ClubRunner

Help Articles > Club Help > Club - Administration Guide > Membership Success > Prospective member process: from prospect to member

Prospective member process: from prospect to member

Mickey D. - 2022-10-21 - 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**.
- 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.

Admin My ClubRunner	Communication	Attendance	Bulletin	Contacts	Membership	Organization	RI integration	Website	Reports	Events	Volunteers	Donations	Help	Membership Success
Overview Welcome														
Getting Started														← Go back
View Prospects	F	Prospect	S											
Forms														
Refer a Member	5	earch Uptions	6											
Membership Inquiry				First Nam	ie									
Settings				Last Nam	ie									
Sender Profiles														
Recipient Profiles			E	mail Addres	S									
Automation Tasks				Created C	in 💿 Any	O Date Range	e		Го	G	1			
Email Templates				Lood Course		Only								
Help				Leau Sourc	ae 🔘 All (J Only.								
Help Articles			÷	More Filter	'S									
				Sort E	By Date Cre	ated First Nam	e Last Name	^ ~						Search
														_
		Prospects	Applicant	Joined	Closed Al	L.								
		• Bulk A	Actions 👻	Email										
		Eugene Si	nith				Interest	Level	★☆☆	습습			Pro	spect View -
		eugene@s	sink.send	grid.net			Date Cr	eated	Oct 20, 20	022 5 minu	tes ago			New
		123-456-7	890				Lead Sc	urce	Members	hip Inquir	y			

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.

Prospect / Eugene Smith

					Send Er	mail -
Email eugene@ net	sink.sendgrid.	Interest Level	* 다 다 다 다	Receive Automated Campaigns	0	
Preferred 123-456-	7890	Туре	Prospect	1 Week Campaign Sent	\otimes	
Phone		Status	New	1 Month Campaign Sent	\otimes	
Source Members	hip Inquiry	Created On	Oct 20, 2022	3 Month Campaign Sent	8	
Details Email Histo	ry Notes					
Contact Informati	on		C	Edit Prospect Details		Edit
First Nan	ne Eugene			Interest Level	★ 습 습 습 습	
Last Nan	ne Smith			Source	Membership Inquiry	
Email Addre	s eugene@sir	nk.sendgrid.n	et	Receive Automated	0	
Preferred Pho	ne 123-456-78	90		Campaigns		
Preferred Addre	s			Prospect's Sponsor		
Addre	s					
				Inquiry Details		Edit
Personal Details				Edit How did you hear about our club?	Attended Event	
Gend	er			Why are you interested	I attended a Rotary meeting and was ven	у
Demographic A	je			in our club?	impressed, I would love to join your club.	
Areas of Intere	st			Question/Comments		
Occupatio	on Teacher					
Biograp	vy			Consent		
				Received consent to	0	
Rotary/Organizat	on History		L	Edit store personal data		
Was a Rotary Alumr	i? No			Consent Date	Oct 20, 2022	
Was a Past Rotaria	1? No					
Worked with oth organization	er No 1s					

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

Prospects Applicant Joined Closed All * Bulk Actions Request More Information × Eugene Smith eugene@sink.sendgrid.net 123-456-7890 This will email the prospect with a link to the Tell Us More form and will change their status from New to Pending Response. Are you sure you want to continue? New View v Joanne Connor Cancel OV View v					
• Bulk Actions • Em Request More Information × • Eugene Smith This will email the prospect with a link to the Tell Us More form and will change their status from New to Pending Response. Are you sure you want to continue? Image: Continue in the image: Contimage: Contimage: Continue in the image: Contimage: Con	Prospects Applicant Joined	Closed All			
• Buik Actions • Em Request More Information × • Eugene Smith eugene@sink.sendgrid.net 123:456-7890 This will email the prospect with a link to the Tell Us More form and will change their status from New to Pending Response. Are you sure you want to continue? Image: Content of the status form New to Pending Response. Are you sure you want to continue? • Joanne Connor Cancel View •					
Eugene Smith This will email the prospect with a link to the Tell Us More form and will change eugene@sink.sendgrid.net This will email the prospect with a link to the Tell Us More form and will change 123:456-7890 View Joanne Connor Cancel	- Bulk Actions - Emi	Pequest More Information			
Eugene Smith This will email the prospect with a link to the Tell Us More form and will change Prospect eugene@sink.sendgrid.net 123-456-7890 View • Joanne Connor Cancel View •		Request More information	^		
Eugene Smith This will email the prospect with a link to the Tell Us More form and will change Prospect eugene@sink.sendgrid.net 123-456-7890 View View Joanne Connor Cancel View View					
eugene@sink.sendgrid.net their status from New to Pending Response. Are you sure you want to continue? I23-456-7890 Continue?	Eugene Smith	This will email the prospect with a link to the Tell Us More form and will change		Prospect	View -
123-456-7890 continue?	eugene@sink.sendgrid.net	their status from New to Pending Response. Are you sure you want to		New	
Joanne Connor Cancel OK View -	123-456-7890	continue?		_	
Joanne Connor Prospect View -					
	Joanne Connor	Cancel	K	Prospect	View -
jconnor@sink.sendgrid.net	jconnor@sink.sendgrid.net			New	

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.

Prospects Applicant Joined C	Add to Applicants	×	
Bulk Actions Email Eugene Smith	This action will change the prospect to an applicant and update their status to Qualified Applicant . Are you sure you want to continue?		Prospect View -
eugene@sink.sendgrid.net 123-456-7890	Cancel	ок	New

- 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**.
- 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.

Prospects Applicant Joined Closed All		
 Bulk Actions - Email Eugene Smith eugene@sink.sendgrid.net 123-456-7890 	Interest Level X X X X X X Date Created Oct 20, 2022 46 minutes ago Lead Source Membership Inquiry	Applicant View + Send Email
Joanne Connor jconnor@sink.sendgrid.net	Interest Level ★★★☆☆ Date Created Nov 06, 2020 2 years ago Lead Source Membership Inquiry	Close Prospect
Zach Taylor zach@sink.sendgrid.net	Interest Level ★☆☆☆☆ Date Created Jul 14, 2017 5 years ago Lead Source Membership Inquiry	Prospect View +

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.

Hi Eugene,

Membership Approved

Your membership has been approved!



Congratulations! We are excited to share that your membership to the Rotary Club of Green Town was approved, and we are extending an invitation to you.

To accept, go to the membership invitation form and confirm your details.

Accept and Confirm My Details

If the button above does not work you can copy and paste the URL below into your browser: https://portal.clubrunner.ca/9723/form/membership-invitation?Etoken=0668b897-5802-446a-b928f3cdab8ef8ca

If you have any questions, feel free to contact me.

Sincerely,

Membership Chair

Questions?

Send an email using the Contact Us form on our website.

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.

Sort By	Data Crosted First Name Last Name	L.	Search
	admin.clubrunner.ca		
Prospects Applicant Joined	This will change the applicant to Member and the status to Joined. The next screen will allow you to add the individual to the club. Are you sure you want to continue?		
	Cancel OK	×	
Bulk Actions - Email			
Eugene Smith	Interest Level	****	Applicant View -
samdun9090@gmail.com	Date Created	Oct 20, 2022 an hour ago	
123-456-7890	Lead Source	Membership Inquiry	Send Email
			Resend Invitation
Joanne Connor	Interest Level	★★★☆☆☆	Add Individual to Club 👻
jconnor@sink.sendgrid.net	Date Created	Nov 06, 2020 2 years ago	Close Prospect
	Lead Source	Membership Inquiry	

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 <u>How do I add a new member?</u> . 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.

New Member - Green Town (0000)

Membership Type	* Active ~
Sponsor	· N/A → 🚱
Rotary Member No.	
Date Joined Club	* Oct 20, 2022 🛗
Integration Options	Report this new member to Rotary International
	O Do NOT report this new member to Rotary Internationa
Member Details	
Member Details	
Member Details	a
Member Details Title First Name	* Eugene
Member Details Title First Name Middle Name	* Eugene
Member Details Title First Name Middle Name Last Name	 Eugene Smith
Member Details Title First Name Middle Name Last Name Suffix	Eugene Smith
Member Details Title First Name Middle Name Last Name Suffix Email	 Eugene Smith eugene@sink.sendgrid.net

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