

HOW TO MANAGE MEMBERSHIP LEADS (FOR CLUBS)



ROTARY.ORG > MY ROTARY | Sign in/Register Club Finder Location/Language

Rotary My Rotary Exchange Ideas Take Action Learning & Reference Manage The Rotary Foundation Member News

CLUB & DISTRICT ADMINISTRATION
Club Administration
District Administration
Contributions
Reports
Club Invoice

TOOLS
Community Marketplace
RSS Feeds
Mobile Apps
Member Data Integration

Go to Rotary.org and sign in to My Rotary. Then go to **Manage**, then **Club Administration**.

1

Rotary My Rotary Exchange Ideas Take Action Learning & Reference Manage The Rotary Foundation

Home | Manage | Club & District Administration | Club Administration

CLUB ADMINISTRATION

PAGE GUIDE

CLUB FINANCES

- ★ **Club Invoice**
View your club's invoice, pay dues with a credit card, or update invoice preferences
[Club invoice](#) | [Daily club balance report](#) | [Edit invoice preferences](#) | [About the club invoice](#) | [Rotary exchange rates](#)

CLUB & MEMBER DATA

- ★ **Manage Membership Leads**
Review your online membership leads for prospective, referred, and relocated members. Then assign and track your candidates through the membership process – from initial action.
View or manage leads | [About the membership leads program](#)

Select **View or manage leads**.

2



If you don't have any leads, you'll get a message that explains why.

MANAGE MEMBERSHIP LEADS

View and manage your membership leads for your club and districts informed about the progress of your leads. You are viewing membership leads for your club.

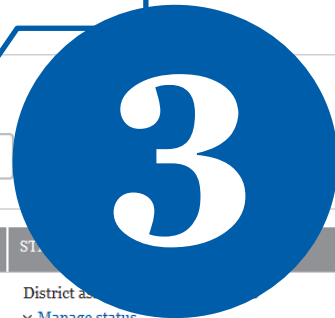
You can filter or sort leads. Scroll down to see more pages.

Active and historical membership leads report

SHOW LEADS BY:

PROSPECT TYPE: STATUS:

SUBMISSION DATE	PROSPECT TYPE	PROSPECTIVE MEMBER	STATUS
29-Oct-2015	Prospective member	John Smith	District assigned candidate to club
2-Nov-2015	Referral		
2-Nov-2015	Relocating or returning member		



View your leads here. Select a candidate's name to see more information.

SUBMISSION DATE	PROSPECT TYPE	PROSPECTIVE MEMBER	STATUS
29-Oct-2015	Prospective member	John Smith	District assigned candidate to club

PROSPECTIVE MEMBER

FIRST NAME
John

LAST NAME
Smith

EMAIL
Personal
johnsmith@hotmail.com

PHONE
Home
555-555-5555
Antarctica

PROFESSION
Sales Manager

EMPLOYER NAME
XYZ Company

AGE RANGE
40-49

GENDER
Male

LANGUAGE
English

CLUB MEETING LOCATION
ABC city, Antarctica

CLUB MEETING DAY
Wednesday

CLUB MEETING TIME
Morning

Referral leads show:

- Details about the candidate
- Who made the referral

Prospective member leads show:

- How they heard about Rotary
- Alumni and program participation

Rejoin or change club leads show:

- Current or previous clubs and positions held
- Previous club and district

4

All current officers can manage membership leads. Incoming and immediate past officers can only view them.

MANAGE MEMBERSHIP LEADS

View and manage your membership leads, including prospective, referred, and former or current members who are rejoining or changing clubs. It's an effective way to keep clubs and districts informed about the progress of your candidates.

You are viewing membership leads for the Rotary Club of ABC

Active and historical membership leads report

The screenshot shows a web interface for managing membership leads. At the top, there is a search bar with a 'FILTER' button. Below it is a table with columns for 'PROSPECTIVE MEMBER' and 'STATUS'. A row for 'John Smith' is visible, with the status 'District assigned candidate to club' and a 'Manage status' link circled in red. To the left of the table is a form for managing the lead. The form includes sections for 'CURRENT STATUS' (District assigned candidate to club), 'FEEDBACK' (Feedback from district), 'CHANGE STATUS' (Club admitted candidate), 'DATE ADMITTED' (ADD button), 'MEMBER ADDRESS' (ADD button), and 'SPONSOR' (- Select -). A 'SUBMIT' button is at the bottom of the form. Below the form is a 'STATUS HISTORY' table with columns for 'DATE' and 'STATUS'. The history shows two entries: '2-Nov-2015 District assigned candidate to club' and '29-Oct-2015 Staff assigned candidate to district'. A callout box points to the 'Manage status' link, and another callout box points to the 'Club admitted candidate' dropdown menu.

When you select **Manage status**, you can officially admit the member by selecting **Club admitted candidate**. Select the **ADD** button, complete the additional details, and hit **Submit**.

Some statuses will require you to leave feedback. Other statuses are considered the final step of the process and will move the lead to the historical lead report.

If you admit members using your own database (i.e., ClubRunner), confirm the member ID before adding the member to avoid creating duplicate records.

For members changing clubs, the secretary of their old club must terminate their membership in Rotary's database before they can be admitted into their new club.

Status history shows the progress of active leads and any feedback left by clubs, your district, or staff.



MANAGE MEMBERSHIP LEADS

View and manage your membership leads, including prospective, referred, and former or current members who are rejoining or changing clubs. Use this information to keep clubs and districts informed about the progress of your candidates.

You are viewing membership leads for the Rotary Club of

[Active and historical membership leads report](#)

You can view reports by selecting this link for inactive leads or selecting **View reports** as shown below.

REPORTS

 PAGE GUIDE

INDIVIDUAL REPORTS

Contributions & Recognition

- ☆ **Donor History Report**
View your contributions to The Rotary Foundation.
[View report](#) | [Give online](#) | [Mail your check](#)

The **View reports** link leads to two reports:

- **Membership Leads Report** — List of active and historical leads and all associated data, by individual lead
- **Membership Leads Executive Summary** — Analysis of how your leads have heard about Rotary, their progress and demographics, and the average time to contact, assign, and admit them

CLUB REPORTS

- ☆ **Membership Leads**
Find a list of active and historical leads in the Membership Leads Report. Review demographics of your leads, and see the average time to admit them in the Membership Leads Executive Summary.
[View reports](#) | [About the membership leads program](#)

For more information about membership leads, see [Connect to Membership Leads](#). Questions? Email membershipdevelopment@rotary.org.