feature will allow the Affiliate to capture the guest's information and prepare for the guest's visit. The Guest Invitation feature will also allow Partners to support each other's guest invitations and follow-up with the guests more easily.

10. COMMUNITY INVOLVEMENT

- a. Philanthropy: beSure LLC is proud to Partner with Angelwish.org, an organization whose purpose is to help children living with chronic diseases. David Faccone, the founder of beSure LLC, believes that businesses have a responsibility to give back to their local community, which is why David pledges 5% of every Partner's investment to Angelwish.org.
- b. Client Resource: Through our Business Showcases, Community Events, Social Media posts and our Online Reviews & Message Boards, beSure Partners will be provided with resources to promote their business within the local community as well as within the beSure organization itself.
- Marketing: Each beSure Partner will be given two beSure LLC Window Decals, one for their place of business and one for their automobile.
 The Partners are encouraged to affix the decals in a place where their

clients and the general public can see they are a "Trusted Member of the beSure Network of Businesses"

11. CODE OF CONDUCT

- All beSure Partners are expected to behave in a professional manner at all times.
- b. All beSure Partners are expected to use appropriate language when communicating with clients, fellow Partners, and the general public, whether in person, over the phone, through emails/text messages or through any type of marketing.
- c. All beSure Partners are expected to practice open communication with each other regarding any issues that may arise and work toward a fair resolution that would allow the Partners to continue to comfortably give and receive future business from one another.
- d. All beSure Partners are expected to contribute to the Affiliate equally, taking duties and responsibilities seriously, and completing all tasks on schedule to ensure the Affiliate runs smoothly.

Appendix A - Meeting Structure

- Room Setup for Formal Meeting
 - Seating arranged in a circle
 - Tablet for Guest Registration
 - Banner
 - Guest Lanyards
- The Associate Partner calls the meeting to order "Welcome to beSure in (your location). We are here for four reasons; TO BE COMMITTED, BE HUMBLE, BE GENEROUS and to most of all BE SURE WE ARE DOING THE BEST WORK POSSIBLE FOR OUR COMMUNITY, OUR BUSINESS PARTNERS AND FOR OURSELVES.
- Introduce Executive Team
 - a. VP of Operations
 - b. VP of Recruiting
 - c. GM
 - d. Associate Partner
- 3. Partners introduce their guests
- 4. VP of Operations
 - a. "Why are we here? We are here for two reasons; first, we are here to grow our businesses through the exchange of warm referrals.

 Secondly, we are here to be a positive presence in our community. We characterize a warm referral very simply; someone you know has a need that one of our Partners can assist with, and they are expecting to hear from the Partner today." With a focus on NEED and EXPECTING
 - b. Announce production
 - Referrals passed
 - ii. Closed referrals (count & \$ amount)
 - iii. Top referral passed this week/month
- VP Recruiting
 - a. Welcome new members
 - b. Recognize new member recruiters
 - c. Member stats
 - i. # of active members
 - ii. # of quests (MTD, YTD)
 - iii. Guest conversion rate
 - iv. # invitations vs # guests attended

- 6. GM
 - a. Announce absent members
 - b. Highlight member performance (scorecard)
 - c. Announce to-do's (update profiles, RSVPs, whatever is needed)
- 7. Two Partner Presentations (8-10 minutes each)
- 8. Around-the-Room
 - a. If GUESTS in attendance
 - i. Why's & What's 10 SECONDS ONLY PLEASE
 - b. If no guests BE PRODUCTIVE!
 - . Split up the room/divide & conquer/training/think tank
 - ii. Social Media connect, review, post, like & share
 - iii. Recruit new members
 - 1. Facebook LIVE
 - 2. Posts on social
 - 3. Direct messages to connections
 - Who do you do business with? Call/text/email/snail mail
- 9. Announce upcoming events
 - a. Department Meetings
 - b. Committee meeting
 - c. Social events
 - d. Business expos
 - e. Community events
- 10. Calls to action
 - a. Social media post
 - b. Invite a guest
- 11. Adjourn

Appendix B - beSure Activity Scorecard

200 POINTS - Sponsor a NEW Partner

200 POINTS - Attend a Business Showcase

150 POINTS - Pass a Referral

100 POINTS - Attend a Formal or Video Meeting

100 POINTS - Attend a Social Event

100 POINTS - A Guest of Yours Attends a Formal or Video Meeting

50 POINTS - Participate in an Partner Meeting

50 POINTS - Participate in a Department Meeting

50 POINTS - Your Passed Referral Results in Revenue

50 POINTS - Substitute Attends a Formal or Video Meeting

^{*}MINIMUM 1000 points required per month.

^{*}It is the responsibility of the Partner to report their individual activity through the Member Portal to receive credit

^{*}A Partner's membership will be terminated for failing to achieve 1000 points within three consecutive Calendar months.

Appendix C - beSure Rewards

Sponsor 1-2 Partners - 5% Reward

Sponsor 3-4 Partners - 10% Reward

Sponsor 5-6 Partners - 15% Reward

Sponsor 7 or more Partners - 20% Reward

beSure is a official supporter of



