



Leadership Guidelines

...connect, share, learn...



Regional Chapter Leadership

Your Guide to a Successful Chapter

Why Regional Chapters

Regional Chapters are an integral part of the AX User Group and provide AX Users the option to connect, learn, and share with other Dynamics AX Users in their geographic area. This face-to-face sharing of Dynamics AX knowledge, analyzing best practices through presentations, interactive discussions and networking is invaluable in helping you optimize your business's effectiveness.

Within this document, you will learn how to run an effective Regional Chapter and what AXUG offers as services. Our Regional Chapter Coordinator, Mary Berens, is here to support all aspects of planning and executing meetings, enabling the leadership team to focus on strategic oversight and meeting facilitation.

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Mary Berens is the AXUG Regional Chapter Coordinator; she can be reached at Mary@AXUG.com or by calling 877-324-8880 x1495.



Getting Started

Who can lead a Regional Chapter?

AXUG allows Microsoft Dynamics AX Users to lead and co-lead our Regional Chapters. The leaders must be a premium user member and must be willing to commit to lead (host and facilitate) their local meetings. AXUG partner members are not allowed to hold a leadership position in the chapter; they may, however, help deliver content at meetings and assist the chapter leadership when requested. The leaders should have a spirit of volunteerism as well as a passion to grow their Regional Chapter membership and help other AX users succeed. The leaders should also have effective communication and organization skills. AXUG is in place to support the Regional Chapter Leadership; duties such as content, logistical planning, registration, promotion, and catering can be the responsibility of AXUG. User Group Leadership should not be a major burden to the leaders personally or professionally.

Is a Regional Chapter needed in my area?

AXUG frequently receives inquiries from Users and Partners about chapters available in their areas. Often times, the inquirer is already an AXUG member and has either been attending an established Regional Chapter. However, some members travel two, three and even four hours to attend these meetings (some members drive to another state!). In other cases, we have new members come on board eager and enthusiastic to launch a Regional Chapter in their area.

If you are interested in launching a new chapter, first you must determine if there are AXUG Members and AX Users in your area and who is willing to assist in leading the chapter. Here's how to find this information:

- If you are a AXUG Premium User Member
 - As a Premium Member, you have access to our AXUG Membership Directories on both AXUG Collaborate and our website. We encourage you to utilize these tools and perform searches to see how many AX users are currently in your area and belong to AXUG. These searches reveal those members who were willing to share their information.
- If you are a AXUG Partner/ISV Member
 - If you have an active and engaged customer, who you think would excel as a Regional Chapter leader; we encourage you to introduce them to us. We can work with that individual to launch a chapter.
 - Due to our privacy policy, AXUG does not give out member information and to ensure a safe user group environment AXUG prohibits our Partner Members from accessing our membership directory.

Contact regionalchapters@axug.com , to ask if there is a high concentration of AXUG User Members in the specific area you're interested in.

What are the Benefits of a Regional Chapter?

- *Networking:* Networking is invaluable for Users to get to know others in their area while forming a network of valuable relationships.
- *Product Knowledge:* Increasing your product knowledge of Dynamics AX, will improve your product satisfaction.





- *ROI*: Optimizing value of your Microsoft Dynamics AX investment for individuals and companies relying on AX to operate their business, in order to maximize their efficiency and success.
- *Helping Others*: Increasing User readiness for upgrades and additional services.
- *Awareness*: A safe, non-threatening environment to learn about companion products, which help meet your specific needs and grow the value of AX within your company.

Planning, is it all on the Leader?

The easy answer is no; however, each AXUG Regional Chapter is unique. Some meet monthly, some quarterly, others maybe twice a year. Some chapters are well established, while others tend to go up and down. In any case, regardless of chapter size, history, or location, ***the role of the chapter leader, from a planning perspective, is one that is heavily supplemented by tools provided by AXUG, along with support from the AXUG staff.*** You, as chapter leader, should never feel like the planning of future meetings is solely your responsibility.

Each quarter new materials will be added to the "AXUG Toolbox", within our AXUG Regional Chapter Leader Collaborate Community, with Powerpoint Decks and Recordings, where appropriate.

The AXUG staff and tools referenced in this document are in place to make your role as leader one that is as simple as possible. From a planning perspective, if you become busy and don't have time to effectively plan an upcoming meeting, no worries; work with the AXUG Regional Chapter Coordinator and choose content from the meeting materials, or perhaps include some of the virtual content that other chapters may be accessing on the same day as your chapter meeting. You should never be short of topics for presentations at meetings if you utilize the program highlighted in this guide. You also should not worry about running out of good content for future meetings and thus not feel comfortable scheduling meetings at least once a quarter. The meeting materials and other information provided by the AXUG staff should make it easy to schedule and execute at least four meetings a year for your chapter.

AXUG Regional Chapter Leadership

Advisory Board

The Regional Chapter Advisory Board consists of local chapter leaders, who exemplify excellent communication, innovative thinking and a commitment to working together to serve the greater good of Regional Chapters globally.

The purpose of the Advisory Board is to enhance the overall AXUG Regional Chapter process for leaders and attendees. The goal of the Advisory Board is to always be enhancing Regional Chapters, including preparations, topics, communication and marketing, management systems, launching new chapters and more.

Our AXUG Regional Chapter Advisory Board is currently looking for additional volunteers to serve a minimum annual term. Please contact regionalchapters@axug.com if you are interested in serving on this important board. Members are announced annually at the AXUG Summit conference each fall.



Local Chapter Leadership Roles

Persons leading Regional Chapters must be Microsoft Dynamics AX Users. The roles defined below, provide guidelines for what common duties are necessary for a smooth running chapter:

Chair Person

- Oversees delivery of and facilitates Regional Chapter Meetings
- Serves as a point person to AXUG and represents the chapter
- Communicates final agenda, location, schedule and other items needed to execute the meetings
- Helps find and selects subject matter experts who can help present
- Oversees survey/feedback/continuous improvement of their chapter
- Provides feedback to AXUG on topics, presenters, member participation
- Participates in AXUG Regional Chapter Leadership calls and training when possible

Vice Chair for Membership (optional but highly encouraged)

- Oversees chapter membership roster for accuracy and completeness
- Welcomes attendees, updates attendance reports and submits to AXUG
- Generates creative ideas to drive User and Partner attendance
- Participates in AXUG Regional Chapter Leadership calls and training when possible

Vice Chair for Communication (optional but highly encouraged)

- Oversees communication to members at a local level via AXUG Collaborate, social media, etc.
- Assists in driving attendance by utilizing the AXUG membership directory, partners, ISVs
- Document activities of meetings, presenters and topics and record Chapter history
- Submits summary of meeting for AXUG Magazine (photos are great)
- Participates in AXUG Regional Chapter Leadership calls and training when possible

Planning a Meeting

Online Planning Tool

Please use the NEW online [AXUG Regional Chapter Planning Tool](#) to communicate Local Meeting Details to the AXUG staff.

If there are questions about the information provided, the leader will be contacted directly by the Regional Chapter Manager, otherwise if all required information is provided the meeting will be posted on the AXUG website within 48 hours. This form requests the following logistical information regarding the meeting:

Meeting Details

- **DATE & TIME:** Annually, leaders will select four (quarterly) dates. It is encouraged to have each subsequent meeting date announced at the end of a chapter meeting.



The average length of a meeting is 3.5 hours; AXUG encourages leaders to hold a minimum of a 2-hour meeting so that all attendees find value in taking work off to attend. Suggested meeting times are: 8:30-12:00pm, 1:00-4:30, or 11-2:30pm if a sponsor is providing lunch.



AXUG suggests meetings to be held 6 times per year (4-quarterly and 2-conference – AXUG Summit and Convergence).

- **LOCATION:** There are two primary options available – a user site or a local Microsoft office. We encourage meetings be held at a user site, which increases the networking opportunity. The leader is responsible for finding a user-site host for the meeting. Be creative – we have had user group meetings held at the Miami Marlins stadium, on a boat cruise, and a performing arts center.

If the leader wants the meeting held at a local Microsoft office, they need to inform the Regional Chapter Coordinator, approx. 60 days in advance, in order to reserve a room. The Regional Chapter Coordinator will confirm details and room reservation with Microsoft.

Meetings generally are not allowed to be held at a Partner or ISV office location. There are occasional exceptions to this rule, based on local meeting location availability.

We suggest all meeting locations have the capacity for a minimum of 20 guests and the following equipment available:

- Laptop (leaders or presenters bring their own)
 - Projector & Screen
 - Speaker system, including telephone, if hosting a large group
 - Flip Chart & markers, if needed
 - Welcome Table for Check-In
- **PARTNER/ISV SPONSORS:** Leaders are responsible for coordinating with the AXUG Staff when a Partner or ISV sponsors a meeting. The opportunity to present and lead portions of meetings will be circulated among active Premium Partner Members as much as possible. Partners who have Basic Membership (free) are allowed to present one time each year. When sponsoring a meeting, the sponsor receives 1 hour to present their solution in an educational session (not a sales pitch). Partner Companies (VAR/ISV) willing to sponsor local meetings must be AXUG members with a signed [Code of Conduct](#).

It is encouraged that Partner attendees be personnel with deep product or business knowledge and not those focused on sales and marketing. Partners do sign a Code of Conduct with their membership, meetings are meant to help the community, not as a sales or marketing activity. Please notify AXUG if you find Partners crossing the line. Sponsoring VARs and ISVs will be encouraged to help communicate meeting dates and chapter messages to their Users. There is a minimum \$500 sponsorship fee to sponsor a meeting which is adjusted to cover anticipated expenses for meetings with a larger audience.



- **AGENDA:** A sample morning agenda:

8:30 – 9:00	Registration and Networking
9:00 – 9:20	Chapter Business, AXUG News & Events
9:20 – 10:00	Member Showcase (Customer Success Story, Tips & Tricks, Best Practices)
10:00 – 10:15	Break
10:15 – 11:00	Discussions (Roundtable, Open Forum Q & A, "Ask the Expert" panel)
11:00 – 12:00	Educational Presentation/Demo (ISV Solution, Sponsor Presentation, or Microsoft Presentation)

* *Chapters are encouraged to select a lunch destination for members to continue social networking following the formal agenda items. (The costs for lunch are the responsibility of the individual) The agenda is flexible and can be modified by the leader to appropriately appeal to their audience.*

- **CATERING:** The Regional Chapter Manager will order catering for the meeting, if requested during the planning process. Catering includes beverages and a light snack, unless the meeting is sponsored and held over the lunch hour. Leaders are also encouraged to have an unofficial, pay-your-own "meet-up" for lunch/drinks following the conclusion of a meeting.
- **REGISTRATION:** All attendees (must be an AXUG member) register via our website registration. Registration is simple and then we can include them with future invites, not to mention all of the other AXUG benefits.

AXUG Basic Members pay a nominal \$20 fee during the online registration process; it is a Premium Member benefit to attend meetings at no charge (that's everyone within a Premium Member organization!). Refunds will not be given to those unable to attend. Leaders should not accept registration monies on-site. Leaders will provide a list of those people who walk-in without pre-registering and the AXUG staff will communicate any fees due by the individuals who attend the local meeting. *AXUG does not charge attendees for a new Chapter's first kick-off meeting.*

Attendance information will be submitted to local leaders approximately 2 weeks prior to the meeting and final sign-up sheets will be emailed approximately 3 days prior to the meeting. Please print the sign-up sheets for attendees to mark if they attended; this sign-up sheet should be submitted to the Regional Chapter Manager following the meeting and kept in confidence.

Marketing & Communication Strategy

- **AXUG WEBSITE:** Once all required information has been submitted to the Regional Chapter Manager, the meeting will be posted online and open for registration. It is the leaders' responsibility to ensure accuracy of all information, including their own registration for the meeting.



- **EMAIL CAMPAIGN:**

Every Sunday	Weekly event blast email sent to all members
4 Weeks Out	Save the date email sent to Chapter's area members
2 Weeks Out	Reminder email sent to Chapter's area members
2 Days Out	Reminder email sent to members who are registered

- **AXUG COLLABORATE:** Each Regional Chapter has its own Community within AXUG Collaborate. When a meeting is posted online, similar information is also posted within that chapter's Collaborate community to notify members of the upcoming meeting and for members to engage with each other. It is the responsibility of the Vice Chair of Communication to invite members to your chapter's community.
- **MICROSOFT DYNAMICS AX BLOG:** The meeting information will be linked to from the Microsoft Dynamics AX calendar, <https://community.dynamics.com/ax/c/2.aspx> , a blog with thousands of daily visitors. This has become a great awareness getter for new users to know of your meetings.
- **TWITTER:** Approximately two weeks prior to the meeting, AXUG will send tweets inviting Users and Members to attend the meeting.
- **ISVs/Partners:** We encourage the leaders to work with local Partners and ISVs to drive traffic and increase chapter attendance.

Helpful Resources

- **Quarterly All-Leader Meeting:** Leaders are invited to attend a 1-hour webinar where the AXUG Program Director and Regional Chapter Manager provide an overview of information about best practices and how chapters performed during the previous quarter and what to expect in the subsequent quarter.
- **Private Collaborate Site for RC Leaders:** In addition to the quarterly RC Leader meetings, a private AXUG Collaborate site has been created for RC leaders to share information amongst themselves. Tips and meeting success stories and topics can be shared on this site, and should provide another valuable resource to help you plan future chapter meetings.
- **Meeting Materials**, the AXUG "Toolbox"
This tool, offered quarterly, provides leaders with materials that are designed to assist in producing a successful meeting. Materials include:
 - Suggested Agenda
 - AXUG Presentation Deck - updated each quarter
 - Presentation Slide Decks & Recordings - miscellaneous topics
 - Miscellaneous Tools: Ice Breaker Suggestions, Evaluations, Sample Introduction Letter



AXUG posts all materials to the [Collaborate Regional Chapter Leader Community](#) for easy access. If you don't have access to this **private** AXUG Collaborate Regional Chapter Leader Community, please email regionalchapters@axug.com. Each quarter the AXUG Staff will add additional content which may be used to build your local agendas.

- **Presentations Already Available!** We are offering a variety of topics this quarter. Below outlines topics along with information on recordings for the presenter to watch, which helps them prepare for local presentations.

Availability	Topic	Description	Webinar/ Recording
Available	Quarterly Meeting Template	This is your welcome deck to be personalized with your meeting information.	
Available Mandatory for 2013 Q3 Meetings	AXUG Summit Highlights	We encourage you to share highlights of the upcoming conference in Tampa.	There is a YouTube video as part of this package.
Available	Introduction to AXUG Collaborate	This deck is available to showcase the benefits of our communication portal. If you wish to have AXUG staff present this via webinar, please reach out to RegionalChapter@AXUG.com to coordinate.	View demo walkthrough. (This is only a FYI. You should do the demo live.)

This list will continue to grow in the upcoming months, providing a simple way to help you plan content for your chapter meetings. Many leaders find the choosing of topics for future meetings to be the toughest part of being a chapter leader, which should not be the case. These presentations and other 'meeting materials' are available to make your job as a leader as easy as possible, and in some cases somewhat repeatable meeting to meeting.

- **AXUG Member Showcase/Customer Success Story.** This is a great way to have a user present what they do with Dynamics AX. The chapters who incorporated this have loved it. It's one way to better understand who's in the room and how you can help each other learn. (see page 11 for more details) A PowerPoint template is available to be populated which make the delivery of these sessions very easy for users. Many chapters rotate showcases amongst chapter members each meeting and find answering the questions on the template makes prep time for these sessions short and sweet!



- **AXUG Collaborate:** This is a great place to find presenters and members in your area who may not yet be attending meetings. Regional Chapter Leaders are added to the *private* Regional Chapter Leader community on Collaborate. Reach out to the community for support – everyone is helpful!



All AXUG Members have access to AXUG Collaborate, the exclusive members-only online community. *AXUG Collaborate* is your key to getting and staying connected, learning about Microsoft Dynamics AX, and exchanging expertise with the Dynamics AX community. Use it to gain access to your AXUG benefits anytime, anywhere. *AXUG Collaborate* allows you to connect with other Dynamics AX users who think, work and use Dynamics AX like you. Get networked with others from your area, in a similar role, in the same industry, in organizations of a similar size, and much more. You can also use the discussion boards to ask and answer Dynamics AX questions, and join your Regional Chapter to stay in tune with what's happening locally.

Get started at <http://community.AXUG.com>.

- **Webinar Recordings:** AXUG offers our Premium members recordings of webinars along with all PowerPoint decks. Consider using these for a meeting when the group wants other topics. They are ready to go! Simply look at past meetings or the [Content Library](#) for what we have today.

Regional Chapter Best Practices

- Chapter meetings are best held at a neutral location which may include a member's facility. This gives a chance for other members to see the site and understand each other's business better. Tours are great, particularly if in an interesting manufacturing or distribution setting. Microsoft offices are great gathering places as well. Usually, Microsoft offices are well equipped to handle meetings.
- Leaders: Forward the AXUG Save the Date email to your contact list with a personal note to invite your network to the upcoming meeting.
- Driving Attendance: Leaders should always be looking for ways to find more users and AXUG members to attend meetings. Strategies include, but are not limited to:
 - AXUG membership directory
 - AXUG Collaborate Regional Chapter Community
 - Attendee Call Downs: Call contacts that you already have, including members attending your chapter and asking for referrals. This will also give you a chance to personally connect with members attending your meetings, making them feel welcomed and a valued part of your Regional Chapter.
 - Twitter



- Ask your partners and ISVs for help on marketing the event. Most partners have hundreds of users they can contact. They can simply forward your invite and add a personal note.
 - Ask users to bring other users
 - **All meetings need to be set at least 45 days in advance** to allow for the best promotion and attendance expectations.
- Roundtable discussions between members seem to be the most favored agenda item. This gives the opportunity for members to learn from the experience of each other. A brief introductory presentation, case study, or testimonial helps to “prime the pump” of discussion. An effective question to launch the discussion is, “What is keeping you up at night?”
 - Once a year, have a fun event like attending a professional ball game, winery or something where you can get to know each other in a less formal setting. Hold an educational session before or after.
 - Vice Chair of Communications: AXUG recommends having a chapter log, a book that includes information such as: meeting invites, copy of attendance, member listing, leadership listing with contacts, notes from meetings and any important information that can be shared in the future. This book becomes important when you wonder what has been done and by whom.
 - Do some PR! AXUG is always looking for summaries of meetings that we can share with others via our leadership meetings, newsletter and magazines. Take photos! We love to show others what is happening around the chapters.
 - Regional Chapter of the Year: We recognize the top performing chapter at our annual conference, Summit. Be sure to keep your chapter growing, providing fresh, relevant content and host meetings at creative locations!

Additional Questions or Thoughts?

- Contact the AXUG Staff
 - [email: regionalchapters@axug.com](mailto:regionalchapters@axug.com)
 - [office: 877.324.8880](tel:877.324.8880)
 - Frank Vukovits, Director of Programming, Frank@axug.com, ext. 1494
 - Heather Williams, Program Coordinator, Heather@axug.com, ext. 1497
 - Tonya Anderson, Membership Manager, Tonya@axug.com, ext. 1451
 - Mary Berens, Regional Chapter Coordinator, Mary@axug.com, ext. 1495

Thank you again for your help in making AXUG Regional Chapters successful!



Member Showcase Outline

The outline below may be useful in developing a Member Showcase presentation for use during a chapter meeting. Be sure to take advantage of the Member Showcase PowerPoint template in the meeting slide deck.

- 1) Introduce yourself
- 2) Provide an Overview of Company
 - a) Primary business activity
 - b) Industry
 - c) Locations
 - d) # of Employees
 - e) Revenue size (if appropriate)
- 3) Introduce others from your company in attendance, and including yourself, review
 - a) Job roles
 - b) How long with company
 - c) How long using Dynamics
 - d) Other interesting items
- 4) Discuss how your company is using Dynamics
 - a) How many users
 - b) How long
 - c) What version(s)
 - d) What segments and for what purposes
 - e) ISV products used/customizations
- 5) Share a "case study" from your experience regarding your company's use of Dynamics
 - a) Pick a project/initiative. It could be your Dynamics implementation overall or perhaps a specific solution within or around Dynamics that Dynamics helped solve.
 - b) What is the problem your organization was trying to solve?
 - c) What pain the problem was causing your organization?
 - d) What alternatives did you evaluate?
 - e) Who in your org was involved in the alternative evaluation?
 - f) Which option/approach did you select?
 - g) How did you start the project?
 - h) How did you get your users onboard and engaged?
 - i) General thoughts of the implementation?
 - j) What results were accomplished?
 - k) How did you measure the results?
 - l) Subjective opinion of the results?
 - m) Lessons Learned.
- 6) Questions and Answers