MANAGING MEMBERSHIP LEADS

[PRESENTER NAME]
[DATE]

Prospective members

Relocating or returning members

Member referrals

Rotary

District **reviews information** and **matches candidate** with a club

Club **contacts candidate** and establishes a relationship

Club **invites candidate** to join and **updates status**

Rotary

THE ADVANTAGE OF USING MEMBERSHIP LEADS

Current status ⬍	Assigned Club ⬍
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

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

50% hear about Rotary through a personal connection

1. Respond to **all inquiries**, even old ones.

2. Assign leads to clubs you know **will respond.**

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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

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

Active and historical membership leads report

Show leads by:

Prospect type	Status	
Any ▼	Any ▼	**FILTER**

Submission date ▼	Prospect type ⬍	Candidate ⬍	Current status ⬍
4-Apr-2017	Prospective member	˅ Mona Liza	Club contacted candidate ˅ Manage status
7-Mar-2017	Prospective member	˅ Diego Rivera	Club contacted candidate ˅ Manage status
19-Jan-2017	Prospective member	˅ Sam Boticelli	Candidate attended club meeting ˅ Manage status
17-Jan-2017	Prospective member	˅ Ed Hopper	Club contacted candidate ˅ Manage status

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TYPES OF CANDIDATES

Show leads by:

Prospect type

| Any ▼ |

Status

| Any ▼ |

FILTER

Submission date ⬍	Prospect type ▼	Candidate ⬍	Current status ⬍
13-Oct-2015	Relocating or returning member	^ Vinnie Van Gogh	Club contacted candidate ⌄ Manage status
21-Sep-2015	Referral	⌄ Lenoardo da Vinci	District assigned candidate to club ⌄ Manage status
4-Apr-2017	Prospective member	⌄ Mona Liza	Club contacted candidate ^ Manage status
7-Mar-2017	Prospective member	⌄ Diego Rivera	Club contacted candidate ⌄ Manage status
19-Jan-2017	Prospective member	⌄ Sam Boticelli	Candidate attended club meeting ⌄ Manage status
17-Jan-2017	Prospective member	⌄ Ed Hopper	Club contacted candidate ⌄ Manage status
18-Oct-2016	Prospective member	⌄ Paul Picasso	Candidate attended club meeting

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INSIDE A RECORD

Submission date ▼	Prospect type ▲▼	Candidate ▲▼	Current status
4-Apr-2017	Prospective member	^ Mona Liza	Club contacted candidate ⌄ Manage status

Prospective member

First name

Mona

Last name

Liza

Email

Business
RIMailTest+MonaLiza-9888988@gmail.com

Phone

Mobile
1234567890
United States

Profession

Attorney

Employer name

Leonardo Attorney At Law

Age range

30-39

Club meeting location

Evanston, IL, United States

Club meeting day

Friday

Club meeting time

Midday

Rotary ID

9888988

Comments

I've met Rotarians on my last trip to India and was impressed by the service they offered in communities there. They suggested to contact my local Rotary club but I didn't know where to start. I'd love to get involved locally and internationally.

STATUS HISTORY

Status History

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 member. ...less
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 ...more

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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

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*These options remove a lead from the page

ADMITTING A CANDIDATE

Change status *

Club admitted candidate

Date admitted *   Member address *

Select Day   Add

Select Month

Select Year

SAVE   Cancel

Sponsor

- Select -

By selecting submit, you will be removing this candidate from your membership leads. You can still see the lead in your historical leads report.

SUBMIT

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EXECUTIVE SUMMARY

	Prospective member		Referral		Relocating and returning 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 days		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 days		1 days		0 days	
Contacted by club	12	3.74%	0	0.00%	0	0.00%
Average time for club to contact candidate	66 days		-		-	
Admitted	20	6.23%	1	16.67%	5	45.45%
Average time to admit after club assignment	59 days		147 days		13 days	
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%

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Executive Summary | **Campaign Success**

Home | Manage | Club & District Administration | Club Administration

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

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

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QUESTIONS?

MembershipDevelopment@Rotary.org