

What are the four stages of a prospect?

Mickey D. - 2022-10-24 - Membership Success

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 navigation sidebar with categories like 'Getting Started', 'Forms', 'Settings', and 'Help'. The 'View Prospects' link is highlighted with a red box. The main content area is titled 'Prospects' and includes search filters for First Name, Last Name, Email Address, Created On, and Lead Source. Below the filters are tabs for 'Prospects', 'Applicant', 'Joined', and 'Closed', with 'Prospects' selected and highlighted by a red box. A table lists a prospect named 'Joanne Connor' with details such as 'Interest Level' (3 stars), 'Date Created' (Nov 06, 2020), and 'Lead Source' (Membership Inquiry). The 'Prospect' status is also highlighted with a blue box.