



OPPORTUNITY  
KNOCKS

# OPPORTUNITY KNOCKS

## Facilitator's Manual

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# Chapter 1

## Overview

### Organization Description

Opportunity Knocks is Central Oregon's business advisory organization that provides business decision-makers the ability to achieve their goals by providing each member with their own collaborative peer-to-peer group of concerned small business advisors that offer trusted solutions.

Opportunity Knocks members are organized into teams of ten-twelve non-competing businesses and/or non-profit organizations. Each team is led by two facilitators and meets once a month for three hours to openly, yet confidentially discuss critical business issues. Meetings follow a tested and proven format which requires individual member updates on their business including how they implemented action steps provided from the previous meeting. Meetings also focus on long-term, strategic issues, in the process encouraging team members to plan and strategize for the future. This format develops a culture of accountability among team members and these peer-to-peer advisory teams form trusted and lasting relationships that provide each member encouragement, inspiration and direction for their business.

Created in 1996, Opportunity Knocks was modelled after The Executive Committee (TEC) currently Vistage, a for profit business based out of San Diego.



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## **Mission**

Opportunity Knocks helps business leaders to think strategically, solve problems and achieve goals.

## **Vision**

Opportunity Knocks inspires small business excellence

## **Values**

- Commitment: OK Members are committed to their teams and fellow members.
- Trust: OK provides a completely confidential environment in which business people can share sensitive and private information.
- Empathy: OK Team Members depend on each other to generate and exchange ideas.
- Collaboration: OK provides a vehicle for small businesses to learn from each other and to solve each other's problems.
- Growth: OK Members help each other to become more knowledgeable in how to operate and grow their business and balance their lives.

## **Members**

- Business owners and/or partners.
- CEO's/Presidents/General Managers
- Non-Profit Executive Directors
- Key employees



### **Five Supporting Beliefs:**

1. OK believes that all businesses have elements that are common to every other business. All businesses face a finite collection of generic problems.
2. OK believes that twelve heads are better than one.
3. OK believes that small business owners and managers are more likely to listen to, and learn from, experienced peers than from paid consultants or educators.
4. OK believes that by assembling twelve small business owners and/or managers in the same room and having trained facilitators follow a tested outline, someone will have a solution to whatever problems are posed.

### **Additional services offered:**

**S.W.A.T. teams:** See Definitions in Chapter 4 and description in Chapter 5.

**Annual Meeting:** Once a year OK hosts an annual meeting for its membership. This meeting offers an opportunity for OK members to meet and network with members from other teams. The meeting also offers OK management the occasion to review for members the past year, preview the upcoming year and entertain suggestions and comments from the membership-at-large. A speaker is usually included on the agenda.

**Social Gatherings:** Throughout the year, OK hosts informal social gatherings



## Chapter 2

### Important Definitions

**Facilitator:** The word “facilitate” means “to make easier.” Thus an OK Facilitator’s primary role is to make it easier for a meeting’s attendees to achieve their goals. He or she accomplishes this by striving “to provide an environment for the team members to solve each other’s problems.”

**OK Team:** Ten-Twelve non-competing business owners who meet monthly and act as one another’s Board of Advisors. Team meetings are facilitated by two OK-trained co-Facilitators.

**Team Meetings:** OK team meetings are held once a month on recurring dates (for instance, second Tuesday of each month) for three hours.

**Strategic Issues:** Strategic Issues are those long-term strategic or operational issues that are critical to the survival of any business, large or small. Strategic Issues can come from a wide variety of topics, and may include such issues as marketing, employee training and motivation, technology, accounting, etc.

**Action Items:** Those specific recommendations and suggestions that result from a Critical Issue or Strategic Issue presentation or from an assignment made by a Facilitator. The team member is required to follow up his or her assigned Action Items at a subsequent meeting. (The team member is not necessarily required to *act* on each Action Item, but is required to *report* on each Action Item, i.e. what was done or what wasn’t done, and why.)

**Critical Issue:** An Immediate Crisis is a situation that has occurred within a team member’s business that requires immediate attention. Every team meeting will include an opportunity for team members to present, and get feedback on, their Immediate Crisis.



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***S.W.A.T Teams:*** S. W. A. T. is an acronym for Special Working Advisory Teams. S.W.A.T. teams are teams that are formed on a one-time-only basis with the purpose of solving a specific problem that has proved to be unsolvable within the normal OK team environment.

***Confidentiality:*** Confidentiality is one of the three keys to OK's success. Team members will be required to sign a Confidentiality Agreement either at the time of registration or at the first meeting.

***Accountability:*** The second key to an OK team's success is Accountability. A culture of Accountability develops when team members understand that they will be held accountable to respond to the specific Action Items assigned to them.

***Commitment:*** The third key to an OK team's success is Commitment. Commitment of every OK team member is needed to insure that all topics get the best advice possible. The degree of a team's commitment can be measured by attendance.

***Meeting Agenda:*** One of the team's co-Facilitators is required to e-mail the agenda and a meeting reminder to team members at least three working days in advance of each meeting.



## CHAPTER 3

### First Meeting Guide

#### First Meeting Agenda:

1. Introduction of Team Members
2. Discuss Team Members Commitment
3. Discuss Confidentiality (making sure all have signed form)
4. Discuss Critical Issue Opportunity
5. Discuss Action Item accountability
6. Discuss Speaker Options
7. Discuss Team Goals and Objectives

#### 1. Introduction of team members:

- A. Name
- B. Business
- C. Number of employees
- D. Describe products or services
- E. What makes your business different?
- F. How long in business?
- G. What did you do before?
- H. What do you expect from OK?

#### 2. Discuss Attendance Rules.

Facilitators should maintain attendance records for team members. Team members have committed to not miss more than two meetings per year. Should a member miss and not notify you, follow up with the member after the missed meeting.



### **3. Discuss Team Size Dynamics:**

The optimum size for an OK team is 10-12 members. When a vacancy occurs within an OK team, the Facilitator should poll the team to see if anyone knows of a business that might be synergetic with the team. If there are businesses that qualify, and the team agrees, the Facilitator or the member can follow up with that business. If the team knows of no such business, the Facilitator should call the Development Director and let him/her know of the vacancy and ask that it be filled as soon as possible.

Ultimately, the team has the last word in whether or not new members should be added. The Facilitator however, should encourage the addition of new members when the team falls below 10 members.

### **4. Discuss Confidentiality Agreement**

Before an OK team member can talk freely about his or her company and its related problems, he or she has to feel comfortable that the discussions will remain confidential. By virtue of having signed the Agreement, the OK team member has promised to his or her peers that the team's discussions will go no further than the room.

### **5. Discuss Speaker options:**

Should a specific topic or need arise from the team for an expert to address, presenters are available to visit and speak at OK team meetings. OK maintains a list of volunteer speakers for OK team members to choose from.

### **6. Strategic Issue Presentations:**

Each team member will be asked to present his or her list of their three top Business Goals or Strategic Issues. (Team members will have previously been given this assignment by the Facilitator. Explain that, over the next year or so, the team will take each of the member's Strategic Issues and discuss them. Each member will be provided at least 60 minutes to present their strategic issue and allow time for discussion. (If more or less time is needed, the Facilitator can make that determination as the discussion ensues.)





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The Strategic Issue(s) to be discussed will be assigned in advance of each OK meeting, so that the presenters will have plenty of time to prepare for their presentation.

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## **7. Make the next meeting's Strategic Issue assignments:**

Before adjourning the meeting be sure and assign one-two members to present their Strategic Issues at the next meeting. Try and select members who have interesting and generic Strategic Issues.



## Subsequent Meetings

### 1. Email Reminder and Agenda

At least three working days before the meeting e-mail a reminder and the agenda to each team member.

### 2. Agenda for the Second Meeting (and for all subsequent meetings:

- A. Ask each team member to give a two-minute update on their business. What has happened since the last meeting?
- B. Review and discuss Action Items that resulted from the previous meeting.
- C. Discuss Critical Issue/Immediate Crisis Opportunity

Every meeting will include an opportunity for team members to bring before the team his or her “Critical Issue” or “Immediate Crisis,” i.e. a situation that has recently occurred that requires immediate attention. An Immediate Crisis can range from cash flow problems to landlord issues to employee issues. Any Immediate Crisis discussion should always be followed by the assignment of Action Items that evolve from member’s suggestions. These Action Items will then be followed up at the next meeting, thus assuring member accountability

#### D. Discuss Action Item Accountability:

At the close of every Critical Issue or Strategic Issue discussion the Facilitator will compile a list of “Action Items”, i.e. a list of the workable ideas and suggestions recommended by the team. The presenter will then be held “accountable” to the team to report at the next OK meeting on those Action Items. This is not to imply that all of the Action Items must be acted upon by the presenter, but only that they must be considered and followed up at least verbally. There may be a variety of valid reasons why suggestions are not acted upon.



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Thus an OK team member's accountability is only to respond to each of the recorded Action Items and not necessarily to act upon them.

This establishment of accountability is an integral part of the culture of every OK team. Accountability helps to insure attendance at the same time it re-enforces the "Board of Advisors" perception among team members.

E. Inquire if there are any Critical Issues/Immediate Crises. If there are, discuss.

F. Introduce the Strategic Issue presenter and begin presentation and discussion.

G. Present the Action Items that have resulted from the meeting. Make sure the presenters of both Critical Issue and Strategic Issues understand that he or she is accountable to follow up the suggestions at the next meeting.

H. Adjourn on time.

## **Alternative Discussion Items**

The preceding "Critical Issue Format" should normally be used for all meetings. However, from time to time an Alternative Format may be inserted. This Alternative Format is only temporary however, and once concluded the team should return to the Strategic Issue format.

### **1) Identifying Business and Personal Goals**

Goals should be discussed and documented each year. At this meeting each team member should list their top 3 business goals and top 3 personal goals for the year. Remind members to set SMART goals (Specific, Measurable, Achievable, Realistic and Timely)

### **2) Yearly Budgets and Review of Previous Year's Financials**



### **3) Review of Mission Statements and Tag Lines**

Every business has (or should have) a mission statement, a tag line. Dedicating part of a meeting to review these can help members to reflect on if change is needed.

### **4) Inviting Speakers**

Experienced OK teams vary in their use of outside speakers. Some use them frequently, others use them sparingly, but all teams use them at least occasionally. Speakers should be allotted no more than one hour of every meeting to allow for members to provide their regular exchange of updates.

### **5) OK Team Annual Review**

At the end of the year, the Facilitator should take the time (usually no more than one half an hour) to review OK's performance for the past year. Team members should be given the opportunity to comment on not only what they like about their OK experience, but also what needs improvement.

### **6) Member Business Review**

A complete review that each member can be assigned in advance including:

- Company's mission
- P & L Review
- Company Strengths, Weaknesses, Opportunities & Threats

### **Helpful Meeting Tips:**

1. Immediately following the current month's meeting, create the agenda for the following meeting. This will assure you've organized the meeting while the details are still fresh.
2. At least three days before the scheduled meeting, e-mail your team a reminder of the meeting along with the agenda.



## Chapter 4

### THE FACILITATOR'S MOST VEXING ISSUES

This chapter includes a number of the most vexing issues that will arise during the course of a typical OK team's growth.

**Issue: *Early Stage Attrition.***

OK teams will initially be assigned 10-12 team members by the Program Director. Typically, 2 or 3 of those team members will, within the first year, drop out. They may drop out officially, i.e. by notifying their Facilitators that OK isn't working for them. Or they may drop out unofficially, either by simply not attending meetings or by attending inconsistently and not contributing.

**Solution:**

In the first year the dropping of 2-3 can sometimes occur. This is because OK is not for everyone and thus certain members will not be having their needs met by the meetings.

Remember, OK only works for those small business owners and managers who:

- ✓ Are willing to listen
- ✓ Can accept constructive criticism
- ✓ Are willing to share
- ✓ Believe that all problems are solvable
- ✓ Are committed to learn

Every time a TEAM member is lost, the Facilitators should review the above list and make sure that the reason the person dropped out can be traced to one of these issues. In which case, Facilitators should not take that individual's departure personally, this is typical for start-up OK teams.



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The Facilitator should also understand that, generally speaking, the above characteristics are those of small business owners and managers who are probably going to be successful with or without OK. OK is simply a tool to make their success come sooner and to a larger degree.

## **Issue: Attendance/Commitment**

By far, the most difficult problem the Facilitator will have to deal with in the early years of a team's existence (until the team has matured, which usually takes two years or more) will be attendance. Attendance is, of course, a measure of commitment. If a team member is committed, he will attend the meetings regularly, if he isn't, he won't.

## **Solution:**

Attendance parameters should be established at the first meeting. Team members who miss two consecutive meetings should be contacted by phone by one of the Facilitators. The purpose of that call should be to determine the level of commitment of the individual and to remind the individual that he or she is letting the team down by not attending. Hopefully the Facilitator will determine that the team member *is* committed and the phone call will simply serve as a warning. If however, the Facilitator determines that the necessary degree of commitment is not there, he or she should suggest that the team member discontinue membership. Remember: It is better to have no team member at all in attendance than to have one that is not participating.

The Facilitator should remember: When a team member misses meetings, there can only be two reasons: 1) He/She is not OK material, 2) He/She is OK material but his/her needs aren't being met. The Facilitator should work with the team to determine which category the absentee member falls into. If the team member is OK material but his needs aren't being met, then the Facilitators should discuss with the team what is missing.

The key to managing attendance is first to track it and then second to deal with it immediately. Facilitators should not let attendance problems fester.



## **Issue: Team members don't have any Issues to discuss.**

There may come a time, after the first or second year, when the team has discussed all of the original Strategic issues and are having a difficult time coming up with new ones. Having no Strategic Issues within a business is patently impossible, every business always has a number of them, the problem is that the owner is oftentimes too close to the business to be able to recognize the key issues.

## **Solution:**

Review of a business's financial statements is a sure-fire way to spot issues. As the team evolves and trust develops, the Facilitators should encourage team members to bring financial statements to the meeting and have the team review one another's financials

There are three elements to every business's financial statements. Those three elements are 1) Revenues 2) Gross Margin and 3) Expenses. Within these three categories lie many potential Strategic Issues, if the financial statements are reviewed by someone who knows how to read, and analyze them.

The opportunity to review financial statements will almost always result in discovering problems that require strategic analysis. (If the business doesn't have current financials, or if they have them but they aren't accurate, this in itself, is that business's most pressing Strategic Issue.)

In reviewing a business's financials, the team should look at the following:

- 1) Revenues: Have they been growing steadily? If not, this is the Strategic Issue. Flat sales are always an important issue, they mean that a business is not growing.
- 2) Gross Margin: Has it been steady or increasing? If not, this is the Strategic Issue. Since gross margin is a function of A) pricing and B) production efficiency, the Strategic Issue will lie within in one of these two categories.
- 3) Expenses: Review the expense accounts to see if there are any categories that are too high, as a percentage of sales. The first that should always be



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reviewed is the “percentage of salaries and wages to sales.” If this number is too high, or has been steadily increasing, this could be the Strategic Issue. Other potential Issues in the Expense category might include Rent, Sales Commissions and Marketing Expenses

### **Issue: Determining Action Items for subsequent meetings.**

As a presenter presents his/her Critical or Strategic Issue the discussion will ensue and a number of suggestions and recommendations will be put on the table by team members. Some of those suggestions and recommendations will be on target and should be turned into an Action Item, meaning that the presenter will be asked to report on it at the next meeting. Some of the suggestions will be “non-relevant”, i.e. for one reason or another are not worthy of being assigned the status of an Action Item.

### **Solution:**

The member should determine what action items they will “take on” for the month. The facilitator can/should suggest possible other action items if appropriate and have not been previously mentioned.

### **Issue: The effective use of guest speakers**

Guest speakers can be an effective learning tool when used effectively.

### **Solution:**

Guest speakers should be used when issues arise within the team that require outside experts to provide answers that are otherwise not available. It should be noted that there are always persons within the community who will agree to appear before an OK team and provide their expertise.

Typical Guest Speakers and their subjects might include:

- ✓ **CPAs and Accountants:** Business valuation, use of financial statements, tax policies and procedures, effective bookkeeping systems (Quick Books, Business Works, etc.), business entities (Sub S, LLC, C Corp, etc.)
- ✓ **Bankers:** Preparing a business plan, how to impress your banker, interest rates, cash management, etc.





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- ✓ **Human Resource Experts:** Hiring, firing, HR laws, performance reviews, organization charts, compensation issues, benefit structuring, etc.
- ✓ **Commercial Realtors:** Structuring a lease, rent-or-buy determination, etc.
- ✓ **Sales and Marketing Experts:** Distribution alternatives, advertising, public relations, sales training, sales compensation, etc.

## **Issue: What happens when one business has an ongoing issue that usurps more than its share of a team's time?**

From time to time a business will require more than its proportionate share of time. As a result, other businesses will be shorted, and their issues will be postponed.

### **Solution:**

This is not an unusual situation. When one team member has a particularly sticky issue - say a severe cash flow problem - that problem is rarely resolved by one meeting. It will take a number of follow-up discussions at future meetings to help the owner resolve the issue. This is as it should be.

The time allotted to any business owner should be whatever it takes to solve a bona fide problem. Mature OK teams find that their attention will ebb and flow from team member to team member. During certain periods one business will require significant amounts of the team's time while others will not. Sooner or later however, the situation will reverse itself, and those businesses which have not required a lot of time will have time-consuming issues themselves.

Occasionally it may prove necessary to schedule a special team meeting when the needs arise. This has been done successfully within mature OK teams, however it should be on a temporary basis only. Generally speaking, once a month meetings should suffice.

## **Issue: What is the process when a member resigns from the team?**

As previously mentioned, attrition will always occur to some degree. When a member stops attending team meetings, it is important to check in with them to determine the reason for having missed the meetings.



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## **Solution:**

If a member has become unengaged and not attending meetings, there can be a variety of reasons. The member may have a change in lifestyle, i.e. young children, increased travel, etc. or they no longer are receiving value from the team.

Should the conflict be in scheduling and not being able to commit, the first step is to announce the departure to the team and then to contact Dennis Hungerford, Opportunity Knocks' Development Director to notify him of the vacancy. Dennis will then seek out a new replacement/addition and contact you with a proposed new team member.

Occasionally members may outgrow their teams and will find that their business is growing at a different level than the other members. As a result they may likely need more experienced resources. The facilitator may be aware of this and approach the member with an option to change teams and/or the facilitator can contact Dennis to reach out to the member to explore if a change of teams is an appropriate option for the member.



## CHAPTER 5

### Frequently Asked Questions

**Question:** *“What are the key skills of a Facilitator?”*

**Answer:** The ability to listen is at the top of the list. The OK Facilitator needs to hear what team members are saying in order to capture the essential information, and subsequently, one or both of the two Facilitators must be able to summarize that information into meaningful Action Items.

Other key facilitation skills include:

- ✓ The ability to keep a meeting flowing by asking the right questions
- ✓ The ability to keep a meeting focused and orderly.
- ✓ The ability to manage the conflict that arises from time to time.
- ✓ The administrative skills necessary to organize, manage and conclude a successful meeting.

**Question:** *“What are some of the key techniques a successful Facilitator can employ to improve the quality of his/her meetings?”*

**Answer:**

- ✓ Use positive statements/suggestions/praise.
- ✓ Limit war stories or soap boxes (the Facilitator’s or a member’s).
- ✓ Put time constraints on comments
- ✓ Don’t engage in side conversations.
- ✓ Don’t interrupt others before they have finished speaking
- ✓ Accept differences as valid.



**Question: “What are the potential stumbling blocks for most Facilitators?”**

**Answer:** First and foremost, the Facilitator must view him or herself as a conduit for discussion, not as an instigator of it. The Facilitator who is quick to offer his or her opinions on the subject at hand, before the team members have had their chance to offer theirs, is not “facilitating” but rather is “directing.” This is not to say the Facilitator cannot offer opinions of his or her own, but rather that those opinions should not be delivered until all team members have had their say.

Hidden agendas are another common stumbling block of the facilitation process. The best Facilitators have no underlying agendas, other than to “provide the environment for his or her team members to solve their problems.”

Finally, a lack of follow-up can be detrimental to a team’s success. Follow-up is an important element in developing accountability within an OK team. Without accountability, team members will have no motivation to take action on the group’s suggestions.

**Question: “How important is follow-up?”**

**Answer:** One of the most important duties of the OK Facilitator is to insure that the Action Items that have developed in the course of previous meetings are followed up.

Failure to properly record Action Items, failure to assign them, and failure to insist on their follow-up can destroy the culture of accountability that is an integral element of the OK concept.

**Question: “Are there identifiable characteristics of a successful OK team member?”**

**Answer:** Yes, the successful OK team member...

- ✓ Is willing to listen
- ✓ Can accept constructive criticism



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- ✓ Believes in sharing
- ✓ Believes that all problems are solvable
- ✓ Has an appetite to learn

**Question: “What is the Facilitator’s primary reward for his efforts?”**

**Answer:** Fulfillment.

- ✓ When a team member stands before the group and recites how the preceding month’s Action Items resulted in a positive change to his or her business.
- ✓ When team members reach for their pencils simultaneously during a meeting to record their latest “aha.”
- ✓ When team members network to solve a common problem (for instance the sharing of one member’s Personnel Manual), or to share an opportunity (for instance the formation of a strategic partnership) or to provide emotional support when needed (for instance after the sudden departure of a key employee.)
- ✓ When a Facilitator leaves an OK meeting and knows he or she has made a difference in a small business owner’s life. (And, by extension, that small business owner’s employees and their dependents.) Ask any OK veteran, it happens all the time!



## CHAPTER 6

### Meeting Tools and Handouts

*The documents in Chapter 6 include a limited number of the Facilitator Handouts. A complete list of other tools can be located at [www.opp-knocks.org](http://www.opp-knocks.org) and accessed from the Facilitator Page.*

#### **New Member Requirements**

- 1) General Membership Information**
- 2) Placement Process for New Members**
- 3) A New Member Introduction to OK:** This handout should be given to every new OK member by the facilitator prior to them attending their first meeting.
- 4) OK Member Guidelines:** All members have previously been provided with this form as part of their initial application packet. Individual signed copies are kept on file at the OK home office. It is recommended that the OK Member Guidelines sheet be reviewed by the team once a year.
- 5) New Member Presentation to Team**

#### **Operational Tools**

- 1) Attendance Sheet:** Attendance should be taken at each meeting to help to address and support member commitment.
- 2) Team Meeting Agendas**
- 3) Sample list of Strategic and Operation Issues**



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- 4) **Presentation Outline:** This outline will help the presenting member to cover the relevant information and stay on track. The outline should be provided to the presenting member in advance of the meeting.
- 5) **Member Business Review:** This information addresses business basics for a member to cover when making a presentation about their businesses. Topics range from mission statements, market share to financials.
- 6) **Critical Issue Review/Structured Listening Exercise:**
- 7) **Member Questions:** A list of questions that can be asked by the facilitator and fellow team members of each other.



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## General Membership Information

*The following information is provided to potential new members of OK. It is found on the Membership Information page on the OK Website (<https://opp-knocks.org/join/>)*

OK teams succeed because of our strategic placement of each individual member. We work closely with you and our facilitators to find the best fit - on a board of advisors team where you will receive the peer mentorship, insight and support you are looking for.

There are **two ways to become a member** of OK - you will either be **invited** to a team by a member of the organization who knows you or your business, or you are welcome to **apply** to be placed on a team.

If you have already been placed on a team, please click [here to complete the New Member Registration](#).

## Application

To apply for membership, click the link below to complete the application form. You will then hear back from Aly, our Executive Director, or a member of our Board of Directors who will work with you to place you on a team. At any point in the team placement process we're here to answer your questions! Feel free to call Aly at **541-588-2719** or email **aly@opp-knocks.org** to learn more about OK or ask questions about the many benefits of membership.

Whatever your professional goals may be, you will thrive with your OK team if you dedicate yourself to your team and your own growth.

You are a great candidate for OK if:

Oppportunity Knocks 705 SW Bonnett Way #1000 Bend, Oregon 97702 541-588-2719





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- You have a willingness to share
- You are able to accept feedback and input
- You have a desire to be held accountable
- You have a desire to help others
- You are committed: to the team, to attending meetings, and to learning

Please [click here to complete the Membership Application Form](#)

## Dues

OK is a 501 (c) 6 nonprofit organization. We believe in supporting the economic growth of Central Oregon and we take pride in offering our service at a fraction of the cost of most professional development courses and programs. All membership dues go toward our administrative costs, and all of our facilitators are volunteers.

For your convenience, OK membership is a simple quarterly subscription, with easy, automatic payments on your credit card. Membership dues are based on the size of your company or organization:

- **Small** business quarterly subscription \$125 (0-5 employees)
- **Medium** business quarterly subscription \$185 (6-10 employees)
- **Large** business quarterly subscription \$250 (10 and more employees)
- **Nonprofit** quarterly subscription \$125
- **Additional members** from any size business pay \$125 quarterly



## **Placement Process for New Members**

- Review the Membership Interview Form to see if the team can address the candidate's challenges and if the candidate can contribute to the other members of the team. Look for ways to be inclusive rather than exclusive. Some less experienced candidates might be able to contribute in ways not obvious at first. Also, look to see if the candidate might bring some balance to the team. It's always nice to have someone with legal, accounting, marketing, sales or other professional skills on the team.
- Next look to see if there are any apparent conflicts with the existing team members. Further, confirm with the team members via email that there are no conflicts. Ask the team members to get back to you within 3-4 days.
- If there are no obvious conflicts with current team members, schedule a phone or face-to-face meeting with the candidate to further discuss the fit on your team.
- If it looks like the candidate will be a good fit, propose the new member to the team via email or at the next meeting.
- If the team is all in support of bringing on the new member, invite them to the next meeting. The assumption is, they will be joining your team, not just checking it out.
- Inform the Executive Director immediately after the candidate attends the first meeting, that the candidate has joined the team or if not, why not. Even after a lot of due diligence and vetting of the candidate, on rare occasions, we discover the candidate just isn't a good fit for your team. If this is the case, the Executive Director will look for another team.
- Please contact the Executive Director with any questions or concerns



## A NEW MEMBER INTRODUCTION TO OK

### THE THREE CORNERSTONES OF OK

Three components are required to be a successful OK team member. Those three components are:

- 1. Confidentiality:** Each team member must sign a Confidentiality Agreement maintained by one of the Facilitators. This agreement pledges that the signers will keep all OK discussions confidential.
- 2. Commitment:** OK members must understand that they form an integral part of their OK team, and that by joining OK they make a commitment to attend meetings regularly. Irregular attendance may be grounds for dismissal from a team.
- 3. Accountability:** **Strategic Issue presenters** must understand that they are “accountable” to either act on all **Action Items** assigned to them or at least respond to those **Action Items** at a future meeting. In this way a “board of directors” environment will develop in which team members become accountable to their peers.

### OK MEETINGS WILL INCLUDE.....

- I. An opportunity to present a **Critical Issue or Immediate Crisis**. (Definition: A problem or situation which requires immediate attention and action.)
- II. One or more “**Strategic Issue**” presentations. (Definition: A long-term strategic problem or opportunity.)
  - A. Tip: the more presentation by the **Strategic Issue Presenter**, the better the response.



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## B. Examples of **Strategic Issues** include:

**Growth Issues:** (Expand, contract, buy assets, sell assets, change focus, refinance, hire a consultant, introduce a new product, etc.)

**Employee Issues:** (Hiring, training, motivating, firing, etc.)

**Marketing Issues:** (New advertising focus, public relations, networking, customer referrals, etc.)

**Sales Management Issues:** (Developing a sales culture, compensation systems, hiring and training sales staff, etc.)

**Distribution Issues:** (Building a direct sales force, hiring manufacturers reps, opening wholesale outlets, catalogs, telephone sales, etc.)

**Inventory Issues:** (Too much, too little, accounting system, shrinkage, etc.)

**Financial Issues:** (Financial reports, bank relationships, accounts receivable, cash flow, credit, etc.)

**Cultural Issues:** (Accountability, time management, quality, etc.)

## III. “**Action Items**” assigned:

Action Items are those suggestions and recommendations passed on to the **Strategic Issue** presenter by his or her OK team. **Action Items** are not necessarily required to be acted upon, but they are required to be reported on at the next regularly scheduled OK meeting.

## IV. “**Follow up**”:

Each meeting will allow follow-up time, affording the previous meeting’s **Strategic Issue** presenter to report on which **Action Items** were accomplished and which were not. Results of all of the **Action Items** will also be reported.



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## MEMBER GUIDELINES

**OK's purpose is to provide you with a board of advisors that meets monthly to help you in solving your problems and growing your business. To help make your OK experience a success, we ask that you agree to the following conditions:**

1. I will honor confidentiality and will not discuss any information from team meetings with anyone outside of my team.
2. I commit to missing no more than three meetings per year. Should circumstances arise where I would need to miss more than three, I will recommit to my team members. In the event of a necessary absence, I will notify my facilitator in advance of the meeting.
3. I will be accountable to my team members by either acting on all action items assigned to me or reporting back on which ones were achieved.
4. I will try to make constructive, positive comments to my team members.
5. I will be open and honest with my fellow team members.
6. I will actively participate by presenting strategic issues and will be open to the comments and suggestions of others.
7. If I choose to continue as an OK member after one year, I agree to pay the annual renewal fee within 30 days or make arrangements to pay the renewal fee in installments.

Name: \_\_\_\_\_  
(Your signature)



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Date: \_\_\_\_\_

## **New Member Presentation to Team**

Please prepare an introduction for yourself and your company. A total of 15 minutes will be dedicated on the agenda to your introduction and will also include time for any questions or comments from your team members. The more your fellow Members know about you and your business, the more they can help you to achieve your personal and professional goals.

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### **What I do (the business)**

- Present a brief historical overview of your company and how you came to your current position.
  - Describe your company's services/products.
  - Describe your operation, facilities, distribution, etc.
  - How many employees in the business?
  - What is your vision for the next 3-5 years?
  - What are your business goals in the coming year?
  - What are your biggest challenges for the coming year?
- 

### **Who I am (about me)**

- Present an overview of your personal background, i.e. hobbies, interests, family
- Vision for yourself over the next 3-5 years



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- What do you want to get from your participation in Opportunity Knocks?

OK TEAM \_\_\_\_

## Team Attendance/ Activity Record

Name	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec

	Key
P =	Present
A =	Absent
I =	Immediate Crisis/ Opportunity
C =	Critical Issue



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F =	Follow Up Action
M =	Refreshments

## OK Team

### Agenda

- a. Announcements
  - i.e. Upcoming Seminars or other events
- b. Immediate Crisis?
- c. Member's Follow – Ups:
  - Action Items assigned from last meeting reviewed for each member
- d. Member Presentation

And/or

Special Topic i.e. Member Goals reviewed, Budgets, Financials or Guest Speaker

- e. Other Business?
- f. Next Meeting Agenda and Presenters





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### **Sample List of Strategic and Operation Issues**

- Accounting Issues
- Acquisition opportunities
- Asset management (Accounts receivable, inventory, equipment, etc.)
- Asset purchases
- Asset sales
- Business expansion
- Business contraction
- Compensation programs
- Credit policies
- Cultural issues (accountability, open book management, etc.)
- Employee manual development
- Employee motivation
- Employee benefits (profit sharing, stock ownership, 401 (k), ESOP, etc.)
- Employee training
- Entity options (C. Corp., subchapter S, etc.)
- Expense control issues
- Financial management (sue of financial statements)
- Financing issues
- Government and regulatory issues
- Marketing issues (advertising, promotion, etc.)
- New directions (new niches, new products, new distribution, etc.)
- Ownership issues (partnerships, shareholders, etc.)
- Planning process
- Pricing issues
- Profit margins
- Quality issues
- Sale of business (all or part)
- Sales development (reps, compensation plans, territories, etc.)



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Technology-related issues (bookkeeping systems, e-commerce, web site construction)  
Vendor relations



## PRESENTATION OUTLINE

1. **Issue:** Strategic, critical or operational issue that is important to the survival of my business. Critical could be product or promotional/advertising as well as an employee issue or financial.

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2. What has been done so far in addressing this issue?

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**What's worked? What hasn't worked so far?**

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3. Time frame of solution. When does this need to be in place?

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**Other Pertinent Information:**

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**Solution: To be discussed by group.**

**Action Items will be generated at the meeting and will need to be reported on at the following meeting.**

**ACTION 1** \_\_\_\_\_

\_\_\_\_\_

**ACTION 2**

\_\_\_\_\_

\_\_\_\_\_

**ACTION 3**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

***Email the outline/presentation to your facilitators prior to the team meeting***



## Member Business Review

### 1. The company's mission, including:

- Mission statement or thoughtful statement defining what is your business focus
- Percentage of your market share
- The market share owned by your top 5 competitors
- Your business strategy to increase your market share
- Key business objectives
- Key business performance indicators

### 2. P & L Review – Worksheet Attached

### 3. Company Strengths, Weaknesses, Opportunities and Threats – Worksheet attached

- Summary of your organization's key strengths;
- Your view of the current key company weaknesses;
- Your perception of the key external opportunities to your company
- The key external threats to your company's continued economic viability.

**Sample Power Questions:** The Presenter should be prepared to answer some of these typical questions that can be anticipated to be raised by the members during the session:

- Where's the cash coming from and going to?
- If things continue the way you're going, when will you miss payroll?
- What would put you out of business?
- What do you want for yourself? Is what you're doing going to get you there?
- What do you want for your company? Is what you're doing succeeding?
- What are you thinking about when you wake up at 3 a.m. in the morning?
- How do you figure out what your products and services cost you to produce?
- What programs do you use most to track your company's performance?



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## **P & L Review**

Revenue – Comparative revenue trends in aggregate and within sales mix (as applicable).

ASP (average selling price) – Average pricing realized for major products/services (requires a review of underlying unit volume activity)

COGS – Cost composition (e.g., understanding material, labor, overhead components evident in cost flow, as applicable)

Margin – Gross margin percentages and/or variable contribution

OPEX - Spending trends and percentages; consideration of fixed cost levels versus variable activity

Any material items occurring in other income/expense

## Business Review Format

<u>Member</u>		<u>Company</u>		<u>Date</u>	
<u>Company Mission Information:</u>					
<u>Key Company Strengths</u>			<u>Key Company Weaknesses</u>		
1.			1.		
2.			2.		
3.			3.		
<u>Key External Opportunities</u>			<u>Key External Threats</u>		
1.			1.		
2.			2.		
3.			3.		



## **Critical Issue Review/Structured Listening Exercise:**

- A. Have members go around and briefly describe a critical issue they are facing in their business or personally. As a listening exercise this should take no more than ten to fifteen minutes for everyone to highlight their issue, if they have one. No verbal interaction between members, just listen.
- B. Have the group select the critical issue that seems the most top of mind and needing the group's immediate attention.
- C. Have the member selected provide an oral narrative description of the problem going into some detail in terms of how it is impacting the business, them personally, other people in the business, what happens if it is not solved successfully, etc. This will probably take about ten minutes as well. Again, all other members should just listen.
- D. Once the story has been completed by the member, it is now time to entertain questions from each member to help bring out more details to the story, find out more information, inquire as to what has been tried and other questions that might help stimulate more options for the member with the critical issue. Questions by the members are done in succession from member to member with no additional interaction, just listening by the others and jotting down notes or follow-up questions once their turn comes.
- E. After going around once, the facilitator asks if there are any more questions or if the member with the critical issue has any more concerns related to the specific critical issue being addressed. If not, the facilitator then repeats the go around asking each member for any recommendations they might have for the member. This is the time for the member with the issue to just listen and jot down notes/thoughts.
- F. Once completed the facilitator asks the member with the issue to communicate what new ideas they have received from their fellow members and what specific actions steps they are willing to commit and to review at the next monthly meeting with the group.





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