5 Ways to Manage Your Prospects with ChamberMaster/MemberZone

Cheri Petterson

GrowthZone & chambermaster

1…Update your Database with Prospects

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- In Person Meetings

- Event Attendees

- Staff App

1…Update your Database with Prospects

- Update Prospects from Event Guest List

1…Update your Database with Prospects

- Staff App
  - Add New Organization
  - Add Reps
  - Add Notes

- WIKI: [ChamberMaster/MemberZone Staff App](#)
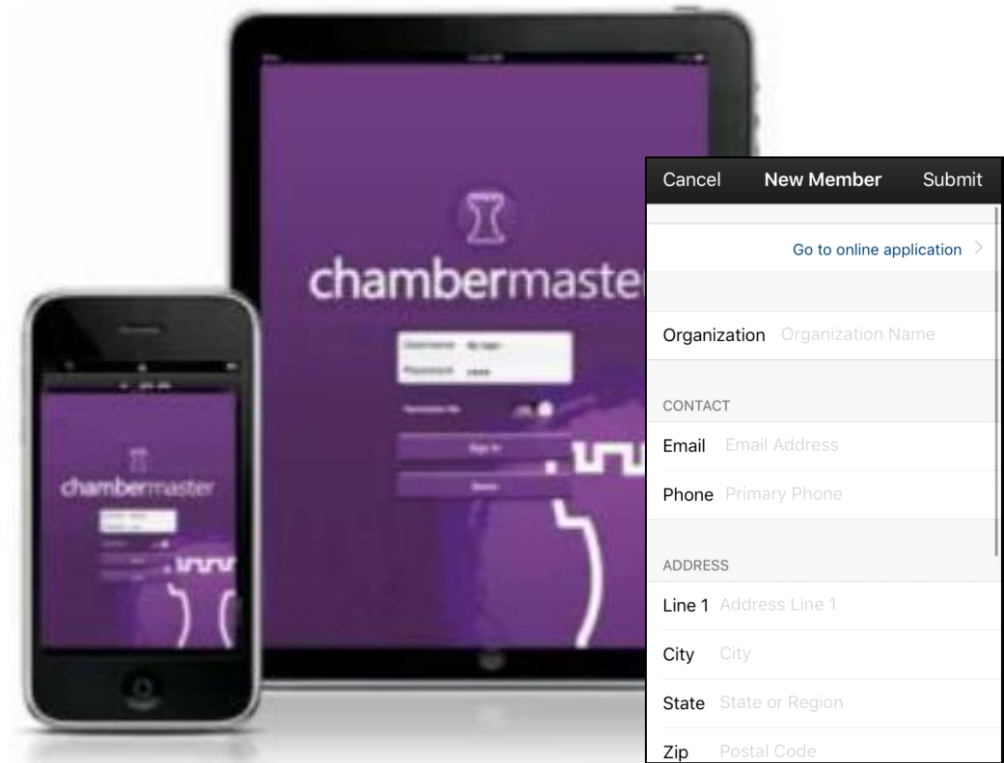
2.....Define your Sales Stage Steps & Assign Staff

2... Define your Sales Stage Steps/Assign Chamber Reps

- 2% of Sales are made on first contact

- 3% of Sales are made on second contact

- 5% of Sales are made on third contact

- 10% of Sales are made on fourth contact

- 80% of Sales are made on fifth to twelfth contact

National Sales Executive Association

3…Track Important "Sales Funnel" Information

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- WIKI: [Custom Fields](#)
  - Lead Source
  - Sales Temperature
  - Probability of Win
  - Date of Initial Contact
- WIKI: [Custom Member Report](#)

Member Listing

Company Name	Lead Source	Date of Initial Contact	Stage in Sales Process	Prospect Temperature	Probability of Sale
Roxie's Rascals	Email Campaign	7/8/18	1st Call	Cold	10
Sleeping for Dollars	Email Campaign	6/10/18	1st Call	Warm	65
Upcycled Art Furniture Studio	Event	7/2/18	1st Call	Hot	95
Free Spirit Fitness	Email Campaign	7/11/18	3rd Call	Warm	75
The Pasture Events & Convention Center	Cold Call	7/3/18	1st Call	Hot	100
Tiny Houses by Me	Email Campaign	7/2/18	1st Call	Warm	60
R Slash Cattle Co.	Email Campaign	7/9/18	1st Call	Hot	95
The Golf Club	Email Campaign	7/2/18	1st Call	Warm	60
Harry's	Drop By	7/9/18	2nd Call	Warm	75
Louise's Lollipops	Event	7/9/18	1st Call	Warm	80
The Yankee Shop	Cold Call	7/3/18	1st Call	Hot	95
Todd's Shoes	Email Campaign	7/9/18	1st Call	Warm	70
Harry's Hair	Drop By	7/1/18	1st Call	Hot	80
Eno State University	Event	7/9/18	4th Call	Cold	10
Business High Point	Email Campaign	7/17/18	1st Call	Hot	100
BHP Chamber	Email Campaign	7/1/18	1st Call	Hot	100
FVCOC	Email Campaign	7/17/18	1st Call	Hot	95
Rabos Pizza	Cold Call	7/1/18	2nd Call	Hot	100
Woody's Woodshop	Email Campaign	7/3/18	1st Call	Warm	50
Nancy's Donuts	Email Campaign	7/15/18	3rd Call	Hot	100

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4…Develop a Touchpoint Program

4… Develop a Touch-point program

- Touchpoint… a voicemail, email, or live conversation

- There's plenty of evidence that suggests response rates rise with each subsequent outreach attempt

- Make at least 5 attempts with each and every prospect, and mix up your approach

4... Develop a Touch-point program

- Create Reminders to ensure you are following your touch-point program
- WIKI: [Create a Reminder](#)

5…Review Prospect Reports

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- The **Prospects and Communication by Rep: Detail** report provides a detailed list of Sales Representatives and all of the prospective members associated with them

- WIKI: [Prospects and Communication by Rep: Detail](#)

5…Review Prospect Reports

- **Prospects and Communication by Rep; Summary:** provides a list of Sales Representatives and the total number of prospective members associated with them, with the average number of days since the Rep's members have been contacted

- **WIKI:** [Prospects and Communication by Rep; Summary](#)

5...Review Prospect Reports

- The **Prospect Conversion by Date** report lists the prospective leads that have been converted to members between a specified date range, sorted by Sales Rep or Groups.

- WIKI: [Prospects by Conversion Date](#)

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- 5 Ways to Manage Your Renewals
- 5 Ways to Manage your Over-due invoices
- 5 Ways to Generate Non-dues revenue
- 5 Ways to Enhance Your SEO
- 5 Ways for Better Custom Reports

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