# MANAGING MEMBERSHIP LEADS

[PRESENTER NAME]
[DATE]





#### WHERE DO MEMBERSHIP LEADS COME FROM?



Prospective members



Relocating or returning members



Member referrals

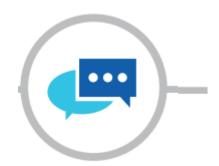


#### THE PATH TO MEMBERSHIP



District reviews information and matches candidate with a club





Club contacts candidate and establishes a relationship



Club invites candidate to join and updates status





### THE ADVANTAGE OF USING MEMBERSHIP LEADS

Current status 💠	Assigned Club	<b>‡</b>
District assigned candidate to club  Manage status	Joliet	
Auto assigned to district  Manage status		
District assigned candidate to club  Manage status	La Grange	
District assigned candidate to club  Manage status	Oak Forest	

### WHO CAN MANAGE LEADS: IN A DISTRICT

Role (if reported to Rotary International)	Receives email	Can manage (update status, admit)	Can view
District governor	X	X	X
Assistant governors	X	X	X
District membership chair	X	X	X
Executive secretary	X	X	X
Other current district officers		X	X
Officers-elect			X
Immediate past officers			X

### WHO CAN MANAGE LEADS: IN A CLUB

Role (if reported to Rotary International)	Receives email	Can manage (update status, admit)	Can view
President	X	X	X
Membership chair	X	X	X
Secretary	X	X	X
Executive secretary	X	X	X
Other current officers		X	
Club's assistant governor	X		X
Officers-elect			X
Immediate past officers			X

#### WHO ARE THESE PROSPECTIVE MEMBERS?

	MEMBERSHIP LEADS	CURRENT MEMBERS
Under 40	63%	5%
Women	35%	21%

## 50% hear about Rotary through a personal connection



#### WHEN MEMBERSHIP LEADS ARE NEGLECTED

OF THE 17,898 ASSIGNED TO	DISTRICTS:
Never contacted by the district	<b>62%</b>

Never assigned to a club 77%

## OF THE 4,131 ASSIGNED TO CLUBS:

Never contacted by the club 67%



54% no longer interested in Rotary

#### **HOW YOU CAN HELP**

1. Respond to all inquiries, even old ones.

2. Assign leads to clubs you know will respond.



#### HOW ROTARY HELPS WITH MEMBERSHIP LEADS

Reviews leads and assigns them to district leaders

Reminds district and club leaders to take action on older leads

Responds to candidates who write with questions or concerns

Reconciles duplicate records

#### EMAIL NOTIFICATION OF MEMBERSHIP LEAD

#

#### Rotary membership lead for your club

To: Club president Club secretary Club membership chair Club executive secretary Club email address (if applicable)

Cc: Assistant governor (you are copied on the club notification after the lead was assigned to a club in your club group territory, access information through your district's Manage Membership Leads page)

Dear Club Officer,

You have a new membership lead! The following person expressed interest in Rotary, and district leaders screened the information and assigned the lead to your club:

Mona Lisa; Chicago, IL

First find contact information and learn more about this candidate.

#### YOUR MANAGE MEMBERSHIP LEADS PAGE

Home | Manage | Club & District Administration | District Administration

#### District Administration

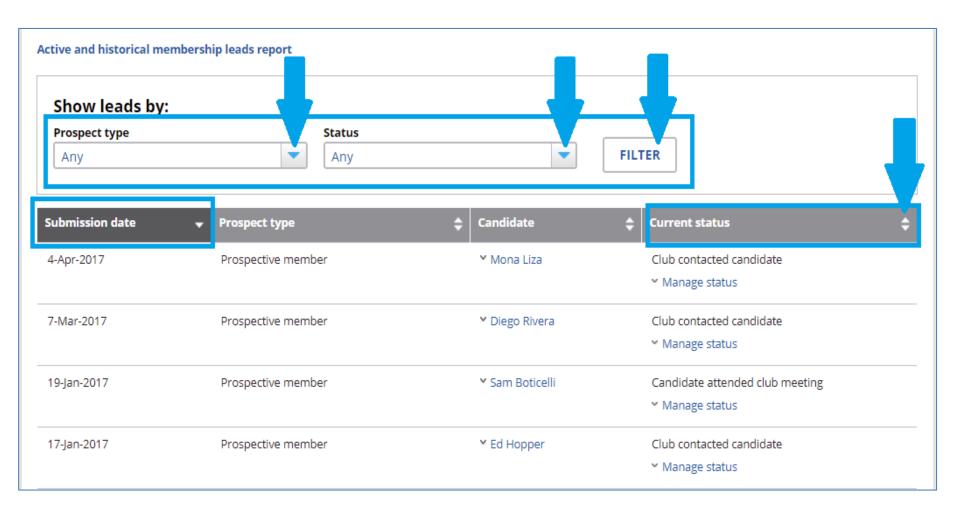


#### **Manage Membership Leads**

Review your online membership leads for prospective, referred, and relocating or returning members. Then assign and track your candidates through the membership process – from inquiry to induction.

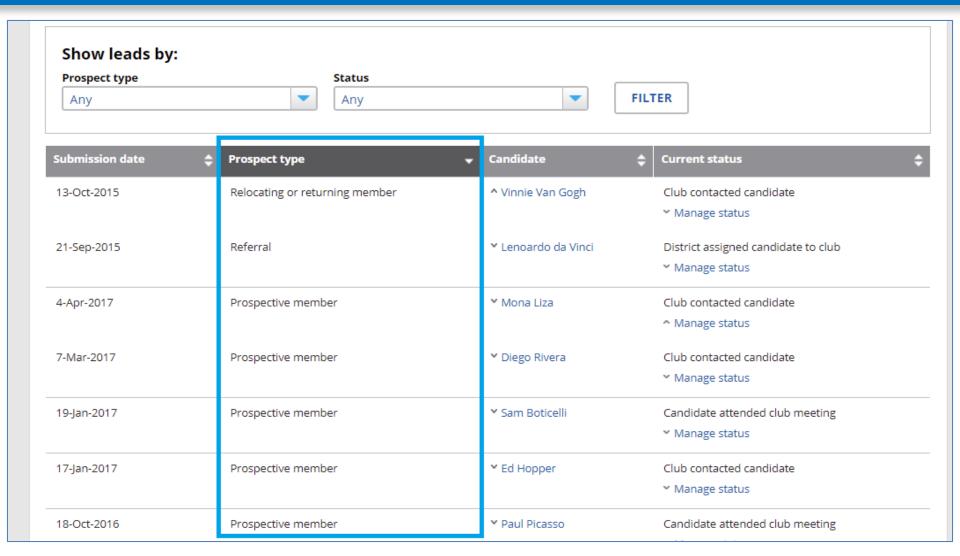
View or manage leads | About the membership leads program

#### FILTER AND SORT



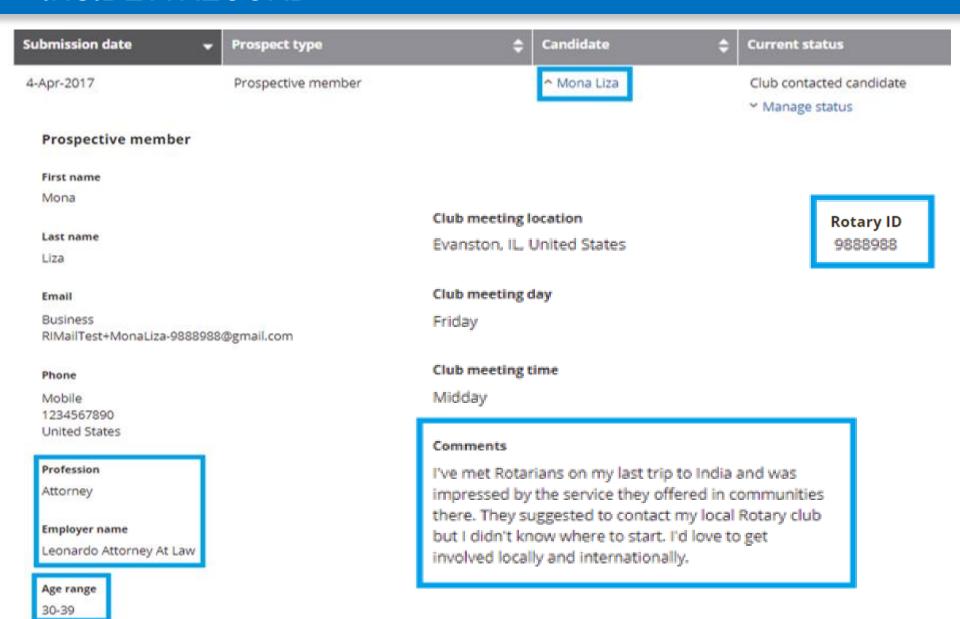


#### TYPES OF CANDIDATES





#### **INSIDE A RECORD**



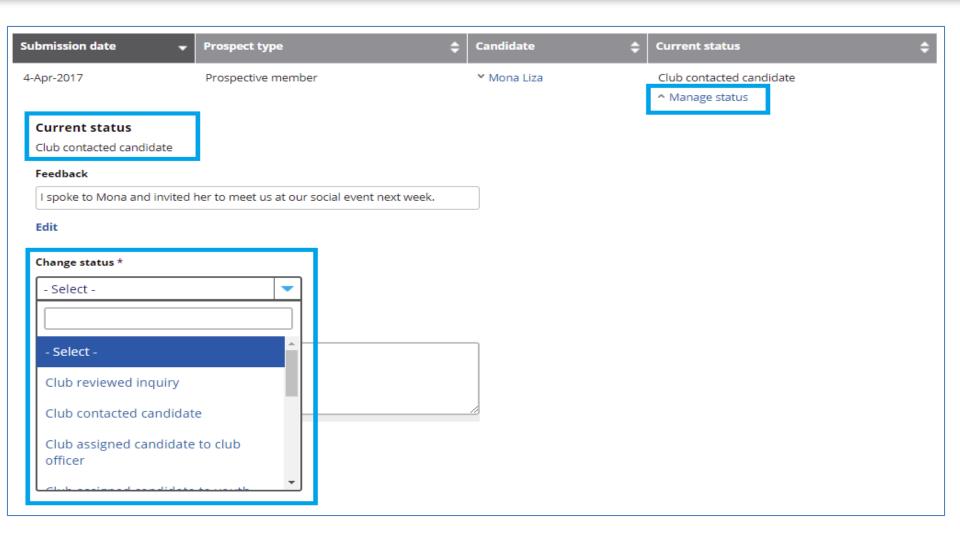
## STATUS HISTORY

St	atu	s H	ist	ory

Date	Status	District/Club	Feedback
12-Oct-2017	Club proposed candidate for membership		Mona participated in one of our fundraisers, helped with the beach clean up service project last month, has made friends at the club, attended our last 6 club meetings, and expressed interest in becoming our newest memberless
27-Jul-2017	Candidate attended club meeting		
6-Jun-2017	Club contacted candidate		I spoke to Mona and invited her to meet us at our social event next week.
5-Jun-2017	District assigned candidate to club	Evanston	Mona did not respond to my email. I called her again today and left a message, but I thought I would send her along to you so that you can contact her. She would prefer a Friday meeting, but you may be able to persuade her to come on Thursday!less
22-May-2017	Candidate sent back to district for reassignment		Mona is not interested in our club but rather visiting a club near her law firm in Evanston. Please inform the Rotary clubs in Eva



#### MANAGING A STATUS

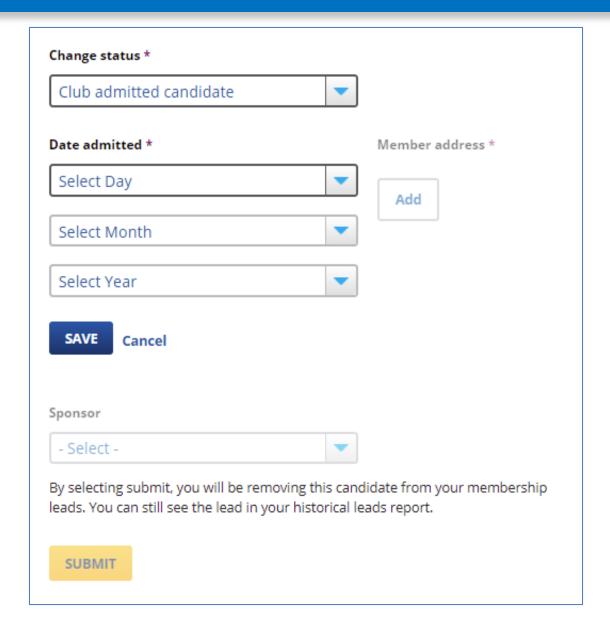




STATUS OPTIONS	DISTRICT	CLUB
Reviewed inquiry	X	X
Contacted candidate	X	X
Assigned to district or club officer	X	X
Sent back for reassignment*	X	X
Determined candidate not interested in club or Rotary*	X	X
Assigned candidate to club	X	
Attended club meeting		X
Proposed for membership		X
Admitted to club*		X

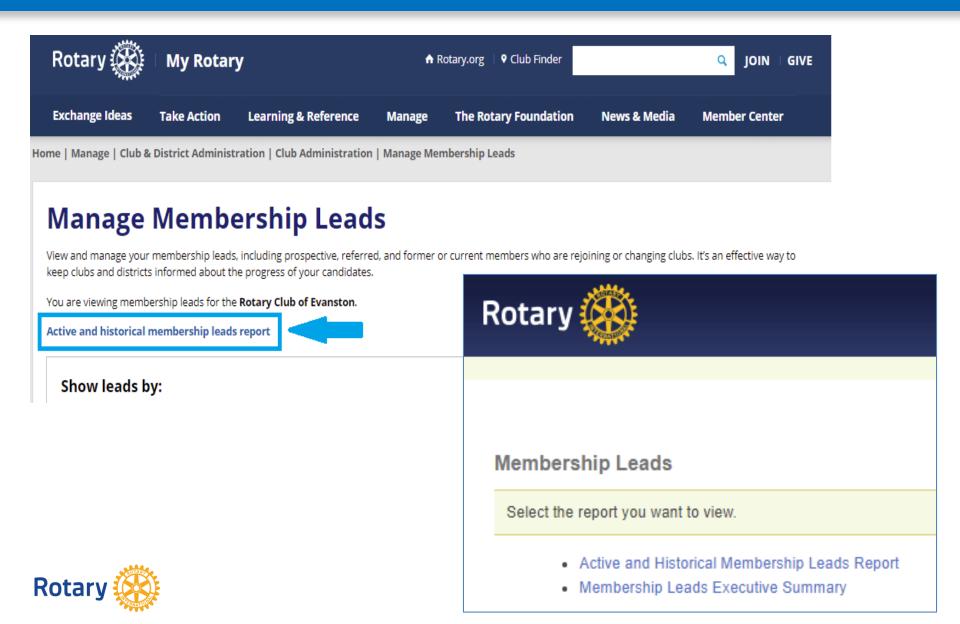


#### **ADMITTING A CANDIDATE**





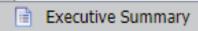
#### VIEWING CURRENT AND PAST LEADS

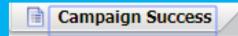


### **EXECUTIVE SUMMARY**

	Prospectiv	ctive member Referral		Relocating and retu	ning member	
	Count	Percentage	Count	Percentage	Count	Percentage
Total candidates	321	100.00%	6	100.00%	11	100.00%
Assigned to district	309	96.26%	6	100.00%	10	90.91%
Contacted by district	158	49.22%	2	33.33%	2	18.18%
Average time for district to contact candidate	7 da	iys	22	days	0 days	
Assigned to club	138	42.99%	2	33.33%	2	18.18%
Average time for district to assign to club	5 da	iys	1 0	days	0 days	
Contacted by club	12	3.74%	0	0.00%	0	0.00%
Average time for club to contact candidate	66 d	ays		-	-	
Admitted	20	6.23%	1	16.67%	5	45.45%
Average time to admit after club assignment	59 d	ays	147	days	13 days	S
District rejected inquiry	0	0.00%	0	0.00%	0	0.00%
Club rejected inquiry	0	0.00%	0	0.00%	0	0.00%
Candidate no longer interested	0	0.00%	0	0.00%	0	0.00%
Sent back to RI	4	1.25%	0	0.00%	0	0.00%







#### REPORTING OFFICERS

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## Club Administration

#### Club & Member Data

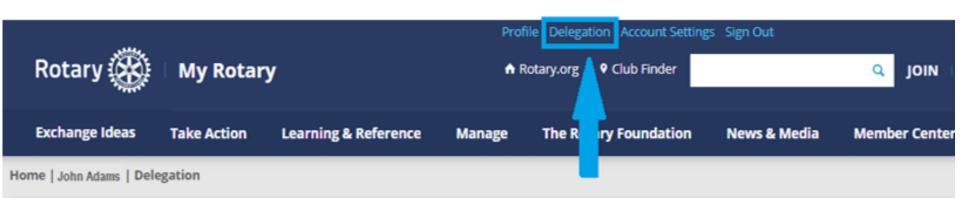


#### Update Member Data

Report membership changes within 30 days, no later than 1 January or 1 July, to ensure your club invoice reflects the latest information. Record new member sponsors.

Add, edit, or remove members Add, edit, remove club officers Record a new member sponsor

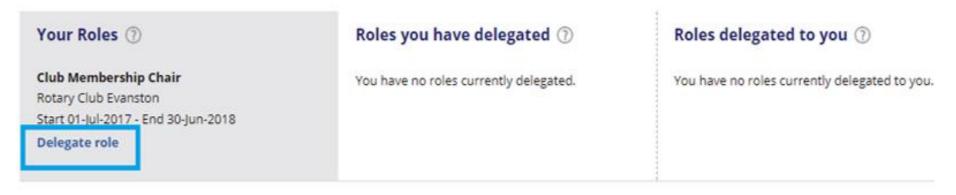
#### **DELEGATION**



#### Delegation

You can delegate temporary permission to conduct online Rotary business on your behalf to any individual in your club or district who has an active My Rotary accountrol the start and end date and can schedule multiple delegations at one time.

View the delegation quick guide



#### **NEXT STEPS**

- Tell others about the advantages of managing leads online
- Tell your district that your club is looking for leads
- Make sure your district leaders know what your club offers candidates
- Make a plan for managing leads
- Encourage new leads by linking to rotary.org/join on your website and social media pages and including it in brochures and other materials



## QUESTIONS?

MembershipDevelopment@Rotary.org

