

RELEVANCE: As a district leader, managing and understanding online membership leads is a key responsibility, as is supporting clubs in managing their leads and creating a positive experience for these prospective members.

Learning objectives

At the end of this session, district leaders should be able to help clubs:

- Understand how membership leads work
- Manage their membership leads online
- Create a positive experience for prospective members

Speaking points

- Online membership leads are the result of
 - a prospective member expressing interest in Rotary by visiting Rotary.org
 - a relocating or former member expressing interest in changing clubs or rejoining a club
 - a Rotarian referring a prospective member to a club other than their own
- When any of these actions are taken, the leads are screened by Rotary International staff and assigned to the appropriate districts.
- When assigned to a district, district governors, membership committee chairs, executive secretaries, and assistant governors will receive an emailed alert, notifying them of a new lead. This email includes a link to their Manage Membership Leads page where they can review additional information about the lead.
- After contacting the candidate and updating the status and feedback online, a district leader may assign it to a specific club, if appropriate, on the Manage Membership Leads page.
- When assigned to a club, club presidents, secretaries and membership committee chairs receive an emailed alert, notifying them of the new lead and linking to their Manage Membership Leads page, where they can learn more about the lead, including notes left by their district leaders.
- Club leaders are expected to follow up with the candidates and take further actions, as appropriate, and update the status of the lead online to reflect the action taken.
- More than half of the membership leads received are not being acted upon by club and district leaders. This creates a negative Rotary experience for the candidate who began with a positive perception of Rotary.

- All current club and district officers can access and manage their membership leads. All incoming and immediate past club and district officers can view their membership leads.

Discussion questions

- How many of you are familiar with membership leads? How many of you have received email alerts? How many of these leads have been admitted to clubs?
- District governors, district membership committee chairs, district executive secretaries, and assistant governors receive the email alerts. It is crucial to establish a process for managing the leads. What is your process for managing the leads when they come to you? Who in your district is responsible for reaching out to candidates to learn more about them? Who is responsible for updating the status online?
- What could happen if a process is not established? (lead could be left unattended or multiple people could reach out to the candidate)
- What do you tell your clubs about membership leads? How do you involve your assistant governors?
- How do you ensure membership leads assigned to your district are followed up on by the clubs they are assigned to?
- Besides the potential to grow Rotary, why is it important to follow up on membership leads?

Suggested Activity: The membership lead experience

Instruct participants to navigate on their mobile devices to learn.rotary.org, then have them search for Membership Leads using the search bar in the Learning Center. Instruct them start the Online Membership Leads course and open the eLearning module, and give them 10 minutes go through it. Then have them get into groups of three or four, with each person sharing two new things they learned from going through the module. Have each group consolidate learnings and report the top 3 to the larger group.

-OR-

Divide participants into groups of three or four and have each group discuss how to handle one of the scenarios below:

- A membership lead candidate – Daniel – is really impressed with Rotary and personally benefitted from a Rotary project when he was young. He expresses

interest online by visiting Rotary.org and clicking on the JOIN button. He anxiously awaits a response. You assign him to a club who doesn't follow up with him. What do you do? What do you do to ensure that more membership leads like Daniel aren't left waiting?

- A membership lead candidate – Vivian – has moved from another country where she was a club leader in her Rotary club. She wants to join a new club in her new country and serve in a leadership position there. You receive the lead and want to ensure that she is matched with the right club and has a positive Rotary experience. How do you ensure that happens?
- A membership lead candidate – Sophia – was referred by a Rotarian from another state who met her on a plane. The lead was assigned to your district. When you call her, you get the feeling she has the wrong impression about Rotary. She is really excited, and seems to fit the profile, but you aren't sure. What do you do?

Ask each group to present their scenario and ideas to the larger group. If you have extra time, you can have each group take another scenario.

Resources

- [Connect to Membership Leads](#)
- [How to Manage Membership Leads \(for districts\)](#)
- [How to Manage Membership Leads \(for clubs\)](#)
- [Membership Leads \(video\)](#)
- [Demystifying Membership Leads](#) (online course)