Recipe for a Successful Rotary Membership Event

A successful Rotary Membership Event (Rotary Information Hour, Discover Rotary, etc.) starts with the right framework. This is a "business seminar", rather than a Rotary meeting, social hour, networking event, etc. Think about how you'd organize a new product introduction event for your company's prospects or customers.

Besides advance planning (enough lead time for members to get prospects lined up), a successful membership event has several essential ingredients, most of which occur before the event:

Pre-Planning

1. Enter the event on the DACdb club calendar. Better yet, set it up as Online Registration, where members can register themselves and their guests. This simplifies logistics

2. Make members <u>accountable</u> to bring prospects. This is not the same as "ask members to bring prospects". Accountability means that EACH member has committed to someone (or several someones) to show up with at least **one** prospect in tow.

3. Execute one or more intentional strategies to help members think of prospects
   a. Invitation Card at each member's place at the next meeting, with instructions to invite someone and report contact info to the Membership Committee
   b. "Who Do You Know" exercise at a Club Assembly. Every member knows someone to invite!
   c. A targeted list of business or community leaders, with someone responsible for contacting each (assigned at Club Assembly). Do a "Gao Analysis" of your club's classifications against those available in your community. Our clubs do need to represent our communities!

4. Members report their confirmed prospects **in advance** of the event - at least a week, to the Membership Committee. That lets you know which members have come through with a committed prospect and which haven't -- time for you to contact those and remind them they need to bring a prospect. Prospect information at a minimum:
   a. Name
   b. Email
   c. Mobile Phone #

   Important: All Prospects are entered in DACdb as "Potential Members" and included in Email distributions of the club's E-Bulletin or E-Newsletter, both before and after the event. Enter the member who invited them in the "Sponsor" field.

5. Membership Committee **emails** prospects with a **reminder** and all event info - time, place, dress code (probably business casual), etc. 2-3 days **before** the event (personalize with DACdb Pmail). One more message the day of the event. Member that invited the Prospect should also call them.

6. Membership Committee **texts** each prospect a short reminder the **morning of** the event

Event Day

The event itself should be practiced in advance and well executed. Essentials:

1. **Sign-in sheet** at the door -- Name, Email, Mobile Phone and Sponsor (who invited them). Make certain that someone is responsible for not only getting guests to sign in, but also to add walk-ins and contact data you collect to their Potential Member profiles in DACdb after the event.

2. **Refreshments** -- Perhaps served as prospects and members arrive.

3. **Agenda** -- VERY simple agendas work best
   a. **Introductions** -- Emphasize "30 seconds" each: (intent is 10 minutes, max. for all introductions)
      i. Name
      ii. Vocation (or past, if retired)
      iii. For prospects, "What sparked your interest in Rotary?"
      iv. For members, "What attracted you to Rotary, and what's kept you coming back?"

   Host or MC goes first, setting an example within the 30-second time budget. Practice this before-hand!

b. **Rotary Overview** -- 20 minutes or less, with GOOD visuals, perhaps 2 or 3 presenters:
   i. Origin of Rotary, Object of Rotary, 4-way Test
   ii. Club overview - History, size, meeting day/time
   iii. Avenues of Service & Service Projects (Local and International)
   iv. The Rotary Foundation - highlights only -- This is what funds "Doing Good in the World"
   v. Membership is by Invitation. Include overview of financial commitment
   vi. "What happens if I join?" -- Onboarding/orientation process. Expectations of being a member
   vii. Hand out applications (use the info form from DACDB) -- "Please return to your sponsor (the member who invited you)"

c. **Take Home Collateral --** Hand out a Rotary Brochure or Club Brochure for each prospect, along with a business card (President, Secretary, Membership Chair, etc.)

d. **Wrap-up**, invitation to stay for refreshments, networking, etc. (20 minutes left to stay inside 1 hour)

Note: NO Invocation, **NO** pledge, **NO** song, **NO** "Rotary Meeting" preliminaries, **NO** Rotary business - this is a "business seminar" format. Stay focused on the purpose of this meeting. Think of what YOU would want to hear and learn at one of these sessions if you had attended one. Simple is best! Details can come after they have become a member.

The Fortune is in the Follow-Up

Sponsors are primarily responsible for phone follow-up, same day or next day, inviting them to join and asking, "what's your decision-making timetable?", and reporting same to Membership Committee. Additionally:

1. Follow-Up Email, thanking prospects for attending - same day or next day (create a template for all to use)

2. Phone call from President or Membership chair within 2 days, asking if any questions and inviting them to join. (create a standard script before making these calls)

3. Sponsor continues to follow up until we get a "Yes", "No" or "Not Now".
   a. **Yes** -- proceed with Membership Proposal process
   b. **Not Now** -- Keep as Potential Member and in "drip marketing", sending your E-Newsletter or E-Bulletin by PMail once or twice a month.
   c. **No** -- Terminate from DACdb to drop them out of your prospect list

Repeat

This is a playbook you can run two, three or four times a year. One club has a membership event every month, just before a regular meeting. Members will have prospects who can't make a given date.   If you go ahead and schedule the next one out a few months, many times they can get a commitment for the alternate date.

REMEMBER:

We are in competition for everyone's time, talent and treasure. Therefore, we must put forth a "value-proposition" that meets the needs of our prospects, and meets the needs of our communities. For Rotary club to continue to grow and succeed, we must continually understand our communities, adapt to their needs, and attract new members that will assist us in achieving these goals. This requires ongoing assessments of our clubs and our communities. By doing so, your club should continue to grow. If you are not growing, you are dying. There is no such thing as "stable" when it comes to membership.