My Motto

You Can't Fix Membership

You Have to Have a Club That People Want to Join

You **CAN** do things
that will increase the likelihood
that interested people will join
and stay

Today we're going to talk about:

- **Finding Potential Members**
- **Tracking Potential Members**
- **Follow-Up** *(woo them!)*
- **Application & Welcoming**
- **Orientation**
- **More Follow-Up**

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Some Ideas:

- **Have your club join your local Chamber and have a couple of people INVOLVED and attending.**

- **Be helpful at community events** _(don't just stand around a booth)._

- **WEAR ROTARY SWAG AT ALL PROJECTS & EVENTS!**

- **Cultivate RYLA parents & teachers.**

- **Use YOUR website & Facebook page to advertise for other non-profits** _(make friends!)._

- _**BRAG about who Rotary helps (not about what we do).**_

THE MOST IMPORTANT THING

HAVE A GOOD VALUE STATEMENT

(i.e. why should someone join?)

THEN ASK THEM!

Come to a service project or event or (last option) a meeting.

When they come to a meeting or project or event:

Make sure they feel welcome

Introduce them to several people

Tell them what to expect ~ especially at meetings
(even more ESPECIALLY with money things like happy dollars or raffles)

When they come to a meeting or project or event, help them find a place to sit

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Tracking Potential Members:

- It's a SALES job – treat it like one.

- Use a spreadsheet or other tracking method so you know what you said, did, sent, and WHEN you did it.

- Clubrunner has a Prospect Management Module.

POTENTIAL MEMBER TRACKER

LAST NAME	FIRST NAME	EMAIL	PHONE	ORG or COMPANY	SOURCE	Written Note Sent?	Rec'd Folder ?	ON Prospect LIST?	CONTACT RECORD
Bailey	George	George@itsawonderfullife.com	617-111-1234	Bank & Loan	Clarence	Y	Y	Y	**8/2018: Invited to District Membership Event. Responded that he'll try to attend.** Sue sent f/u email that day.
Fraser	Jamie	jamie@outlander.com	(1) 80 333 72	Clan Fraser	Chamber Holiday Party		Y	Y	1/14/2019: Met and chatted about service. Seems very interested. Likes highland games - who in our club knows about that?

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Things that have worked for us:

After someone attends, we send a HAND WRITTEN thank you note, that also invites them to return.

Special invitations to service projects & special events.

Things that have worked for us (cont):

- **They are added to our Potential Members contact list** *(on Clubrunner)* **& are sent emails about speakers, service projects, events, etc.**

- **Monitor whether they respond, attend another project or meeting, and reach out regularly.**

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When They're Ready to Apply:

- **Have 1 or 2 members meet with them to ENSURE they understand the obligations & benefits of joining** *(especially the financial end).*

- **Find out their interests and how to fit them into the club** *(maybe find another member with similar interests and introduce them).*

- **Explain the application process and timing.**

- **Keep them informed during the process:** *"Hey, your application FLEW through the board – now I'll send it to the full club".*

Once They're Approved:

- **Enter them as a member and <u>then</u> schedule the Induction** _(get 'em on the books!)._

- **Send a welcome email (**_include their login credentials, encourage them to visit the 'members only' area of the website, etc)._

- **Send an email to the CLUB announcing the new members. (Full disclosure: I just thought of this while creating this presentation!)**

The Induction:

- **Make it special! Put it on the club calendar and announce it beforehand.**

- **Encourage the new member to invite a few friends or colleagues to the** meeting *(as the club's guests, of course!)*

- **Have the ceremony prepared, including a pin and certificate. Take photos.**

- **Send out press releases & posts afterwards.**
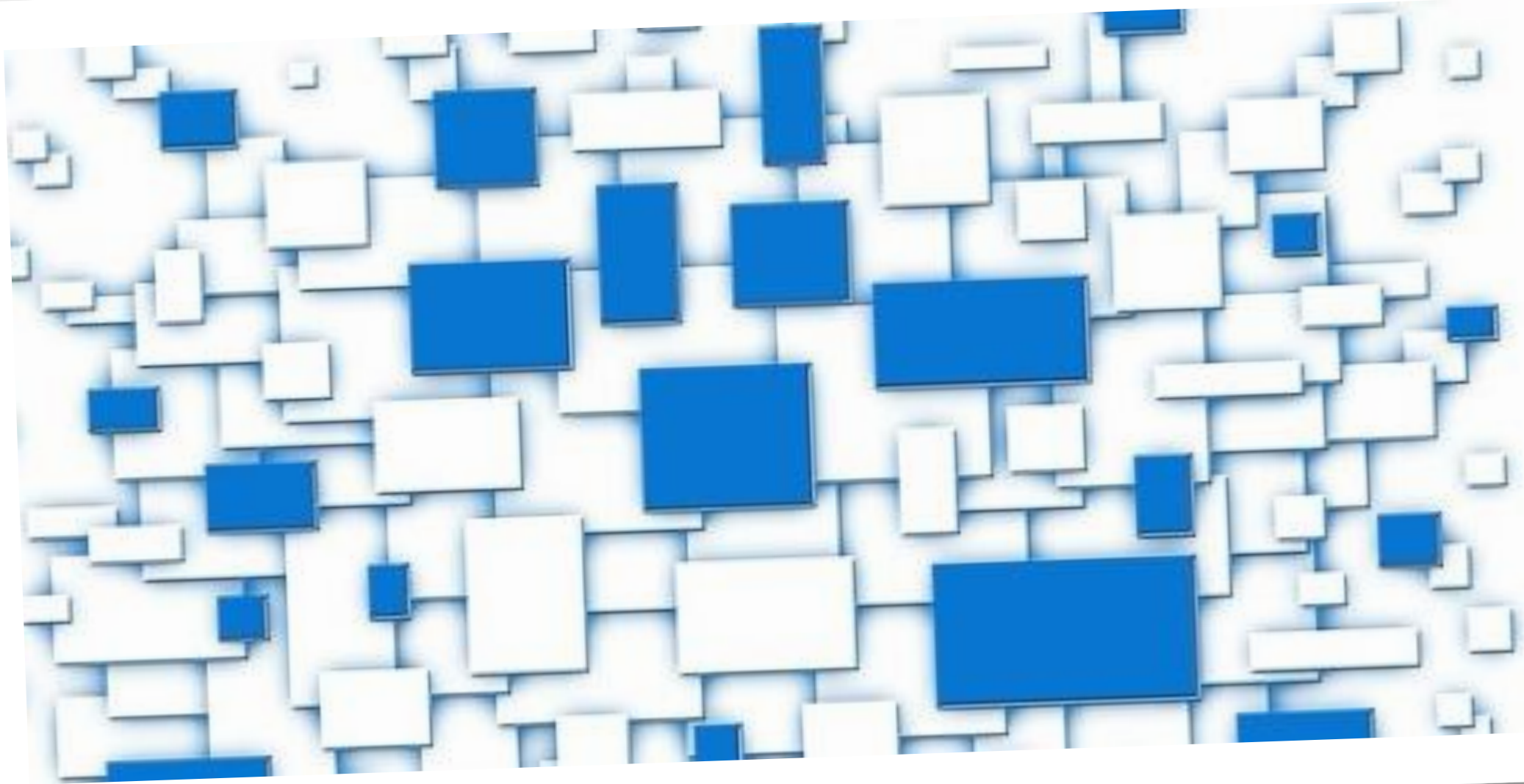
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WELCOME TO ROTARY
We are neighbors, community leaders, and global citizens uniting for the common good. With you, we can accomplish even more.
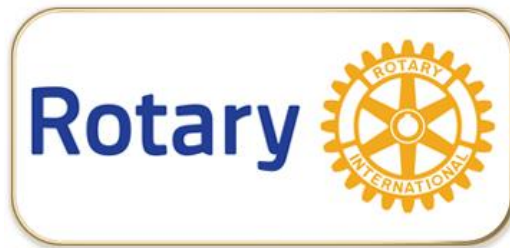
Do An Orientation

- **At THEIR convenience** *(place & time)*.

- **Give them relevant info about your club: website, committees, important dates, how to get info, who's in charge!**

- **Educate them about the District & RI** *(you're part of something amazing!)*.
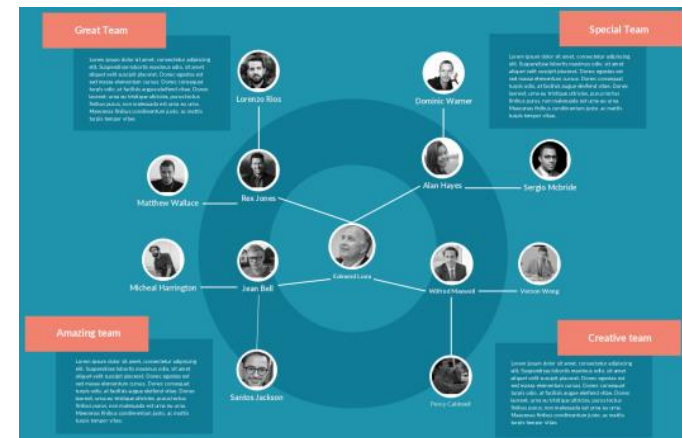
Also at the Orientation:

- **GET THEM ON A COMMITTEE OR IN A JOB** *(Greeter/SAA is a GREAT new member job).*

- **Get them a mentor.**

- **Talk about The Rotary Foundation.**

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New Member Follow-Up Ideas:

- Make sure they're feeling included *(are they getting the emails, is their mentor in touch, did the committee welcome them, etc.).*

- The president sends a "so glad you joined - how's it going?" letter one month in.

- A membership committee member or 2 could invite them out for coffee.

- Someone greets them specially at the first few meetings.

Have A Plan:

- **Whatever you decide to do, write it down.**

- **Don't let the word 'Plan' scare you – it can be elaborate or a simple process.**

- **Just write it down.**

Failing to plan …
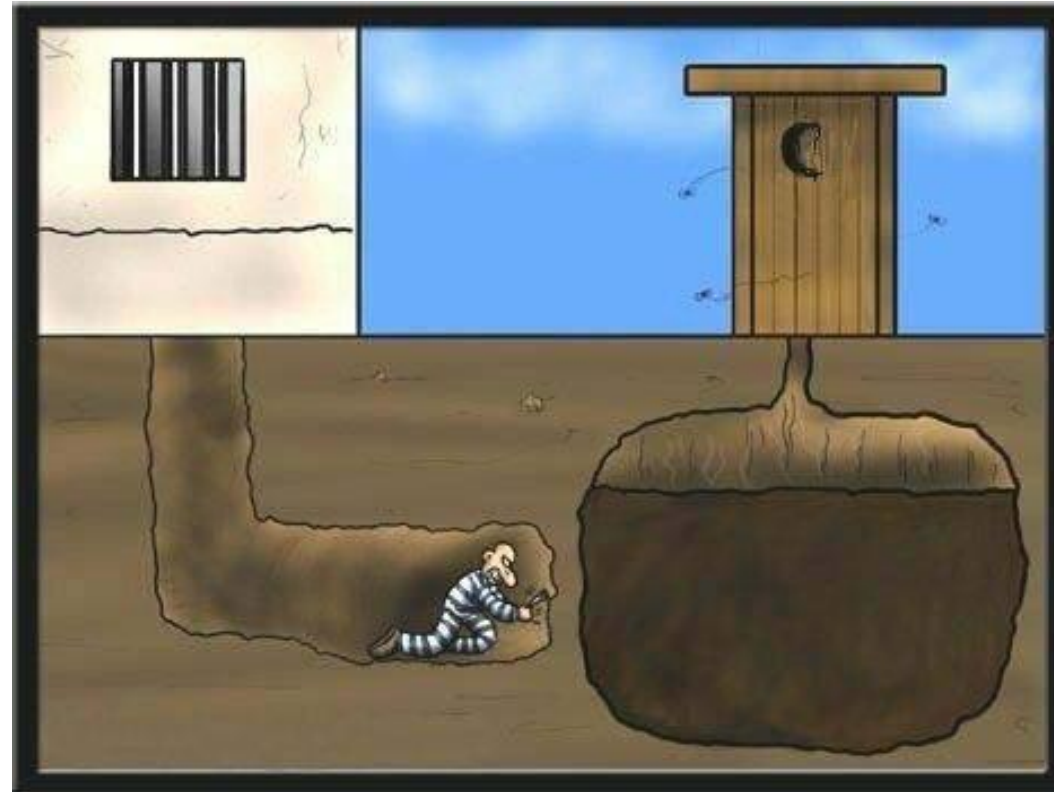
…can have unexpected results

Random Suggestions:

- **When talking to potential members, talk about YOUR experience in Rotary. Why are you a member?**

- **Make sure your club is welcoming and INCLUSIVE** *(look at those rituals…..).*

- **Get new members involved IMMEDIATELY.**

- **Send (require?) ALL new members to attend RLI and a District 'New Member Orientation'. Have the club pay.**

Remember

HAVE A GOOD VALUE STATEMENT

and

YOU CAN'T "FIX" MEMBERSHIP

The BEST Thing is to Have a Club

That People <u>Want</u> to Join

(If you need help with this, talk to me afterwards and I'll hook you up with Visioning)

QUESTIONS or COMMENTS

YOUR IDEAS?

If you leave your name & email I will send you:

- **The Prospective Member Tracker**

- **Our new member certificate, orientation outline, yearly calendar, induction ceremony…and anything else I can think of that relates to membership** *(I have a lot of documents!).*

- **A link to a GREAT webinar from RI about "Courageous Leadership".**

- **The link to Rotary.org's "Learning Center" – more great stuff!** *(Need help with Rotary.org?.....)*