



Selling Rotary!

Step by Step Process to Sell Your Club

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What! Selling A Volunteer Organization!

During my year as a President of my Rotary club, I had big goals of increasing membership; I created a new marketing piece, developed a new member package and provided everything to my membership chair. At the end of the year our club's membership was even, we had brought in a few new members to cover the ones we lost but had not achieved the gains I had hoped for. Since then, I've had the privilege of working at the District level, have listened to speakers from throughout our District and Zone, and it finally clicked.

I am a salesperson and have been for over 30 years. After my year as President I realized that if I offered my products and services in the same fashion that we are offering the opportunity of being a Rotarian, I would be broke and no longer be in sales. Bottom line, I knew what to do but was not doing it in Rotary and as I looked around, this is common problem in most clubs and even people at the District level were promoting Rotary using methods of getting members involved in our great organization without providing them the understanding of what they were getting into or how to get involved. No wonder that, as an organization, we were not growing.

Now you may say, "selling is a bad thing", you are trying to trick people into joining Rotary. I disagree; selling, when done

properly, is just a process. When done ethically, you are better serving the prospect by ensuring that you meet their needs.

Since I am a Rotarian, I use Rotary as an example of an volunteer organization but the principles will work for any other volunteer organization.

So, I have created this program to help clubs sell themselves in a professional and ethical manner. I truly believe that if you do this correctly you will bring in better and longer-lasting members.

Good Luck,

Ray

What Does Your Club Offer It's Members?

Before you can sell your club to a prospective member, you need to take a serious look at your club and see what it offers the membership. Generally, clubs sell the good feeling that comes from doing the right thing. But is that really the reason your current members stay as part of your club?

I would bet some of your members continue due to friendships they have developed, others may like the fact that they can network with other members of your club, still others may be looking to have something to do in their spare time. Whatever the case, they feel that they are getting a return on their investment in the club.

With that in mind, let's look at the way that most clubs sell themselves to prospective members: they ask them to show up to a meeting, if you like what you see and hear, join. Really, if I was selling you a new car, would I suggest that you show up to the dealership and watch others drive cars around then ask you to decide whether you want to buy one? No, of course not.

By knowing your club's strengths and why you members are part of your club, you will understand who your target market is. Think of a car dealership that sells high-end sports cars, if they market to low income areas of town they would likely not get a return on their marketing investment. Whereas, marketing to

high income individuals is their market. If you market that your club provides many opportunities to work on international projects and your club has no project and does not plan to do any in the near future, prospective members who have an interest in helping internationally probably will not be very interested in joining. If they do join, they will most likely leave the club soon because they are not getting their needs met.

Since we normally do not analyze our club's strengths, when asked "What is Rotary?", members describe our organization like this: 'Rotary is an international service group that has 1.2 million members in 34,000 clubs.' This is like describing a sports car as a transportation device which has 1.2 million bolts that are attached to 34,000 panels. Can you feel the excitement that you are generating?

The question you should be asking yourself is what are the reasons that a prospective member would like to join my club? You and your fellow club members should spend some time and determine the reasons the club brings value to the prospective member.

Before I further discuss the strengths of your club, I want you to consider after your analysis your club's strengths whether it's strengths will attract your ideal prospective candidates. If your club is not attracting young professionals, local business leaders, or other

important demographics that you need to become a stronger more viable club, then I would suggest that you read a book by my friend Dr. Bill Wittich "Stop Recruiting/Start Attracting ". This book will help you evaluate your club to see if it is attractive to the audience you want to join your club.

Here are a few examples, please do not use these if they do not apply to your club, please find your own club's strengths.

Friendships (Fellowship): In today's busy world, people need and want to develop relationships with others. Remember, many people simply go to work and return home with very little interaction with others. Our society does not promote the neighborhood gatherings and other social events that were common in the past. Our clubs can be a resource for others to fulfill this basic human need.

As you may have noticed this section is labeled "Friendship" but commonly our club and members refer to this type of interaction as "Fellowship". Studies have shows that younger generations are not attracted to the term Fellowship. They often consider is a term used by older people for getting together. Also, there are others who consider this term religious. Therefore, you might want to use Friendship in your discussions and marketing materials with prospective members.

Business Development/Networking: We hear all the time that Rotary started off as a business networking group, so we should promote that. But is your club really a good place for someone to network? Example: a person that sells payroll services shows interest in your club, you have 20 members, 10 are retired and the other 10 are employees of large corporations. Who is that person going to network with? Well, if the 10 employees are sales people then there may be an opportunity. But if instead those 10 members are government employees, maybe there are no networking opportunities.

To sell your club as a networking club, I believe that you have to have the members and mind set to help others grow their business. In addition, you need to explain to the prospective members the chances that they will get any referrals from your club. If your club has a membership that has a wait-and-see mentality before offering a referral, explain that to the prospective member. Remember, if you oversell the prospective member on the fact that they can make lots of money by joining your club and then they find out that it is not possible, they will be disappointed and leave.

If you want to attract prospective members that want to network and currently your club is not a networking-friendly club, consider developing a networking club within your club where members are encouraged to shamelessly promote their business. If you don't have enough members interested in

joining this group, contact other local Rotary clubs in your area and create a regional networking group. The benefits for your members are that Rotarians would rather do business with someone who believes in and lives by the 4-way test even if they are in a different club?

Families Working Together: I did not join Rotary for this aspect of Rotary but it is now a passion for me. When I joined Rotary, my daughter was only 9 years old. I would bring her to work projects and she loved it. I found out it was a real bonding experience. What I also realized is that my daughter was around quality adults and learning from them. When a new member brings their children, my daughter is the first one there to greet them and to help them get involved.

Compare your Rotary projects with other activities children participate in: sports, scouts, music, etc. are all generally designed so that parents are spectators, in our projects we can work side by side with our children. The only way the prospective member can have the same interaction in the previously mentioned activities is if the parent is a leader/coach. In those cases, the children and parent get to interact but does the child benefit from interacting with 20+ quality adults that are in your club?

Another result you should investigate, are your Rotarians children developing leadership skills? I have found my daughter

developed speaking skills not just the ability to talk with adults but also speaking in front of groups.

Her leadership skills were further developed by participating on club committees. My daughter was actually the chair for a few committees at our annual fundraiser. These are all skills that will help her later in life.

In addition, the children are generally enjoy working with other children. At your community service projects, the children can be working with adults but with their peers. This multiple generation interaction increases their ability to communicate and appreciate people of all ages.

Mentorship: If you are interested in attracting younger members and your base membership is older, sell your older members on how they can provide help to younger members by sharing their knowledge and wisdom.

Mentorships are a lost activity in our society. Many professionals today jump from company to company and therefore true mentorship programs have disappeared. Your club can help local professionals by creating mentorship programs and develop an attitude help my members within your club. An example of how it may work: if you have a retired marketing professional they can mentor a member by helping them plan

and by discussing issues they are having marketing their business.

I have included a "Mentorship Questionnaire" (see Reference Section) that our club is using to identify mentors so we can better match them up with new members.

Local Community Service Projects: Do you have a list of all the community service projects that your club participates in? If not, create one.

Remember, everyone's interest is different. If you have two prospective members both interested in helping local schools, one's hot button may be providing scholarships while the other could be the reading program.

International Service Projects: As Rotarians, we know and discuss the Polio Plus program but will it have any meaning to the prospective member? Consider this, if the prospective member is under 50 years old, they may have little or no knowledge of the effects Polio has on people, since they may have met only a few victims of this disease in our country. Therefore, if your club has an international focus, you should also have a list of all the projects that your club participates in because the younger visitors may not appreciate the Polio Plus program. Please note: this list does not have to be programs your club is the lead club in, but projects you participate in.

Education/Personal Growth: Each week your club has a speaker which can provide information about the community, personal growth and other ideas that can help your members understand and increase their knowledge of their community or pick up tips to help them grow personally or their business. Explain to a visitor the value they will receive from attending your weekly meetings.

In addition, members can develop skills that they can use outside of Rotary such as public speaking, project management and other leadership skills.

Rotary District's have Leadership programs that members can attend. Promote these programs to prospective members as a ways that we can help them grow their skills which can help them in their profession.

Fun: Rotary should always be a lot of fun. If your meetings are fun, your projects are fun, and your socials are fun, brag about these activities to the prospective members. Let them know that they will build friendships and participate in activities that will make them feel happy that they helped.

Also remind them that there are other events where they can meet other Rotarians, not only locally but internationally, such

as: District Conferences, Rotary International Conventions and other special events.

Other Reasons: Have you ever asked why do your current members enjoy being part of your club? It might be special socials, your fundraisers, your weekly speakers, or other projects. You should ask your members and then create a list of the reasons your members feel they get value from being a member of your club.

Here is a partial list of the projects that I created for my club during my year as President that we could distribute to potential members:

- High School Scholarships
- Dictionary Project
- Rotary Discovery Garden
- RYLA
- RYE
- Interact
- Polio Plus
- School Mini-Grants
- Relay for Life
- Support of Boy Scouts and Cub Scouts
- Friendships
- Fun Meetings
- Business Networking Group
- Business Referrals
- Great Speakers
- Relationships with community leaders
- Leadership Opportunities
- Budgeting Experience
- Work with Community Leaders

Once you have accumulated this information, write it down! Clubs should create marketing materials that highlights what we do as a group.

You may want to consider multiple marketing pieces for different situations. I like using a Tri-fold brochure for general

distribution whereas, when discussing the club one on one with the prospective client, I like using a single page flyer. You can see examples in the "Reference Section".

Now you are armed and ready with the information to begin talking to prospective members and sell your club!

Club Evaluation

Since you have reviewed what your members feel your club's strengths are, the next step is for you to evaluate your club to ensure that prospective members will find the club attractive to join.

In addition, you should review your club's membership procedures to make sure you are prepared to handle a prospective member's inquiry to join your club.

Here is a list of questions you should review prior to starting on your plan:

1. Do you have standard procedures, structure and documentation for all metrics and every function to recruit and retain membership?
2. Have you reviewed your club's procedures, meetings, and projects to ensure they are attractive to a prospective member?
3. Before deploying any tactic, have you thought through the master strategy?
4. Do you have more than a four ways working currently to get to prospective members?

5. Have you documented, honed, and mastered each step to bring in a new member?
6. Have you identified and developed the best strategies to attract prospective members?
7. Have you developed marketing materials that will attract our targeted prospective members?
8. Are your follow-up strategies include more than a five follow-up attempts, timed to perfection and executed with precision?
9. Have you perfected our “infomercial” and know exactly what to say to all potential members?
10. Are your meetings can't miss events and are attractive to our targeted prospective members?
11. Do you have programs, vocational opportunities, service projects, events, and marketing that is attractive to our target prospective members?
12. Are your goals, outcomes, plans and objectives are laid-out on paper and reviewed regularly?

Goals/Tracking

In order for Selling Rotary to be successfully implemented, your club President and Membership Chair need to set goals and develop a plan to hit that goal. In addition, you will need tracking program to help you accomplish your plan.

And since you have identified your clubs selling points and the strengths of your club, you are ready to develop your plan.

"A good plan is like a road map: It shows the final destination and usually the best way to get there."

H. Stanley Judd

The next step is to review what your club achieved last year as far as membership goals and set your new year's goal.

Previous Year Review

Number of Members at the beginning of the previous year?

Number of Members at the end of the previous year?

What Membership Skills did you do well in last year?

What Membership Skills did you need to improve in next year?

Basic Plan

Now that you collected information why your club is attractive, the club's strengths, and your goals, you should be ready to develop marketing plan for your club.

We have included a basic outline for you to use.

Membership Chair: _____

Committee Members: _____

Public Image Chair: _____

Membership Goal:

Basic Goal Setting:

First, you need to set a goal. How many members do you want by the end of the Rotary year? This will provide you with your net increase. Then you need to factor in the average 10% loss rate that most clubs experience. Add the two numbers together and you have the total new members you need to increase by.

So let's say that your club currently has 40 members and you want to grow to 42 members. Therefore, you need to find 6 new members this year.

Next you have to estimate the number of potential members you need to talk with to achieve your new member goal.

Let's say historically you need to invite on average 3 visitors to have one new member join. Therefore, to achieve 6 new members goal, you need to invite 18 visitors to your club.

Current members: _____

Estimate loss: _____

New Member Goal: _____

Total members: _____ Gain: _____

Club Review:

Greeters/Sign-In Sheet _____

Review of Club Meeting _____

Needed Changes: _____

Prospective Member Process _____

Needed Changes: _____

Target Audience:

Group: _____

How to Reach: _____

Group: _____

How to Reach: _____

Group: _____

How to Reach: _____

Marketing: *Date(s)*

Create/Update Membership Application _____

Create/Update Flyer/Brochure _____

Create/Update Membership Video _____

Create/Set Date Membership Event(s) _____

Retention:

New Member Program: _____

Mentor System: _____

Process to get involved _____

Needed Changes: _____

Outward Communication/Marketing:

Website:

Prospective Member Section: _____

Membership Contact Info: _____

Attractive: _____

Events Posted Who/When/Process: _____

Facebook:

Membership Contact Info: _____

Current: _____

Events Posted Who/When/Process: _____

Email/Database:

Contact Info Collection: _____

Contact Input: _____

Who Communicates Events: _____

Special Events:

Event: _____

Marketing: _____

Event: _____

Marketing: _____

Now that you have a plan, in order for you to accomplish your goals, you should continue to review your plan throughout the year and track your process. We have created a sample Tracking Sheet (see Reference Section) that you can use.

Prospecting

Prospecting is always the first step in the sales cycle. If you do not have anybody to talk to then you have nobody to sell to.

We first need to look at your members and realize that they all have different strengths and weakness. Some can generate excitement with people they meet and others are uncomfortable talking with people about participating with your club. You must develop a system where everyone can help your club grow in their own way.

I think that we should look (in a positive way) at you club like a car lot. You have initial sales people out on the lot that talk to prospects when they arrive on the lot and then you have other people that sit down, explain the details and close the deal.

In your club the initial sales people are all of your members. They should be talking to their friends and people they meet and invite them to a club meeting. The problem is normally we do not train them how to do this. This causes them to be uncomfortable with the process, and when someone is uncomfortable it is easy to do nothing.

Infomercials

So the first step is to train your members. This means that you need to create 30 to 60 second infomercials about your club. You may want to make a couple so the members can decide

which one they are more comfortable with or is more appropriate for the potential members. You should also encourage members to develop their own personal infomercials, that way they will have ownership in them. Just remember that most of your members will probably just use the ones you created.

So how do you create an infomercial for your club?

First, remember to review the reasons people join your club that we discussed in the previous chapter; these are the reasons that are meaningful to your members and highlight the benefits of your club.

Then show the member how to develop a style that they are comfortable with telling the Rotary story. And finally, ask them to start telling your club's Rotary story.

Here are a few techniques using a project I that was important to our club and our club members:

Fact Based Infomercial:

Rotary is an international service organization that helps local schools by providing grants so that local teachers can develop and implement innovative programs in their classrooms. These programs help the teachers increase the student's learning and participation. Without our support, many of these teachers would not be able to move forward with these programs. This is

one of many local and international service projects in which we participate in.

Soft Sell Infomercial:

Do you know how schools today always have to either reduce their costs or find alternative funding? Our Rotary club is a service organization that helps with this issue. We offer local schools funding for projects and programs that the school could not normally fund. Let me tell you, I really enjoy hearing from the teachers and students about how much the students have learned and grown since these programs have been implemented into the classrooms. This is one of many local and international service projects in which we participate.

At the end of each infomercial, you should end with a call to action. You can simply add a line like: How would like to join me for breakfast next _____ to learn more about other programs in which we participate?

I would encourage your club to develop a series of infomercials that discuss various projects that your club participates in that you can teach your members. Then have your club members develop their own and share them back to the club.

Now What

But you may be asking who, when, where do I use the infomercial? Ask you club members to look at their sphere of

influence (people they know or have contact with) and ask them if they are familiar Rotary? In order for the member to be comfortable with the complete process, here are some examples:

Basic Approach

Think about how a retail store uses advertising signs and ads to generate interest in their products and services.

How can Rotarians use this approach? Simply wear your Rotary Pin everyday and everywhere. I have a number of pins in my car so that if I forget to put one on in the morning, I have some to choose from before I get to my first appointment. If you are always wearing your pin, some people will come up to you and ask what it is. Here is an opportunity for you to use your infomercial.

I believe this is something everyone in your club can commit to and the President and Membership chairs should stress.

This is how the conversation may go:

P) What is that pin you are wearing?

R) It is a Rotary pin (don't stop)

R) INFOMERICAL (don't stop)

R) Are you interested in learning more about Rotary?

P) Yes

R) Would you like to be my guest at our next meeting?

P - Potential Member R - Rotarian

Tell Stories

As a club you have weekly guest speakers, you have socials, and you do community service. As a club, encourage you members to tell others about their experiences.

For example: you have a local community leader come to speak to your club about an issue in your community. After the meeting, encourage your members to spread the word. They should inform their neighbors, friends, or other community groups the important data they learned. The member comes off as expert in their community while updating their friends on community issues that they may not be aware of. As the club member explains what they learn, they state that they learn this information at their Rotary meeting. Then they invite their friends to attend a meeting so that they could learn valuable information.

In addition, encourage your members to discuss your community service projects and what they get from helping their community.

Also, do not forget that these stories should be shared on your website, social media sites, and in press releases to local press.

Direct Approach

In business, every business owner and successful salesperson understands they need new prospects to generate new clients. That means they have to approach prospects that may not realize that they wanted or needed their services. In Rotary,

many people either do not know or understand what we are about but that does not mean, we should not approach them.

R) Have you ever considered becoming a Rotarian?

P) What is a Rotarian?

R) INFORMERCIAL

P) That sounds great.

R) Would you like to join me at our next meeting so you can learn more?

Softer Approach

R) Have you ever heard of Rotary?

P) What is Rotary?

R) INFORMERCIAL

P) That sounds interesting.

R) Would you like to join me at our next meeting so you can learn more?

All else fails . . .

Some Rotarians are never going to feel comfortable

approaching people about becoming a Rotarian but they still know people. Therefore ask them to simply invite their friends to breakfast, lunch or whenever your meeting is. Remind your members that they have all invited someone to have breakfast in the past, we are just asking them to do it again and the breakfast is connected to our club meeting.

Here are a couple of ways to do it:

I meet with a group of local professionals for breakfast every week, would you like to join us?

I have some friends and we meet for lunch, would you like to join us?

Simple right? Yes, but remember once that person comes to the meeting the Rotarian must introduce their friend to the other members who are more comfortable discussing Rotary and the benefits.

In conclusion, your club needs to complete the following to be successful:

- From your list of club benefits develop infomercials
- Teach the infomercials to the members
- Encourage members to create their own infomercials
- Teach the members prospecting skills
- Require your team to begin prospecting – set goals

Non Person to Person Recruiting

Remember, a person to person invitation is only one way to reach out to prospective members. Today, businesses large and small use other forms of communications to reach out to prospective clients. I would suggest that you also take advantage of these resources.

Social Media/Electronic Media: Your club should have a website, Facebook and Twitter presence. Remember, prospective members are shopping your club today using the internet. These people may decide not to join your club without ever visiting your club or talking with a member strictly from

what they learn from your website and social media site(s). In order to attract these prospective members, you need to communicate with them using the forms of communication that they are most comfortable with.

Your club can create a website very inexpensively using some online services. Or for a little more money your club can purchase software like what is offered by www.Clubrunner.ca which offers the club an easy-to-update website and additional features to manage your club.

Social Media Sites, like Facebook and Twitter (the two most popular sites) are free for the club to sign up and use. The club's commitment is to keep them up to date. Prospective members are also using these sites to shop your club. Not only are they reviewing your activities, but they are looking to see how often you update the site. Please note, you should post at least twice a week (up to 3 times a day) and the best posts will have either a photo or a video attached. If you are adding a video, keep it short, less than 2 minutes long.

Conventional Media: Do not forget that conventional media is still an important resource. Even if your club can not afford to run ads in local publications, send them press releases and invite them to your events. Remember electronic media has caused most of the media companies to reduce the size of the staff so they appreciate press releases with information for

stories that their readers will be interested in. In addition, many have become more locally focused so they have community calendars and spotlights where they can promote your events.

Database

Remember, it is wonderful that you and your members begin developing prospective members for your club. But you need to remember that only a percentage of the people who attends one meeting will join your club. Some will need more information, others the timing is not right.

Therefore you need to collect these prospective members contact information so that you can continue to follow-up with them.

More in the "Follow-Up" chapter.

Introduction

In sales, those first few minutes are so important to the business relationship. It is said that people make decisions about others within 7 to 17 seconds of meeting them. So what kind of impression does your club make?

I found an article "12 Statistic-Driven Ways To Make Lasting First Impressions" (<http://www.businessinsider.com/20-ways-to-nail-a-good-first-impression-2010-12>) in Business Insider that gives some great pointers.

This article was designed for someone going on an interview, therefore some of the comments do not necessarily apply to your club setting. I have added comments in italics that might apply to your club.

1. Dress for success

Psychology studies reveal that first impressions are formed within 7 to 17 seconds of meeting someone; 55% of a person's opinion is determined by physical appearance. In reality, what you wear is not a shallow consideration; it could make or break your meeting.

It is a good idea to dress conservatively when you meet someone for the first time (even if the office is known as being "funky" and "creative"). Be careful with loud accessories, perfumes, hair-styles and shoes that may be distracting; you

don't want someone to remember what you wore over your business skills.

For our Rotary clubs, the President and the Membership Chair should dress at a minimum in business casual. That way no matter how a visitor is dressed they will feel comfortable.

Also if your club is more formal or less than business casual, encourage your members to inform visitors prior to them attending of your common dress. Many people feel uncomfortable if they are over-dressed or under-dressed.

2. Choose your words with care

Statistics show that first impressions are also determined by the words people use. In fact, 7% of what we think of others is based on what they say.

Before you meet someone for the first time, think about how you want to come across: optimistic, confident, humble, aggressive, and/or innovative?

Then make a list of words you could use to convey these qualities. While you should not get hung up on this list during the meeting, having a selection in the back of your mind will help you choose words wisely.

In Rotary, we should be using words such as service, help, and compassion to describe our club's work.

Another thing to consider that I heard at a Zone Meeting on Public Relations that I attended, it was mentioned that younger people are not comfortable with the word "Fellowship", it was suggested that you substitute the word "Friendship".

3. Strike the right tone

Have you ever instantly disliked someone because their voice sounded brash, whiny or cocky? That is because 38% of a person's first impression is determined by their tone of voice.

Striking the perfect tone of voice is difficult: You want to appear calm but enthusiastic, confident but humble, determined but secure. Start paying attention to your own tone of voice as well as others around you, then practice speaking the way you want to be perceived.

4. Readjust your body language

During face to face meetings, 93% of people's judgments of others are based on non-verbal input like body language. How you stand, sit, and shake hands communicates a lot more than what you say.

Good body posture, a nice smile, and eye contact are essential for making good impressions. It is equally important to

avoid crossing your arms (which may signify boredom) or sitting too casually (which could indicate a lack of care).

It is easy to unconsciously strike a pose; stop every few minutes to notice how your body is positioned. You may be harming or helping your case without even knowing it.

I think a warm smile and the proper attention to speakers will help your club create a proper first impression to visitors.

5. Use someone's name often

According to a Cal Poly Study, personalizing marketing materials, or addressing potential customers by their name, increases the likelihood that they will respond by 36%. People like it when they are singled out; cater to their ego and call someone by their name.

As soon as you learn someone's name, say it back to them and then repeat it throughout the conversation. When you are finished with the meeting, write them a personal note mentioning all the people you met by full name. While it may seem simple, people are more likely to connect with you if you make the effort to get their name right.

By providing name tags, your members should be able to easily use visitor names when talking to them. Make sure you have a member write out the name tag with large, easy-to-read

lettering. Do not have the visitor write their own name since their handwriting may be poor.

Also, make sure that when a Rotarian introduces a visitor that they do it properly. State their name and their classification. If they are a visiting Rotarian, they should state their home club.

6. Be on time

Always be on time for an initial meeting. People are busy; one of the worst offenses you can commit is not respecting their time.

Even better, arrive 15 minutes early. Spend a few minutes collecting your thoughts and walk into an interview composed. This tactic also leaves time for getting lost.

Start and stop your meetings on time. Your visitors are busy people and their time should be respected.

7. Focus on the other person

Talking too much about yourself will make you appear self-centered and bore your listener.

Before your meeting, make a list of all the things you want to know about the other person: How did they get into their line of work? What business partnerships do they already have/are they seeking to cultivate? What are their business aspirations?

Without getting too deep during a first meeting, show someone you are interested in establishing a connection with them; they will be more likely to want you on board as a result.

At a Rotary meeting, the way your club can focus on the visitor is to have everyone introduce themselves to the visitor, if possible. When I visit other clubs, I will normally show up at least 15 minutes early, and at some clubs it seems that everyone walks up to me and introduces themselves. When I am at a club where no one comes up to me and I have to start approaching the members to introduce myself, I do not feel as comfortable.

8. Be a good listener

35 business studies analyzed by the International Listening Center indicated that listening is a top skill needed for success in business. Unfortunately, most people only retain about 50% of what they hear.

Make an excellent impression by beating this statistic and demonstrating you are an exceptional listener right off the bat.

Exchanges are always better if two people work together to keep the conversation going. React to comments with phrases such as "interesting," "that makes sense," and "could you tell me more about that?" Ask follow up questions; it will show you are

engaged in the conversation and care about the subject matter.

Have you ever been met a person who has done all the talking in a conversation, then tells someone else how great of a conversationalist you are? Most people like to do all the talking and loves it when someone listens to them.

Train your Membership Chair and your members to ask questions of your visitors so they can talk about themselves. You have only a few free minutes at a meeting to make them feel comfortable.

9. Be careful with humor

Jokes are very hit or miss. One taken the wrong way can send you to social Siberia.

While there is nothing wrong with a little banter, avoid controversial jokes or sarcasm that could be misinterpreted. Everyone is different; before you know someone's sensitivities, it is best to play it safe and tone down the joke attempts.

Most Rotary club meetings are fun because members are very familiar and comfortable with each other. Just remember the visitor does not know the history of your club and may not understand or appreciate your jokes. Just caution your

membership not to be too mean spirited when guests are there.

10. Bring printed materials with you

Bringing materials to a first meeting automatically makes you look like a responsible, organized person.

When appropriate, print out relevant documents such as resumes, business proposals, relevant statistics, transcripts, business cards and case studies. Carry them in an organized briefcase so you can find them easily once you sit down.

The process will make the meeting run smoother and it should impress the person you are meeting. With that said, don't go overboard; they'll think you're a know it all or that you're trying too hard.

Your club should have club information and maybe copies of the Rotarian Magazine that the visitor can have and take home with them after the meeting.

11. Do your research

Know as much as possible about the person you are meeting before you're introduced. You will impress someone immediately if you can ask informed questions about their background and signify that you understand their interests/achievements.

With an abundance of social media tools at your disposal, it should not be difficult to dig up some professional information. You might stumble upon a mutual interest or friend that you can drop into the conversation for automatic chemistry.

This point does not apply to normal visitors, but you should have information on your guest speaker so they can be properly introduced.

12. Relax and be yourself

Everyone is nervous before a first meeting; there is a lot at stake and the stress can get pretty intense. The more at ease you are, the more the other person can get to know the real you.

Before your meeting, do something that makes you happy: go to the gym, take a bath, listen to music. Instead of focusing on what's at stake, concentrate on pumping yourself up. Make a list of your best qualities, give yourself a pep talk in the mirror, or call a family member or friend who can give you a boost.

During the meeting, pretend you are having a casual cup of coffee with a friend. If you get flustered, don't panic; take a deep breath and keep going. Never assume you are making a bad impression; you never know what the other person is thinking!

The club should do everything to make the visitor feel comfortable. My young daughter went around to different service clubs to talk. The best clubs had someone sit with her and made her feel comfortable by explaining what was happening during the meeting.

Introduction Plan

So if your club is going to make the best first impression, these are the things you should have in place:

- Visitor Host: Should greet every visitor.
- Have name tags for your visitors.
- Have a visitor sign-in sheet that asks for basic information such as name, phone number and email address.
- Properly introduce your visitors to the club.
- Have either the inviting Rotarian or the Visitor Host sit with the visitor and explain your club's procedure and any Rotary terms used during the meeting.
- The Membership Chair should introduce themselves to every visitor.
- At the end of the meeting, thank each visitor for attending the meeting and invites them to come to another event (the event does not have to be a meeting, it could be a service project).
- Provide the prospective member either a club brochure or a copy of the Rotarian Magazine. Also make sure the club's website address and social media username are provided to the prospective member.

- The inviting member or Membership Chair creates a procedure to follow-up.
- If the visitor attends another meeting, then the Membership Chair should gauge the level of interest the visitor has in joining the club.

Qualifying The Prospective Member

Often we are so excited that someone visits our club we just spill our guts out on why our club is so great. If this happens, one of three things can happen: one you bore the visitor; two, you overwhelm them; or three, we emphasize an important program or project that the visitor may not be interested in.

In sales, qualifying the prospect (visitor) is the most important step of the process. The reason it is so important is because it allows you to understand what the person is interested in so that you can show them how you can meet their needs.

The first thing when qualifying someone is to get them talking about themselves. You have probably been in the situation where you are in a conversation with a person that does all the talking. Later you hear that person telling everyone how they had such a great conversation with you. The reason, most people like to talk about themselves.

Therefore, you should start by asking the visitor personal and business questions. Here are some examples:

- Tell me a little about you?
 - Where did you grow up?
 - How long have you lived in the area?
 - What are your hobbies?

- Tell me about your family?
 - How many kids do you have?
 - Do you have any grandkids?
 - What does your spouse do for a living?
- What are some of the things you enjoy doing in your spare time?
 - What are your hobbies?
 - What sports teams do you like?
- Tell me about your business?
 - How long have you been in the business?
 - What makes you better than your competitors?

Your goal is to keep them talking about themselves as long as possible.

Now that you developed some rapport, you can start getting information to help you decide if the visitor will be a good Rotarian.

- What made you first attend our meetings?
- Are you familiar with Rotary?
 - If so: What aspects of Rotary interest you?
 - If not: What are you expecting from Rotary?
 - Have you been a member of a service organization?
 - If so, what was your experience?
- Are you familiar with our club's projects?
 - Which ones are you interested in?
- What are your strengths and how could they help the club?

- Why are you interested in joining our club?
- Have you ever been to one of our Fundraisers?
 - What did you think of that event?
 - Would you be comfortable selling tickets or collecting donations?

Add any additional questions to ensure that you gauge the visitor's interest and understanding of your club.

One way that professional salespeople ensure that they ask all the questions they need to understand the needs of the client is by creating a questionnaire and using it with every prospect. I have included our club's questionnaire in the "Reference Section".

Remember, you need enough information to see if your club is a fit for the visitor. Retention can only be obtained if your club is a fit for the visitor. Also, during the presentation stage, you will present the reasons your club can fulfill their needs. More in the next section.

Selling the Benefits

Now that you understand the visitor's motives to investigate your club, you are ready to match the visitor's needs or desires to the strengths of the club.

First review, with the visitor what you learned during the "qualifying stage":

- So if I understand correctly, the things that interest you most about our Rotary club is how we help local students by . . .
- In addition, you are hoping to begin . . .

Once you confirm their interests, you should do what is called a "Test Close". A Test Close is simply a confirmation of information that has been presented. For example: You stated that you are interested in joining our club to help local schools, is that correct?

The Test Close will be used throughout the presentation stage. It is a way of confirming that you are on the right track with your presentation. If during the presentation you use a Test Close and the prospect says "No" that is not the case, you have the opportunity to stop and ask more questions so that you completely understand their need.

An example:

If you ask: you had mentioned that you are interested in Rotary to help you build your business and we have a great leadership training program, that would interest you, wouldn't it? If they say NO, then you are off track, you may want to follow-up with: if leadership training does not interest you, then how do you think our club can help your business?

They may then tell you that they are interested in sharing ideas with other business professionals. Therefore, if you continue to discuss leadership training instead of your mentoring program, then the prospect may not think the club is a good fit for them.

The goal of most sales professionals' is depending on the length of the presentation is to ask at least 3 Test Closes.

The next part of the presentation step is how to present the features of the club that makes the prospect understand the value of joining your club. This is where you present to the prospect the features of your club, those reasons why that particular prospect should join and stay a member.

The way you achieve this is to present a service or program that your club provides and then follow-up with the benefit of that feature for that prospect. If you don't add the benefit, the prospect may not understand the value of that feature for them.

Example:

We have a great Dictionary Program. (*feature*) This program provides an Encyclopedia-styled dictionary to every 3rd grader at XYZ School. You can not imagine the smiles on the students when they receive their own dictionary, for many of them this is the only book they own. (*benefit*) Is this a program that you would be interested in helping us with? (test close)

As a club, you should have a Feature/Benefit statement for every program and project that you have listed in your marketing material that we discussed in chapter 2. Before you use them with a prospect, please practice them so you are comfortable with them. When practicing, add a Test Close after each Feature/Benefit. When presenting to the prospect, only use the Test Closes occasionally so that you do not overwhelm the prospect.

Remember practicing your Test Closes is very important. You should be so smooth that the prospect should not realize what you are doing. If you do not practice, then the Test Close will sound awkward and forced making the prospect feel uncomfortable with you.

Closing

Now that you understand what the prospect is interested in a club and you have shown them how your club will fulfill their needs, you only need to ask them to join.

Sounds easy, but unfortunately this is the step that so many salespeople never complete. This is also the reason that many salespeople fail at their job.

Closing the prospect does not have high pressure but you have to ask because as they say: if you don't ask they won't say yes.

So here are a couple closes that you can use:

- *Assumptive Close*
You (Test Close): Does that sound like a program you would like to participate in?
Prospect: Yes
You: Great, let's go ahead and fill out an application so the club can approve you for membership.
- *Direct Approach*
You (Test Close): Does that sound like a program you would like to participate in?
Prospect: Yes
You: Our process is that you fill out an application which needs to be approved by the club. Would you like to complete it right now?
- *Soft Approach*
You (Test Close): Does that sound like a program you would like to participate in?

Prospect: Yes

You: I believe that you would make a great member. In order for you to be approved for membership we need you to fill out an application. Would you like to complete it right now?

Remember, it is not how you close that is important, it is that you close! Rarely will people say YES to an opportunity unless they are asked. And if you truly believe that Rotary is a wonderful opportunity for your prospect, you need to ask them to join us and this wonderful organization.

Follow-Up

If you are working this process, you will begin to develop a database of potential Rotarians, some who are just not ready to join when you first ask. For these people you need to stay in contact with them, remind them of the good work you are doing, and invite them to your events.

Here are a few suggestions:

- Sign-in Sheet – have a sign-in sheet at every meeting and at every event and ask all visitors to sign-in.
 - Request address, phone number and email address.
 - Ask if they would like to sign up for your newsletter.
 - Invite them to your Facebook page
 - After they complete the sign-in sheet, confirm you can read their writing.

- Invite them to attend future meetings. It does not matter whether you ask them personally; using a Facebook invite, personal call, or note will let them know that you would like them to learn more about your club.

- Invite them to attend future work projects. It does not matter whether you ask them personally; using a Facebook invite, personal call, or note will let them experience the joy of helping.

- Invite them to attend a fundraiser as either a helper or donor. It does not matter whether you ask them personally; using a Facebook evite, personal call, or note will let them know that you value them and can use their support.

Remember to Also Follow-Up on Your Plan

As discussed before, you have develop goals and a plan to get there. The Club President and Membership Chair should review the tracking sheet monthly to determine that you are on the path to success.

Good Luck and Much Success!

Reference Materials

From "Mentorship" Page 5:

Mentorship Program

Rotarian: _____

Work Experience:

Title: _____

Industry: _____

Company: _____

Skills You Can Share: _____

Rotary Experience:

Positions Held: _____

Passion: _____

Other:

From "Marketing Materials" Page 6:
Sample Tri-fold

About Rotary

Rotary is a worldwide organization of more than 1.2 million business, professional, and community leaders. Members of Rotary clubs, known as Rotarians, provide humanitarian service, encourage high ethical standards in all vocations, and help build goodwill and peace in the world.

There are 33,000 Rotary clubs in more than 200 countries and geographical areas. Clubs are nonpolitical, nonreligious, and open to all cultures, races, and creeds.

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

FIRST. The development of acquaintance as an opportunity for service;

SECOND. High ethical standards in business and professions, the recognition of the worthiness of all useful occupations, and the dignifying of each Rotarian's occupation as an opportunity to serve society;

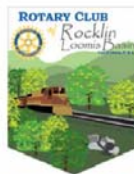
THIRD. The application of the ideal of service in each Rotarian's personal, business, and community life;

FOURTH. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

The Rocklin/Loomis Club was established in 1964 and was the 552nd club chartered.

Join Us For A Free Breakfast
We meet every Wednesday
from 7:00 am—8:15am

First Wednesday of each month:
The Ugly Mug
3589 Taylor Rd Loomis, CA
All other Wednesdays:
Sunset Whitney Country Club
4201 Midas Ave. Rocklin, CA



**Rotary Club of
Rocklin/Loomis Basin**

PO Box 666
Rocklin CA 95677
Our voicemail (916) 497-1321
www.RocklinLoomisBasin.Rotary5180.net
501(c)3 Non Profit Status Pending

**Rotary Club of
Rocklin/Loomis Basin**



*Helping Local &
International Communities*

Inside of Tri-fold

**Benefits of Rotary
Membership**

- Personal Growth**
- Leadership Training
 - Develop Public Speaking Skills
 - Effecting Positive Change within the Community
 - Impact International Humanitarian Issues
 - Develop Relationships with Community Leaders
- Business Growth**
- Learn and Work with Others that Practice the Highest Business Ethics
 - Develop Relationships with Business Leaders in Many Different Vocations
- Family Growth**
- Show Children/Grandchildren the Importance of Community Service
 - Work Together as a Family to Make a Positive Impact on the Community
- FUN, FUN, FUN!** Interesting Meetings, Numerous Social Activities, Providing Service with Friends.



**Some of Our Club's
Projects/Events**

Youth Services

- Provide Backpacks for Needy Students
- Provide Dictionaries to Local 3rd Grade Students
- Provide Mini-Grants for Local Teachers to Fund Special Projects
- Sponsor an Annual High School Speech Contest
- Provide College Scholarships to High School Students at Del Oro, Rocklin and Whitney High
- Sponsor Interact Clubs for Rocklin and Del Oro High School Students
- Improved and Maintained the Teaching Garden at Rocklin Elementary
- Provided Landscaping and a Teaching Garden at the Loomis Charter School
- Sponsored 2 Students to attend the Rotary Youth Leadership Awards



Community

- Developing Rotary Discovery Garden in Rocklin
- Annual Holiday Gift Baskets to Local Disadvantaged Families
- Help fund and support the Loomis Soap Box Derby
- Support Local Cub and Boy Scouts
- Support American Cancer Society Relay for Life Rocklin & Loomis
- Support for a New Rocklin Police K-9

International

- Contribute to the Rotary Polio Plus Campaign
- Provided Solar Cookers to Poor Villagers in South Africa
- Sponsor Inbound & Outbound Foreign Exchange Students
- Involved in the Rotary Group Study Exchange Program
- Provided KIVA Micro-Loans to Foreign Entrepreneurs



Also ask us why the Bill & Melissa Gates Foundation contributed \$405 million to Rotary International.



**Rotary Club of
Rocklin/Loomis Basin**

PO Box 666
Rocklin CA 95677
Our voicemail (916) 497-1321
www.RocklinLoomisBasin.Rotary5180.net

Projects/Events

Partial list of our support for the community

Youth Services

- Annually provide Backpacks for Needy Students
- Annually provide Dictionaries to Local 3rd Grade Students
- Annually provide Mini-Grants for Local Teachers to Fund Special Projects
- Sponsor an Annual High School Speech Contest
- Provide College Scholarships to Del Oro, Rocklin, & Whitney High School Students
- Sponsor Interact Clubs for Rocklin and Del Oro High School Students
- Improved and Maintained the Teaching Garden at Rocklin Elementary

- Provided the Landscaping and a Teaching Garden at the Loomis Charter School
- Sponsored 2 Students annually to attend the Rotary Youth Leadership Awards.

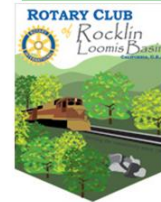
Community

- Developing the Rotary Discovery Garden in Rocklin
- Annual Holiday Gift Baskets to Disadvantaged Families
- Participate in the Loomis Soap Box Derby
- Support Local Cub and Boy Scouts
- Support American Cancer Society Relay for Life

- Support for a New Rocklin Police K-9

International

- Contribute to the Rotary Polio Plus Campaign
- Provided Solar Cookers to Poor Villagers in South Africa
- Sponsor Inbound & Outbound Foreign Exchange Students
- Involved in the Rotary Group Study Exchange Program
- Provides Funds in support of Blood Safe Africa
- Provided KIVA Micro-Loans to Foreign Entrepreneurs



Other benefits of joining

Personal Growth

- Develop Relationships with Community Leaders
- Leadership Training
- Develop Public Speaking Skills
- Effecting Positive Change within the Community
- Impact International Humanitarian Issues

Business Growth

- Learn and Work with Others that Practice the Highest Business Ethics
- Network with Business Leaders in Many Different Vocations
- Create Mentorship with Current and past Business Professionals

Family Growth

- Show Children/ Grandchildren the Importance of Community Service
- Work Together as a Family to Make a Positive Impact on the Community

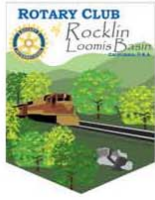
HAVE FUN & DEVELOP FRIENDSHIPS

PO Box 666 Rocklin CA 95677
 VM (916) 497-1321
www.RocklinLoomisBasin.Rotary5180.net
 501(c)3 Non Profit Status Pending

Rotary Club of
 Rocklin/Loomis Basin

Service Above Self

- > Community Service Projects
- > Community Leadership
- > International Service
- > Fun, Family, & Friendship



Prospective Member Survey

Date: _____ Newsletter: Yes No

Name: _____

Phone: _____ Email: _____

Address: _____

Occupation: _____

How Long: _____ Position: _____

What differentiates your business? _____

Family: Spouse _____ Occupation: _____

Children/Age(s): _____

Family Activities: _____

Rotary Knowledge: _____

What Rotary Can Do For Them: _____

Their Rotary Interest: _____

Possible: Rotarian Volunteer Sponsorships Donor

Possible Mentors: _____

Possible Committees: _____

Sponsor: _____

Follow-Up: _____

