



New Chamber Executive Tool Kit:  
Your First 90 Days

CCEO provides professional development for our members.

# Welcome!

Congratulations. On behalf of the Chamber of Commerce Executives of Ohio (CCEO) I would like to welcome you to the chamber business.

The chamber profession affords you the opportunity to promote and protect the business interests in your community. Leading your chamber is rewarding, educational and positive. There is no other profession that allows you to impact your community like this.

A chamber brings your business, professional, educational and manufacturing people together to work on accomplishing common goals for your community.

Managing and leading your chamber of commerce is a profession. There are many chamber executives in this state ready and willing to assist you as well as professional resources available to help you succeed.

We hope you find this kit helpful in getting your chamber career off to a good start.

CCEO Board of Directors & CCEO Staff

# Your First 90 Days as CEO

## Keys to a Fast Start

- **Getting Started:** There is nothing magical about 90 days or 100 days per se. However, there is something magical about having a specific period of time to devote an intense amount of focused time and energy to getting command of your new position and putting your stamp on the organization. Take advantage of the 'new guy / gal thing' while you can.
- **90 Day Goal:** The goal of your '90-Day Plan' is to get a quick, strong start in your new position by learning what is on peoples' minds, assessing people and situations with your own eyes, creating new impressions about the chamber and its CEO and building relationships that will endure during your tenure as CEO.
- **Staffing:** Depending on the size of the chamber, you may be inheriting a staff. Every circumstance is different, but it's typical for the staff to be excited about a new start as well as be worried for their jobs. Find a balance between being 'easy to get along with' and imposing your will. You are their leader and you need them to get you started right. Do be careful about making quick decisions in the early days at the request of a staff member or the overall staff until you understand the circumstances. Learn from them. Remember: you work for the board; the staff works for you.
- **Listen** twice as much as you talk. Your learning curve is steep and it's hard to learn while you're talking.

## 90 Day Checklist

- **Prior to your first day** have the interim president and executive committee members provide you with a **list of 'key people to meet' and have someone begin scheduling meetings for you.** This list will include key members, news media, local government officials (city, county), education officials, past chairs, other key business groups (economic development, tourism, downtown association), other chambers in the area, and other influencers. (Consider getting your email account set up right away so that communication between you and your community can begin to flow as soon as your hire has been announced.)
- **Talk to all board members.** Get to know them. Key issues? Key people I need to know? What do you think the top priorities are? Is the board expecting status quo or big changes? What's the balance between the two? How is the chamber perceived in the community and by members? (Where are the landmines?) Other things you think I should know? What do I need to get done over the next year to be considered successful? Are there any discontented board members or staff that I need to be aware of?
- **Get clear on expectations.** What is in the chamber's current strategic/business plan of action? Is it realistic or do you have recommended changes? Lay out what you plan to accomplish over the short- and long-term and get input and concurrence from your leadership.
- **Meet with each staff member one-on-one.** Have them brief you on their job descriptions, ask them what needs to get accomplished in the next 90 days. What is on their calendars for the next 90 days?
- **Meet past chairs.** Invite past chairs to breakfast or lunch as a group to get acquainted. They will be surprised and flattered that you asked. You'll gain some insights about the chamber and develop a group of supporters.
- **Hold a staff planning session.** Have key staff members brief the full group on their department's goals, key issues and what needs to get accomplished in the next 90 -180 days. This is an opportunity for you to take the measure of your team and to begin shaping the chamber's priorities in your image.

- Identify key meetings** of committees, membership events, and public meetings that you should attend and get them on your calendar. (Determine which events will necessitate chamber comments and develop key and appropriate messaging.)
- Depending on the circumstances of their departure and their relationship with the chamber, **contact your predecessors to get their feedback** and advice.
- Get a briefing on top government affairs issues.** What are the chamber's top priorities? What are the chamber's positions on issues? How is policy set at the chamber? Review the guidelines and policies for the Government Affairs Committee.
- Read the chamber's **bylaws**.
- Read past years' worth of the chamber's **newsletters**.
- Read member **surveys**.
- Read the past 3 years' worth of **Executive Committee and Board meeting minutes**.
- Request feedback from your Executive Committee informally every 30 days.** 'You know what I've been working on and who I'm meeting with. What else should I be doing?'
- Read the chamber's past 3 **annual reports and strategic/business plans**.
- Review the **past 3 audits** and all of the **past year's monthly financial statements and the budget**. Regarding the budget, review it in detail to understand how realistic it is, especially the income projections. If they are not realistic, work with your CFO/staff accountant and staff to develop a revised budget to present to your treasurer, finance committee and executive committee.
- Ask that a **financial audit be performed**. You are inheriting someone else's finances. Are they an honest reflection of the current situation?
- Read **committee minutes**, 1-2 years' worth.
- Read the chamber's current **contracts** and understand the practices the chamber uses to secure contracts.

Develop and implement a plan to **introduce yourself to members** – use of an already scheduled general membership meeting, newsletter, mail, email, and social media

**Call at least one member per day to introduce yourself.** Ask about what the biggest issues are with their firm and in the community.

Keep a running list of To Do's, questions and possible changes.

Don't be afraid to ask for help. Resources ARE available.

**Make contact with key chamber professionals and resources** to say hello and introduce yourself:

- Josh Torres, CCEO-AP, Chief Executive Officer, Chamber of Commerce Executives of Ohio, ceo@cceohio.com
- Isaac R Lee, MBA, CCEO-AP, Chief Operations Officer, Chamber of Commerce Executives of Ohio, coo@cceohio.com

## Resources Available

**Chamber of Commerce Executives of Ohio:** The state professional association for chamber executives is known as the Chamber of Commerce Executives of Ohio. The objective of CCEO is to enhance the personal growth, development, and management effectiveness of chamber of commerce executives within the State of Ohio. The CCEO membership includes management people, staff, and board members from large and small chambers throughout the State of Ohio. CCEO is headquartered in Columbus, Ohio. It is governed by a board of directors elected from the membership by specified geographical districts within the state. The staff of CCEO, working with a committee structures, directs a variety of programs and services for the membership. CCEO offers an annual winter conference to provide education, information and networking opportunities for all chamber professionals.

Annual membership dues in CCEO are determined by total membership number from your local chamber. For more information about the programs and services offered by CCEO, call ( 567-277-6824), or visit our website at [www.cceohio.com](http://www.cceohio.com).

**Ohio Chamber of Commerce:** The Ohio Chamber of Commerce is organized to represent business and industry for the state of Ohio. As Ohio's largest and most diverse statewide business advocacy group, the Ohio Chamber of Commerce has been a consistent voice for business since 1893. They are dedicated to presenting Ohio lawmakers with the business perspective on issues. They continue that tradition, advancing legislation that will support successful Ohio businesses. Fighting for fair regulations and improving Ohio's job climate are only part of the Ohio Chamber's mission. By investing in the Ohio Chamber, you will have access to our advocacy efforts and our cost-savings programs. Complete the membership form @ [www.ohiochamber.com](http://www.ohiochamber.com) will help to complete the process. For more information, call the Ohio Chamber at 614-228-4201 or 800-622-1893. Eighty percent (80%) of your dues are tax deductible as a business expense.

**Association of Chamber of Commerce Executives (ACCE):** ACCE uniquely serves individuals who manage chambers of commerce. ACCE's mission is to support and develop chamber professionals to lead businesses and their communities. Chamber executives hold positions requiring leadership, vision and strong management skills. ACCE helps chamber executives and their staffs play a significant leadership role in their communities.

Established in 1914, ACCE offers a wealth of information, professional development opportunities, management techniques and best practices through its award winning publications, online education, conferences and networking. ACCE also works to upgrade the economic status and professional standing of those active in the chamber field.

Annual membership dues in ACCE are determined by membership income from your local chamber. For more information call (703) 988-0072 or visit their website at [www.acce.org](http://www.acce.org).

**United States Chamber of Commerce:** The U.S. Chamber is the world's largest business organization representing the interests of more than 3 million businesses of all sizes, sectors, and regions. Members range from mom-and-pop shops and local chambers to leading industry associations and large corporations. They all share one thing – they count on the Chamber to be their voice in Washington, D.C.

Some of the membership opportunities offered to local chambers include Washington Fly-in Policy Briefing, Free Enterprise Network Web Portals, Communications Resources, Regional Government Affairs Conference and America's Small Business Summit.

The U.S. Chamber of Commerce headquarters are in Washington, D.C. Kentucky is served by the Great Lakes Regional office based in Chicago. For more information, visit [www.uschamber.com](http://www.uschamber.com)

**Institute for Organization Management (IOM):** Institute for Organization Management was designed to enhance individual performance, elevate professional standards, and recognize association, chamber of commerce, and other nonprofit professionals who demonstrate the knowledge essential to the practice of nonprofit management. It is the professional development program of the U.S. Chamber of Commerce Foundation.

IOM curriculum, comprised of four week-long sessions, is taught by university professors, industry experts, and leading practitioners in the chamber and association industries. Each session is five days long and is offered at five locations across the country annually; allowing participants to choose which site or time of year best fits their schedule. Typically, Kentucky chamber executives attend either the Midwest site held at the University of Wisconsin-Madison or the University of Georgia in Athens. Both of these Institutes occur in June of each year.

With courses on topics such as advocacy, media training, membership, finance, legal issues, human resources, and much more, Institute ultimately educates participants on all facets of running a nonprofit organization. Institute should be a top priority for you and your board of directors. For more information, visit [www.institute.uschamber.com](http://www.institute.uschamber.com).

**Accreditation:** The Accreditation program of the U.S. Chamber of Commerce defines excellence in chamber planning and recognizes chambers for outstanding contributions toward positive change in their communities. The Accreditation program is strictly voluntary, although a chamber of commerce must have been in operation for three years before applying.

The accreditation program helps the local chamber define and maintain superior standards of chamber operation. It provides recognition to volunteers and staff members who are meeting the basic standards of operation and performance. At the same time, it helps the volunteer leadership understand more about the necessary ingredients required for a successful chamber.

The accreditation designation is not permanent. It must be renewed every five years. Re-accreditation is achieved by going through the same self-analysis and evaluation required in the initial designation.