



WELCOME TO ACCA'S MIX® GROUP PROGRAM

WHAT'S THE PURPOSE?

The ACCA MIX Group program is the ultimate venue for contractor-to-contractor networking and information exchange that will help your business succeed. The goal of each meeting is to help every company improve by getting honest and frank counsel from your non-competing peers.

Continue reading to see what other ACCA members think about MIX Groups!

WHAT IS IT?

ACCA's Management Information Exchange (MIX) Group program is an organized forum of ACCA's contractor members. ACCA MIX Groups usually meet twice each year and travel to each other's companies to review each company's sales, operations, policies, advertising, staff, strategies, facilities, etc.

WHO IS IT FOR?

Most ACCA MIX Groups consist of 8-10 ACCA heating, ventilation, air conditioning, and refrigeration (HVACR) contractors, and they must be from non-competing areas. Members MUST be in good standing with ACCA.

As a reminder, ACCA does not have state or local chapters. Confirm your ACCA National membership at www.acca.org or e-mail membership@acca.org.

Some existing MIX Groups are residential HVACR only, others may consist of only commercial contractors, and some may allow a mixture of residential and commercial. Most often, MIX Groups consist of contractors whose companies are about the same size, based on annual sales volume. However, you can start your own MIX Group and recruit ACCA members of any size and profile.

COST? Besides your annual ACCA National membership dues, the cost of being involved in a MIX Group can vary greatly. Depending on where Group members are located and how often they meet, some ACCA members estimate their annual costs to be about \$7,500. The expenses can include travel, hotel, meals, social events, and facilitator fees (if your group hires someone to facilitate the meetings).

DOES ACCA PLACE ME IN A MIX GROUP?

NO, and this is very important to remember, ACCA does NOT place anyone in a MIX Group. You are either invited into an existing MIX Group or you start your own. ACCA serves as the clearinghouse for interested contractors, and makes your information available to existing MIX Group leaders on our website. The existing Groups have very specific criteria that they are seeking in a contracting business, and whom they invited into their MIX Group

HOW DO I START A GROUP?

The appendix to this document includes a "MIX Group Start Up" sample document to guide you as you work with other ACCA members to create a MIX Group. Additionally, ACCA can recommend a facilitator to help get your Group started, ***but it's up to the Group members to ensure its success.***

ARE YOU STILL INTERESTED?

Fill out the ***Company Profile forms*** (2 pages) and return to todd.washam@acca.org. Once you have submitted the profile form, Todd Washam, ACCA's Director of Industry Relations, will send the existing MIX Groups your information. If an existing MIX Group is looking for new members they will contact you directly, so be prepared to respond to an e-mail or a phone call.

Todd will also respond to your e-mail with the list of other candidates looking to join/form a MIX Group in case you want to start your own MIX Group.



What do MIX Group Members Think About ACCA's MIX Group Program?

Jennifer Pierce, Owner of Clay's Climate Control and Member of ResPro – “My husband, Clay Pierce, and I started our business in 2001. As a first generation business we did not have family members or business contacts to confide in. Joining an ACCA MIX group provided us with a network of business owners who not only had similar business compositions, but also had similar goals. Learning from our MIX Group members allowed our company to evolve through the stages of business growth. To be honest, my husband was leery of joining the group at first. The travel, cost and work commitment was too overwhelming for him. But, as our membership continues, he and I have seen the enormous positive impact the MIX group has had. If you are willing to put in the work, a MIX Group can change your business.”

Randy Seaman, President of Seaman's Mechanical and Member of the MixMasters – “I have been in our MIX Group for over 25 years. The information and the input I have received over those years has been invaluable. We have increased the size and scope of our business 10 fold. I would have never had the confidence to do some of the things we do now if it wasn't for the power of the group. Each member brings in their own level of experience and knowledge. It is truly amazing what you learn and what you can achieve with this input and help from others who really care about your success. Thank you ACCA for making these peer groups possible!”

Wade Mayfield, President of Thermal Services and Member of The Eagle's Nest – “Being in an ACCA MIX Group is a must for many reasons, but the biggest reason is best explained using an old saying. ‘You can't see the forest due to the trees.’ We get so involved and so entrenched in our businesses that we get lost in them at times. Your MIX Group partners help you by bringing you some real truths that maybe we don't see, or don't want to see. Either way, you get much needed truths that only help you become better.”

Steve Lauten, President of Total Air and Heat and Member of Nothing But Net - “Every Business owner needs someone to confide in and run ideas past without fearing repercussions by sharing your ideas. My ACCA MIX Group has provided me with unwavering support and honest feedback that I need. I've participated in an ACCA MIX Group for many years and it has helped me grow my business and profits beyond my wildest expectations. Growing my business is important, but even more important was the help I got in creating a solid management team and success plan. If you want an unbiased Board of Directors, easy access to run ideas past, an incredible info sharing base, and great friends you trust to always be there for you...Join an ACCA MIX Group Today!”

Tony Yanniello, Director of Operations at Del-Air Mechanical Contractors and Member of The Big Picture – “When you need direction and unbiased feedback, your ACCA MIX Group is there. They have been essential in supporting my goals and vision for the company. As a member for many years, not only has their advice brought significant changes for the better, but they have allowed me to see the perspective of others that sometimes would have been overlooked. Today's market can have its challenges and the support that comes from your MIX Group allows you to examine diverse methods from an array of backgrounds that best suit your business needs. My ACCA MIX Group has been an integral part of our development and vital to any organization. Take the time to get acquainted with an ACCA MIX Group today!”



ACCA MIX® GROUP PROGRAM

COMPANY PROFILE (page 1 of 2):

THE FOLLOWING INFORMATION WILL BE MADE AVAILABLE TO OTHER CONTRACTORS IN THE MIX GROUPS PROGRAM:

NAME _____ TITLE _____

COMPANY _____

ADDRESS _____

CITY _____ STATE _____ ZIP CODE _____

PHONE _____ FAX _____ E-MAIL _____

ANNUAL SALES VOLUME \$ _____ NUMBER OF EMPLOYEES _____

WHAT IS YOUR MARKET AREA? _____

IS YOUR BUSINESS OWNED BY ANOTHER ENTITY? _____ YES _____ NO

- IF YES, PLEASE SPECIFY: _____

ARE YOU A UNION SHOP? _____

ARE YOU WILLING TO START YOUR OWN MIX GROUP? YES _____ NO _____

- IF YES, ACCA CAN RECOMMEND A FACILITATOR TO HELP YOUR GROUP GET STARTED

TYPES OF WORK PERFORMED:

_____ Air Conditioning	_____ Heating	_____ Refrigeration	_____ Energy Management
_____ Insulation	_____ Sheet Metal	_____ Electrical	_____ Plumbing
_____ Ventilation	_____ Controls	_____ Piping	

CHECK EACH MARKET IN WHICH YOU COMPETE AND IDENTIFY THE PERCENTAGE OF ANNUAL SALES VOLUME FROM EACH:

	%NEW CONSTRUCTION	%SERVICE	%REPLACEMENT	TOTAL %
<input type="checkbox"/> Residential	_____	_____	_____	_____
<input type="checkbox"/> Residential/Light Comm. (under 5 tons)	_____	_____	_____	_____
<input type="checkbox"/> Commercial/Industrial (over 5 tons)	_____	_____	_____	_____
<input type="checkbox"/> Government	_____	_____	_____	_____
<input type="checkbox"/> Design Build	_____	_____	_____	_____

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ACCA MIX® GROUP PROGRAM

COMPANY PROFILE (page 2 of 2):

Please share some additional information about yourself and your company. For instance, will your spouse join you at MIX Group meetings? What are your hobbies? Why do you want to be in a MIX Group? Do you have specific goals for your company in the next year, or 3-5 years? How much money are you prepared to spend to go to MIX Group meetings?

Please type your additional information:

I understand that ACCA’s MIX Group program is an ACCA member benefit. I attest that I am a member in good standing with ACCA National, and will remain an ACCA National member so long as I am in an ACCA MIX Group.

SIGNATURE

PRINT NAME

Return to: TODD WASHAM
2800 SHIRLINGTON RD. SUITE 300
ARLINGTON, VA 22206
TODD.WASHAM@ACCA.ORG
703 824-8864
FAX: 703 575-9101

Once you have completed and submitted this profile form, Todd Washam, ACCA’s Director of Industry Relations, will send the existing MIX Groups your information. If an existing MIX Group is looking for new members they will contact you directly, so be prepared to respond to an e-mail or a phone call. Todd will also respond to your e-mail with the list of other candidates looking to join/form a MIX Group in case you want to start your own MIX Group.



APPENDIX:



MIX Group Start Up:

***Recommended Guidelines
That Can Help
Your New MIX Group
Succeed***

***EXCEPT FOR THE REQUIREMENT TO BE AN ACCA CONTRACTOR MEMBER:
The following samples of guidelines, minutes format, evaluation form, MIX Group
bylaws, meeting agenda, discussion topics, and business analysis documents are
RECOMMENDED.***

SAMPLE BYLAWS & MEMBERSHIP INFORMATION

PURPOSE

Our ACCA Mix Group consists of non-competing ACCA contractor members who will meet twice per year to improve our business practices and industry standards, and to forge personal relationships by freely exchanging information related to the HVACR industry and our businesses.

GOALS

- To establish a business agenda that includes discussion on marketing strategies, employee growth and development, quality improvement, financial reviews, industry sensitive issues, and other information relative to the common interest of the Group.
- To foster personal growth and relationships.
- To learn from one another and help each other.
- To provide a structured businesses and social atmosphere that will encourage full participation of all members and spouses.
- To openly and freely exchange information.
- To protect our individual interests, the interest of our industry, and fellow members of the Air Conditioning Contractors of America.
- To be profitable.
- To provide a good working environment for our employees with fare wages and benefits.
- To promote training programs that encourage growth of our employees

MEMBERSHIP

- Each member must sign a confidentiality agreement, a non-disclosure agreement, and agree maintain their ACCA national membership. (Exhibit A)
- A member who is not in good standing with ACCA National will be required to update their ACCA National membership or resign from the MIX Group.
- A member may voluntarily leave the group by submitting a letter of resignation to the group chairman.
- When a member ceases to be a principal owner within their company, their membership terminates. His/her successor must apply for membership and be accepted as a member by a majority vote of the existing group members.
- A member company sold to a consolidator automatically forfeits their membership.
- The current standing chair is to keep copies of the signed documents and verify that everyone in attendance has signed the agreement.
- New members should be compatible with existing members of the group.
 - Companies should have a strong and common interest in our goals.
 - Companies should have an interest in improving all aspects of their business, our industry, and ACCA.
- If a vote occurs on any subject, each member company will receive one vote.

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SAMPLE BYLAWS & MEMBERSHIP INFORMATION CONTINUED

MEETINGS

Meetings will be held twice per year, typically one meeting scheduled in the fall and another in the spring.

MEETING ATTENDANCE

- Members are required to attend all meetings in person.
- Companies may be dropped from the group if they miss an excessive amount of meetings or conference calls without documented excuses.
- Members may not attend by proxy.
- Outside vendors and speakers can attend if there is consensus agreement in the group and the vendor or speaker signs a non-disclosure agreement.

MEETING ARRANGEMENTS

- Meeting arrangements vary widely and can evolve over time. Depending on the anticipated cost, each member will send the host of the next meeting an amount determined to be appropriate by the host prior to the meeting. The money is to be used by the host to pay for common expenses of the group, including meals, transportation within the host's city, meeting rooms, coffee breaks, and social activities (golf, fishing, etc.).
- Meeting location will be rotated through the group, and all participating member sites should be visited before a second meeting can be hosted at a repeat location.
- The host of the current meeting will be the meeting chairman and should help the group make all necessary lodging arrangements.
- The host is responsible for advising members about available transportation to and from the airport. The expense of transportation will be paid directly by members, but common transportation costs will be paid by the host from the pre-determined costs.
- The host is not responsible for flight arrangements.

MEETING OPERATION

- The host is responsible for keeping the minutes of the business portion of the meeting. The minutes will be distributed to all members within one month of the meeting. (Exhibit B)
- The host will be responsible for a treasurer's report detailing the current state of advance meeting deposits, current money due, and any previous meeting balances still uncollected.
- The host, in cooperation with the standing chair and input from the group, will be responsible for the meeting agenda.
- The host should provide an optional half-day of activities for spouses.

STANDING CHAIRMAN

The Standing Chairman will serve for a set number of meetings agreed upon and elected by the members.

Duties:

- Manage correspondence with ACCA.
- Enforce ACCA National membership requirements.
- Keep a complete and up-to-date file of the ACCA MIX Group non-disclosure agreements, confidentiality agreement, membership roster, meeting minutes, and group reports.
- Assist the group with attracting new members (ACCA maintains a list of contractors seeking to join a MIX Group).
- Be a central contact for all members.
- Assist the host with making meeting arrangements and formulating agendas.
- Ensure the meeting timetable is adhered to by the meeting participants.
- Prepare and make available for distribution a MIX Group Evaluation (Exhibit C)

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SAMPLE MEETING TIMELINE

Spring Meeting: The focus of the spring meeting will be on general operations with a financial review of each company. The sample timeline is for an April 1 spring meeting

- **6 months prior to meeting:** Determine who will host the spring meeting.
- **January 15:**
 - Meeting host to have facilitator or guest speaker arranged for upcoming meeting
 - Meeting host to survey group for 10 discussion topics from each company
- **February 15:**
 - Meeting host to compile top 10 discussion topics
- **March 1:**
 - Each company is required to have their year-end financials, key performance indicators (KPIs), and departmentalized staffing report to facilitator.
 - Each company is required to have _(fill in number)_ number of business update packets (Exhibit D) placed in individual folders and mailed to the host. These packets will contain copies of anything that was utilized or implemented by each company since the previous meeting:
 - Updated company biography
 - New marketing materials, forms, documents, policies, and procedures
 - New employee programs
- **10 days prior to meeting:**
 - Meeting host will mail each member company an updated business packet from each other, a meeting agenda, and discussion topics.
 - Meeting host to survey their employees for any questions they would like to ask the MIX Group, and e-mail them to the chairman.
 - The facilitator will e-mail each company the group comparisons of the following:
 - Income statement
 - Financial ratios
 - Balance Sheet
 - KPIs
- **Day of Meeting**
 - All Company Representatives are responsible for reviewing EVERY company's packet, financials, KPIs, and prepare for robust discussions.

Fall Meeting: The focus of the fall meeting will be on general operations with a concentration on each company's marketing programs. The sample timeline is for a November 1 fall meeting

- **6 months prior to meeting:** Determine who will host the fall meeting.
- **August 15:**
 - Meeting host to have facilitator or guest speaker arranged for upcoming meeting
 - Meeting host to survey group for 10 discussion topics from each company
- **September 15:**
 - Meeting host to compile top 10 discussion topics
- **October 1:**
 - Each company is required to have _(fill in number)_ number of business update packets placed in individual folders and mailed to the host. These packets will contain copies of anything that was utilized or implemented by each company since the previous meeting:
 - Updated company biography
 - New marketing materials, forms, documents, policies, and procedures
 - New employee programs

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SAMPLE MEETING TIMELINE CONTINUED

- **10 days prior to meeting:**
 - Meeting host will mail each member company an updated business packet from each other, a meeting agenda, and discussion topics.
 - Meeting host to survey their employees for any questions they would like to ask the MIX Group, and e-mail them to the chairman.
 - The facilitator will e-mail each company the group comparisons of the following:
 - Income statement
 - Financial ratios
 - Balance Sheet
 - KPIs
- **Day of Meeting**
 - All Company Representatives are responsible for reviewing EVERY company's packet, financials, KPIs, and prepare for robust discussions.

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SAMPLE MEETING AGENDA

Group Name
Meeting Date
Location

Hotel Name
Address
City, State Zip
Telephone

Host Company Name
Address
City, State Zip
Telephone

Day 1:

Members arrive at the hotel in the afternoon/early evening

6:00 p.m. Reception in hotel lounge
7:00 p.m. Dinner (location TBD)

Day 2:

6:30 a.m. Depart hotel for host company
7:00 – 8:45 a.m. Breakfast/Agenda Outline/Housekeeping Details
9:00 – 9:30 a.m. Tour of facility
9:30 a.m. – 12:30 p.m. Visit with departments
12:30 – 1:30 p.m. Lunch at host company
1:30 – 4:30 p.m. Visit with departments
4:45 p.m. Depart facility for hotel
6:00 p.m. Depart hotel for dinner
6:30 p.m. Dinner (business casual attire)

Day 3:

6:30 a.m. Depart hotel for host company
7:00 a.m. Breakfast at host company
7:30 – 8:30 a.m. Observe weekly managers' meeting(s)
9:00 a.m. – 12:00 p.m. Feedback on department visits & feedback on company owner
12:00 – 1:00 p.m. Lunch
1:00 – 4:30 p.m. Growing your business – Measuring frontline performance
Recruiting – What's working for you?
Marketing – What's working for you?
Consideration of new member(s)
Open discussion
4:45 p.m. Depart facility for hotel
6:00 p.m. Depart hotel for dinner
6:30 p.m. Dinner (casual attire)

Day 4:

Location – Room at Hotel To Be Determined

7:00 – 7:30 a.m. Continental Breakfast
7:30 a.m. – 12:00 p.m. Financial Reviews – 20 minutes per company
12:00 p.m. Lunch served in conference room
1:00 p.m. Optional social activity/Depart for Airport

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SAMPLE DISCUSSION TOPICS

Financial Management:

- Economic outlook, alternate opportunities in declining markets, profitability strategies, off-season work
- Cash flow management and budgeting
- Investing company profits
- Integration of personal finances with business
- Budgets, overhead, sales – departmentalized
- Controlling overhead and cost cutting techniques
- Financial analysis
- Collection strategies
- Credit Policy
- Tax savings opportunities and maximizing tax credits
- Company valuation & generational takeover
- Stock ownership programs (ESOPs) vs. phantom stocks – Do they make sense?
- Employee bonus programs and profit sharing
- Open book management

Strategic Management:

- Strategies to maintain profitability
- Annual business planning process
 - Planning for growth
 - Managing growth
 - Budgeting process
 - Controlling overhead
 - Budget adjustments
- Diversifying in the changing marketplace
 - Are there new products or services we should be offering?
 - How can we stand out from the pack?
- Adding services such as solar, plumbing, and electrical
- Growing through mergers and acquisitions
- Expanding into new market locations
 - Purchase existing business or open new?
 - Expanding into other services
 - What services make sense?
- Keeping management and owners motivated, making staff feel like owners
- Generational management – baby boomers, Gen-X, millennials
- Stress management
- Green Building influences in business
- Organization chart – why does your company look the way it does?
- Employee benefit packages
- Ownership compensation
- Management compensation
- How are we dealing with unscrupulous actors and low-ball “contractors”?
- Building – lease or own?
- Future of the industry
- Community programs
- Creating exit plans vs. business evaluations and selling via business broker
- Creative team building methods – what do they look like in reaction to coaching, mentoring, and employee involvement?

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Operations Management

- Wireless equipment utilization update
- Creating raving fans – how can we better handle each customer to create trust, loyalty, and a customer for life?
- Goal setting
- Employee evaluation process
- Establishing expectations
- Positive vs. negative reinforcement
- Employee wage policy
- Wage at time of hire
- Wage review process
- Safety policies
 - Training
 - Enforcement
 - Tracking
- Remaining competitive
 - Cost cutting measures
 - Efficiency
 - Adding value to your customer offerings
- Inventory control and automation
- Employee education and training field personnel
- Hiring procedures and onboarding information
- Promoting from within
- Maintaining a positive company culture
- Motivation techniques
- Maintaining motivated employees
- Field automation
- Technology
 - Wireless, paperless, back-of-office computer upgrades
 - Costs vs. rewards
- Fleet/GPS/fuel
 - Fleet management – lease/buy?
 - Repairs and maintenance schedules
 - Retirement schedules
- Workplace safety
- New refrigerant and equipment concerns
- Warranty issues
 - Extended warranties
 - Processing
 - Parts and labor
- Customer satisfaction and feedback
- Quality installation practices
- Tools
 - Company provided?
 - Tool reimbursement program?
- Residential Maintenance Agreements (RMA)
 - How many new customers should we add each year?
 - How many new RMAs can we sell per year?
 - How many can we expect per 1,000 households?
 - When do we reach the saturation level in a mature market?

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Operations Management Continued

- Downsizing & layoffs
- How do we make our company more convenient?
 - Extended hours and weekends?
 - Web based scheduling?
- Outsourcing and subcontracting
- Helpers and apprentices
- 1099 labor
- Recruitment and staffing decisions
 - How long is too long before I implement change?

Sales

- Sales management
 - Tracking sales
 - Appointment scheduling
 - Follow-up tracking
- Tax credits, ENERGY STAR products
- Differentiating your company from the competition
- Techniques in growing residential and commercial RMAs
- Can technicians sell RMAs?
- Sales leads
 - Who is responsible?
 - Is EVERYONE responsible?
 - How to motivate people to follow through on a lead
- Better sales techniques
 - Are there new products and services for sales staff?
 - Classes and training?
 - Motivational speakers?
- What are your salesmen's responsibilities beyond the proposal and sale?
 - Do they run the job?
 - Do they guide or control the installers?
 - Do they visit the customer during or after the job?
 - Do they collect money?
 - Do they perform quality control?
 - Do they handle or initiate customer follow-ups?
- How to become strong in commercial maintenance?
- What do you offer for incentives to homeowners for referrals?
- Increasing market share – best practices in good and bad economies
- Customer retention

Marketing

- Website strategies
 - Creating more traffic
 - Website design
 - Services offered online?
- Online marketing
 - Online with Angie's List, Homeadvisor, BBB, et al., vs. print advertisements and mailers
- Internet strategies
 - What works and what's necessary?
 - Search engine optimization

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Marketing Continued

- Social media
 - Facebook
 - Twitter
 - Instagram
 - Pinterest
 - LinkedIn
- Techniques to increase market share
- Making the most out of tax credits offered to the consumer
- Imaging
 - Trucks
 - Uniforms
 - Facility
- Marketing service and repairs
- Customer relations after the sale
 - Cards, phone call, flowers, gift, e-mail?
 - What's just enough?
 - What's too much?

Miscellaneous

- MIX Group Discussion
 - Improving the group's effectiveness
 - Format changes
 - Schedule and productivity
 - How do we ensure everyone is an ACCA National member?
 - What can ACCA change about the program?
- New Ideas
 - How to share a new idea that may sound dumb
 - Are there dumb ideas?

Continue to Next Page for Exhibits A, B, C, & D



Confidentiality & Non-Disclosure Agreement for members of ACCA MIX Groups

As an ACCA National Member, and a participant in an ACCA MIX® Group, I shall be privileged to receive confidential information regarding the operation, financial condition, affairs, practices, procedures, trade secrets, customer lists and other information and documentation which is considered confidential by each member of this ACCA MIX Group.

I, therefore agree that the disclosure of such information to any third parties, entities, corporations, or business persons could cause immediate and substantial damage to the business whose information was disclosed. I, therefore, covenant and agree, on behalf of my corporation, its employees, officers, agents and shareholders, that

- I will not disclose or permit to be disclosed any such information provided to me by any member of the ACCA MIX Group at any time; and
- I represent that I shall not appropriate, photocopy, reproduce or in any fashion replicate any information provided to me by any member of the ACCA MIX Group without the consent of the member whose information is being used. At no time shall financial information be copied or left unattended in such manner that any outsider may have access to same.

This agreement shall be governed by the laws of the state in which a proceeding may arise hereunder.

Dated: _____

Signature: _____

Exhibit B – Sample Minutes Format

As a general guide, the minutes of the meeting should include but not necessarily be limited to the following:

1. Name of the group holding the meeting (ACCA MIX® Group).
2. Place, time and date of the meeting.
3. Kind of meeting (a regular meeting or a special meeting called to discuss a specific subject or problem).
4. Number of members present and their names.
5. A statement that the Standing Chairman and Standing Chairman Elect were present, or the names of any substitutes.
6. A statement that the minutes of the previous meeting were approved, revised, or not read.
7. A list of any reports that were read and approved.
8. All of the motions that were made, with statements as to whether they were carried, defeated or tabled (vote postponed) and the name(s) of those making motions. It is not necessary to record the name of the seconder of the motion or motions that were withdrawn.
9. A full description of resolutions that were adopted and a simple statement of any that were rejected.
10. A record of all written ballots with the number of votes cast for and against.
11. The time that the meeting was adjourned (officially ended) and the place, time and date of the next meeting.
12. The recording secretary's typed name and signature and the typed name and signature of the standing chairman.

Since minutes are often used to clarify procedures and settle disputes, they must be accurate, complete and clear. Minutes should be written as concisely as possible. When approved, minutes of meetings are official.

Sample MIX Group Evaluation

1. What did you like best about the (**name host company**) tour? What suggestions do you have that might improve the host facility tour? Please be specific.
2. Are there any items we should add/delete/change from the facility tour.
3. Did you gain any information on (**name agenda item**) that proved particularly valuable to you personally or in running your business?
4. Were the agenda items generally informative and helpful to you in forming opinions and making business decisions?
5. Are there any items that you feel were redundant and should be eliminated in future meetings?
6. Was there sufficient balance between the business agenda and the personal agenda?
7. Was your spouse satisfied with the activities provided for their enjoyment and do they have any suggestions that would help in structuring activities for future meetings? (if applicable)
8. What was the most important outcome of this meeting?
9. Do you have any suggestions to make future meetings more effective?
10. List as many topics as you can (please be specific) that you would like to discuss at our next meeting.
11. Can you suggest any companies that might make a good addition to our group?
12. List your name and three goals you would like to achieve before our next meeting.

Please set aside time to complete this evaluation by **ONE WEEK after meeting** and return by email to:

Name of Standing Chairman Elect

Your input and direction is valuable in helping plan our upcoming meeting, assembling topics, setting personal goals and fine tuning our sessions to achieve continuous improvement. Thanks in advance for your timely completion of this evaluation. The compiled results of this evaluation will be sent to each MIX Group member on or before **ONE MONTH after this meeting**.

Sample MIX Group Member Bio

Company Name:

Year Established:

Website:

City/State:

Number of Employees:

Phone:

Company Representative Name & Title:

Mission Statement:

Motto:

Jingle:

Company Cheer:

Services Provided:

Awards:

Sample Business Update

Company Name:

Host Location:

Financial Update:

Best New Ideas:

Worst New Ideas:

Areas Requesting Review:

Office Operations:

Marketing:

Sales:

Service:

Residential:

Commercial:

Installation:

Replacement:

New Construction:

Miscellaneous Updates:

Sample MIX Group Personnel per Department

Company: _____ Date: _____

Fiscal Year: _____

Department	Field	Sales	Management	General Office
Service/Maintenance				
Retro/Replace				
Res. Tract				
Res. Custom				
Comm. Construction				
Plumbing				
Senior Mgmt.				
IT/Purchasing/ Warehouse/HR/Admin				
Total				

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