



**ANNUAL**

**CHAPTER GUIDE**

2017-2018

# A LETTER

# FROM THE PRESIDENT

Dear EO Arizona Members:

Thank you for giving me the honor of serving as your president for the 2017-2018 year. I'm truly humbled to have the opportunity to lead a group of fellow entrepreneurs who inspire me everyday. Because of your dedication, persistence and entrepreneurial spirits, I am certain that EO Arizona will continue to grow and thrive in the year to come.

Last year's theme was Share Your #EOAZlife, so I'd like to take this opportunity to share my EOAZ story.

My entrepreneurial journey began like many others. Working at my first post-grad job at a big advertising agency, I felt stifled by the corporate machine. I was bursting at the seams with creative ideas, but my ideas were never heard. These feelings lit a spark within me. After long days at the office, I began cold calling any and every business that would listen. With persistence, a few small projects turned into a full-time freelance workload, all while I continued to work at my corporate day job.

I was on top of the world...until I wasn't. While my freelance business flourished, my personal life crumbled. I had to deal with an unraveling marriage and a financial disaster. I was left without a car, without a home and saddled with the responsibility of cleaning up a financial mess made by someone I thought was trustworthy.

I had absolutely nothing left to lose—so I went for it. I quit my job. The next day, I went through my typical morning routine, walked into my living room and got to work. And I worked my tail off. I had never felt so driven and full of energy. With a clear vision and tireless ambition, business was soon booming. I realized that I couldn't handle the work alone. I had to make the leap from independent business owner to employer, without any experience being a leader.

Fast forward to 2010. The James Agency was five years old and we had recently moved into our second office space to accommodate our growing team. While I felt proud and grateful for the success I'd achieved, I struggled with the immense weight that came with it. A team of people depended on me for their livelihoods and the pressure was overwhelming. I felt like an island when it came to making business decisions and I was running on empty.

That's when Dave Looney and Kyle Bell both suggested that I join EOAZ. It was daunting at first. I wondered how I could possibly fit something else into my already over-booked schedule. Now, I am forever grateful that I joined. EO has been a game changer and a lifesaver.

Being surrounded by brilliant, successful entrepreneurs inspires and challenges me on a daily basis. Through Forum, I've gained my own personal board of directors and most trusted advisors. I've learned to be a better leader, mentor, businesswoman and friend. And I re-gained the spark that I'd lost along the way.

Today, I'm proud to be the CEO of a thriving business, an employer to 32 talented employees, a wife, a mother of two toddlers and president of EOAZ. I'm grateful for my journey and wouldn't change a thing.

I'm sure you can all relate to parts of my story, especially the feelings of intense energy and drive I felt when I started my business and when I joined EO. I'm sure you'll also agree that as time goes by, it's easy to lose sight of the excitement and energy that propelled you to succeed early on. It's easy to fall into a pattern and become caught up in the day-to-day responsibilities that come with running a business while trying to maintain a personal life. How do you regain that spark?

One of my mantras in business and in life is that, if I'm not feeling uncomfortable at least once a day, I'm not doing something right. As a business owner, it's important to push yourself outside of your comfort zone and always be open to new ideas and inspiration. It's a philosophy that I share with my team, and now I share it with you.

This year, I challenge you all to **Ignite Your Spark!**

During our 2017-2018 year, I encourage you to leave your comfort zone and do **ONE THING** different within EO. Make a pledge to your Chapter and to yourself that you will experience something new, no matter how far you need to step outside of your comfort zone. Whatever the change may be, one thing is certain: you will grow from it. You will become re-engaged, re-energized and re-invigorated. Your renewed energy will be contagious and spread throughout your Chapter, your business, your personal life and your community.



A handwritten signature in black ink that reads "V. James".

**Veronique James**  
EO Arizona President

# SAPs

# & ABOUT EO ARIZONA

Our Strategic Alliance Partners are valuable assets to the Entrepreneurs' Organization. When we join forces with reputable organizations that are in alignment with our mission, we are able to expand our programs and resources and create more opportunities for members to learn and grow. By raising awareness of the Entrepreneurs' Organization, we also facilitate chapter growth and expansion to new areas of the world.



## Our Vision

To build the world's most influential community of entrepreneurs.

## Our Mission

To engage leading entrepreneurs to learn and grow.

## Our Core Values

### Boldly Go

This is what we've done all our lives. It's what allows us to grow and take risks. It inspires us to never give up, celebrating failures as well as successes. It's an innate instinct born out of courage, creativity and eternal optimism.

### Thirst for Learning

Our most valuable asset is wisdom gained through our appetite for knowledge and the transformational experiences that we share with our peers. A thirst for learning leads to an open mind, and an open mind leads to greater opportunities.

### Make a Mark

We are not afraid of challenging conventions. We are in control of our own destiny, and with that comes great responsibilities: To build value. To make a difference. To leave a legacy. We are willing to put in the effort to transform any experience into a positive one for all.

### Trust and Respect

In business, as in life, integrity is everything. Within our organization, integrity goes deeper than just the game rules—it is our code of conduct. Confidence, respect and inclusiveness are imperatives. Non-judgment and non-solicitation are non-negotiable.

### Cool

Cool defines our approach, attitude and experiences. As we carve our own path, we are reinventing the experience of what it means to be an entrepreneur. We are vibrant and progressive. We commit to innovation. We commit to cool.



The following are the principles we adhere to as an organization and will guide all of our efforts.

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### 10 Principles

- 1** Peer-to-peer relationships, the fundamental value of EO, will continue to be a cornerstone of our organizational culture. The value delivered to members will exceed perceived and real member expectations in a direct relationship to chapter and global dues paid, and EO's allocation of resources will reflect the strategic intent to deliver member value through its products and services.
- 2** EO will always be, at its core, a peer-based learning organization focused on personalized experience gained from a range of offerings at the local, regional and global levels which allow for growth and development.
- 3** EO will serve the member through an experience, which honors and respects the totality of an entrepreneur's life to include family, business, community, health and wellness.
- 4** EO embraces diversity and will be a global organization, present in all societies where entrepreneurs live and work, which respects different cultures, leverages our regional strengths and reflects diversity in its governance and structure.
- 5** EO and its members will continuously innovate, research and develop new customized products and services and support those which will deliver enhanced value to its members and allow it to be a cutting-edge learning organization.
- 6** Governance is organized to balance the needs of local and regional considerations in conjunction with global in order to ensure the delivery of optimal value to all members.
- 7** Quality growth rather than growth alone will be a hallmark of our recruitment activities.
- 8** EO will establish and protect its brand in a way that solidifies its role as the most credible and respected entrepreneurial organization in the world, and EO will have a communication plan which reaches every member electronically and traditionally with depth, clarity and transparency.
- 9** EO will have the most professional and competent staff available in the market to serve the member needs of the organization.
- 10** At all levels, EO is a member-led organization that seeks to identify, engage and empower its leaders.



## MEMBER

## BENEFITS

### Forum

A unique communication model that provides unparalleled access to the wisdom of your peers during confidential monthly meetings, to discuss your service offerings in a topical manner and to enable you as a member to position yourself as the expert within your landscape.

### Events

EO Arizona's learning chair works a year in advance to curate a spectacular learning calendar for the term. This learning calendar enables members and SAPs to attend local events at exclusive venues, learning from keynote speakers, influential industry leaders and celebrity personalities alike. In addition to the robust local curriculum, EO hosts a wide variety of regional and global events from universities to specialized events for like-minded enthusiasts.

### MyEO

MyEO empowers members to connect with fellow EOers around the globe, either by hosting an experience or participating in one. MyEO is members hosting MyEO Events, forming MyEO Groups and creating personalized MyEO Forums geared toward their unique interests. It's about self-selection, increased global choice and members making a mark.

### Member Exchange

Member Exchange is driven through the Member Exchange website, which allows you to complete a skills profile, update your information regularly, submit and track your requests and respond to other members' requests.

### Health Network Foundation

Health Network Foundation, an EO member benefit, is a 501(c)(3) non-profit organization that has been networking presidents, CEOs and business leaders into the top hospitals since 1991.

### Mentorship

EO Mentorship is a chapter-based program, where members create structured, goal-driven relationships aimed at accelerating personal and professional growth. EO Arizona has one of the largest and most successful mentorship programs in the entire organization.

### Executive Education

EO is proud to offer members the opportunity to learn at a higher, more intense level through executive-education programming. Our programs strive to bring members to new levels of leadership, growth and success in their business, community and family lives. Offerings include The Entrepreneurial Masters Program (EMP), Key Executive Program (KEP), London Business School Growth Forum (LBS), EO@Wharton: Elevating Finance + Operations, and EO@IMD: Navigating Your Family Business.

### EO Partnership Referral Program

The Partnership Referral Program is an initiative to raise global awareness, grow the network and strengthen membership value through partnerships and strategic alliances.

# MEMBER

# BENEFITS

## EO Insignia

EO Insignia is a program exclusively for members with 7+ years of EO tenure. This program connects you with other long-term members like yourself who are looking for greater professional achievement and deeper personal realization.

## EO Quantum Leap

EO Quantum Leap is exclusively for members who have a business with US\$15+ million in annual revenue. This program connects you with other members who can understand the complexities of your business and the issues you face because they experience similar challenges.

## Leadership

Your local, regional and global boards all need members to step up and make a difference. Here are some of your local board benefits: GLC, \$500 towards any regional or global university, ride to holiday party, monthly meeting meals and experience. This is not a burden, it's an honor, and it's a benefit.

## EO PressPass

EO PressPass is an exclusive member benefit that helps EO members and their companies get recognition for free. Think of it as a matching service that connects entrepreneurs with business reporters who need sources for stories. When reporters contact us looking to speak to thought leaders and influencers in the business community, we pass those opportunities along to you, our members.

## EO Marketplace

Access exclusive deals from around the world with EO related businesses.

## Your Chapter Partners

Thank you to our Strategic Alliance Partners who are featured within this booklet. Please visit with them, engage them and make them feel welcome in our chapter. Without their support we couldn't thrive.



GET MORE

OUT OF EO



### Events

Create an event around your passion (a topic, culture, activity or experience) and invite EO members from around the region, country or world to join in your experience.

*Examples: MyEO Superbowl Experience, Family Camp Experience, Power of Powder-Business and Risk In the Mountains, Climb Mt. Kilimanjaro-Change Part of the World*

### Groups

Engage a new network of peers united to focus on business, passion or lifestyle by joining or creating a MyEO Group. Use existing social media platforms, and promote them in a central location, only visible to EO members.

*Examples: BadAss Cigar Club, Art Lovers Group, Web Property owners, Wrestlers in Business Network, MyEO Spousal Group, Dirtbike Group, Youth Exchange*

### Forum

Learn and share with members in a Forum environment focused around a particular industry or peer group.

*Examples: SheEO, Flow Forum, Franchise Owners, Saas International, Private Duty Home Care, Real Estate/Construction Forum*

### HOW TO GET INVOLVED:

- 1 Browse the existing MyEO opportunities and join one that matches your interest.
  - Visit the [MyEO website](#)
  - Join the [MyEO Facebook group](#)
  - Subscribe to the [MyEO newsletter](#)
- 2 If you don't find what you are looking for, become a MyEO Champion and create it yourself.

### Become a MyEO Champion in FIVE EASY STEPS:

- 1 Imagine the experience you want to share with EOers.
- 2 Define the format (Event, Forum, Group).
- 3 Create your initiative at [myeo.eonetwork.org](http://myeo.eonetwork.org).
- 4 Promote your initiative and apply the best practices available in the MyEO manuals, available for download at [EOaccess>Benefits>MyEO](#).
- 5 Contact the MyEO team for additional support.

#### Melissa DiGianfilippo

MyEO Chair

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**NEW**

**MEMBER**

## **APPLICATION PROCESS**

### **Discovery Call**

Membership chair schedules a one-hour discovery call with prospective member to qualify the candidate.

### **Document Submission**

A candidate that successfully passes the first step is prompted to submit:

- EO Arizona revenue verification form completed by CPA/accountant
- First page of most recent U.S. business tax return
- Copies of Articles of Incorporation
- Bio form via the EO Arizona website
- EO Global application with credit card information

### **Review Luncheon**

The candidate will be invited to attend a review luncheon hosted by the Membership Committee along with other candidates and participate in a group interview.

After the prospects have left the committee review lunch, committee members will score each prospect on a 60-point comprehensive score card.

### **Board Interview**

Candidates that score well during the committee review luncheon will be asked to attend a 15-minute interview with EO Arizona board members.

### **Chapter Review**

Bios of selected candidates from the board interview will be sent to the chapter at large, requesting feedback and/or conflicts from current EO Arizona members within four business days.

### **New Member Approval**

Qualified candidate's application will be formally approved by EO Arizona.

- New members announcement will be sent to the chapter at large.
- Link to EO Arizona website with their bio information under New Member Spotlight.
- New members will attend forum training with their fellow class members.
- New members will attend a new member happy hour celebration with the chapter at large for introductions.



**NEW**

**MEMBER**

## **CONFLICT RESOLUTION**

In the event a member contacts the membership chair with concerns about a new candidate within the requested time frame, the following steps will be taken:

### **Explain**

The current member must have a clear explanation of the direct acts committed by the potential member that would lead to integrity or ethical problems.

### **Verify**

The current member will need to provide objection either in person or via phone call to the membership chair with direct instances relating to the conflict. The membership chair will speak to the potential member to hear their position regarding the conflict.

### **Meet**

At the membership chair's discretion, the current member will meet with a membership conflict committee to discuss the issues involved. Forum confidentiality will be observed and applied. The membership conflict committee will be a group formed separate from the review committee.

### **Concern Validation**

The concern must be validated by the following objection criteria:

- Cannot be based on the current and potential member's indirect or direct competitive landscape
- Cannot be based on second-hand knowledge—the conflict must be a direct experience of the current member
- Objection must be factually supported by current member
- Concern can be based on the potential member's business activity that may expose the current member to fraudulent behavior
- Preference of current member will be taken over potential member if the potential member will create a toxic environment
- If two or more members have raised concern about a potential member, they must have individual substantiated explanations—without independent positions from multiple members, the conflict returns to the primary member with concerns

The committee will consider objections presented during the concern validation process. A majority vote will be taken by the members of the committee in attendance of the review.



2016-2017

## REPORT SUMMARY

### Membership

**14**

NEW  
MEMBERS

**13**

ATTRITION

**166**

TOTAL

### SAPs

**2**  
NEW

### Accelerators Accepted

**3**  
ZACK BARNA  
MARK DISALVO  
JEREMY ELLENS

### Membership Dues

**\$351,900**  
COLLECTED

### Partner Dollars

**\$149,700**  
COLLECTED

### Member Businesses Sold

**2**  
CORWIN SMITH  
MATT BLANTON

### Made the Inc. 5000

**12** MEMBERS

### Forums

**16**

FORUMS

**2** KEY EXECUTIVE  
FORUMS

**2** SPOUSAL (SLP)  
FORUMS

### Events

**\$250k**  
SPENT ON EVENTS

**14** LEARNING  
EVENTS

**13** SOCIAL  
EVENTS

**2017****EVENTS**

Date	Event
Tuesday 8.22.17	KICK OFF: Leaving a Legacy Speaker: Jeff Hoffman
Wednesday 9.6.17	Building Social Communities Speaker: Rick Lax
Monday 9.25.17	New Member Happy Hour
Wednesday 9.27.17	How to 10x Your Business Speaker: Clate Mask
Tuesday 10.3.17	True Confessions: Stories from EO/YPO
Tuesday 10.10.17	It's Just Lunch
Thursday 10.19.17	Overcoming Obstacles Through Music & Creativity Speaker: Jim Brickman
Tuesday 10.24.17	Forum Mashup
Thursday 11.2.17	How to Apply Buddhist Teachings to Run Your Business Speaker: Noah Rasheta
Tuesday 11.7.17	Lunch & Learn
Tuesday 11.14.17	Maximize Your Travel with Points Speaker: Brian Kelly
Saturday 11.25.17 (Tentative Event)	SOL Devil's Tailgate Party (UA vs ASU)
Saturday 12.9.17	Holiday Party
Tuesday 12.12.17	50 Full Ironman Courses in 50 Days in 50 States Speaker: James Lawrence

### ATTENDANCE POLICY

Members plus one guest can attend events at no charge. Additional guests are \$50 each.

Our event venues require attendance numbers to ensure that appropriate seating and food/beverage needs are met. Because of this, we kindly ask you that you RSVP for events that you plan on attending, and if you have to cancel, that you do so at least 48 hours in advance. We continue to reserve the right to charge a fee for late cancellation and no-shows.

Thank you for your cooperation and understanding as we strive to provide successful and enjoyable events for all.

**2018****EVENTS**

Date	Event
Saturday-Sunday 1.13.18-1.21.18	Barrett Jackson
Tuesday 1.16.18	Poetry for Life Speaker: In-Q
Monday 1.22.18	New Member Happy Hour
Wednesday 1.31.18	How to Keep Your Company & Life Secure Speaker: Ori Eisen
Wednesday-Saturday 1.31.18-2.3.18	Waste Management Phoenix Open Skybox 18—EOAZ
Thursday 2.15.18	Overcoming Diversity Speaker: Gerald Molen
Saturday 2.24.18	Dine Around
Wednesday 2.28.18	Don't Be A Leader, Be THE Leader Speaker: Ryan Avery
Tuesday 3.6.18	It's Just Lunch
Tuesday 3.20.18	Forum Mashup
Wednesday 3.28.18	Building a Family Plan Speaker: Gordie Bufton
Wednesday 4.4.18	Musings of a Mad Man: Creative Brainstorming Speaker: Derek Neighbors
Saturday 4.14.18	Family Event
Monday 4.23.18	New Member Happy Hour
Tuesday 4.24.18	The Power of the Mind Speaker: John Moyer
Tuesday 5.8.18	Lunch & Learn
Thursday 5.10.18 (Tentative Event)	AFS Day
Monday 5.14.18	Ben Brooks Mentorship Award
Friday-Sunday 6.1.18-6.3.18	Chapter Retreat   San Diego, CA

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## CONTACT

## INFORMATION

### EOARIZONA.ORG

- Click events to see and register for local EO events
- Another resource to share with prospective members

### TWITTER.COM/EOARIZONA

- Follow our Twitter profile
- Tag it in your pictures

### FACEBOOK.COM/GROUPS/873376276087552/

- Private Facebook group—members only
- Request access
- Connect with other members; use this group as a resource
- Tag it in your pictures

### INSTAGRAM.COM/EOARIZONA

- Follow our Instagram profile
- Tag it in your pictures

### FACEBOOK.COM/EOARIZONA

- Public Facebook page
- Like this page
- Tag it in your pictures

### CONTACTS:

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EONetwork.org: Global

EOArizona.org: Local