



August 12, 2016



Membership

Playbook

Membership Playbook

1. What to do
2. How to do it
3. Make it Happen
4. Keep 'em



1. What to do

Many time we don't know how to identify people to become new members to target

- Identify skills your club is missing. Do you need an accountant, lawyer, Publicity Chair or someone to manage your website? Summarize the skills missing in your current club and this could be the start of your target list.
- Identify classifications that are missing your club
- Identify companies in your area &/or your corporate sponsors are they represented in your current membership? Those companies could be added to your target list.

STEP 1:

Create a target list based on the above answers:

- Industry specific
- Location
- Family
- Friends
- Business Associates
- Age
- Ethnicity
- Chambers
- Networking groups
- Church
- Other organizations
- Retirees
- Club speakers
- Past Youth Exchange students
- RYLA
- Rotaract parents
- Youth Program parents



STEP 2:

Contact, connect with these people:

- Call
- Social Media
- Email
- In-person
- Referrals
- Cold calls

STEP 3:

Share your Rotary Story

STEP 4:

- Follow up, follow up, follow up

STEP 5:

- Invite prospective member to an event or service project (for your club or district). Have them attend a few meetings before signing on

STEP 6:

- Follow up



SALES STATISTICS

48 % of Sales People NEVER Follow up with a Prospect
25 % of Sales People make a second contact and STOP
12 % of Sales People ONLY make three contacts and STOP
ONLY 10 % of Sales People make more than THREE contacts
2 % of Sales are made on the FIRST contact
3 % of Sales are made on the SECOND contact
5 % of Sales are made on the THIRD contact
10 % of Sales are made on the FOURTH contact
80 % of Sales are made on the FIFTH to TWELFTH contact



2. How to do it

Networking: Where to Network

Where to find Prospective Rotary Members can be an extension of your typical day's activities and there are two main ways to go about this.

1. Keep Rotary in the top of your mind when meeting with your current network. Where? Anywhere
 - Your next door neighbors
 - Your friends & their kids
 - Your associates at work
 - Your work suppliers & customers
 - People at networking events like the Chamber of Commerce
 - Your bowling, poker, bridge, running buddies



- People you know from your religious organization
- Your dentist, doctor, vet
- Your realtor
- Your professional service providers (accountants, investment advisors, lawyers)
- I met my Rotary Sponsor at a Funeral!
- PTA, sports parents, schools, youth programs (organizations)
- Past youth exchange students, Rotaract, Interact, RYLA

How to Network for Rotary

Networking for Rotary is really bringing up Rotary in your conversations with the people you network with. Learn their interests and relate that to something in Rotary.

JET – Join Leaders, Exchange Ideas, Take Action

Have your few minute summary of “What is Rotary” prepared something like Rotary International’s summary:

- We are 1.2 million neighbors, friends, and community leaders who come together to create positive, lasting change in our communities and around the world.

Or another option:

- Rotary is an international service organization with members dedicated to many causes from eradicating polio from the world to keeping a corner of a community a little cleaner. There are many clubs in our local area my club focuses on

Is the “Rotary Conversation” difficult for you to have with people you talk with? You ask them about themselves and depending upon the answer there are many ways to weave Rotary into the conversation.



1. What they do for fun?

- Oh you golf? My Rotary Club sponsors a Golf Tournament in September and the proceeds go to support clean water projects in Haiti

2. Where was your last vacation?

- I was recently in Lake Placid we had a Rotary Service day where members from around the area....

3. What types of community service projects does your business perform?

- None? What kind of community volunteering do you like?
- Oh really? That's great. Would they ever think about linking up with our Rotary Club on that project? We'd be interested in helping!

When the person asks more about Rotary

- Invite them to join us in a Service Project, Fundraising Event or Fellowship get together that works within their schedules and is consistent with their interest.
 - You can invite them to a club meeting also but that is not why most people are interested in Rotary.
 - You can offer to pick them up or meet them someplace to arrive together.
- Get their contact information to provide some links to useful Rotary information
 - www.rotary7190.org
 - www.rotary.org
 - www.yourclubswebsite.com
- If they don't jump in with both feet at the first time, ask again!



Overcoming objections

When speaking with a prospective Rotarian there is always a moment when the candidate expresses some concern or doubt. It is important for the recruiter to be ready to adapt a response to the most common objections. This is best done in a way that is affirming and which engages one of the three JET elements: Join Leaders, Exchange Ideas, and Take Action.

1. "***I really don't know anything about Rotary...***" Well, here's what's cool about Rotary. We're a local service organization, and we work with the community in all the same areas of focus that you probably care about: a clean environment, education, poverty, peace and social justice. But unlike other service groups, there are 1,200 of us in the Capital Region, and 1.2 million worldwide!
2. "***I am too busy!"*** You bet! That's why you're the perfect candidate! I wouldn't ask you to consider Rotary if you were a slacker! We're looking for the best leaders in the region, and I have yet to meet one Rotarian who spends a lot of time sitting around!
3. "***I hear it's expensive to be a Rotarian."*** There are definitely annual dues to be a Rotarian, about \$3 a week, and some clubs do meet for a meal, like my club. But not everyone comes to a meeting each week, and not everyone buys the meal either. There's even an E-club for those who can't make a local meeting. It doesn't have to be expensive, and the fellowship and chance to work together on local service projects make the cost small.
4. "***I hear that Rotary is a bunch of old men sitting around."*** Actually, Rotary started as all the most influential business leaders in the community, and now they are definitely older for sure. But today's Rotary is nothing like Rotary then. Women and men in even numbers, and the Clubs are getting younger every day. One thing has not changed, though. My club is full of leaders in our town, and that's why I am talking to you about joining.
5. "***My friend joined Rotary and said he didn't like the meetings."*** There are some traditions at the meetings, and everyone has the one they like the least.



But mostly the meetings are about the people you meet, and the ideas and mentoring that goes on. Rotary is changing, though. We're very tuned in to the local community and our goal is to give service back. The meetings are for fellowship and information exchange.

6. ***I don't have the time to meet every week or I can't meet at that time.***

Almost everyone has a hard time meeting every week, and so must of us don't! I find that I generally make 2 meetings a month, sometimes even less, but I also find ways to be a Rotarian. I go to other meetings, which happen nearby but at different times, or I engage a service project someplace in the region. Plus, there are many clubs nearby ours, and maybe they meet at a time that's better for you. It's not about meeting attendance; it's about serving the community in a positive way.

3. Make it Happen

Prospects present themselves in many ways. Your members might refer one, and sometimes leads come from RI or the District, by email or more direct. Please respond!! Grab the low hanging fruit!!

When a Prospect is received, the Club Membership Chair (or the person in the Club dedicated to Membership) should send an email and call the Prospect within 2 days. This is for a quick introduction to Rotary and to invite the Prospect for lunch or coffee with the Membership Chair or someone else from the Club. If the Prospect is a referral from a Member, then that Member should also be invited.



The purpose of this meeting is to introduce Rotary in detail on a personal level, because it is hard to get a sense of the whole Rotary experience at a typical weekly meeting. The discussion should cover such topics as:

- specific activities that the Club does;
- projects, events, fundraisers, etc.;
- fellowship;
- time commitment; and
- financial obligations.

If the Prospect seems interested, invite them to a Club meeting. If not interested in joining in full, ask if they'd like to become a "friend" of the Club that can be called on when projects and events come up - they reached out in the first place because they want an opportunity to give back, so we can offer that without someone becoming a full member. Don't forget to suggest another club in the district if your club doesn't seem to be the right fit.

After this individual meeting, whoever met with the Prospect should follow-up within 2 days. Thank them for their time and interest and confirm their attendance at an upcoming Club meeting. The Membership Chair should be looped in here (if not already).

The Membership Chair should send the Prospect (email recommended) an Application and copy of the Club By-Laws, and should follow-up at the end of the Club Meeting with the Prospect, ideally collecting the completed Application at that time. If not received then, the Membership Chair should follow-up within one week.

Completed Applications should be delivered to the Vice President or President-Elect to be reviewed and voted on at the next Club Board of Directors Meeting in accordance with your club's by-laws.



Once voting is complete, the President of the club passes the good news to the Prospect. At the former-Prospect's first meeting as a New Member, they should be assigned to a Club Committee. A Club Meeting in the near future should be selected for the New Member to give a short introduction about themselves.

4. Keep 'em

The best way to keep a new Rotarian is to engage them right way in Rotary and club activities. Here's a list of suggestions that you can adapt for your own Club. Do a couple, or do them all and make it fun! Track their progress.

- (1) Give a brief 1-3 minute new member "talk" at a meeting. _____
- (2) Do a "make-up" at another club. _____
- (3) Attain perfect attendance one month. _____
- (4) Serve as a "greeter" for two meetings. _____
- (5) Work on two committees/projects. _____
- (6) Attend a membership orientation meeting, or meet for orientation with the Immediate Past President and your sponsor
- (7) Attend a monthly board meeting. _____
- (8) For four weeks, sit at four different tables. _____
- (9) Introduce visitors & guests at a meeting.



Some clubs ask new members to organize a service project that the entire Club will help them to execute. Other clubs use the new member's sponsor or a mentoring team to check in regularly with the new Rotarian, answering questions and making sure to connect.

If you haven't seen your new Rotarian for a few weeks, it's time to find them and figure out what's going on. Engage your new Rotarian in meaningful and varied activity; they will thank you years later when they take a Club leadership position!

OK, so occasionally someone decides that Rotary is not for them...

Hold an exit interview with people who have resigned and ask probing questions to get responses:

- What were your 3 favorite aspects of being a member of our club?
- What were your 3 least favorite aspects?
- What can we do better to engage and keep members?

Share the responses with others and develop action plans to address consistent concerns and maintain the areas people generally enjoy the most. Use what you've learned!

Consider a survey of your current members of this sort to get input before people chose to resign.