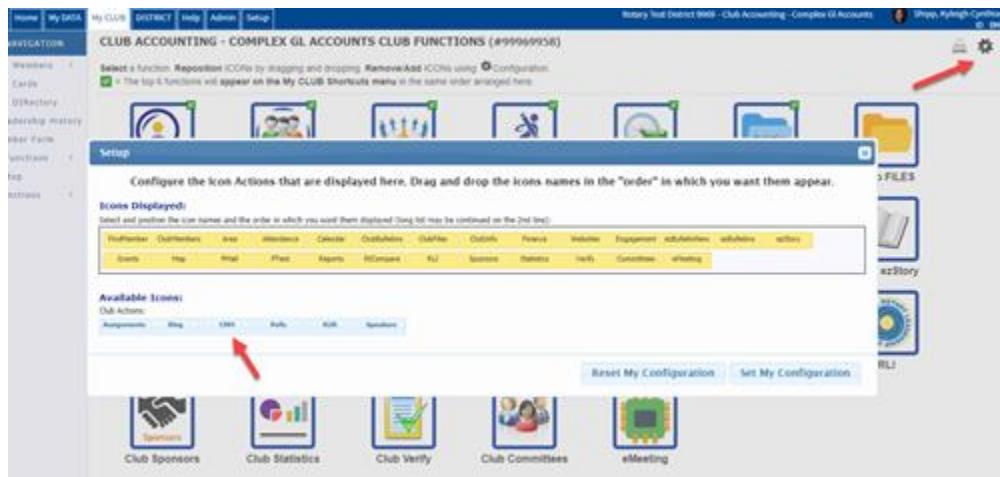




## DACdb Feature of the Year 2019

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.

**Prospect Management:** Managed Prospects

You are viewing a Club list of Managed Prospects in the CRM. Managed prospects have been assigned a pipeline status.

| Action | Member Name                   | Pipeline Status  | Member Type      | Mobile Phone  | Created On   | Created By | District   | Club Name     | Email                    | Cell Phone    | Office Phone  | Last Visit | Last Act |
|--------|-------------------------------|------------------|------------------|---------------|--------------|------------|------------|---------------|--------------------------|---------------|---------------|------------|----------|
|        | Discover Rotary in Club visit | Potential Member |                  | 987-1234-5678 | Mar 23, 2018 | 7799       | 0000000000 | Discover Club | discover.club@rotary.org | 345-1234-5678 | 345-1234-5678 | Jan 2018   | Jan 2018 |
|        | S-Proposed                    |                  |                  |               |              | 7799       | 0000000000 | Discover Club | discover.club@rotary.org | 345-1234-5678 | 345-1234-5678 | Jan 2018   | Jan 2018 |
|        | S-Interested                  |                  | Potential Member | 987-1234-5678 | Mar 23, 2018 | 7799       | 0000000000 | Discover Club | discover.club@rotary.org | 345-1234-5678 | 345-1234-5678 | Jan 2018   | Jan 2018 |
|        | Discover Rotary in Club visit | Potential Member |                  | 987-1234-5678 | Mar 23, 2018 | 7799       | 0000000000 | Discover Club | discover.club@rotary.org | 345-1234-5678 | 345-1234-5678 | Jan 2018   | Jan 2018 |
|        | S-Proposed                    | Proposed         |                  | 987-1234-5678 | Mar 24, 2018 | 7799       | 0000000000 | Discover Club | discover.club@rotary.org | 345-1234-5678 | 345-1234-5678 | Jan 2018   | Jan 2018 |
|        | S-Interested                  |                  | Potential Member | 987-1234-5678 | Mar 24, 2018 | 7799       | 0000000000 | Discover Club | discover.club@rotary.org | 345-1234-5678 | 345-1234-5678 | Jan 2018   | Jan 2018 |
|        | S-Proposed                    | Proposed         | Potential Member | 987-1234-5678 | Mar 25, 2018 | 7799       | 0000000000 | Discover Club | discover.club@rotary.org | 345-1234-5678 | 345-1234-5678 | Jan 2018   | Jan 2018 |

**Identity level of interest**

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

| My Task List   |                              |   |                              |                              |                              |                              |                              |                              |                              |                              |                              |                              |
|--|------------------------------|---|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|
| #  | Action                       | Name  | Club Name                    | Home Office                  | Cells                        | Email                        | Last Viewed                  | Status                       | Created By                   | Created Timestamp            | Modified By                  | Modified Timestamp           |
| 1  | <a href="#">View Details</a> | <a href="#">View Details</a>  | <a href="#">View Details</a> | <a href="#">View Details</a> | <a href="#">View Details</a> | <a href="#">View Details</a> | <a href="#">View Details</a> | <a href="#">View Details</a> | <a href="#">View Details</a> | <a href="#">View Details</a> | <a href="#">View Details</a> | <a href="#">View Details</a> |
| <b>Next Steps:</b> Check the checkbox first completed. |                              |   |                              |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| Due Date   | Task                         | Description   | Comments                     |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| ✓ Jun 22 2018  | Follow-Up Call Required      | Call <a href="#">Member</a> to get a status about joining.  | Done Jan 19<br>2019          |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| ✓ Jun 22 2018  | Email Sent                   | Email sent to member inviting them to meeting.  | Done Jun 20<br>2018          |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| ✓ Jun 12 2018  | Call Meets                   | Talked to <a href="#">Member</a> about attending a future club meeting.   | Done Jun 13<br>2018          |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| ✓ Jun 04 2018  | Late Task                    | This is a late task   | Done Jun 19<br>2018          |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| ✓ Jun 02 2018  | New Member Form              | New member form was sent via snail mail to member.  | Done Jun 02<br>2018          |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| ✓ Apr 30 2018  |                              | Conversation with employer continues.   | Done Apr 30<br>2018          |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| ✓ Apr 20 2018  |                              | Like the idea of joining, but employer is behind on financial support for dues.   | Done Apr 20<br>2018          |                              |                              |                              |                              |                              |                              |                              |                              |                              |
| ✓ Mar 13 2018  |                              | Employer attended financial meeting, and he was impressed by Member and wanted to see if his employer would cover his dues. | Done Apr 30<br>2018          |                              |                              |                              |                              |                              |                              |                              |                              |                              |
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**CRM Pipeline Status:** gives a real-time, accurate account & timeline of where the potential member is at in their decision.

The screenshot shows the DACdb CRM interface for Prospect Management. At the top, there are tabs for My Club, DISTRICT, Help, Admin, and Setup. Below that, a banner says "Prospect Management: Managed Prospects" and "View: Club View". A search bar and various icons are also present.

The main area displays a table of prospects with columns for Name, Club, Email, Module, Office, Home, Sponsor/OU, and Notes. A red callout bubble points to the "Status can be customized" section, which shows a pipeline status bar with stages: (not tracking), Inquiry, Club Matching, Contacted, Discover Rotary or Club, Interested, Decesse < 2 months, Decesse 2-12 months, Promised, and Proposed.

Below the table, sections for "Next Steps (soon items)" and "Past Activities (completed)" are shown. The "Past Activities" section lists several entries with icons, names, dates, and descriptions. A red callout bubble points to the "Detailed time line of steps taken to reach out" section, highlighting the timeline of activities.

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.

