

From Leads to Members: 5 Ways to Manage Prospective Members

Manage Prospects

1. Update Database
2. Define Sales Stages & Assign Staff
3. Track Sales Funnel Information
4. Touchpoint Program
5. Review Prospect Reports



1. Update Your Database with Prospects

- Add prospects to your database
 - But not just any prospects!
- Who are your ideal members?
 - Who will benefit most from chamber membership?
- Prospect list should reflect ideal member characteristics
- Secret sauce for adding new members



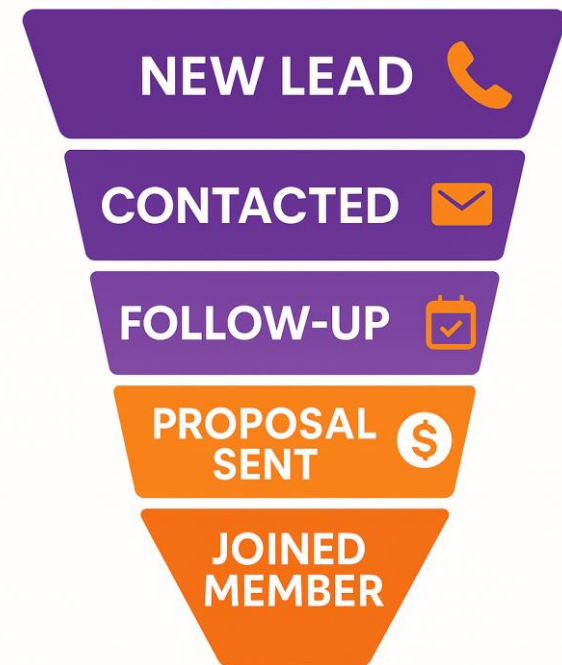
1. Update Your Database with Prospects

- Event Attendees
 - Update Prospects from [Event Guest List](#)
- Staff App
 - Add a [member](#) or [rep](#)
 - Add [Notes](#)
- Add member via [Membership Application](#) or [back office](#)
- Make joining [easy](#)



2. Define Sales Stage Steps & Assign Chamber Reps

- Clear, consistent Sales Stages keep staff on track
 - Data-driven decisions
 - Consistent follow-up
 - Better forecasting
- Connect with your prospect
 - On average it takes 5-8 follow-ups to convert prospect to member
 - May need to check budgets, get board approval, or compare benefits



2. Define Sales Stage Steps & Assign Chamber Reps

- Sales Stages
 - Customizable for your organization
- Assign Chamber Rep to prospective members
 - Clear ownership of prospect
 - Consistent communication
 - Point person for questions and concerns
- Run reports on prospects and assigned staff

The screenshot shows the 'Member Management' interface for a member named 'Pedal Bike Shop'. The interface includes a sidebar with navigation options like Dashboard, Members, Groups, and various reports. The main content area has tabs for General, Reps, Web, Communication, Account, Stats, Benefit Tracking, Advanced, and Marketing. The 'General' tab is active, showing fields for File-By Name, Membership Status (set to 'Prospective'), Join Date, Drop Date, Established Date, Created Date, Full-Time Emps, and Part-Time Emps. A red box highlights the 'Sales Stage' and 'Chamber Rep' fields, which are set to '3rd Call Back' and 'Sandra Dee' respectively. The 'Sales Stage' field has a link to 'edit stage options'.

3. Track Important Sales Funnel Information

- Custom Fields
- Custom Member Report
 - Report on Prospects, include Sales Funnel custom fields
 - Gain insight into effectiveness of sales process
 - Spot trends and successful strategies

Member Listing					
Company Name	Lead Source	Sales Temperature	Probability of Sale	Date of Initial Contact	Stage in Sales Process
Custom Cabinets	Event	Warm	70	4/11/23	1st Call
Emma's Kitchen	Member Recommendation	Hot	100	4/11/23	2nd Call
Elizabeth's Creations	Drop By	Hot	100	9/5/22	1st Call
Kalamazoo Brewery Tours	Email Campaign	Cool	20	9/5/22	3rd Call
Rodney's Roosters	Cold Call	Cool	20		2nd Call
Kalamazoo Public Library	Drop By	Cool	20		1st Call
Kalamazoo Coffee Shop	Event	Warm	70	3/5/23	1st Call
Bait Shop	Email Campaign	Warm	50	3/6/23	1st Call
Pedal Bike Shop	Email Campaign	Warm	50	3/6/23	1st Call
Kalamazoo Photography Studio	Drop By	Warm	60	2/12/23	2nd Call
Juice Joint	Email Campaign	Warm	60	3/5/23	2nd Call
Sandra Dee's Cake Company	Member Recommendation	Warm	50		2nd Call
Jane's Coffee Shop	Event	Hot	90	11/11/22	3rd Call
Jane's Juice Joint	Member Recommendation	Warm	70	2/12/23	2nd Call

3. Track Important Sales Funnel Information

- Lead Source
 - What efforts are paying off
- Sales Temperature
 - Hot Prospects
- Probability of Sale
 - Be realistic
- Date of Initial Contact
 - How long to convert Prospects to Members?
- Membership Calculations for Association Pros Who Hate Math



4. Develop Touchpoint Program

- Have a Touchpoint strategy
 - Phone calls
 - Email
 - Live conversations
 - [The power of the Welcome Email](#)
- Response rates rise with each subsequent outreach attempt
- Make at least 5 attempts with every prospect
 - Share success stories
 - Mix up your approach
 - Update [Communication History](#)

New Correspondence Entry

Contact Date: 4/21/2023

Task: ▼

Chamber Rep: John-Jacob Jingleheimer-Schmidt ▼

Member: [A Place For Dogs](#)

Member Rep: [select a member representative](#)

Subject: Membership

Message/Notes: Prospect is interested in membership and would like to discuss benefit packages.

Follow-Up Date: 04/28/2023 [today](#) | [tomorrow](#) | [one week](#) | [one month](#)

Follow-Up Notes:

Save

Close

4. Develop Touchpoint Program

- Create Reminders to ensure you are following your Touchpoint Program
- Ensure prospects are contacted even if you're not there
- Add notes directly within Follow-up Reminder
 - Add new communication and follow-up reminder at the same time

The screenshot displays the ChamberMaster MemberZone interface. On the left sidebar, the 'Reminders' option is highlighted with a red box. The main content area shows a list of communication entries with filters and a table of results.

Filters:

- Date From: 2/16/2022
- Through: 2/16/2023
- Member Rep: [Dropdown]
- Tasks/Categories: [Dropdown]
- Staff Contact: [Dropdown]
- ☒ Display **bulk mail** correspondence entries in the table below.
- Display: 100 results per page.

Actions: Refresh Listing, Clear Filters, New Communication, Reports


Communication Options: Email with ChamberMaster, Email with Outlook, Log a Call or Note, Send an eReferral, Notes and Follow-Up, Print Mailing Label

Table Data:

Subject	Date	Follow-Up	Task	Contact	Association Rep
Join the MIC already	2/10/2023	add follow-up		Henrik Zetterberg	Elizabeth Diephouse
Welcome	2/10/2023	add follow-up		Mary West	Elizabeth Diephouse
May Newsletter	2/8/2023	add follow-up		Mary West	Elizabeth Diephouse
Have you tried Autopay?	2/6/2023	add follow-up		Mary West	Elizabeth Diephouse
AUTOPAY	2/2/2023	add follow-up		Mary West	Elizabeth Diephouse
Hot Deals	1/18/2023	add follow-up		Mary West	Elizabeth Diephouse
Autopay	1/17/2023	add follow-up		Mary West	Elizabeth Diephouse

5. Review Prospect Reports

- Prospects and Communication by Rep: Detail report
 - Detailed list of Sales Reps
 - All prospective members associated with Sales Rep
 - Days since last contact
 - Includes average days

Prospects & Communication Detail		
		
Rep	Lead	Days Since Contact
Andrew Lewis	Emma's Kitchen	12
	Kalamazoo Brewery Tours	19
	Total: 2	Average: 15
John Thompson	Kalamazoo Coffee Shop	51
	Total: 1	Average: 51
John-Jacob Jingleheimer-Schmidt	Juice Joint	14
	Total: 1	Average: 14
Mary West	Elizabeth's Creations	16
	Total: 1	Average: 16
Sandra Dee	Custom Cabinets	19
	Pedal Bike Shop	12
	Total: 2	Average: 15

5. Review Prospect Reports

- Prospects and Communication by Rep: Summary

- Sales Rep and total number of prospective members assigned to them
- Average number of days since the member was contacted
- Are staff members following Touchpoint Program?




Prospects & Communication Summary

Rep	Leads	Average Days Since Contact
Amanda Lorean	1	0
Andrew Lewis	1	36
Anna East	2	30
Jane Thompson	2	40
John Thompson	1	68
John-Jacob Jingleheimer-Schmidt	1	0
Mary West	1	26
Sandra Dee	2	20

5. Review Prospect Reports

- Prospect Conversion by Date report
 - View which prospects became paying members
 - Specified date range
 - Sorted by Sales Rep or Groups
 - Who are your top sales staff?



Prospects Conversion by Rep & Date

	Member	Join/Conversion Date
John-Jacob Jingleheimer-Schmidt	Music Connection	1/4/2023
	Ballet Kalamazoo	1/1/2023
	Bayside Painting Company	1/1/2023
	Josef's Bakery	2/10/2023
	Village Toy Shop	2/3/2023
	Skate Shop	4/13/2023
	Furniture Store	5/5/2023
	Total: 7	
Mary West	Big Foot Shoe Shop	11/3/2022
	Total: 1	
Sandra Dee	Quinn's BBQ Grille	11/4/2022
	Pet Supply Shop	3/9/2023
	Total: 2	
Sarah Hawkins	Kalamazoo Candy Store	11/2/2022
	Total: 1	


5. Review Prospect Reports

- Custom Member Report
 - Use Initial Contact Date and Join Date for Sales Funnel insights
 - How long does it take from initial contact to membership?
 - View Sales Funnel custom fields

Member Listing						
Company Name	Lead Source	Sales Temperature	Probability of Sale	Date of Initial Contact	Stage in Sales Process	Close Date
Bait Shop	Email Campaign	Warm	50	3/6/23	1st Call	
Custom Cabinets	Event	Warm	70	4/11/23	1st Call	
Elizabeth's Creations	Drop By	Hot	100	9/5/22	1st Call	
Emma's Kitchen	Member Recommendation	Hot	100	4/11/23	2nd Call	
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Kalamazoo Public Library	Drop By	Cool	20		1st Call	
Pedal Bike Shop	Email Campaign	Warm	50	3/6/23	1st Call	
Rodney's Roosters	Cold Call	Cool	20	11/11/22	2nd Call	
Sandra Dee's Cake Company	Member Recommendation	Warm	50	9/5/22	2nd Call	
Smiths Store	Email Campaign	Warm	50	3/5/23	1st Call	

5. Review Prospect Reports

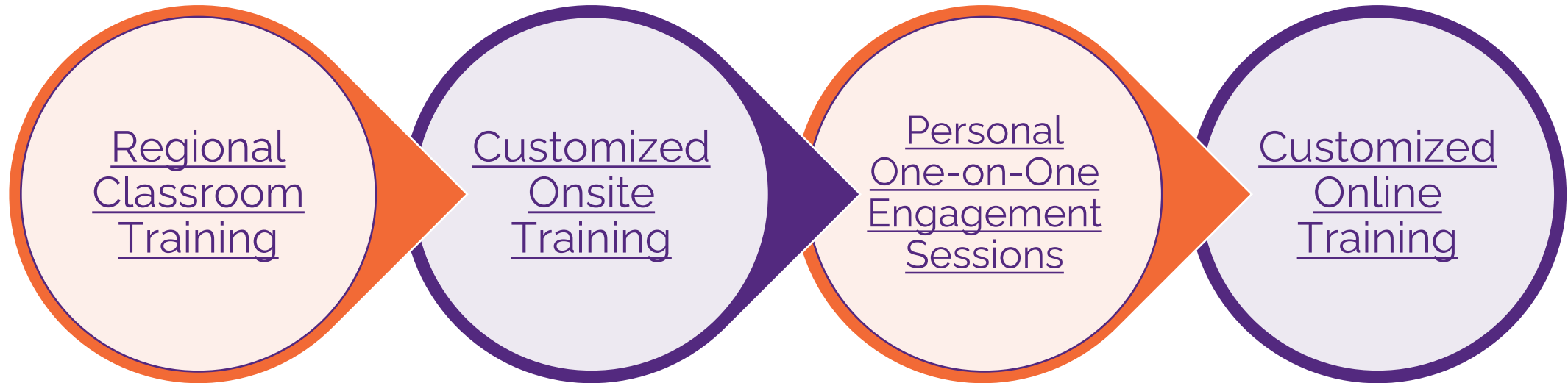
- Member Contact Benchmark report
 - Measures communication with members
 - Non-bulk communications
 - Filter by status to Prospective members
 - Are you following your Touchpoint Program?

 Member Contact Benchmark				
Member	Representative	Longevity	Last Contact	Days Since Contact
Kalamazoo Coffee Shop	John Thompson	0 years 6 months 0 days	2/24/2023	66
Bait Shop	Andrew Lewis	0 years 5 months 29 days	3/13/2023	50
Kalamazoo Brewery Tours	Andrew Lewis	0 years 7 months 2 days	3/28/2023	34
Elizabeth's Creations	Mary West	0 years 7 months 24 days	4/1/2023	31
Juice Joint	John-Jacob Jingleheimer-Schmidt	0 years 5 months 1 days	4/3/2023	29
Emma's Kitchen	Andrew Lewis	0 years 7 months 24 days	4/5/2023	27
Pedal Bike Shop	Sandra Dee	0 years 5 months 29 days	4/5/2023	27
Rodney's Roosters	Mary West	0 years 6 months 26 days	4/7/2023	25
Custom Cabinets	Sandra Dee	5 years 7 months 16 days	4/20/2023	11

Training Resources



Expanded Training Offerings



Questions?