ClubRunner

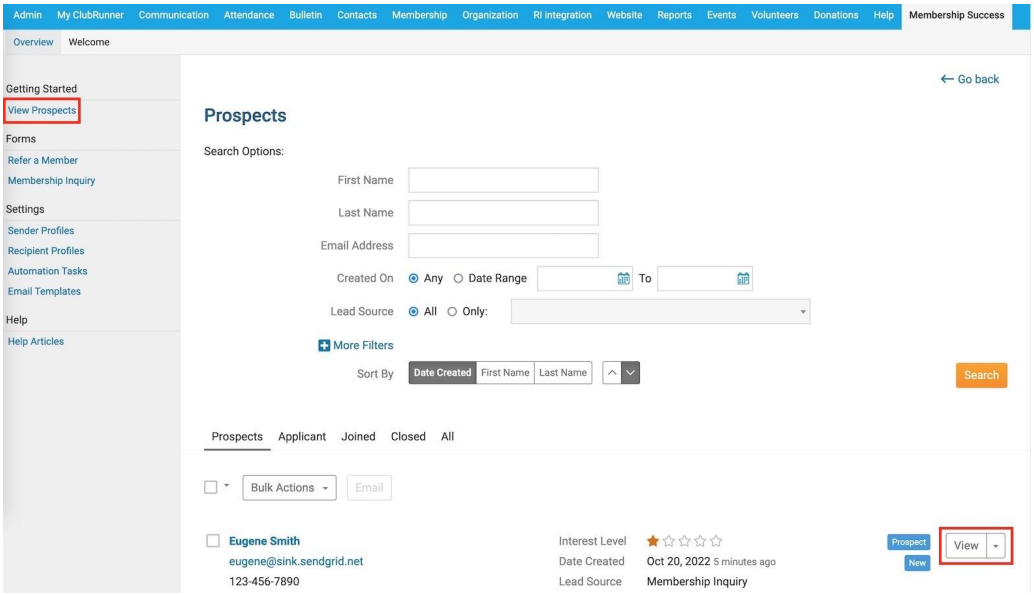
Prospective member process: from prospect to member

Mickey D. - 2025-12-05 - Membership Success

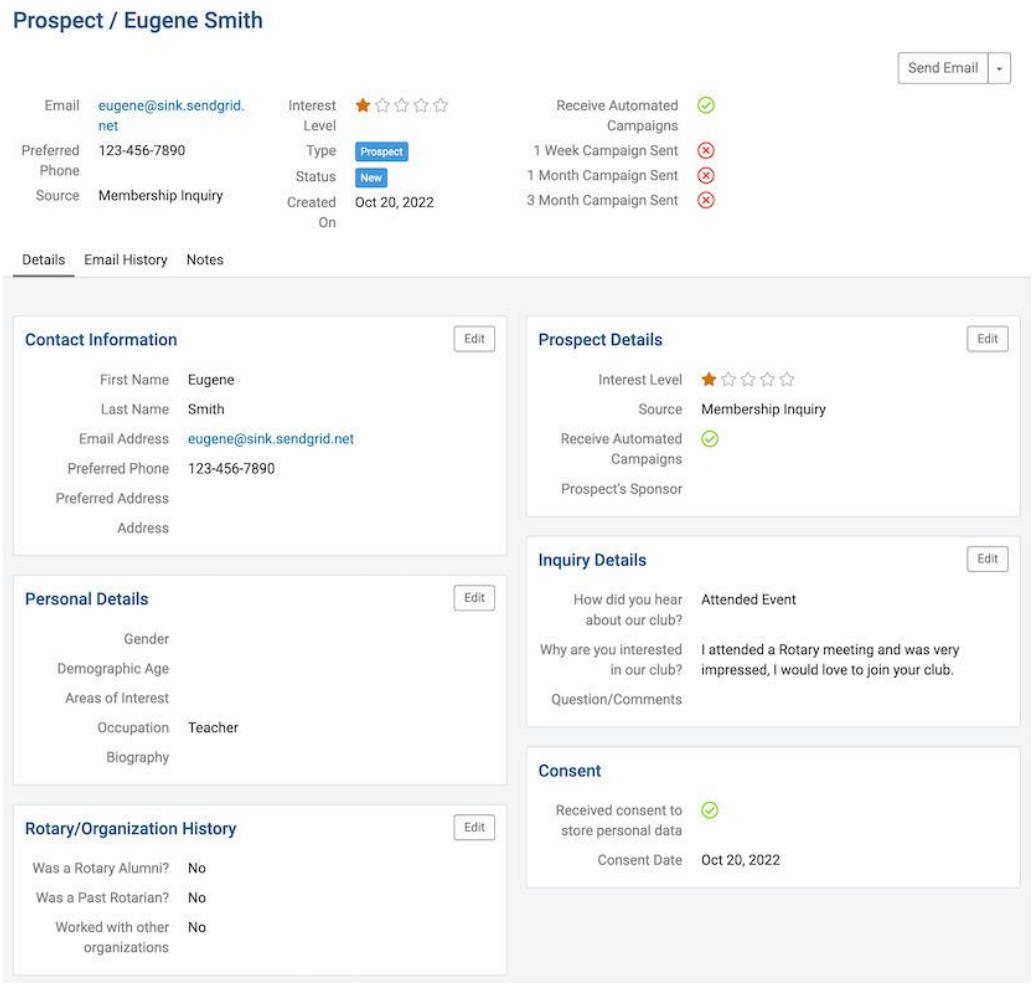
Once a prospect is referred by a club member or fills out the online application form, their prospective member information is now stored inside the Membership Success module. Let's explore the process of moving a prospect through the various stages.

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.

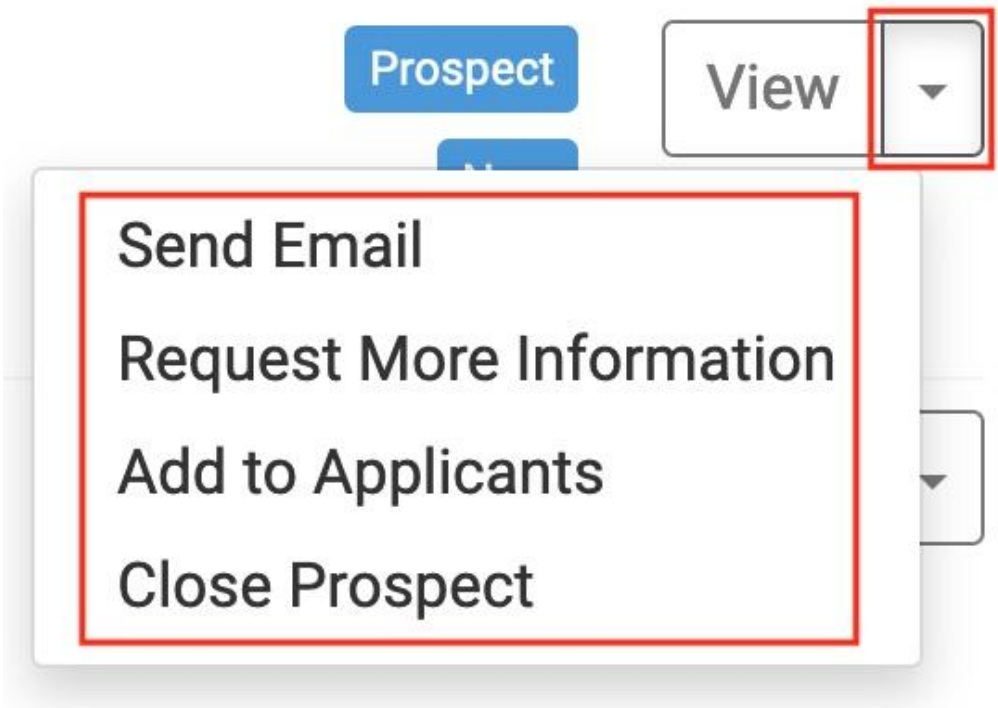


6. The Membership Success module has the ability to store extensive information about the prospect including contact information, email history, interest level, prior club history (if any) and more. If you click the **Edit** button in any section, your club can fill in information about this prospect.



7. Click the **Go Back** button to go back to the list of prospects again.

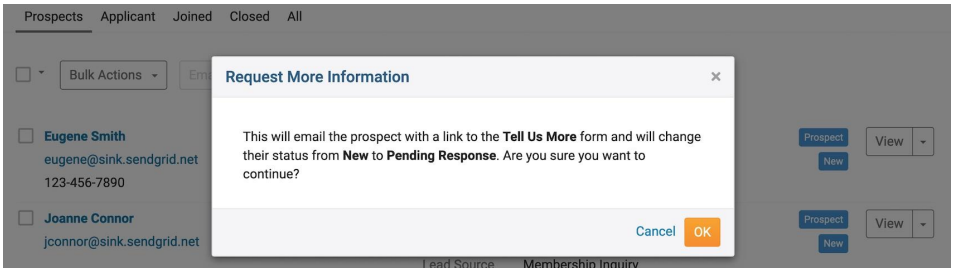
8. If you click the '**down arrow**' icon beside any name, you'll see four additional options.



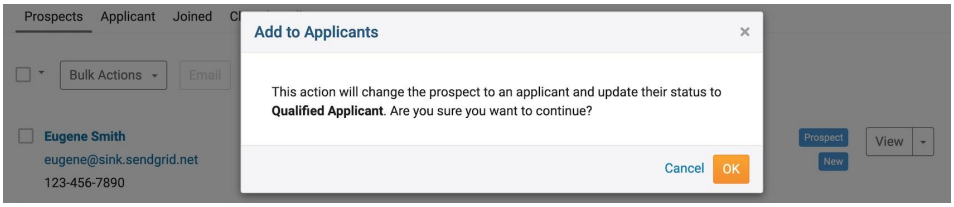
9. The four stages are:

    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.



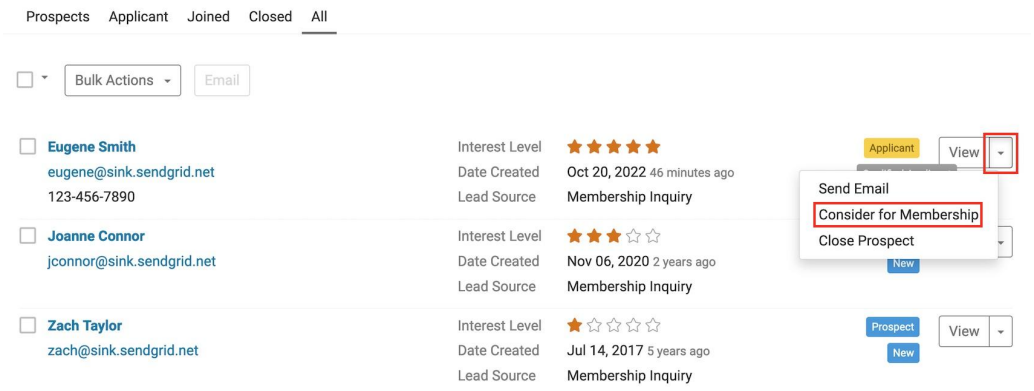
    3. **Add to Applicants**: if you choose this step, the prospect becomes an *applicant*. An applicant is the next stage in this process, it means the person applying has more than just a passing interest but has met the initial requirements of the club.



    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.

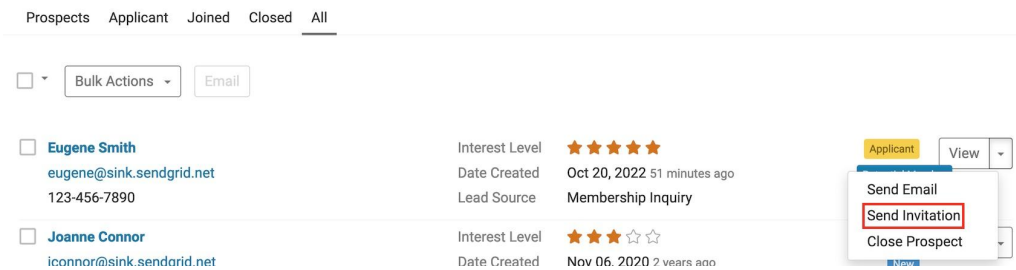
10. After emailing the prospect and inputting further information, let's advance this prospect into an *applicant* by choosing the above option **Add to Applicants**.

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.

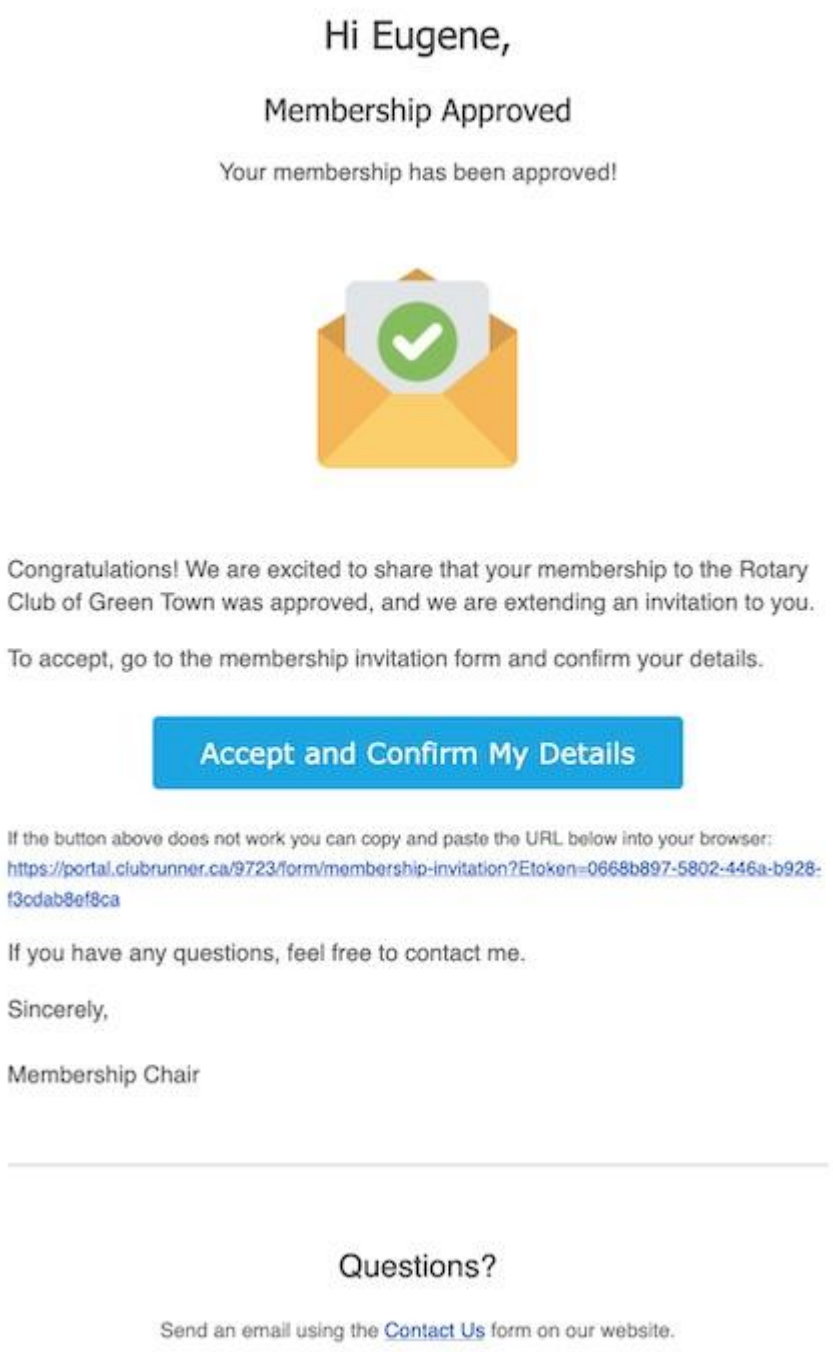


12. Your club has evaluated and is now ready to offer this person a membership. While you can still send this person emails or close out this applicant, you will now see a new dropdown option which we will

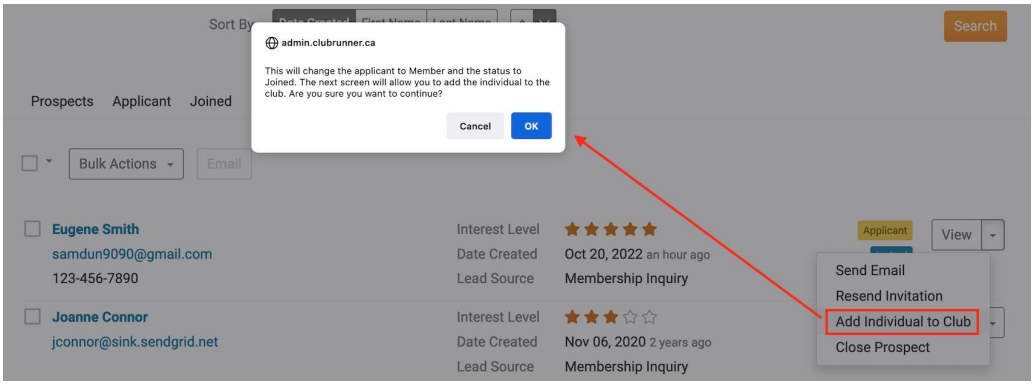
click: **Send Invitation**.



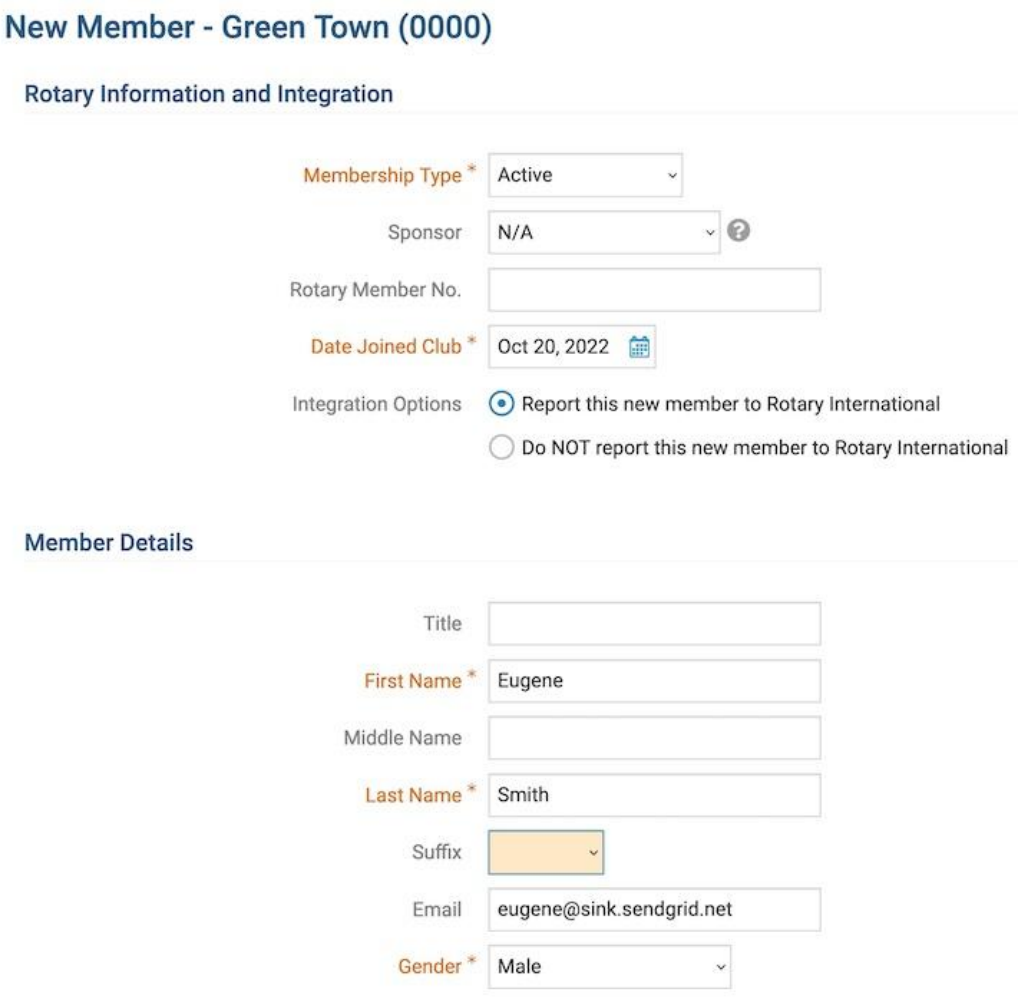
13. You have now sent a special **Membership Approved email** to the applicant, asking they confirm their details and accept your club's invitation of membership. If the applicant clicks **Accept and Confirm my Details** in that email, they are verifying their contact information is correct so you can process their application.



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.



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.



This overview is for illustration purposes only, your order of operations may differ slightly depending on the prospect but these are the general steps.