This very useful worksheet, properly deployed, can be a great "lead generation" exercise for your club. Most clubs that fall short of their growth goals do so because of a lack of "lead flow", meaning they don't have enough people on their prospect lists.

**The 10-3-1 Rule**

People experienced at prospecting realize that not every prospect will come through, whether as a customer or as a new Rotary member. In major league baseball, a 30% hit ratio is considered GOOD, even if it's a 30% hit ratio of only singles.

Generally speaking, it will take about **10** leads (referrals or acquaintances) to get into **3** substantive conversations about Rotary, to get **1** member.

**How to Use This Worksheet**

**Most Important:** This is not "homework". Anyone who has let a member take this home, expecting to get it back has been disappointed. That doesn't work.

**Second Most Important:** This information is **not** for the Membership Committee. When this exercise is complete, **don't** ask members to pass the worksheets in. What that does is imply that it's the Membership Committee's job to contact prospects and attract new members. Keep that shoe appropriately on the member's foot. In a Rotary Club it's **everyone's** job to attract new members.

**Quick Start Guide**

* Announce a **Club Assembly** where members are asked to bring their contact information
* **Send reminders** a few days before and the day of the meeting emphasizing contact information
* **Print** the "**Rotary Membership - Who Do You Know?"** worksheet 2-sided and put one at each member's seat
* At the meeting, explain **why** it's essential to build membership
* **Explain** the exercise -- 15 minutes, heads-down, listing everyone we know on the back page
* **List the “Top 5”** potential Rotary prospects on the front page, with contact information
* **Walk the room** to be sure members are engaged -- break up "chit-chat" sessions
* **Contact the Prospects** – Members get in touch with a week to invite them to a Rotary event
* Option -- Have them list the Top 5 on a 3"x5" card so the membership committee can enter them as Prospects
* Option 2 - Have them take a photo of their page and email to the Membership chair so the membership committee can enter them as Prospects

**See next page for detailed "How to use this worksheet"**

**Detailed "How-to"**

1. At least a week in advance, **announce to your members** that an upcoming meeting will be a Club Assembly, where they need to bring all their personal and business contact information. That may be on a smartphone, tablet, laptop, Rolodex, business cards in a rubber band, or handwritten on notebook paper. Email or phone all members, so you also reach those who weren't at the meeting.
2. **Remind your members** to bring their contact information to the meeting. Use phone or email, a few days before the meeting **and** the morning of the meeting. Make sure there's enough communication that "dog ate my business cards" isn't a plausible excuse.
3. Lay out the 2-sided "**Rotary Membership - Who Do You Know?"** Worksheet on each table - 1 per member.
4. As you open the exercise, explain **why** this is important -- It's essential to build our membership, and we need members bringing prospects to membership events and as guests at meetings to ensure a steady flow of new member candidates. **We need more prospects.**
5. Explain **what** we're going to do -- We're going to take 15 minutes, individually, to recall as many people as we can who we know - not necessarily prospects, just people we know, jotting those names on the “thought-starter page” (reverse side).
6. Then, enter the Top 5 on the front page, along with contact information.
7. Go into "Proctor" mode. Some members won't take you seriously. If you let that happen, the exercise will collapse. Walk the room. When you find a couple of members chit-chatting instead of doing the assignment, say, "Guys, I really need your help with this. You may have a better idea for how to identify prospects, but I'm asking you to humor me for the next few minutes, and give this exercise a try."
8. Ask each member to contact their prospects in the next week to invite them to either a pre-determined prospective member event, or to a future meeting focused on membership.
9. **OPTION**: You might also have 3"x5" cards on the table where they can report their names and contact information to the membership committee. They take the full prospect list with them, and the membership committee enters them in DACdb as Potential Members
10. **OPTION 2**: Ask them to take a picture of their prospect page with their phone, and email it to the Membership Chair, who will enter them in DACdb as Potential Members, along with their contact and Sponsor information.

**IMPORTANT:** Please **don't** take up these sheets after the meeting. That suggests to the members that it's somebody else's responsibility to approach and contact these prospects. Keep that shoe on the member's foot -- it's everyone's job to regularly bring prospective members to Rotary.

**Follow up** -- At the next meeting or by email, ask members how they're doing on their 3 prospects. If they're not making the contacts, ask "What's getting in the way?" Then see what you can suggest to break down the excuses or roadblocks.

**GOAL:** If you can get each member to bring just **one** prospect to the table, you'll eclipse most any prior membership development effort in your club. Getting members to act on approaching and inviting members is not only your biggest challenge, but also your key success factor.

Please let us know how you used this worksheet and how it worked for you.
Email dawkins@goeaston.net with your experience.



**Rotary Membership - Who Do You Know?**

Your Name Date

Your E-Mail Phone

Considering our Rotary Club's passion and purpose - Service above Self and networking opportunities, do you know professional colleagues, community leaders, friends or acquaintances who might qualify as potential Rotarians? Please list at least five individuals you believe should be in Rotary.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Occupation** | **Email** | **Phone** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Acquaintances to Consider:**

Architect

Attorney

Banker

Business Consultant

Chiropractor

Contractor

C-Suite Executives or Management

CPA

Customer(s)

Dentist

Distributor

Engineer

Entrepreneur

Estate Planner

Financial Manager/Planner

Friend/Neighbor

Funeral Service

Home Health Service

Hospitality Owner/Manager

Internet Technology Consultant

Manufacturer

Non-profit Executive Director

Other Leader(s) in your Company

Physician

Public Relations Manager

Public Relations/Marketing Agency

Religious Leader

Reseller/Manufacturer’s Rep

Retail Owner/Manager

School Administrator

Software Developer

Supplier(s)

Veterinarian

Other