HOW TO MANAGE MEMBERSHIP LEADS (FOR DISTRICTS)

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

1

Select **View or manage leads**.

2

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

GIVE JOIN

MANAGE MEMBERSHIP LEADS

...who are rejoi... ...r to keep clubs and...

3

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

SHOW LEADS BY:

PROSPECT TYPE
Any

STATUS
Any

FILTER

SUBMISSION DATE	PROSPECT TYPE	CANDIDATE	CURRENT STATUS
29-Oct-2015	Prospective member	⌄ John Smith	District assigned candidate to club ⌄ Manage status
2-Nov-2015	Referral	⌄ Jane Referral	District contacted candidate
2-Nov-2015			

View your leads here. District governors and membership committee chairs can select a candidate's name to see more information.

SUBMISSION DATE			
29-Oct-2015	Prospective member	⌃ John Smith	District assigned candidate to club ⌄ Manage status

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

CLUB MEETING LOCATION
ABC city, Antarctica

CLUB MEETING DAY
Wednesday

CLUB MEETING TIME
Morning

MEMBER ID
1234

Prospective member leads show:
- How they heard about Rotary
- Alumni and program participation

Referral leads show:
- Details about the candidate
- Who made the referral

Rejoin or change club leads show:
- Current or previous clubs and positions held
- Previous club and district

GIVE JOIN

MANAGE MEMBERSHIP LEADS

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

You are viewing membership leads for **District** 1234

Active and historical membership leads report

4

SHOW LEADS BY:

PROSPECT TYPE
Any ▼

STATUS
Any ▼

FILTER
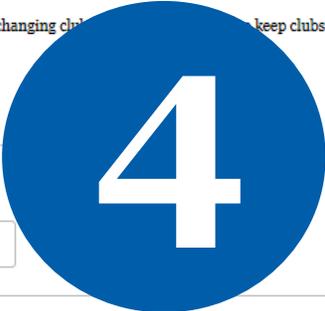
SUBMISSION DATE	PROSPECT TYPE	CANDIDATE	CURRENT STATUS
29-Oct-2015	Prospective member	⌄ John Smith	District assigned candidate to club
			^ Manage status

CURRENT STATUS

District assigned candidate to club

FEEDBACK

> If a club is grayed out, it has opted not to receive leads.

> To take action on a lead, select **Manage status**. Then choose an action from the Change Status drop-down menu and select a club, if appropriate. Be sure to leave feedback for your clubs to endorse the candidate or add other notes for your club or district leaders. (Feedback is a requirement for some statuses.) Then hit **Submit**.

CHANGE STATUS *
District assigned candidate to club ▼

CLUB *
- Select - ▼

FEEDBACK

> Some statuses are considered the final step of the process and the leads are no longer visible on this page. You can access these inactive leads in reports (see step 5).

250 characters

> If a club doesn't take action on a lead, it will be routed back to you for reassignment.

> Status history shows the progress of active leads and any feedback left by assigned clubs, other district leaders, or staff.

SUBMIT

STATUS HISTORY

DATE	STATUS	DISTRICT/CLUB	FEEDBACK
4-Nov-2015	District assigned candidate to club	Club name	Feedback from district
29-Oct-2015	Staff assigned candidate to district	1234	

5

MANAGE MEMBERSHIP LEADS

View and manage your membership leads, including prosp
districts informed about the progress of your candidates.

You are viewing membership leads for **District**

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

INDIVIDUAL REPORTS

Contributions & Recognition

☆ **Donor History Report**
View your contributions to The Rotary Found

View report | **Give online** | **Mail your contribution**

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.

Rotary