



Club Growth Director Checklist

Outgoing CGD Transition Checklist

Before the meeting: (May 1 – May 31)

- Spend time identifying key items that need to transition
- Look at any pressing business that will need to occur in the midst of the transition (i.e., struggling club issues, key new club opportunities and/or any decisions that were made in the current administration that will affect and/or impact the incoming CGD)
- Schedule and prepare for your meeting with the incoming CGD
- Toastmasters Lead Management (TLM) system
 - ▶ Update each Lead record as follows (use the edit (pencil icon) button):
 - Lead Information is complete
 - Lead Status is updated to current status
 - Corporate Clubs and Club Sponsor Contact (1) and (2) are completed where necessary
 - Add Notes to document pertinent status information and next steps

Meeting agenda: (occurs within June 1–30)

- Review page 2 of the CGD Handbook
- Review page 6 of the CGD Handbook and how it relates to the mission of the district
- Review the district's goal achievement over the past year
- Address any pressing business that may impact the incoming officers
- Review the Club-building initiatives and marketing programs/campaigns
 - ▶ Discuss what events, teams and/or procedures...
 - Led to the most success for the district
 - You wanted to create/do, but didn't get a chance to
 - You would have done differently if you knew then what you know now
- Review the following programs purposes, objectives and how the incoming CGD can leverage and support them toward district success
 - ▶ Club Sponsor Program
 - ▶ Club Coach Program
 - ▶ Club Mentor Program
- Ask if they received the email and checklist from Toastmasters International World Headquarters (being sent June 1st) and if there are any questions you can help answer

Incoming CGD Transition Checklist

Preparing to step into your role: (June 1 – June 30)

- Attend a transition meeting with your district's outgoing CGD
- Read the CGD Handbook
- Brainstorm your future Marketing Team
 - ▶ Who would you want to join you in your efforts as the CGD?
 - ▶ What roles/positions would they hold?
 - ▶ What would their responsibilities be?
 - ▶ What management style would you take?
 - ▶ Would you hold weekly/biweekly/monthly meetings?
- Submit your TLM team request to the District Growth and Support team
 - ▶ Each District may request access for one (1) club extension chair. TLM access is automatically provided for all other District Executive members as part of their District Central permissions. Therefore, it is not necessary to submit a request for these individuals.
 - ▶ To request access for one (1) club extension chair, please submit the following information to the District Growth and Support team at districts@toastmasters.org.
 - District
 - Title (Example: Club Extension Chair)
 - Full Name
 - Email Address
- Familiarize yourself with the Toastmasters Lead Management (TLM) system and brainstorm how you think you can leverage the TLM with your future Marketing Team.
 - ▶ Log into the TLM system on District Central and click on Leads and Prospective Clubs
 - ▶ Review the tutorial resources TLM Best Practices and Guidelines and watch the TLM Webinar Recording
 - All TLM resources are found on the Toastmasters website [here](#) or by searching Club Growth Director Resources.

On or before July 1 — Corporate Relations will email incoming Club Growth Directors with information and links to all CGD-related marketing materials, including TLM resources.