Exceed Network

Volunteer Guidelines

Dos and Don’ts of Being a Team Member

Do

- ✓ Complete a confidentiality agreement.
- ✓ Listen to your client.
- ✓ Update the AF staff about meetings and conversations with the client.
- ✓ Be sure to get all of your client’s contact information including cell phone and email.
- ✓ Keep lines of communication open with the Angel Fund staff for brainstorming.
- ✓ Use personal contacts to help the client with advice.
- ✓ Visit the client at their business site for a better understanding of the case.
- ✓ Review systems and procedures a client has set up.
- ✓ Advise if your time is limited and offer to call back at a mutually convenient time.
- ✓ Set limits if a client is calling too often.
- ✓ Be proactive and don’t wait for a client to call you.
- ✓ Use words such as “we”, which imply that you are working together as a team.
- ✓ Point out differences of opinions with words like; “I think differently, but hear what you are saying” or “I’ll sleep on it” or “I’ll ask someone else what they think.”
- ✓ Bring aboard new volunteers.

Do Not

- ✗ Do not do work for the client, such as going on sales calls, building a website, etc.
- ✗ Do not set up systems and procedures for the client
- ✗ Do not spend / lend your money or invest in the clients business without consulting with the AF
- ✗ Do not use negative vocabulary like “can’t”, “won’t fly”, “no good”, “impossible”
- ✗ Do not use your authoritative position over the client

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