Instructions for Managing Rotary Membership Leads

When someone completes the form on the Rotary International (RI) website by clicking the 'JOIN' button, their information is automatically sent to the club closest to them geographically. As the first point of contact for these new leads, reaching out by phone is the recommended first step. After your call—whether you've spoken to the prospect or left a message—follow up with an email to maintain the connection.

If the prospect seems like a good fit for your club, that's great! If not, please share your impression with the district membership team so we can help find another way to get them involved.

How to Access the RI Leads System

1. Log in to my.rotary.org.
2. Navigate to **My Rotary > Club Resources**.
3. Click on **View or Manage Leads**.
4. Select **View Candidate Details**.

Updating Lead Status

Please update the lead status as appropriate for your club. Here are some available options:

- **Candidate sent back to the district for reassignment**: If you believe the candidate would be a better fit for a different club, select this option.
- **Club admitted candidate**: Once your club admits the candidate, use the RI Member Number to add them to your roster.
- **Candidate requested future follow-up**: If the candidate isn't ready to join but wants to stay informed, keep them assigned to your club for periodic follow-up. Consider adding them to your club's newsletter, if applicable.
- **Club determined candidate not interested in Rotary**: Choose this to close the record if the prospect declines further engagement.

When adding a new member to your roster, use the RI Number provided in the lead. If you need assistance working with the prospect or updating the lead status, please email us at **d5450engaged@gmail.com**.

Additional Resources
Grow Your Club Using Membership Leads