

## "Who do You Know?" Club Assembly Exercise

This very useful worksheet, properly deployed, can be a great "lead generation" exercise for your club. Most clubs that fall short of their growth goals do so because of a lack of "lead flow", meaning they don't have enough people on their prospect lists.

### The 10-3-1 Rule

People experienced at prospecting realize that not every prospect will come through, whether as a customer or as a new Rotary member. In major league baseball, a 30% hit ratio is considered GOOD, even if it's a 30% hit ratio of only singles.

Generally speaking, it will take about **10** leads (referrals or acquaintances) to get into **3** substantive conversations about Rotary, to get **1** member.

### How to Use This Worksheet

**Most Important:** This is not "homework". Anyone who has let a member take this home, expecting to get it back has been disappointed. That doesn't work.

**Second Most Important:** This information is **not** for the Membership Committee. When this exercise is complete, **don't** ask members to pass the worksheets in. What that does is imply that it's the Membership Committee's job to contact prospects and attract new members. Keep that shoe appropriately on the member's foot. In a Rotary Club it's **everyone's** job to attract new members.

### Quick Start Guide

- Announce a **Club Assembly** where members are asked to bring their contact information
- **Send reminders** a few days before and the day of the meeting emphasizing contact information
- **Print** the "Who do You Know" worksheet 2-sided and lay one at each member's seat
- At the meeting, explain **why** it's essential to build membership
- **Explain** the exercise -- 20 minutes, heads-down, listing everyone we know
- **Walk the room** to be sure members are engaged -- break up "chit-chat" sessions
- After 20 minutes, ask for show of hands -- how many have 50, 40, 30, etc.
- Ask them to **circle** 3 or 4 they would approach to invite to a future membership event or meeting
- Option -- Have them list those 3 or 4 on a 3"x5" card -- membership committee to follow up with them

See next page for detailed "How to use this worksheet"

## Detailed "How-to"

1. At least a week in advance, **Announce to your members** that an upcoming meeting will be a Club Assembly, where they need to bring all their personal and business contact information. That may be on a smartphone, tablet, laptop, Rolodex, business cards in a rubber band, or handwritten on notebook paper. Email or phone all members, so you also reach those who weren't at the meeting.
2. **Remind your members** to bring their contact information to the meeting. Use phone or email, a few days before the meeting **and** the morning of the meeting. Make sure there's enough communication that "dog ate my business cards" isn't a plausible excuse.
3. Lay out the 2-sided "Who do You Know" Worksheet on each table - 1 per member.
4. As you open the exercise, explain **why** this is important -- It's essential to build our membership, and we need members bringing prospects to membership events and as guests at meetings to ensure a steady flow of new member candidates. **We need more prospects.**
5. Explain **what** we're going to do -- We're going to take 20 minutes, individually, to recall as many people as we can who we know - not necessarily prospects, just people we know. This is to be a "free flow" or "personal brainstorming" process. We'll decide later who are the best prospects.
6. Go into "Proctor" mode. Some members won't take you seriously. If you let that happen, the exercise will collapse. Walk the room. When you find a couple of members chit-chatting instead of doing the assignment, say, "Guys, I really need your help with this. You may have a better idea for how to identify prospects, but I'm asking you to humor me for the next few minutes, and give this process a try."
7. When the time is up, ask how many people have 50 names (show of hands), 40 names, 30 names, etc. Depending on your club culture, you might chide those with less than 10, saying, "You really need to get out more."
8. Ask each member to **circle** the 3 or 4 people they plan to contact in the next week to invite them to either a pre-determined prospective member event, or to a future meeting focused on membership.
9. **OPTION:** You might also have 3"x5" cards on the table where they can report their 3 names to the membership committee so you can remind them of their commitment. They take the full prospect list with them, and the membership committee tracks only the 3 "best prospects"..

**IMPORTANT:** Please **don't** take up these sheets after the meeting. That suggests to the members that it's somebody else's responsibility to approach and contact these prospects. Keep that shoe on the member's foot -- it's everyone's job to regularly bring prospective members to Rotary.

**Follow up** -- At the next meeting or by email, ask members how they're doing on their 3 prospects. If they're not making the contacts, ask "What's getting in the way?" Then see what you can suggest to break down the excuses or roadblocks.

**GOAL:** If you can get each member to bring just **one** prospect to the table, you'll eclipse most any prior membership development effort in your club. Getting members to act on approaching and inviting members is not only your biggest challenge, but also your key success factor.

Please let us know how you used this worksheet and how it worked for you.  
Email [DG2015@Rotary7750.org](mailto:DG2015@Rotary7750.org) with your experience.

# 25-Minute Membership Survey

Your Name \_\_\_\_\_ Date \_\_\_\_\_

Your Phone \_\_\_\_\_

Your E-mail \_\_\_\_\_

Consider professional colleagues, community leaders, and acquaintances who might qualify as potential Rotarians.

Your neighbor(s):

1. Male \_\_\_\_\_ Occupation \_\_\_\_\_

2. Female \_\_\_\_\_ Occupation \_\_\_\_\_

3. Male \_\_\_\_\_ Occupation \_\_\_\_\_

4. Female \_\_\_\_\_ Occupation \_\_\_\_\_

Your immediate manager (if applicable):

5. \_\_\_\_\_ Job Title \_\_\_\_\_

Another business professional within your company or organization:

6. \_\_\_\_\_ Job Title \_\_\_\_\_

Community leaders with a commitment to service:

7. \_\_\_\_\_ Occupation \_\_\_\_\_

8. \_\_\_\_\_ Occupation \_\_\_\_\_

RI or TRF program alumni your club maintains contact with:

9. \_\_\_\_\_ Occupation \_\_\_\_\_

Professional business association colleagues:

10. \_\_\_\_\_ Occupation \_\_\_\_\_

11. \_\_\_\_\_ Occupation \_\_\_\_\_

Consider your professional acquaintances:

- 12. Physician \_\_\_\_\_
- 13. Dentist \_\_\_\_\_
- 14. Financial Manager/Planner \_\_\_\_\_
- 15. Religious Leader \_\_\_\_\_
- 16. Attorney \_\_\_\_\_
- 17. Business Consultant \_\_\_\_\_
- 18. CPA \_\_\_\_\_
- 19. Veterinarian \_\_\_\_\_
- 20. Internet Technology Consultant \_\_\_\_\_
- 21. Public Relations Manager \_\_\_\_\_
- 22. Entrepreneur \_\_\_\_\_
- 23. Non-profit Executive Director \_\_\_\_\_
- 24. School Administrator \_\_\_\_\_
- 25. Other \_\_\_\_\_

Professional acquaintance (not named above) that you have done business with in the last week:

26. Name \_\_\_\_\_ Occupation \_\_\_\_\_

Professional acquaintances (not named above) that you have done business with in the last month:

27. Name \_\_\_\_\_ Occupation \_\_\_\_\_

28. Name \_\_\_\_\_ Occupation \_\_\_\_\_

Personal acquaintances who have volunteered with you (for a Rotary or a non-Rotary event/service project):

29. Name \_\_\_\_\_ Occupation \_\_\_\_\_

30. Name \_\_\_\_\_ Occupation \_\_\_\_\_