



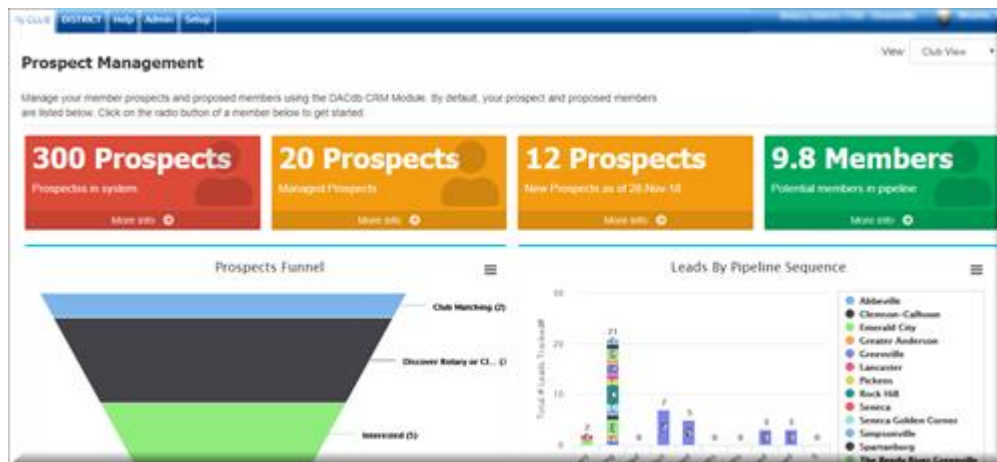
DACdb Feature of the Year 2019

The DACdb CRM module is FREE - a new part of the base DACdb platform. To turn it on:

1. Go to the *My Club* tab in the new interface.
2. Click the *cog wheel configuration icon* at the top right.
3. When the *Setup* pane opens, find *CRM* in the Available Icons section at the bottom.
4. Drag it up into the *Icons Displayed* section.
5. Click *Set My Configuration* and you'll be back on the *My Club* tab and you'll see the CRM icon somewhere on the page. Drag & drop the icon to where you like it.



Then, play this 25-minute guided tour video: <https://vimeo.com/313419460>



This feature allows you to:

- Enter new potential members into DACdb.
- Identify the "live prospects" your club is following.
- Identify their level of interest and progress through the decision-making process (sometimes called your "pipeline" of qualified prospects.)
- Log conversations "touches" or notes to keep track of their interest or concerns.
- Create follow-up reminders for yourself or others.
- Ultimately, convert more potential members into Rotarians.

Managed Prospects Page: capture, track and manage your potential members.

The screenshot shows the 'Prospect Management' interface. A table lists prospects with columns: Member Name, Pipeline Status, Member Type, Start Date, Contact Info, and Club Name. A red box highlights the 'Pipeline Status' column with the text 'Identify level of interest'.

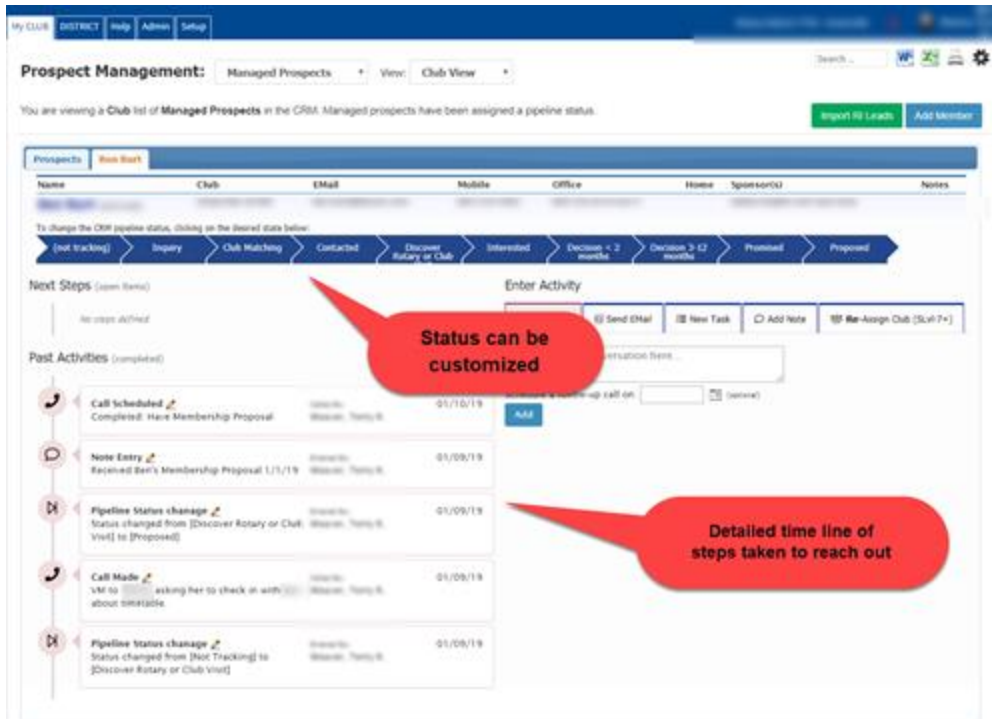
Member Name	Pipeline Status	Member Type	Start Date	Contact Info	Club Name
John Doe	Discovered Rotary or Club Visit	Potential Member	Mar 25, 2018	7700	Rotary Club of Chicago
Jane Smith	Proposed	Proposed	Mar 25, 2018	7700	Rotary Club of Chicago
Bob Johnson	Discovered Rotary or Club Visit	Potential Member	Dec 05, 2018	7700	Rotary Club of Chicago
Alice Brown	Proposed	Proposed	Mar 25, 2018	7700	Rotary Club of Chicago
Charlie White	Discovered Rotary or Club Visit	Potential Member	Dec 15, 2018	7700	Rotary Club of Chicago
Diana Green	Proposed	Potential Member	Mar 25, 2018	7700	Rotary Club of Chicago

My Tasks: Stay on top of your prospect management and keep track of your progress.

The screenshot shows the 'My Tasks' page. It includes a 'Next Steps' section with a table of tasks:

Due Date	Task	Description	Comments
Jul 02 2018	Follow-Up Call Required	Call Member to get a status about joining.	Done Jan 19 2018
Jun 20 2018	Email Sent	Email sent to member inviting them to meeting.	Done Jun 20 2018
Jun 12 2018	Call Made	Talked to Member about attending a future club meeting.	Done Jun 13 2018
Jun 04 2018	Lite Task	This is a lite task.	Done Jan 19 2018
Jun 02 2018	New Member Form	New member form was sent via email to member.	Done Jun 02 2018
Apr 30 2018		Conversation with employer continues.	Done Apr 30 2018
Apr 20 2018		Like the idea of joining, but employer is talking on financial support for June.	Done Apr 30 2018
Mar 18 2018		Member attended Discovery Session, said he was impressed by Rotary and wanted to see if his employer would cover his costs.	Done Apr 30 2018

CRM Pipeline Status: gives a real-time, accurate account & timeline of where the potential member is at in their decision.



CRM is a "systems solution" to ensure 100% follow-up on each potential Rotarian introduced by our members. It's critically important that we don't "forget" about a prospect, because they don't all decide to join Rotary when they first hear about it. Some will wait a month, a quarter or a year -- or more. In the meantime, we need to keep Rotary on their mind with an intentional follow-up strategy.

Understanding the 10-3-1 Rule

The 10-3-1 Rule came from a study done by Northwestern Mutual Life over 50 years ago, and holds true today. It also holds true for attracting new members to Rotary. It takes 10 qualified leads (not strangers - people who are qualified to join Rotary that Rotarians know) to find 3 interested prospects, ONE of whom will become a member. That's a lot of people to keep track of!

DACdb's CRM provides the platform capturing contact information on the 10, then following up on the 3 until one of them joins Rotary. It avoids losing track of the 3 prospects, any one of whom could be the person who joins.

Here's another article on keeping those prospects warm with a regular email update from your club:

<https://www.rizones33-34.org/wp-content/uploads/2018/10/DontSquanderYourLeads.pdf>

Give DACdb CRM a try - you'll find that using an intentional, rather than accidental strategy for keeping track of potentially-interested Rotarians is well worth your time (and costs no money.) We can help those prospects make a good decision that will change their lives.

