



Leadership Collaborative Communications Web Meeting

April 6, 2018



Agenda

- Introductions
 - To each other
 - To the Leadership Collaborative
 - XPX platform
 - Start of KPI system
- Consultation: email list cleanup
- The XPX Brand
 - Background
 - How we're talking to prospective Chapters
- Where to now

Introductions

Attendees

Mila Kachovska	Chicago	Communications Co-Chair
Raymond Palys	Chicago	President
Laura Yunger	Chicago	Communications Co-Chair
Abby Bensimhon	DC Metro	Membership Chair, President Elect
Mary Adams	Global	Executive Director
Daniel Guglielmo	Global	Co-Founder
Rudi Scheiber-Kurtz	New England	President
John Dowd	New Jersey	President
Joseph Pucci	New York	President
Steve Economou	Philadelphia	President

(missing Maryland, Hartford, Fairfield, San Antonio)





BUSINESS
VALUE
GROWTH

[Calendar](#)[All Chapter Leaders](#)[XPX Chapter Manual](#)[Communications](#)[Events](#)[Finance and Metrics](#)[Membership](#)[Presidents](#)[Sponsorship](#)[Video Guides](#)

LEADERSHIP COLLABORATIVE - COMMUNICATIONS

This is a shared resource for all XPX Chapters. We try to include helpful resources and information. If there is content you have any recommended resources, [please let us know!](#)

to your Chapter or

COMMITTEE LEADERS



Hector Fietze

San Antonio



Doug Smith

DC Metro-Individual



Dina Wasmer

Maryland-Individual

exchange.com/LC

CHAPTER DOCS

[XPX Style Guide](#)

[Hinge/XPX Study on Referrals](#)

CHAPTER MANUAL

Click here for the most recent [XPX Chapter Manual](#) and the related forum for discussions, suggestions and questions.

CHAPTER COMMUNICATIONS



Our platform

- Website – on Wild Apricot platform implemented 9/2015
 - Chapter mini-sites
 - Owners' Academy posts and videos
 - Monthly newsletter to 7,000 advisors
- Meetings
 - Email invitations
 - At meetings: introductions, programming
- LinkedIn Group
 - 757 members

Chapter	Chicago				
Column Labels					
Values	31-Dec-16	30-Mar-17	30-Jun-17	30-Sep-17	31-Dec-17
Web page views	1,259	1,704	1,949	1,648	1,283
Mailing List	575	600	640	649	662
Members	140	164	194	85	63
Sponsors	-	-	-	-	-
Events	3	4	7	4	6
Event attendees	181	166	200	124	130
Average attendees	60	42	29	31	22
Email open rate	29.7%	28.0%	24.2%	22.6%	21.5%
Email click rate	5.1%	2.8%	2.1%	1.2%	1.4%

Chapter	Maryland				
Column Labels					
Values	31-Dec-16	30-Mar-17	30-Jun-17	30-Sep-17	31-Dec-17
Web page views	871	1,431	843	1,078	1,229
Mailing List	536	567	587	607	645
Members	70	63	68	71	75
Sponsors	17	12	13	13	14
Events	5	4	3	3	4
Event attendees	142	190	129	59	155
Average attendees	28	48	43	20	39
Email open rate	28.4%	27.7%	29.0%	27.6%	25.5%
Email click rate	2.5%	2.9%	2.6%	3.0%	3.1%

Chapter	Philadelphia				
Column Labels					
Values	31-Dec-16	30-Mar-17	30-Jun-17	30-Sep-17	31-Dec-17
Web page views	374	426	361	362	653
Mailing List	395	409	414	417	457
Members	29	30	29	30	31
Sponsors	2	2	2	1	1
Events	3	2	3	2	6
Event attendees	48	51	63	26	102
Average attendees	16	26	21	13	17
Email open rate	20.1%	18.5%	17.8%	20.9%	20.7%
Email click rate	1.2%	1.4%	1.0%	2.4%	1.1%

Chapter	DC Metro				
Column Labels					
Values	31-Dec-16	30-Mar-17	30-Jun-17	30-Sep-17	31-Dec-17
Web page views	663	788	788	829	744
Mailing List	474	494	527	538	561
Members	55	51	59	63	62
Sponsors	6	6	5	5	5
Events	4	3	5	2	3
Event attendees	121	95	211	90	123
Average attendees	30	32	42	45	41
Email open rate	24.2%	24.6%	23.9%	24.6%	25.3%
Email click rate	3.7%	2.5%	1.7%	2.3%	3.0%

Chapter	New England				
Column Labels					
Values	31-Dec-16	30-Mar-17	30-Jun-17	30-Sep-17	31-Dec-17
Web page views	3,055	4,141	3,097	2,112	1,682
Mailing List	1,748	1,770	1,822	1,861	1,886
Members	78	81	80	83	79
Sponsors	11	9	9	12	11
Events	4	3	3	2	3
Event attendees	270	174	191	113	135
Average attendees	68	58	64	57	45
Email open rate	22.8%	21.4%	22.2%	21.7%	20.1%
Email click rate	1.3%	1.1%	1.2%	2.2%	0.8%

This is from the Metrics Pivot Table in the Leadership Collaborative Finance and Metrics page

Chapter	San Antonio				
Column Labels					
Values	30-Jun-17	30-Sep-17	31-Dec-17		
Web page views	268	756	649		
Mailing List	12	545	559		
Members	12	30	79		
Sponsors	-	-	-		
Events	-	1	1		
Event attendees	-	81	48		
Average attendees	#DIV/0!	81	48		
Email open rate	0.0%	0.0%	17.5%		
Email click rate	0.0%	0.0%	2.5%		

Chapter	Tri-State combined-Fairfield, Hartford, NY, NJ				
	Column Labels				
Values	31-Dec-16	30-Mar-17	30-Jun-17	30-Sep-17	31-Dec-17
Web page views	1,495	1,813	2,329	1,793	2,817
Mailing List	1,286	1,545	1,648	1,790	1,037
Members	76	95	115	131	157
Sponsors	11	11	11	13	22
Events	6	7	12	7	13
Event attendees	169	168	293	120	442



Consultation

Old emails – makes sense to archive?

Enabled emails	7099
+ On a regional list	6583 (rest on newsletter only)
+ Created before 9/30/15	2984 (when we moved to WA)
+ Last updated before 12/31/15	1801
+ Have attended 0 events	1787 (only 14 attended an event)
(1787/6583= 27%)	

(we don't have the ability to download open data in this context)

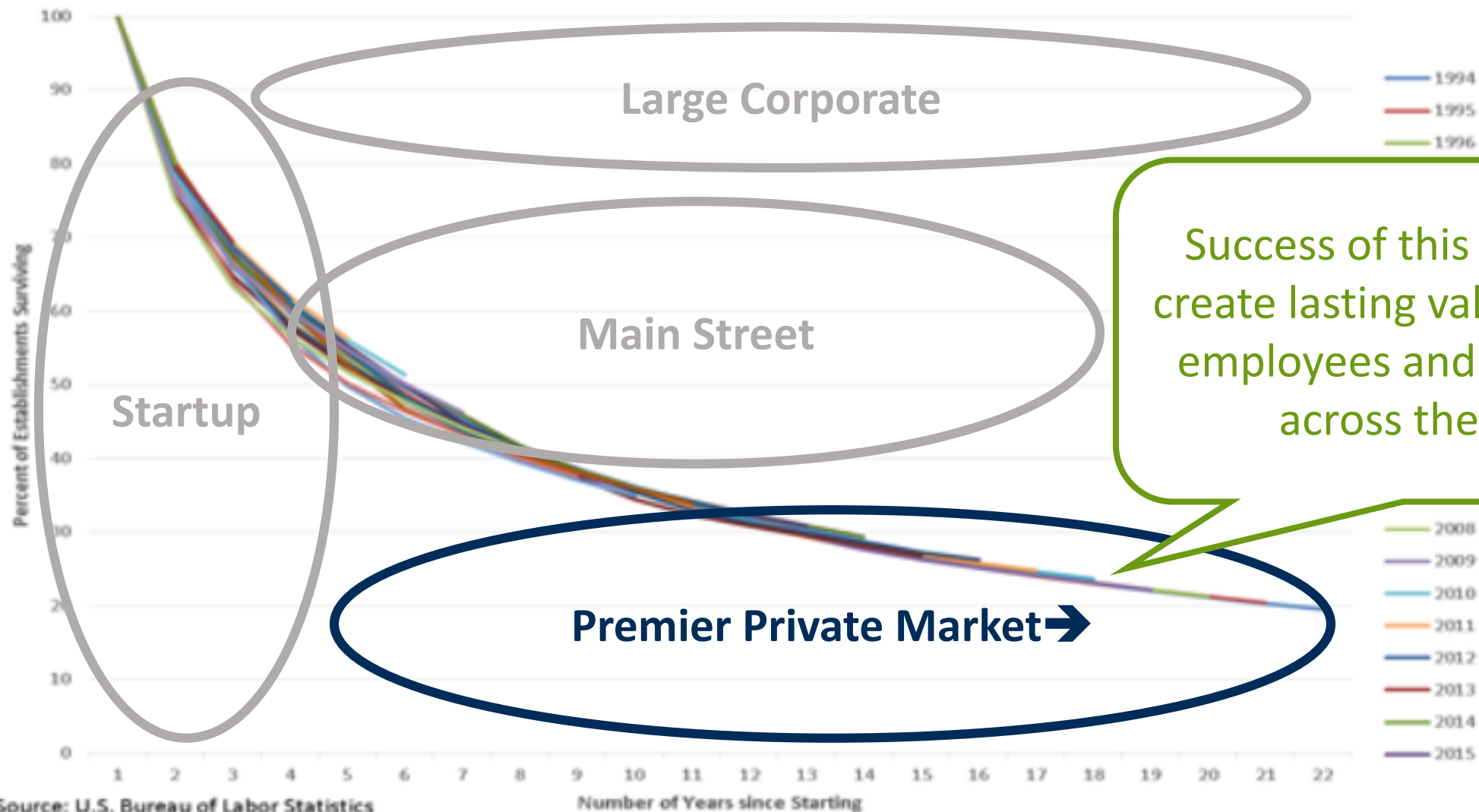
After this meeting, I'll send you the spreadsheet of the 1787 names

The XPX Brand

Over 10 years, our community has evolved

- Exit planning is still at the core of our purpose in the sense that our members work to help private companies and their owners:
 - Build value in the company
 - Transfer value (benefits the owners, employees, communities)
 - Optimize life and legacy of the owners
- However, it's more than that:
 - Our Chapters are comprised of 12 different professions
 - All have a long-term value orientation
 - Very few actually do formal exit planning
 - We get a lot of feedback that “exit planning exchange” is limiting and confusing
- Here's what we're saying to new Chapters....

Chart 3. Survival rates of establishments, by year started and number of years since starting, 1994-2015



Success of this market helps create lasting value for owners, employees and communities across the country

The characteristics of this market

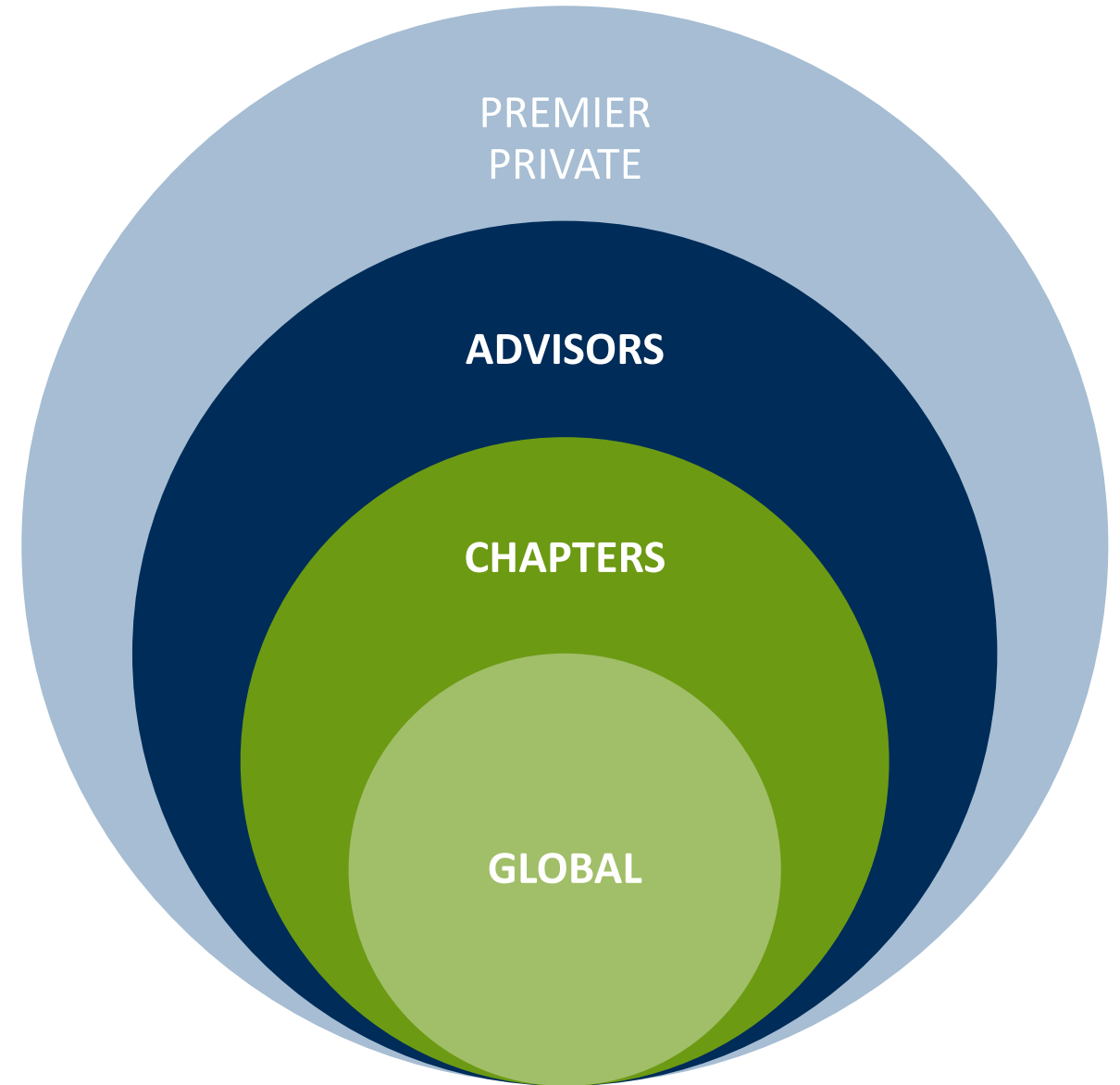
- Past the startup phase, survived more than 5 years
- Built a sustainable company, often still operating with original owners/managers
- Have a strong enough foundation that the business model and value could be successfully transferred to new owners/managers
- Owners see this opportunity and have the desire to make it happen
- These companies are interested in investing time and money in building transferable, realizable value

The importance of this market

According to the National Center for the Middle Market (NCMM) in past five years the market:

- *Revenue increased nearly twice as fast as GDP*
 - *Growth generally outpaced that of the S&P 500, often by huge margins (6.9% to 4.4% in 4Q 2016)*
 - *Three out of five net new private-sector jobs*
 - *Produced jobs 1.5-2.0 X faster than either big or small business*
- ➔ This market is important to local, state and the national economies

- **XPX** supports expert advisors in the premier private market
- We have **425 XPX members** from 12 professions with diverse expertise
- Members are served by independent Chapters holding meetings in **10 markets**
- XPX Global provides **association management, strategy** and branding to Chapters



Member profile

- **Who are the XPX Experts?**

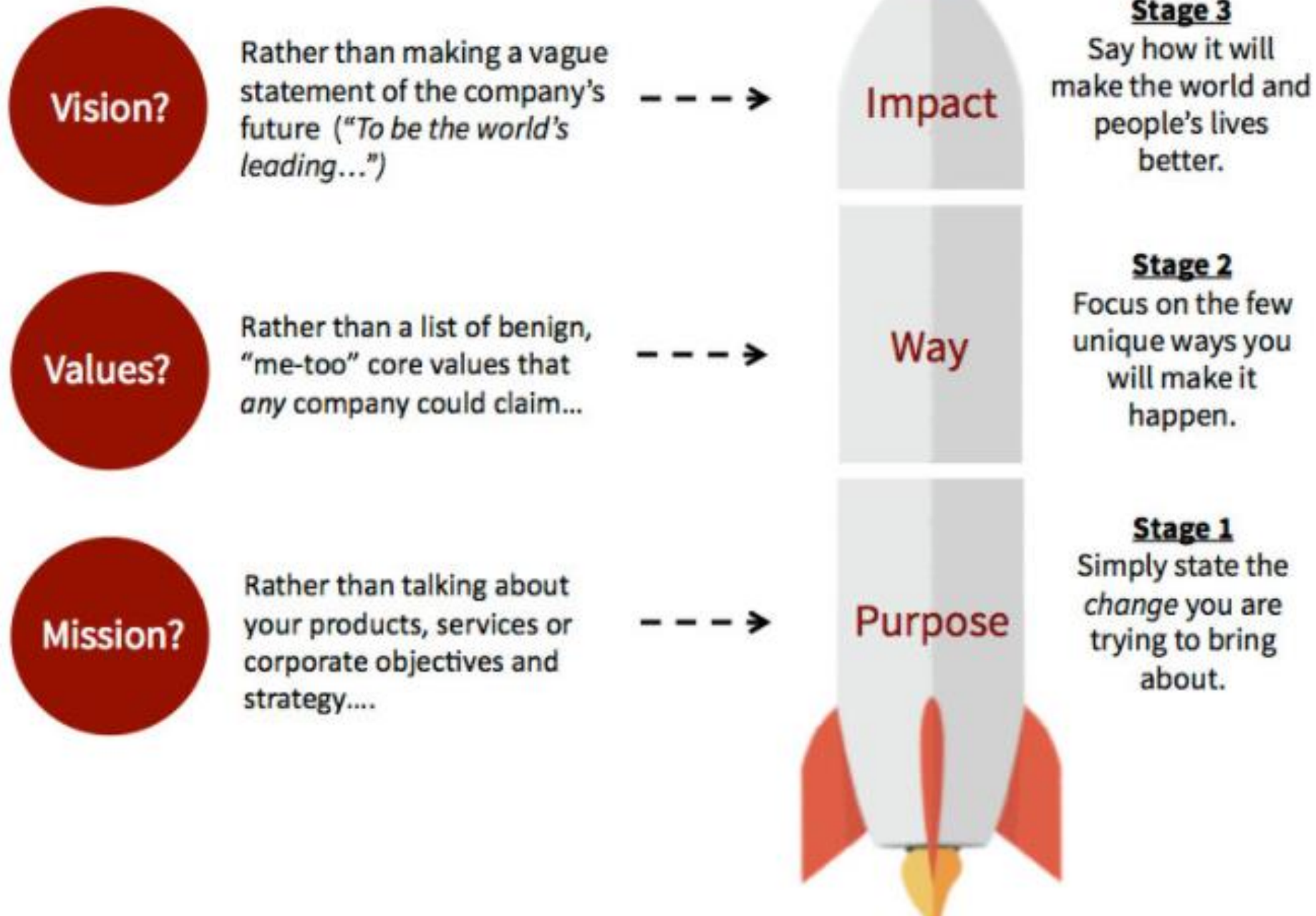
- 12 professions: Accountant, Attorney, Banker, Coach, Consultant, Insurance, Investor, M&A Intermediary, Non-Profit, Valuation, Virtual Manager, Wealth Manager
- 70+ areas of expertise
- Experience in all major industry segments

- **Who is the ideal member?**

- 10+ years of experience (5 for young professionals)
- Works directly with owner and/or senior managers
- Deep expertise in one or more areas
- Work is consistent with the XPX Advisor Code



Where to now?



Communication goals for this year

- Finalize MVV/Purpose, Way, Impact at Annual LC Meeting
- Return to this committee to talk about how to communicate all this to our members and the market
- Part of this will be website refresh:
 - New URL (exitplanningexchange.com → xpx.us or xpxus.com)
 - New messaging
 - Freshen look
- What else? (process, content, all thoughts welcome!)