

5 Ways to Manage Your Prospects

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

- 2% of Sales are made on **first** contact
- 3% of Sales are made on **second** contact
- 5% of Sales are made on **third** contact
- 10% of Sales are made on **fourth** contact
- 80% of Sales are made on **fifth** to **twelfth** contact



2. Define Sales Stage Steps & Assign Chamber Reps

- Sales Stages
 - Customizable
- Assign Chamber Rep to Prospective members
 - Run reports on prospects and assigned staff
- What is a Sales Funnel and Why Should Associations Use It?

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 Reports. The main content area shows the member's details, including contact information and additional information. A red box highlights the 'Sales Stage' and 'Chamber Rep' fields, which are set to '3rd Call Back' and 'Sandra Dee' respectively. The 'Membership Status' is set to 'Prospective'. The 'Created Date' is 11/3/2022, and the 'Modified Date' is 4/17/2023 11:21:01 EDT. The 'Primary Rep' and 'Billing Rep' are both listed as 'Joe Bicycle' from Kalamazoo, MI 49008.

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
- Why You Need to Track Your Sales Funnel KPIs

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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
- Response rates rise with each subsequent outreach attempt
- Make at least 5 attempts with every prospect
 - Mix up your approach
 - Update [Communication History](#)
- [Let prospects know what you're doing for them](#)

New Correspondence Entry

Contact Date:

Task:

Chamber Rep:

Member: [A Place For Dogs](#)

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

Subject:

Message/Notes:

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

Follow-Up Notes:

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

The screenshot displays the ChamberMaster MemberZone interface. On the left is a sidebar with a 'Task List' section containing items like 'Mbr Signups', 'Hot Deals', 'MarketSpace', 'News Releases', 'New Events', 'Job Postings', 'Pub. Requests', 'Reminders' (highlighted with a red box), 'Mbr Payments', 'Invoices', and 'Web Leads'. The main area shows a 'Correspondence' list with columns for Subject, Date, Follow-Up, Task, Contact, and Association Rep. A red arrow points from the 'Reminders' task in the sidebar to the 'Notes and Follow-Up' option in a context menu that is open over the 'AUTOPAY' entry in the correspondence list. The context menu also includes options like 'Email with ChamberMaster', 'Email with Outlook', 'Log a Call or Note', 'Send an eReferral', and 'Print Mailing Label'. At the top of the main area, there are filters for 'Date From' (2/16/2022), 'Through' (2/16/2023), 'Member Rep', 'Tasks/Categories', and 'Staff Contact'. There are also buttons for 'Refresh Listing', 'Clear Filters', 'New Communication', and 'Reports'.

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

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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	
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	
Juice Joint	Email Campaign	Warm	60	3/5/23	2nd Call	
Kalamazoo Brewery Tours	Email Campaign	Cool	20	9/5/22	3rd Call	
Kalamazoo Coffee Shop	Event	Warm	70	3/5/23	1st Call	
Kalamazoo Photography Studio	Drop By	Warm	60	2/12/23	2nd Call	
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

Questions?