

# Guide to Organizing an IT Pro Group

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You have full permission to distribute this document in any way you see fit without making any changes to it. By all means, please give this document to anybody that may be running or interested in running an IT Professional group.

The latest revision of this document can be found at:

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## *About This Guide*

Take a deep breath.

This guide is a collection of resources available to help guide you through the organization of your IT Pro group. This is **not** a how-to on starting a group and all the benefits and reasons to do it. This guide is meant to help you get organized if you've already started a group or made a strong dedication to starting one in your area.

Keep in mind that this is a reference guide, not a novel, so don't read it from cover to cover expecting to be enlightened about running a group. This is just a list of resources that can make managing and organizing your IT Pro group easier, less time consuming and thus more affordable and successful.

## **Define**

The first step in organizing a group is defining its purpose. Think of what you will be saying to a stranger to get them to join your group. Some of the questions you should ask yourself are:

- *Who is this group for?* For example, some groups are strictly exclusive to members who are peers in their profession – developers, network administrators, system administrators and DBA's. In most cases, the end users are not invited into the group to encourage frank exchange between likely-minded professionals with similar goals and objectives.
- *What is the purpose of this group?* Think about why you decided there was a need to create this group in the first place. If you cannot validate the point of the group to yourself then you won't be able to interest others to join.
- *What will this group contribute to its members, sponsors, and overall community?* Part of the challenge of leading your group will be to give a sense of value to your members. Most groups are voluntary and everyone involved will be investing their time so that they can take something away to help develop them and their businesses. A successful start to a group will encourage others to help contribute and maintain the momentum on the back of your efforts.
- *What will drive the members to attend group meetings?* If you cannot afford the time to develop your group outside of your day job then perhaps you need to consider nominating another leader or think about delegating some of your tasks. In addition to facilitating your group you have to find ways and means to get people to attend. Talk to your peers and ask them which aspects of your group drive them to attend regularly.
- *How will the group define a success?* Don't be afraid of feedback; take the good and the bad and ensure that you apply it for the good of the group. Success can be measured in a number of ways including increasing membership base, increasing attendance, improved performance of members' businesses, and increased interest from vendors and local government bodies.

As you can tell there is no magic *cookie-cutter* definition. The group takes a life of its own lead by your vision. It is for your members, about your members and by your members. **Listen.** Successful group will go in the direction its members find most valuable. You do not own the group, you guide the group and a group led by you for own means will certainly be flawed and fail.

## ***Organize***

The first step in organizing an effective group is choosing an effective communication medium. How will you communicate with your members? Your options are nearly limitless and include the following options:

- Discussion groups
- Announcement lists
- Blogs
- Public SharePoint portal
- Private SharePoint portal
- Public web site

### *Discussion Groups*

Discussion groups offer a public or private web portal to carry on discussions with your members. It can be used as a central source of information distribution and collection – you can post meeting announcements, local events, conduct polls and even allow your members to post technical and business questions that are immediately delivered to everyone via email.

Out of the many ways to organize a discussion forum (bulletin board, private list servers, nuke forums) two of the most popular providers are Google groups and Yahoo groups. Both are absolutely free, advertising-sponsored systems that can be organized nearly effortlessly in a matter of minutes.

Google groups offer advanced search and threading (message organizing) capabilities and feature much less obtrusive advertising than Yahoo. Yahoo does have its advantages as well in that it offers you a true portal: file storage, picture storage, interactive polls and forums.

Google Groups: <http://groups.google.com>

Yahoo Groups: <http://groups.yahoo.com>

### *Announcement Lists*

IT Professionals lead busy lives which are usually accompanied by a flooded mailbox. One of the unintended consequences of active discussion groups is that they tend to create cluttered mailboxes and members may stay paying less attention to them or even unsubscribe from your list completely. This can lead to them missing very important announcements about your meetings or special time-sensitive promotions or events.

Consider creating a separate announcement-only list that has a very low-volume, one-way communication from your group leadership to group members. For example, Orlando IT Professional group publishes a weekly newsletter with most relevant global and local information as well as local event / group meeting RSVP, directions and meeting reviews or descriptions.

### *Blogs and Wikis*

Blogs or “web-logs” offer a great way to instantly create a public information site for your group. The main advantage of creating a blog instead of a public web site is *simplicity*. Blogs can be managed collaboratively by multiple people, require very little to no knowledge of HTML, offer plenty of free templates and allow you to create an instant library of information about and for your group.

A simple web search will offer a whole host of free blogging services. The most popular free blogging solution is Google’s Blogger service that can give you a way to keep the public or your group members up to date on what is going on within the group. Post meeting announcements, recap previous meetings, point members to webcasts or other relevant information on the Internet.

Google Blogger: <http://www.blogger.com> (

MSN Spaces: <http://spaces.msn.com> (does not support FTP publishing)

TypePad: <http://www.typepad> (commercial, \$4 monthly fee)

Wikis are collaborative web sites that can be easily edited by your group members without extensive user administration or experienced web design team. The most successful, popular and distributed wiki is the Wikipedia which is a free, user-edited, international encyclopedia. There are many different wiki platforms you can install in your own hosting account with relatively little effort, but for a free, ready-to-go hosted Wiki consider Jot Wiki:

Jot Wiki: <http://www.jot.com>

### *Private SharePoint portal*

Private SharePoint portals give your group a customizable message board, file storage, announcements, polls and a completely interactive web site without the complexity of writing your own code or designing web pages. The single most important differentiator between SharePoint and solutions like Google / Yahoo Groups is the ability to customize and grow your portal the way you need it.

Free SharePoint portals for groups are available from Culminis and Own Web Now Corp:

Culminis: <http://www.culminis.com>

OWN: <http://www.ownwebnow.com>

### *Public SharePoint portal*

Private SharePoint portals are great for distribution of information among the members you choose to invite to your group. Unfortunately, they do not offer an effective way to offer the information about your group to the potential members that may just be learning about your group.

Public SharePoint portals make most of the private content available to the general public would requiring a username and password in order to read content you designate as public. This allows site search services such as Google and MSN to effectively index your web site and offers you another viable way to market your group.

Free public SharePoint portals are available from OWN.

### *Public web site*

Public web site gives your group a presence on the Internet with the ultimate flexibility and customization opportunities. Beware of the *maintenance* factor: public web sites require a lot of maintenance and support.

Web sites have tremendous advantages over the portals, blogs and list servers. They give your group an identity both in the way of the visual style and easy to remember domain name. Web sites can be a lot more flexible than other solutions if you choose to build it out.

### **Overview**

Remember that the best approach to organizing your group information may not be answered by a single solution but a mix of solutions that allow you to deliver your content in a way that makes it easy for you to organize and easy for your members to access. Here is a brief overview of discussed solutions:

	<b>Yahoo Google Group</b>	<b>Share Point</b>	<b>Blog</b>	<b>Web Site</b>
Easy to start?			<b>X</b>	
Easy to use?	<b>X</b>	<b>X</b>	<b>X</b>	
Easy to customize?		<b>X</b>	<b>X</b>	<b>X</b>
Flexibility?		<b>X</b>		<b>X</b>

## *Additional Resources*

There are three important questions that come up every time you organize a meeting: Where is it? Who will be there? Was it good?

### ***Where is it? – Give your members good directions.***

Make it easy for your members to find your meeting. Just because you know how to get there does not mean your members do – take a few seconds to generate a map using **Google maps**.

Google Maps (<http://maps.google.com>) easily identifies your meeting location and lets users obtain accurate directions in minutes. *Link to this page* option on Google Maps lets you paste a relatively short web address that can be easily pasted in an email invitation or linked from your web page.

Possible alternatives include:

Yahoo Maps (<http://maps.yahoo.com>),  
MapPoint (<http://www.mappoint.com>),  
Mapquest (<http://www.mapquest.com>),  
Whereis (Australia) (<http://www.whereis.com>)  
MultiMap (UK, Ireland, & Europe) (<http://www.multimap.com>)

### ***Who will be there? – Request RSVP.***

Will there be 15 or 51 people at your event? Do not post open ended questions in your mailing list requesting everyone that is coming out to post on the thread. Such junk mail is the leading cause of dissatisfaction with mailing lists. Point them to a professional event planning site instead: **Microsoft Partner Events** (<http://www.microsoftpartnerevents.com>).

Microsoft Partner Events is a free web site that lets you collect information from your members and offer directions, contact numbers and meeting agenda. It also provides you with the members phone number, how they found out about the meeting, which company they are with. This useful information will help you find out how your members are finding out about the meeting and who is encouraging them to come: Is it your web site? Your partners? Newsletters?

For qualifying organizations there is also **Microsoft Group Events** (<http://www.microsoftgroupevents.com>) that has the ability to help you quickly and conveniently get RSVP's from your group members.

**WARNING:** Both Microsoft Partner Events and Microsoft Group Events have a requirement that they only be used for Microsoft-centric events. If you are planning an event not related to Microsoft technologies you may want to look elsewhere.

To get the word out about your event and get attendees you can also consider social networking / event sites in **Eventful.com** and **Upcoming.org** which provide a social networking and event management / announcement services absolutely free of charge and could be the most important place you announce your events because they can be discovered through web search (where mailing list posts may not be.)

### ***Was it any good? – Collect feedback.***

Key to growing your group and improving attendance is satisfying the needs of your members. If you do not know about the problem, you cannot address or fix it. Get in the habit of encouraging, collecting and analyzing feedback. Not only will it pinpoint the possible areas of improvement but it will also give you quotes to use in promotional materials, thank you notes sent to your presenters and it will give your members the way to shape their own group.

**Survey Monkey** (<http://www.surveymonkey.com>) is a great survey site that gives you many survey features absolutely free of charge (some advanced features require a monthly fee.) Sign up for the account and encourage your attendees to give honest feedback after each meeting.

## **Market**

Marketing your user group is no different from marketing your business except that the effort you put into your group is voluntary and doesn't pay the bills! Recognize that you are marketing a not-for-profit organization that provides a tremendous positive service to the community: drop your salesman anxiety and ask people to help you help others. Delegate if required. You will have a group of members there who all will have something to offer so consider drawing upon their talents as well.

### *Marketing Collateral*

Inviting partners and professionals to join or support your group will require you to *hand* them some information. What you choose to *hand* over should clearly identify the questions you asked yourself when you defined your group: who are you, what is your purpose, what is your contribution to the community and why should anybody care?

### *Flyers*

Flyers are a great, dynamic and affordable way to promote your group. You can put together a flyer in Microsoft Word or Publisher in a matter of minutes and print it out on demand. Always print out twice as many as you think you will need and leave them anywhere your target audience hangs out: Computer college, CTEC, University, computer store. Do not be afraid to recruit: Introduce yourself to the manager of the establishment and ask them to help you inform the public. In the absolutely worst case scenario they will be extremely polite to you until you leave and they throw your flyers in the trash.

At the very minimum your flyer should clearly indicate the following:

- Who are you?
- What is your purpose?
- How can someone get in touch with you?

You can always provide more details – for example, include directions to your meeting location, showcase the next speaker. Most importantly: give your audience a reason to find out more about you. It may also be useful to include comments from existing members to re-enforce your message.

### *Business Cards*

Slightly more expensive than flyers, business cards add to the professional appearance of your group. There is a significant advantage

business cards have over flyers: people do not tend to throw them away. Business cards get scanned, organized, stacked or collected in some way *until* they are needed. While a flyer may give you immediate interest and shortest path to the recycling bin, business cards will bring more people in over time.

Business cards are very affordable and in some cases free: VistaPrint (<http://www.vistaprint.com>) You can order a set of 250 premium business cards from VistaPrint just for the cost of shipping, the only catch is that they provide a link to their web site on the back. **Important:** Remember to sign up for the VistaPrint newsletter as they frequently offer 80-90% discounts on business card printing.

Encourage your partners to take several cards and give it to their partners and interested parties. Remember that you are not promoting yourself with this business card – you are promoting your group: so place group information and objectives in lieu of a fax number and vendor logos you may place on your own business cards.

### *Microsoft Partner Channel Builder*

Microsoft publishes a listing of its partners under the Microsoft Partner (<http://www.microsoft.com/partners>) web site. Using the channel builder you can build a mailing list of partners in your area that may be interested in joining your group. **Important:** Do not resort to spamming or contacting these partners via email unless you personally know them. Spamming someone, regardless of your best intentions, will absolutely damage your reputation and the reputation of your group.

### *Microsoft Seminars: TS2, Technet, Connections*

IT professionals love to learn. One of the best ways to find interested partners is to ask the Microsoft presenter for an opportunity to invite IT professionals to attend your group. Find out when and where the next Microsoft event (<http://www.microsoft.com/events>) in your area will be and ask the presenter for a minute of audience's time.

### *IT Professionals, Partner Account Managers, Community IT Leaders*

Take advantage of the IT professionals that network with a lot of other IT professionals. Your IT sales people, Partner Account Managers, resellers, community champions and leaders of other groups will gladly bring up the name of your group when they meet someone that could benefit from your efforts. Make sure these people have your business cards, flyers and convenient ways to reach and promote you.

### *Collaborate with other IT Group leaders*

Not every attendee of the .NET group is a developer, not every member of the PASS is a DBA and not every member of the computer enthusiast society is an end user. Even if they are, they know people that may be interested in joining your group. Extend any support you may have to the leaders of these groups, after all, they are also struggling to raise awareness for their groups. Establish a collaborative relationship with them and ask them to point people your way.

### *Harry Brelsford: SMB Nation Newsletter*

Harry Brelsford maintains the most popular community-friendly newsletter in the IT world. Each monthly issue lists local IT groups along with points of contact, meeting announcements and meeting recaps. Contact Nancy Williams ([nancyw@nethealthmon.com](mailto:nancyw@nethealthmon.com)) and tell her about your group.

### *Microsoft & Culminis: Getting your sites listed at Microsoft.com*

Microsoft with help from Culminis maintains a database of IT Professional groups. Culminis requires a membership application and you can get more information about it at <http://www.culminis.com>

### *Continuing Technical Education Centers*

CTEC's have the most local IT professional foot traffic. This is the single most important place for you to try and raise awareness of your group. Get to know your local CTEC managers, instructors and receptionists. Most will be more than glad to support your IT professional group because their business depends on the continuing education and networking of IT professionals. Leave your flyers and business cards where-ever they will let you and focus on the waiting room (where test takers are waiting for their exam to be loaded) and lunch rooms (where people are trying to take a break from classes).

Don't forget existing systems that are already in place. Local government agencies will have a vested interest in their region and if you can get them on your side then they will think of you and your members first when it comes to business referrals. Other committees and organizations are in place that may compliment what you do. Ask your members what other groups they belong to. It maybe that they you have some un-tapped opportunities on your doorstep.

## ***Plan***

Planning a meeting is the most difficult and time consuming part of the group experience. Choosing a venue to hold the meeting, arranging for food and drinks, finding a knowledgeable speaker, inviting members and marketing the event can easily become a second job if you take it to the extreme. Keep in mind what you are trying to accomplish and enlist all the help you can get to pull off an excellent event – every time.

### ***Pick a venue***

Where you actually hold your meetings is a matter of convenience to your members and a matter of availability to your group. The obvious go-to places are restaurants, Microsoft regional offices, CTEC's or partners.

### ***Restaurants and Hotel Conference Rooms***

If you have a very small group, Panera Bread, your local hotel or any other chain with wi-fi and semi-separated section makes for a great meeting location. You do not have to worry about reservations, food & drinks or cleanup. Most places are usually very happy to turn down the music and may even allow you to reserve a room for a nominal charge. Restaurants also offer a great fail-over location in case your primary venue has a scheduling conflict.

### ***CTEC***

Continuing Technical Education Centers such as New Horizon's generally offer the most welcoming environment for IT professional groups. Not only is your group their biggest customer but their support for your group shows they are part of the IT community. Many hold classes at night so there are plenty of empty rooms for your group to use. If you do not have a friendly CTEC look at other educational institutions that may have available room when you wish to meet.

### ***IT Partners***

Bigger IT companies may be sympathetic or supportive of your initiative. Local computer stores, Gold Certified Partners, larger software vendors are open to allowing their customers and partners to get together.

### ***Microsoft Regional Office***

Microsoft Regional Office may be open to hosting your meetings: your mileage will vary depending on their understanding of community. There are examples of Microsoft-Community combo working spectacularly and there are examples of it being a miserable failure. Be aware that Microsoft offices require 1 Microsoft employee per 10 partners/members attending and you will not be given Internet access.

**WARNING:** Keep in mind that Microsoft and nearly every other vendor will not be very accommodating in hosting events discussing competitive technology. Seek independent venue if at all possible.

### ***Tour the Venue***

Before you announce the meeting to the world and take someone at their word, take a moment to tour the facility. Drive to the facility and find out where you may be able to park. Look at the room, find out if it will be able to fit your group. Need a projector – is there one in the room, if not is there a projection screen where you can point your own? Again, look to your members to see if they can help with a spare projector to loan for the event.

### ***Find a speaker***

You will never be at a loss of people trying to talk to your group. Finding the people that your group would actually want to listen to is the most difficult task because most willing speakers are usually the marketing/sales people that will only bring a PowerPoint stack and not much else. So how do you find the people that understand the community and are experts at what they are talking about?

### ***Microsoft Presenters: TS2 and Technet***

Community and partner event involvement is a passion of every single SST presenter you will meet. If your meeting is right around a TS2 or Technet event you will not have a problem tapping one of these folks for an expert business or technical presentation. You can find one at <http://www.ts2community.com> and <http://www.technetseminars.com> or just talk to them at the next local Microsoft event. Your local PAM may be able to put you in touch with someone local as well.

### *Culminis Speaker Directory*

Culminis (<http://www.culminis.com>) has a wonderful speaker directory and they actually strip the marketing fluff from the presenters slide deck. Contact Culminis for details.

### *Microsoft MVP's*

Point your web browser to <http://www.msmvps.com> and find someone with an active blog. People that “get” blogs are generally the people that get the community and are more than interested in speaking to you. SBSgroupsLeads and Susan Bradley ([sbradcpa@pacbell.net](mailto:sbradcpa@pacbell.net)) can arrange a free LiveMeeting presentation for your group.

### *Hit the Blogs*

Bloggers love to write, they love to talk. For example, take a look at <http://blogs.technet.com> for a listing of Microsoft bloggers and keep an eye for the experts among the active ones. If they find the time to write about community events they participated in, they will find the time to talk to your group. This applies for just about every other IT company as well. People who understand the community are always willing to contribute to it.

## *Meet*

You've marketed your group, announced your event, booked the venue and you're looking forward to an evening of fun, learning and networking. You are the host, be polite and welcoming to everyone and expect the same in return.

### *Food & Drink*

If you are holding an evening event your members will be hungry. Unless you have stated that this is a brown-bag event people will try to find food. You have a few options: South Florida SBS leaders generally bring burgers and soda. Tampa SBS leader carries sandwiches up to the Microsoft office. Pizza is a popular choice with many. Larry Lentz brings tacos. Food and drink options are totally up to your interpretation. After all, you are getting together to network and your food efforts are there only to facilitate the networking process. If you put too much precedence on it, it will distract members from what is the point of the group.

If you are concerned about the event making a huge dent in your checkbook invite everyone that takes food/drink to throw in a few dollars in the donation dish. Pass it around the room and help pay for the current or next meetings food bill.

Some support organizations (Culminis) routinely provide pizza coupons that can help offset the cost of meetings. If you are hosting an event at which a vendor will be presenting they are usually very happy to cover the cost of food and drinks and often even invite your members to an after-event meeting. Be prepared with a list of nearby places where you can meet after the meeting in a more relaxing environment and have one-on-one conversation with the presenter.

### *Introduce Speakers*

Welcome the speakers and introduce them to the crowd. Until the meeting you, as the leader, have been their primary contact for your group. This is an excellent opportunity to tell the group why the speaker is there, why you are excited to see them, what they do, why everyone should pay attention. Offer to help them setup their computers for demonstrations, if any, and take care of your guests.

### *Handle Problem Members*

You will not be in front of an antagonistic audience. However, you should prepare yourself for problems that may arise during the meeting and you

should have a plan to deal with unprofessional attendees. Set reasonable expectations, ask for input, address feedback and keep it positive. Ask your members to turn off their cell phones (or use vibrate and take calls outside of the meeting room.) If those efforts just do not translate to a particular member prepare a course of action. If their cell phone is continuously ringing off the hook, if they have a problem paying attention, if their questions or comments are clearly derogatory or insulting to the other members or the speaker ask them to step out with you and try to address the problem professionally. Everyone can have a bad day.

### *Request Input & Know your audience*

If you notice eyes glazing over or members starting to doze off you may not be presenting relevant material or doing it effectively. Ask for input, walk around, know everyone's name. Nobody enjoys an IT soliloquy.

This is your single monthly opportunity to find out, face-to-face, what your members are expecting, what they would enjoy hearing about, what they dislike. Make a point to offer alternatives and ask for guidance.

### *Remember that you are local*

Never miss an opportunity to tell people about the upcoming local event, next meeting or a relevant download. Your members can get IT information anywhere from the comfort of their home, but they cannot get local content and the opinion of dozens of their colleagues and partners all at once. Some of the most entertaining and valuable meetings are filled with members offering solutions, partnering together to do business, helping one another with IT and business challenges.

## Grow

Growing your group over time is a challenging process that requires a lot of effort in finding out what you are doing wrong, what you are doing right and what you could be doing better. As your group starts to grow you will also need to consider soliciting help from group volunteers but for the most part you will be doing the same marketing, organizing and planning activities. No matter how many times you've invited the entire Technet audience to your meeting, you will always meet someone that has never heard of your or your group. Take all the help you can get.

### *Empower Volunteers*

*Leadership is not assigned, it is taken.* Keep an eye on who is always trying to help you and tap them to help you lead the group. Over the course of your group's life, certain members will have a lot of time to help at one time and none at all at another. You may need to put 60 hours at work instead of current 40. Circumstances will dictate your ability to effectively lead the group and provide the same value to your members on consistent basis. Encourage volunteers to help and welcome changes that most people agree with. This is not *your* group, it will take a life of its own.

### *Motivate yourself through the success of others*

SBS Group Leads mailing list ([SBSgroupLEADS@yahogroups.com](mailto:SBSgroupLEADS@yahogroups.com)) and SBS Groups web site ([www.sbsgroups.com](http://www.sbsgroups.com)) gives you access to other SBS groups and leaders that you can learn a lot from. Find out their success stories and try to realize them for your group. Someone just had an excellent speaker – find out how they can speak to your group. Someone created a deck about SP5 – get a copy of it and distribute to your group. People who get and participate in the community want to help, take advantage of every resource available to you.

### *The pride of ownership*

People want to “belong” to something. Send your logo off to CafePress (<http://www.cafepress.com>) and print out a few T-shirts. Has a member contributed a lot to your group or to the community – find a way to recognize them. Celebrate community triumphs of your members.

## *Get Help*

There are several organizations whose sole purpose is direct support of community group efforts. There are vendors that are very supportive of groups and offer discounts or special content to partner networks. Major book publishers offer discounts and even free copies to groups for review. There are many people and groups that are willing to help you make the most out of your community:

### *Microsoft SBS User Group Community*

Effort lead by Mike Iem at <http://sbsleads.wss.bcentral.com> is a direct partnership with the Microsoft SBS team and among the most supportive group support efforts available. Contact Mike Iem, subscribe to the newsletter and update your information on the SharePoint site. This community initiative is great because it gives you access to materials that are simply not available anywhere else: SBS Groups DVD's with exclusive partner content, SmartPhones, conference discounts, etc.

### *Culminis*

Culminis is an international organization representing IT professionals and IT professional user groups. They offer free SharePoint sites, send a large welcome kit with thousands of dollars of NFR software and are constantly helping you promote your group in front of a large technical audience. Contact Culminis ([www.culminis.com](http://www.culminis.com)) and find out how they can get you a table at the next Technet event, SQL Server 2005 launch and other shows that come through your town.

### *SBS Group Leads and SBS Group Networks*

SBS Group Leads and <http://www.sbsgroups.com> is a group of SBS community leaders such as yourself that discuss everything related to organizing, running and growing a group. The mailing list is the primary resource where you can ask questions and find out what others are doing or trying to do in their community.

Other communities worldwide also have systems in place to help develop their local network. The UK is currently maintained by two sites; [www.sbsbpi.co.uk](http://www.sbsbpi.co.uk) and [groups.yahoo.com/group/UKSBSG](http://groups.yahoo.com/group/UKSBSG). Ireland is handled by [www.sbsireland.com](http://www.sbsireland.com). Australia's user group network is managed currently by [www.sbsgroups.com.au](http://www.sbsgroups.com.au) and other group leaders in local regions ([www.floridasbs.com](http://www.floridasbs.com)) routinely network to share information on local events that may be interesting to your membership.

This is a truly global effort and the best source of information and support.

## *Group Leader Advice*

Now that you have an overview of all the resources that are available to help you manage and organize your group there is a matter of finding the one that will make your group successful.

Remember, you are not alone in what you are doing and so use the community to help offer your members the essence of why you chose to lead the group in the first place. Don't be afraid to ask and if you get the opportunity to visit another group then use it to see what you can learn for yourself.

Whether you're about to have your first or tenth meeting, you can always learn something new from the other IT Pro group leaders around the world. The following interviews with successful group leaders provide some keys to success as well as painful mistakes to avoid. As you read these comments you will notice that not everyone agrees on everything, likewise, you will define your own successful practices. This information is provided only to give you a brief insight on what others are doing well; hopefully some of it will help you better your group.

## *Andy Goodman*

Andy Goodman (andy@sbs-rocks.com) leads the Triad SBS Group (<http://www.tsbsg.org>) and offers the following advice:

### **"Help people get over the idea that we are only competition"**

Promoting your group to partners will often bring up anxiety in sharing ones trade secrets. Why should I give away my secrets to my partners? Andy finds that the key to a successful user group is to promote it as "friends helping each other out" in a welcoming environment. Overcoming "you're my competition" stigma is Andy's way to run a successful and positive group. Step up to the plate and offer some of your tips and tricks to the group, lead by example. Talk about the reality of how large the market is and how few partners there are. Ask the question, when was the last time you bumped into a partner at a potential customer site.

### **"Make friends with Microsoft TS2 presenters so they still mention me even if I'm not there"**

Local Microsoft events can be a great way to build up your attendance. Your potential group members are there, watching a sales presentation, looking for the competitive edge. If you can make it to the presentation, Microsoft presenters will allow you to briefly talk about your group. Andy's key to success is befriending the presenter, explaining his goals and showing the passion for the group. By doing so Andy can count on the presenters to "still mention me even if I am not there." Getting Microsoft to help you spread the word about your group is crucial.

### **"Don't put too much emphasis on crappy giveaways"**

One of the mistakes Andy urges you to avoid is to focus on giveaways. "At the end of the day it really does not matter what they walk away with, people remember the content better than the trinket" says Andy. While giveaways are a nice way to entice people to come to your meetings, focusing on the giveaway is a mistake. So what is really important, according to Andy: "They will come back for the content, not the trinket"

### **"Your group is a great resource for it's members"**

Once folks get to sit down and talk and get to know eachother, it is much easier to call on one another if you get in a crunch. Either for advise or even to hire eachother. It does not take long to figure out whose strengths may cover someone else's weaknesses. The group is like a family, and will support eachother once you help them over the initial hurdle (see the first point).

## *Anne Stanton*

Anne Stanton (astanton@thenorwichgroup.com) leads the NH/VT Upper Valley IT Consultant's group (<http://thenorwichgroup.blogs.com/uppervalleynhvtsbs/>) and offers the following advice:

### **"One trick to word-of-mouth marketing is consistency"**

"Many IT Pro Groups are grassroots organizations starting with no specific budget. This grass roots format leans heavily on word-of-mouth marketing. One trick with word-of-mouth marketing is consistency" Anne considers consistency in meeting times and locations the greatest key to success. It is easy for Members to tell their peers. As you build your group "meeting at the same time and same place each month" makes continued growth and success a natural process instead of a painful battle.

### **"Build a mailing list of those who are interested that is different from your listserver or yahoogroup."**

"Just as important is to continue to build a list of technical people who want to be contacted about meeting times and topics. Sometimes IT professionals will only attend a meeting depending on topic. As such it is important to keep these people on a mailing list to alert them of upcoming events. Not all people will join the list server. So keep a separate announcement mailing list. You might also want to use the 3 week, 1 week, 3 day announcement technique to cover those who make their decisions in advance versus those who decide at the last minute." Anne indicates that the more people you tell about the meetings, the more attendees you will have.

### **"It is about community and shared knowledge, for knowledge shared is knowledge gained"**

Anne suggests that you always make time for some "roundtable" even if you must suggest a topic and then ask each member to comment. Having a speaker for 30 minutes is important for the draw and for new knowledge, but you should "always reserve time for information sharing." It is a balance, you as the moderator and/or the speaker of the month should not be positioned to be the oracle and only source of information. That is the beauty of a group of IT Professionals with years of experience.

## *Amy Luby*

Amy Luby (aluby@mobitechonline.com) leads the Greater Omaha Small Business Server Partner Group (<http://www.gosbs.org>) and offers the following advice:

### **"Commit to networking, taking the time to build the group"**

Building up a grassroots effort is an enormous task that will require you to talk to a lot of people and convince them to be a part of a collaborative, community effort. Amy explains: "It is a huge commitment, everyone is excited to start but when you get into it you get the first reality check of what is required to just promote the group."

### **"Develop relationships with vendor contacts"**

Building up an attendance for group meetings requires good content, but how do you go about providing experts to talk about the meeting topic? "Invite the vendors", Amy says, "and build a relationship with vendor contacts so you can ask the right people to come and present at your meetings." You have to give people a reason to come out and to meet, and Amy has found great success by getting vendors to present their own products.

### **"Get the right venue, do not hold meetings in your office"**

Your group attendance will depend on how easy and convenient your meeting location is. The simplest thing to do is to meet at your office, but Amy cautions that may not be a good idea: "Meeting at our office discouraged some partners from attending group meetings." Finding a neutral location where your group members would be comfortable to travel to and discuss business topics is crucial.

## *Jasminder Rai*

Jasminder Rai (jas@jio.ca) leads the Vancouver SBS User Group (<http://www.vansbs.com>) and offers the following advice:

### **"If you change the time, make sure someone actually shows up"**

Changing your meeting location, or meeting time can lead to a big drop-off in attendance. Jasminder found this when he attempted to meet with partners outside of the regular group meeting: "I wanted to bring in more personal interaction, not just have people showing up to see a presentation delivered by a speaker. I organized a separate meeting, and nobody showed up." Jasminder encourages you to "build up interest over time" by announcing future special events and initiatives two or three months in advance. If your special event raises anxiety for your members, hold it at a friendly (neutral) location where nobody is put in the spotlight - "They can sit down, eat, listen - They are not in front of everyone expected to say something"

### **"When dealing with vendor product groups, go directly to the people involved with SBS"**

Having attended other local User Group meetings for more than 5 years and also Puget Sound Small Business Server User Group meetings for 1 year I came to the realization that the needs of the SBSer community was not being met locally. Trying to organize your group with the help of local Microsoft can be a challenging task. Jasminder found that out early on: "Nobody is involved with SBS, We can't own your group, etc." He then went directly to the SBS leads, SBS team, the IT Pro marketing manager in Canada until he found a sympathetic ear. "Finding a good venue is crucial" according to Jasminder, everyone usually knows where the local Microsoft office is.

## *Karen Christian*

Karen Christian (karen.christian@gmail.com) is a part of the WiNSUG Steering Committee of Windows Networking Solutions User Group (<http://www.wunsug.com>) and offers the following advice:

### **"Focus on shared leadership and multiple person involvement"**

Karen finds shared leadership to be at the core of running a successful user group. Trying to run it by yourself can become strenuous and lead to burn out, so Karen urges us to seek help with organizing events, holding meetings, working with vendors and every other aspect of the group. Reach out and involve others.

### **"For the long term, you want to build a group that represents a team rather than an individual"**

Karen's group is lead by a steering committee that shares the responsibility of running the group. Multiple leaders take equal part of managing the group. Why is that so important? Karen explains: "By taking equal input from multiple leaders, your group will over time reflect all the participants, instead of a single individual."

### **"Do not try to run the group yourself"**

One of the biggest mistakes that you can make is trying to run the group by yourself. Karen warns to "include annual elections and avoid not sharing responsibility of the group" because it can lead to a very quick burnout. Furthermore, Karen stresses the need to have a structured and organized meeting: "People want to know what they are coming to, respecting their time is important. Start on time and get to the topic: do not talk for two hours without a defined purpose."

## *Karl Palachuk*

Karl Palachuk (karlp@kpenenterprises.com) leads the Sacramento SBS Users Group (<http://www.kpenenterprises.com/SBSUG.htm>) and offers the following advice:

### **"Find energetic people that can bring vibrance to your community immediately."**

Nothing kills your meetings like a bunch of people sitting with their arms crossed. Sometimes the subject at hand is particularly exciting, meeting on software licensing for example. Karl recommends engaging the passionate and energetic members of your group that can carry on a conversation when you hit rough parts of your presentation.

### **"Meet at a place that can give you a bigger room without changing location"**

Changing your groups meeting location can be devastating. Karl meets at a local CTEC, New Horizons, because they are very versatile: "They can move us to a bigger room when we grow so I absolutely know I can have meetings there in the future." Even when that group grows it will not have to change meeting locations.

### **"Have multiple people representing your group at regional events"**

Microsoft TS2 events present a great opportunity to introduce your group to the potential members. But remember, you are presenting a community so it helps to bring out a few of your members. Karl explains: "I encourage everyone that can show up to attend. We talk to people, take pictures, give everyone a sense that there is really a community out there and not just one guy"

## *Ken Shafer*

Ken Shafer (info@technologywizards.com) leads the Technology Wizards group (<http://www.technologywizards.com>) and offers the following advice:

### **"Get the information out to the group often with variety"**

Ken considers information sharing one of the most successful features of his group: "I update them on things that may not specifically relate to the user group: Technology, Business, TechNet events, special offers for Small Business Specialists." Be prepared to talk about a variety of topics with your group, you never know who is an expert in a particular field that could have information beneficial for the entire group. By sharing various topics, you will encourage your members to share more that they find interesting - to the overall benefit of the group.

### **"Listen to what your members want from participation in the group"**

"What can this group do for you?" is the question Ken asks his members often. After all, what is bringing your members to the meeting? What do they find important? Ken often solicits this information that helps him find the relevant content for everyone.

### **"Do not set your entire meeting around a featured presenter"**

Why not? Ken explains very briefly: "They may back out." If you've promoted the entire meeting around a featured presenter and they back out, you need to have something to talk about.

## *Larry Lentz*

Larry Lentz (larry@lentzcomputer.net) leads the Alamo PC Small Business Server Special Interest Group APCO SBS SIG (<http://www.lentzcomputer.net/sbs>) and offers the following advice:

### **"Hold the meeting at the same time, same place, every month"**

Consistent meeting time and place can go a long way in helping you grow and maintain your meeting attendance. Larry mentions the importance of having the meeting every single month: "I was a part of the technology chapter of the local chamber - they decided to skip the July meeting and then proceeded to meet only when it was convenient. By skipping around meetings nobody knew when the next one would be held."

### **"You gotta have the sense of urgency, desire to put a group together"**

"You really need to be motivated to run the user group. If you are just doing it because you think it might be a good idea, that may not give you enough momentum to carry the group to a successful community." Larry's key to success is having the motivation and long-term commitment to building a technology community.

### **"Do not make it inconvenient for your members to RSVP"**

Before you commit to a new way of organizing your meeting, run it by your members and see if you're doing the right thing. Larry recently implemented the MicrosoftPartnerEvents.com RSVP system and "the members felt that it asked for too much information to be provided. Some didn't feel like revealing that much, some expected the Passport to pre-fill the fields, and others just did not like it at all." Make sure the systems you are implementing are comfortable for your group members.

## *Rayanne Buchianico*

Rayanne Buchianico (rayanne@abcsolutionsfl.com) leads the Tampa Bay SBS UG and offers the following advice:

### **"You have to be dedicated or it will fall apart around you"**

Strong words but still very true. Rayanne encourages us to "Make sure you are doing it for the right reasons and you really want to do it because it is a LOT of work. There is no financial reward, just a few pats on the back and the self-gratification of having put together a successful group."

### **"I found literally 90% of my members at TS2 events"**

Microsoft events are a great membership draw for Rayanne: "If they are willing to spend a few hours at a free Microsoft event, they are willing to take that extra step and meet on a regular basis. More importantly, they are the people that are truly willing to learn."

### **"Define an agenda and stick with an agenda"**

Having a plan for your meetings is very important. Rayanne remembers: "Our first few meetings were just get-togethers, we got together and then figured out what to do and what to talk about." but as her group matured Rayanne realized that she needed to set expectations: "Have an agenda and stick with it. Know what the meeting is about, have a plan and stick with it!"

## *Roger Otterson*

Roger Otterson (roger@snetweb.com) leads the San Diego SBS User Group (<http://www.sandiegosbs.org>) and offers the following advice:

### **"The most important item is to establish a common bond"**

According to Roger, "the most important item is to establish a common bond" when starting a user group. "A group for the sense of starting a group is not necessarily a group unless you establish that other people have common needs" is the key in defining a group that serves everyone. But how do you find the people that share your needs and interests? "Be at the right place at the right time, common events that interest you or your customer base. Vendors, other partners, customers in your space. It is a form of market research." And research is important when looking for common-minded professionals, but how do you identify them? "Ask. Are other people having the same issues you're having, can you establish success based on leveraging numbers over your singularity existence. That can apply to anybody in any business. Go to different events, once you've established you can get along, comradery, then you sit down and say a group of the idea is..."

### **"Establish purpose, no different than a mission statement"**

One of the things that has led to Roger's success with his user group is careful planning but also establishing a purpose for the group: "Do we all agree on the purpose to get together. It could be as simple as "we do similar thing, lets just get together and enjoy each others war stories and have fun." On the upper end there are higher reasons to belong to a group: "There is business success.. The opportunity is there to help each other in business, which is not a strong suit for most of us."

### **"If you don't understand why you are getting together you don't have a group you have a monthly hangout."**

Meetings and groups should have a defined purpose as Roger explained above. But how do you define purpose and what should it be? "One mistake that is often made is that due to our common bond we fall in our comfort zone of technical capabilities. Is this a group all about getting together and learning about command line arguments or is there more that we can do together?" claims Roger.

## *Scott Cayouette*

Scott Cayouette (scott@iprowebs.com) leads the South Florida Technology Network (<http://www.sfltech.net>) and offers the following advice:

### **"Find someone that you can share the workload with"**

"Running an SBS group is a lot of hard work", Scott explains, "do not attempt to go at it on your own." It is hard to estimate just how much work you will need to put in to make your group succeed, but it will definitely be more than you think. By sharing the workload with someone else you can avoid the eventual burnout if you try to do everything solo.

### **"Make sure that the people you work with have the same goals"**

When you have found the people that are willing to help you run the group, "make sure you are on all the same page." Understand why you are starting this group, what benefits it provides and what goals it has. "Find the people that have the willingness to build a community" so that the goals you created the group for benefit the whole community in the long run. Remember too that "When you give you do receive" in many ways that will benefit you both professionally and personally.

### **"Do not assume that everyone reads what you're writing"**

Scott cautions that everyone is not reading every single message you send to the group mailing list. "If its important, say it often and encourage members to spread the message", pointing out that you should disseminate your message any way possible such as a phone call or lunch with key group members. Use other group leaders, and always encourage your group members to reach partners that are not members of your group.

## *Steven Lai*

Steven Lai (laifour@gmail.com) leads the San Francisco Bay Area SBS user groups (<http://www.sfsbs.net>) and offers the following advice:

### **"Promote yourself - Do not be afraid to ask people"**

Steven considers promotion one of the biggest keys to success, especially now that there is a big push from Microsoft to grow the SBS community.

"Just walk up to the presenter and tell them you are interested in starting one up" and don't be afraid to talk to people or introduce yourself.

### **"Find a place to meet at regularly"**

"In past I've run other groups that spent a lot of time on food and speakers, which requires a lot of time, money and organization." By focusing on the community and interesting content you will retain members that are truly interested in your group. "Do not be concerned with the numbers", Steven explains, "Interactive and lively crowd of 10 is much better than a room full of muffin-eaters that are there just for free food".

### **"Do not feel like you're competing with other user groups."**

The purpose of user groups is to interact: "If it is interesting, they will come." Steven cautions against trying to compete with other groups: "Do not get territorial, do not go out of the way to compete with other groups." By "focusing on what is comfortable" for you and your group, your community will grow and be more successful in the long run.

## *Tim Barrett*

Tim Barrett (timbarrett@rehabdesigns.com) leads the Kentucky SBS User Group KYSBSUG (<http://www.kysbsug.org>) and offers the following advice:

### **"Form a study group if there is no decent representation that cares about SMB"**

Tailor the group to your niche, in Tim's case, SMB market. One of the Tim's keys to success was organizing study groups, employee training and getting together for the SBS Tour. By building the community on the grounds of technical training, Tim was able to get partners together and unify them in an SMB segment.

### **"Have a great relationship with the TS2 presenter"**

Relationship with local Microsoft representatives is quite important for a community group. Tim has made it a point to be available every time Microsoft looked for case studies, proof of concept and all training incentives.

### **"Do not move your meetings, it just frustrates people"**

One of the biggest mistakes Tim cautions us to avoid is moving around meetings trying to please everyone: "I tried to hold meetings on Tuesdays and Wednesdays, I alternated them. In the end, I ended up losing a lot of people and would have been better off sticking with a day and just letting everyone that could make it attend the meeting."

## *Wayne Small*

Wayne Small (wayne@correct.com.au) leads the Sydney SBS Group (<http://www.sbsgroups.com/au/Sydney>) and offers the following advice:

### **"One thing in common is to get the word out about the group"**

Wayne believes that each group has a different definition of success: "Some want to grow, some don't. One thing in common is to get the word out about the group which assures that the vendors know of your group and that it has value to them." This has allowed Wayne to form a great relationship with vendors on the argument that "If your group contains five resellers in the area shows they have interest in that vendor. The fact that they come out for a few hours of their billable time shows a huge commitment on their part."

### **"Encourage everyone with knowledge to be a presenter"**

"Group participation is key," according to Wayne, "getting people to participate in the group and try to encourage people who may not have that good of presentation skill but know a lot.. encourage them to present." It is a matter of developing your group and your members: "Group leaders tend to have the skills and the leadership quality. It is good for us to share that knowledge, information and skills because it will help lessen the load off you and give someone else a share of the lead."

### **"I am still working on perfecting everything"**

Wayne encourages us to remember what is really important and focus on that: "Avoid doing everything yourself. I was putting into the community and not too much into the business." So how does one get more time to their business while encouraging a thriving user group?: "Do not do everything yourself. You need to understand the power of delegation and making the decisions into actions. Biggest threat is to keep the momentum going and it can be impacted due to leadership issues if you don't encourage everyone to help things moving." So why do you do it?: "I love teaching, love sharing knowledge and get a massive high out of sharing knowledge."