



# **Member Care Manual**

*"Supporting the membership journey"*

## **Appendix C**

### **Membership Leads Program**

## GROW YOUR CLUB USING MEMBERSHIP LEADS

One of the easiest and most effective things you can do to expand your club's membership is to follow up on your online membership leads. Each year, more than 30,000 people express an interest in joining a Rotary or Rotaract club through [rotary.org/join](https://rotary.org/join). You'll find these leads on the [Manage Membership Leads](#) page of My Rotary.

### RECOMMENDED ACTIONS

Follow the links to see screenshots and learn more about effective leads management:

- Develop a [clear plan](#) for who will review your club's membership leads.
- Sign in to [My Rotary](#) and go to the [Manage Membership Leads page](#). (If you don't have a My Rotary account, [create one](#).)
- [Review your leads](#) to learn more about the candidates, including whether they are prospective, referred, or relocating members, and why they are interested in Rotary.
- Contact candidates and ask them what they hope to gain by joining Rotary.
- Use the [status options](#) available to map a candidate's journey.
- Support your club membership committee as they work to [building positive relationships](#) with the candidates.

### YOU CAN ALSO:

- Take this [Online Membership Leads course](#) to learn more about the process.
- Use the [Manage Membership Leads page](#) of My Rotary to [store information](#) about all your prospective members.
- [Use reports](#) to track success rates, gain insights into candidates' progress, and keep up with trends to help you grow membership in your club.
- Write to Rotary's [Membership Development staff](#) if you have any questions about managing your membership leads. Or provide [feedback](#).

## PLANNING

Develop a clear plan for who will review your club's membership leads and take action.

- **Club presidents:** You, the club membership chair and secretary will receive email notifications when a new membership lead is assigned to your club. Work with your club leaders to establish a process for following up with prospective members in a timely manner. As a club leader, you have the responsibility to make sure each candidate's experience with Rotary is a positive one, regardless of whether they join or not they join your club.
- **Club membership chairs:** You'll also receive email notifications about leads that are assigned to your club. As membership chair, you are the main person to manage these leads or delegate their management, according to your [responsibilities](#). Get to know your prospective members and engage them by inviting them to attend a club meeting or a service project. Talk to them honestly about your club's expectations out of new members.
- **Club secretaries:** You'll receive email notifications about new candidates assigned to your club as well. Help your club leaders maintain up to date membership records by actively updating the candidate's status as they progress through their journey and admit them through your [Manage Membership Leads](#) page.

## REVIEWING CANDIDATE INFORMATION

Candidates may be prospective members, referrals, or relocating or returning members.

Use the arrows to sort by prospect type, date, or status.

Learn more about a candidate by clicking their name or **View Candidate Details.**

Candidate	Prospect Type	Submission Date	Status	Location	Action
Jane Rotaractora	Prospective member	2 Nov-2021	Club reviewed inquiry	Evanston	<a href="#">View Candidate Details</a>
Pat Rotaractor				ton	<a href="#">View Candidate Details</a>
Gwen Stacey					<a href="#">View Candidate Details</a>
Sara Demo					<a href="#">View Candidate Details</a>

Review all of your leads to learn more about the candidates, including what types of candidates they are:

- **Prospective members.** Each month, Rotary processes thousands of inquiries from people around the world who are interested in joining Rotary. These people are all around you, and they become the prospective members in your membership leads. They might be Rotary alumni who moved to your area or community members who heard about Rotary in the news or saw a club's billboard.
- **Referrals.** When one of our members refers someone who would be a great Rotaractor or Rotarian, that candidate may become a referral in your membership leads. And if you know such a person who isn't in your area or can't meet when your club meets, you can [refer them](#), too. When you make such a referral or act on a lead that has been referred to your club, you help expand Rotary's reach and increase our impact.
- **Relocating or returning members.** Be sure to check your leads for these members, who are moving to your area, want to join a different club, or have left Rotary or Rotaract but want to join again. And if you know a member who is moving or who wants to join a different club because of schedule conflicts or other obligations, keep them involved in Rotary by helping them find a new club.

Select a candidate to review additional details:

**Jane Rotaractora**

Club type: Rotaract  
Profession: Student  
Age range: 18-29  
Gender: Female  
Lead Type: Prospective member  
Status: Club reviewed inquiry  
Member ID:

**CANDIDATE INSIGHTS**

How they heard about Rotary:  
More Details:  
Notes:  
Interest in joining Rotary:  
They had additional comments: 856

**CONTACT PREFERENCES**

Mobile:  
Email: JaneRotaract@gmail.com  
Preferred Method of Contact:

**CANDIDATE LOCATION INFORMATION**

Meeting Preferences:  
Daytime Location: Evanston, IL, United States  
Evening Location:

Candidates can select Rotary or Rotaract as their reason for interest.

The **CANDIDATE INSIGHTS** section shows how the candidate heard about Rotary.

Review the candidate's meeting preferences to match them with a suitable club.

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## UPDATING A STATUS

Use this menu to update a candidate's status.

**Candidate Journey**

Candidate Progress Type \*

- Select -

**Journey History**

Date	Status	
10-Nov-2021	Club reviewed inquiry	Evanston
10-Nov-2021	District assigned candidate to club	Evanston
9-Nov-2021	District reviewed inquiry	
2-Nov-2021	Auto assigned to district	

Track the progress of each active lead under **Journey History**.

Contact candidates and ask them what they hope to gain by joining Rotary. As each candidate progresses through the membership lead process, select options from the **Candidate Progress Type** menu to continually update their status.

**Journey history** shows the progress of active leads and any previous statuses or feedback left by clubs, your district, or staff.

- **STATUS OPTIONS**
- Choose **Club reviewed inquiry** if you have reviewed their information and are planning to talk to them about what they're looking for.
- Choose **Club contacted candidate** if you have talked to them to learn more about their preferences.
- Choose **Candidate sent back to district for reassignment** if you have talked to the candidate and think they should be assigned to a different club or district.
- Choose **Club determined candidate not interested in Rotary** if you have talked to the candidate and determined that they aren't interested in joining a Rotary or Rotaract club.
- Choose **Candidate attended a club meeting** if the candidate attended a club meeting or participated in a club project.
- Choose **Club proposed candidate for membership** if the candidate was proposed for membership and still needs board approval.
- Choose **Club admitted candidate** if the candidate is now a member of your club.

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## ADDING CANDIDATES

Add your own candidates.

Candidate	Prospect Type	Submission Date	Current Status
Jane Rotaractors	Prospective member	2-Nov-2021	District assigned candidate to club
Pat Rotaractor	Prospective member	1-Nov-2021	Club reviewed inquiry
Given Stacey	Prospective member	1-Nov-2021	District assigned candidate to club

Use the Manage Membership Leads page of My Rotary to store information about all of your prospective members. Some things to note:

- You can use the **Add Lead** button to add candidates to the list whenever someone expresses interest in joining Rotary to someone in your club rather than through Rotary.org. They will be notified by email when you enter their information.
- Even if you use another system for tracking prospective members, adding them to **Manage Membership Leads** keeps all your information in one place where it's easy to manage and secure.
- If you use a club management software (like ClubRunner) to report new members to Rotary, please confirm the candidate's member ID before adding them, to avoid duplicating records. This will be listed under the **Candidate Details page** in My Rotary.

## REPORTS

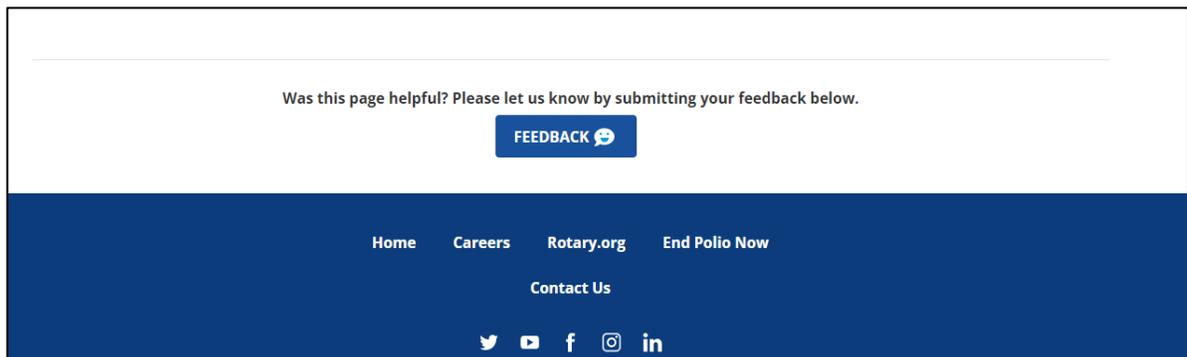
Membership Leads page

Reports page

Use reports to track success rates, gain insights into candidates' progress, and keep up with trends to help you grow membership in your club. You can get them in the [Reports](#) page of My Rotary or at the bottom of the Manage Membership Leads page, under **LEAD REPORTS**.

## FEEDBACK

If you have any questions about managing your membership leads, write to Rotary's [Membership Development staff](#). And use the feedback button to send us your ideas and suggestions:



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