

Prospective member process: from prospect to member

Mickey D. - 2022-10-21 - Membership Success

Once a prospect is referred by a club member or fills out the online application form, their prospective member information is now stored inside the Membership Success module.

Let's explore the process of moving a prospect through the various stages.

To view the list of all your prospects:

1. Login to your club's **Member Area**.
2. In the Member Area click **Membership Success** in the top blue bar.
3. In the grey bar below click **Overview**.
4. Down the left side click **View Prospects**.
5. You now come to the **Prospects** screen where all prospects are listed, including a search feature. If you click the **View** button you'll be able to see all the info for our sample prospect Eugene Smith.

The screenshot displays the 'Prospects' management interface. At the top, there is a navigation bar with various menu items, and a sub-header with 'Overview' and 'Welcome'. A left-hand sidebar contains a 'Getting Started' section where 'View Prospects' is selected. The main content area features a 'Search Options' section with input fields for 'First Name', 'Last Name', and 'Email Address'. Below these are radio buttons for 'Created On' (Any, Date Range) and 'Lead Source' (All, Only). A 'Sort By' dropdown is set to 'Date Created'. An orange 'Search' button is positioned to the right. Below the search area are tabs for 'Prospects', 'Applicant', 'Joined', 'Closed', and 'All'. A 'Bulk Actions' dropdown and an 'Email' button are visible. The prospect list shows 'Eugene Smith' with contact details and a 'View' button highlighted in a red box. Other details include 'Interest Level' (5 stars), 'Date Created' (Oct 20, 2022), and 'Lead Source' (Membership Inquiry).

6. The Membership Success module has the ability to store extensive information about the prospect including contact information, email history, interest level, prior club history (if any) and more. If you click the **Edit** button in any section, your club can fill in information about this prospect.

Prospect / Eugene Smith

Send Email ▾

| | | | | | |
|-----------------|--------------------------|----------------|--------------|-----------------------------|---|
| Email | eugene@sink.sendgrid.net | Interest Level | ★☆☆☆☆ | Receive Automated Campaigns | ✓ |
| Preferred Phone | 123-456-7890 | Type | Prospect | 1 Week Campaign Sent | ✗ |
| Source | Membership Inquiry | Status | New | 1 Month Campaign Sent | ✗ |
| | | Created On | Oct 20, 2022 | 3 Month Campaign Sent | ✗ |

Details Email History Notes

Contact Information

First Name Eugene
Last Name Smith
Email Address eugene@sink.sendgrid.net
Preferred Phone 123-456-7890
Preferred Address Address

Edit

Prospect Details

Interest Level ★☆☆☆☆
Source Membership Inquiry
Receive Automated Campaigns ✓
Prospect's Sponsor

Edit

Personal Details

Gender
Demographic Age
Areas of Interest
Occupation Teacher
Biography

Edit

Inquiry Details

How did you hear about our club? Attended Event
Why are you interested in our club? I attended a Rotary meeting and was very impressed, I would love to join your club.
Question/Comments

Edit

Rotary/Organization History

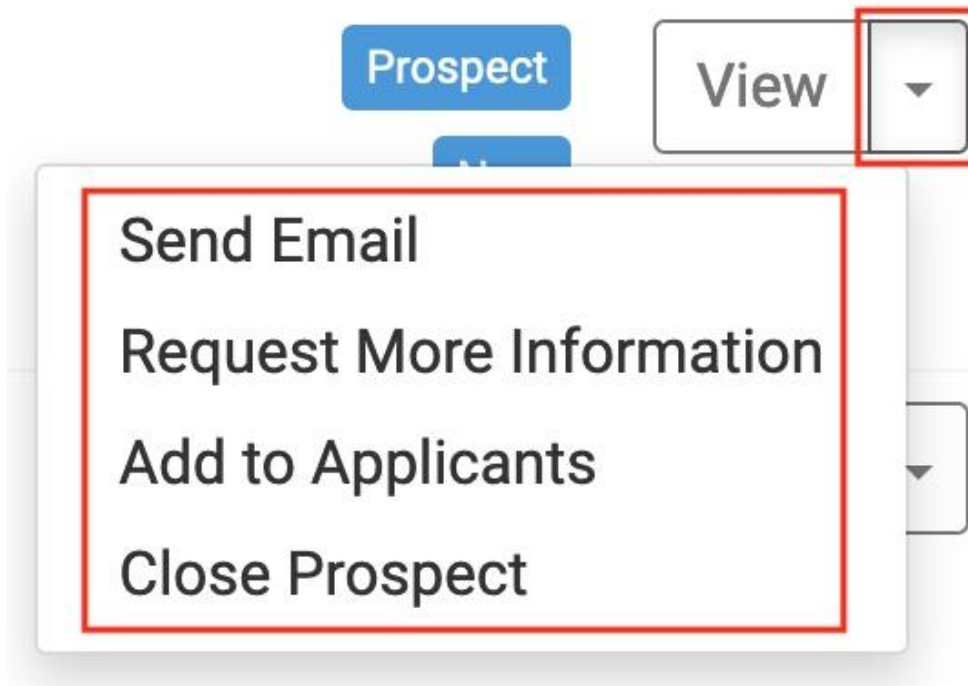
Was a Rotary Alumni? No
Was a Past Rotarian? No
Worked with other organizations

Edit

Consent

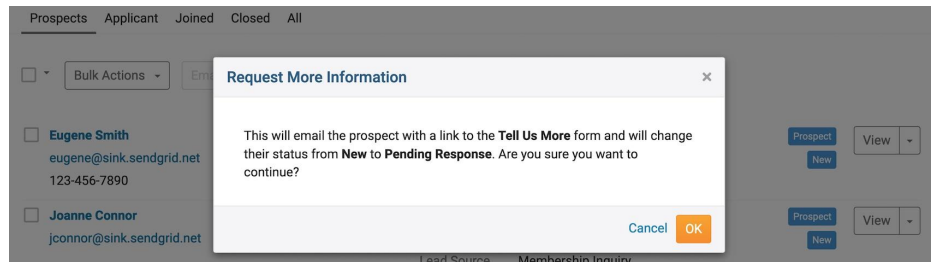
Received consent to store personal data ✓
Consent Date Oct 20, 2022

7. Click the **Go Back** button to go back to the list of prospects again.
8. If you click the **'down arrow'** icon beside any name, you'll see four additional options.

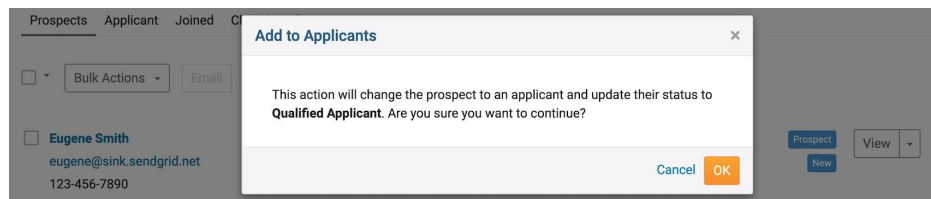


9. The four stages are:

1. **Send Email:** you can send a manual email to the prospect, this is very convenient if you want to ask general questions.
2. **Request More Information:** this is a special feature which, instead of sending a simple email, emails the prospect a **Tell us More** form and moves them along in this process to **Pending Response**. You can see the popup box below. Moving prospects through this process can be done at any pace. For example some prospects take days or even weeks to reply, while some prospects can provide your club information within hours.



3. **Add to Applicants:** if you choose this step, the prospect becomes an *applicant*. An applicant is the next stage in this process, it means the person applying has more than just a passing interest but has met the initial requirements of the club.



4. **Close Prospect:** this prospect is not suitable, you'll be closing this prospect's file and storing their information in case they ever decide to apply again.
10. After emailing the prospect and inputting further information, let's advance this prospect into an *applicant* by choosing the above option **Add to Applicants**.
 11. Now that this person is an applicant, a new option appears in their dropdown option which we will click: **Consider for Membership**. This will advance the person to a **Potential Member** meaning soon it will be up to the club, or the potential member, to accept or decline membership.

| Prospects | | Applicant | Joined | Closed | All |
|--------------------------|---|-------------------------|---|-----------------------------------|---|
| <input type="checkbox"/> | Bulk Actions | Email | | | |
| <input type="checkbox"/> | Eugene Smith eugene@sink.sendgrid.net 123-456-7890 | Interest Level ★★★★★ | Date Created Oct 20, 2022 46 minutes ago | Lead Source Membership Inquiry | <div style="border: 1px solid gray; padding: 5px;"> Applicant View <ul style="list-style-type: none"> Send Email <li style="border: 1px solid red; padding: 2px;">Consider for Membership Close Prospect </div> |
| <input type="checkbox"/> | Joanne Connor jconnor@sink.sendgrid.net | Interest Level ★★★☆☆ | Date Created Nov 06, 2020 2 years ago | Lead Source Membership Inquiry | |
| <input type="checkbox"/> | Zach Taylor zach@sink.sendgrid.net | Interest Level ★☆☆☆☆ | Date Created Jul 14, 2017 5 years ago | Lead Source Membership Inquiry | <div style="border: 1px solid gray; padding: 5px;"> Prospect View <ul style="list-style-type: none"> <li style="background-color: blue; color: white; padding: 2px;">New </div> |

12. Your club has evaluated and is now ready to offer this person a membership. While you can still send this person emails or close out this applicant, you will now see a new dropdown option which we will click: **Send Invitation**.

| Prospects | | Applicant | Joined | Closed | All |
|--------------------------|---|-------------------------|---|-----------------------------------|--|
| <input type="checkbox"/> | Bulk Actions | Email | | | |
| <input type="checkbox"/> | Eugene Smith eugene@sink.sendgrid.net 123-456-7890 | Interest Level ★★★★★ | Date Created Oct 20, 2022 51 minutes ago | Lead Source Membership Inquiry | <div style="border: 1px solid gray; padding: 5px;"> Applicant View <ul style="list-style-type: none"> Send Email <li style="border: 1px solid red; padding: 2px;">Send Invitation Close Prospect </div> |
| <input type="checkbox"/> | Joanne Connor jconnor@sink.sendgrid.net | Interest Level ★★★☆☆ | Date Created Nov 06, 2020 2 years ago | Lead Source Membership Inquiry | |

13. You have now sent a special **Membership Approved email** to the applicant, asking they confirm their details and accept your club's invitation of membership. If the applicant clicks **Accept and Confirm my Details** in that email, they are verifying their contact information is correct so you can process their application.

Hi Eugene,

Membership Approved

Your membership has been approved!



Congratulations! We are excited to share that your membership to the Rotary Club of Green Town was approved, and we are extending an invitation to you.

To accept, go to the membership invitation form and confirm your details.

[Accept and Confirm My Details](#)

If the button above does not work you can copy and paste the URL below into your browser:
<https://portal.clubrunner.ca/9723/form/membership-invitation?Etoken=0668b897-5802-446a-b928-f3cdab8ef8ca>

If you have any questions, feel free to contact me.

Sincerely,

Membership Chair

Questions?

Send an email using the [Contact Us](#) form on our website.

14. If this members accepts, you will now see the option **Add Individual to Club**. This prospect is now going to become an Active member of your club.

The screenshot shows a CRM interface with a table of prospects. A modal dialog box is open, asking for confirmation to change the applicant's status to Member. The dialog box has 'Cancel' and 'OK' buttons. A red arrow points from the 'Add Individual to Club' option in the prospect's action menu to the 'OK' button in the dialog box.

| Prospect | Interest Level | Date Created | Lead Source | Actions |
|---|----------------|--------------------------|--------------------|--|
| <input type="checkbox"/> Eugene Smith samdun9090@gmail.com 123-456-7890 | ★★★★★ | Oct 20, 2022 an hour ago | Membership Inquiry | Applicant View Send Email Resend Invitation Add Individual to Club Close Prospect |
| <input type="checkbox"/> Joanne Connor jconnor@sink.sendgrid.net | ★★★☆☆ | Nov 06, 2020 2 years ago | Membership Inquiry | |

15. You are now in the standard **Add New Member** screen inside your club website. If you have never added a member into ClubRunner before please see our Help article [How do I add a new member?](#) . The applicant's stored information has been imported into this section for you. You may now add this person into your club's Active member list. If your club has RI integration enabled, this information is automatically sent to MyRotary.org as well.

New Member - Green Town (0000)

Rotary Information and Integration

| | |
|---------------------|--|
| Membership Type * | Active |
| Sponsor | N/A |
| Rotary Member No. | |
| Date Joined Club * | Oct 20, 2022 |
| Integration Options | <input checked="" type="radio"/> Report this new member to Rotary International <input type="radio"/> Do NOT report this new member to Rotary International |

Member Details

| | |
|--------------|--------------------------|
| Title | |
| First Name * | Eugene |
| Middle Name | |
| Last Name * | Smith |
| Suffix | |
| Email | eugene@sink.sendgrid.net |
| Gender * | Male |

This overview is for illustration purposes only, your order of operations may differ slightly depending on the prospect but these are the general steps.