

## What are the four stages of a prospect?

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After a prospective member gets referred by an existing club member or fills out the Membership Inquiry form, their information is saved into the Membership Success module. This prospect will go through four main stages.

1. **Prospect:** This is the initial stage, the prospect has filled out a form or been referred, some basic initial data has been captured about them.
2. **Applicant:** The prospect has moved past the initial stages, and they are now being seriously considered for club membership. This process may also include more data gathering of the prospect or further inquiries from the club.
3. **Joined:** The prospect has joined the club. If this occurs, the prospect information the club has been gathering can be brought into the new member's Active member profile.
4. **Closed:** For whatever reason, the prospect has not joined the club, or the club has not decided to accept their membership. It is useful to *keep* this prospect information even if they don't join, as the prospect may decide to re-apply at a later date.

The screenshot shows the 'Prospects' management page in ClubRunner. On the left is a sidebar with navigation links: Getting Started, View Prospects (highlighted with a red box), Forms, Refer a Member, Membership Inquiry, Settings, Sender Profiles, Recipient Profiles, Automation Tasks, Email Templates, Help, and Help Articles. The main content area is titled 'Prospects' and includes a 'Go back' link. Below the title are search options for First Name, Last Name, and Email Address. There are also filters for 'Created On' (Any, Date Range) and 'Lead Source' (All, Only). A 'More Filters' button and a 'Sort By' dropdown (set to Date Created) are also present. A red box highlights the stage tabs: Prospects, Applicant, Joined, Closed, and All. Below the tabs are buttons for Bulk Actions and Email. The bottom section displays a list of prospects, with one example shown: Joanne Connor (joconnor@sink.sendgrid.net). This prospect has an interest level of 4 stars, was created on Nov 06, 2020 (2 years ago), and has a lead source of Membership Inquiry. Action buttons for 'Prospect' and 'View' are visible next to the entry.