

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 ClubRunner Membership Success interface. The top navigation bar includes 'Admin', 'My ClubRunner', 'Communication', 'Attendance', 'Bulletin', 'Contacts', 'Membership', 'Organization', 'RI Integration', 'Website', 'Reports', 'Events', 'Volunteers', 'Donations', 'Help', and 'Membership Success'. The left sidebar contains 'Overview', 'Welcome', 'Getting Started', 'View Prospects' (highlighted), 'Forms', 'Refer a Member', 'Membership Inquiry', 'Settings', 'Sender Profiles', 'Recipient Profiles', 'Automation Tasks', 'Email Templates', and 'Help'. The main area is titled 'Prospects' and features search options for First Name, Last Name, and Email Address. It also includes filters for 'Created On' (Any, Date Range) and 'Lead Source' (All, Only). A 'More Filters' button and a 'Sort By' dropdown (Date Created, First Name, Last Name) are present. Below the filters, there are tabs for 'Prospects', 'Applicant', 'Joined', 'Closed', and 'All'. A list of prospects is shown, with the first entry for Eugene Smith highlighted. The 'View' button for Eugene Smith is also highlighted with a red box.

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

Prospect Details

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

Personal Details

Gender
Demographic Age
Areas of Interest
Occupation Teacher
Biography

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

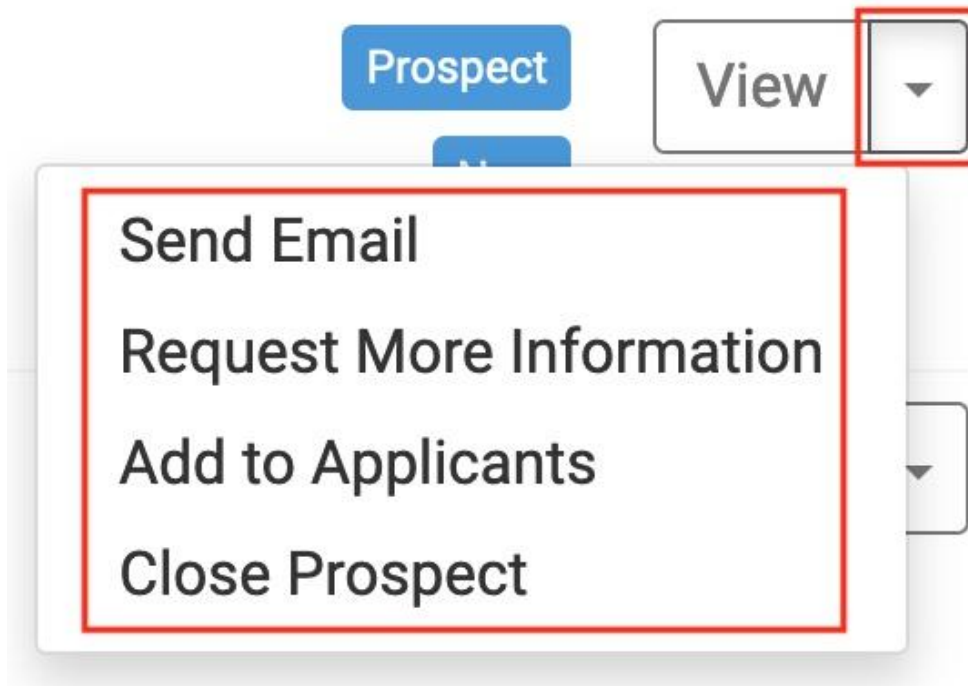
Rotary/Organization History

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

Consent

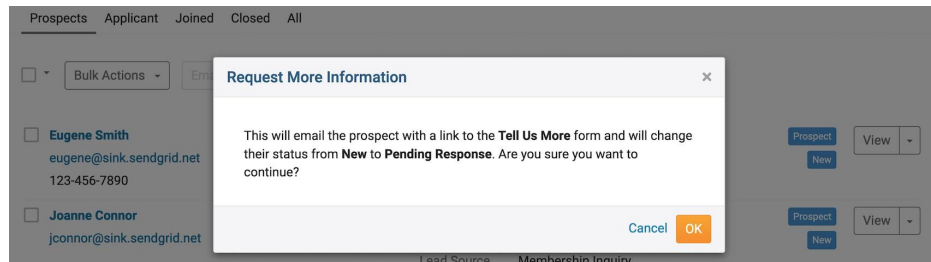
Received consent to store personal data ✓
Consent Date Oct 20, 2022

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.

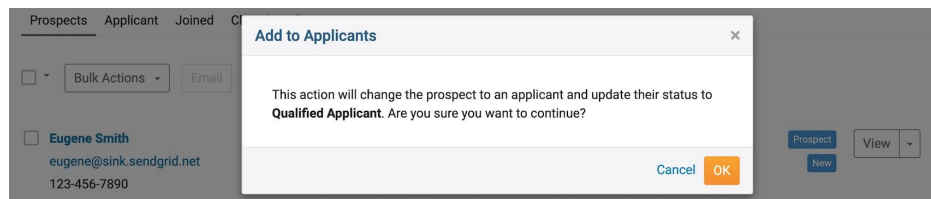


9. The four stages are:

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;">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: #17a2b8; 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;">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 context 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.