

5 Ways to Manage Your Prospects with ChamberMaster/MemberZone





Cheri Petterson

1...Update your Database with Prospects

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- In Person Meetings
- Event Attendees
- Staff App

Guest List





[Need help?](#)

Status: Show All Paid: Show All [More Options](#) [Clear Filters](#)

Guest List 300 per page 1 - 5 of 5





<input type="checkbox"/>		Reg ID	Attendees	Attendee Company	Fee Amount	Reference	Status	Reg Date	Online	Attendee Comments	Registration Comments
<input type="checkbox"/>	  	1069	Additional Attendee	(S) A Place for Dogs			Registered	7/9/2018	<input type="checkbox"/>		
<input type="checkbox"/>	  	1069	Additional Attendee	(S) A Place for Dogs			Registered	7/9/2018	<input type="checkbox"/>		
<input type="checkbox"/>	  	1069	Additional Attendee	(S) A Place for Dogs			Registered	7/9/2018	<input type="checkbox"/>		
<input type="checkbox"/>	  	1070	Laura Swenson	Laura's Decorating	\$150.00		Registered	7/23/2018	<input type="checkbox"/>		
<input type="checkbox"/>	  	1069	Susan Williams	(S) A Place for Dogs	\$1500.00		Registered	7/9/2018	<input type="checkbox"/>		

1 - 5 of 5

1...Update your Database with Prospects
















- Update Prospects from Event Guest List

Guest List





[Need help?](#)

Status: Show All Paid: Show All [More Options](#) [Clear Filters](#)

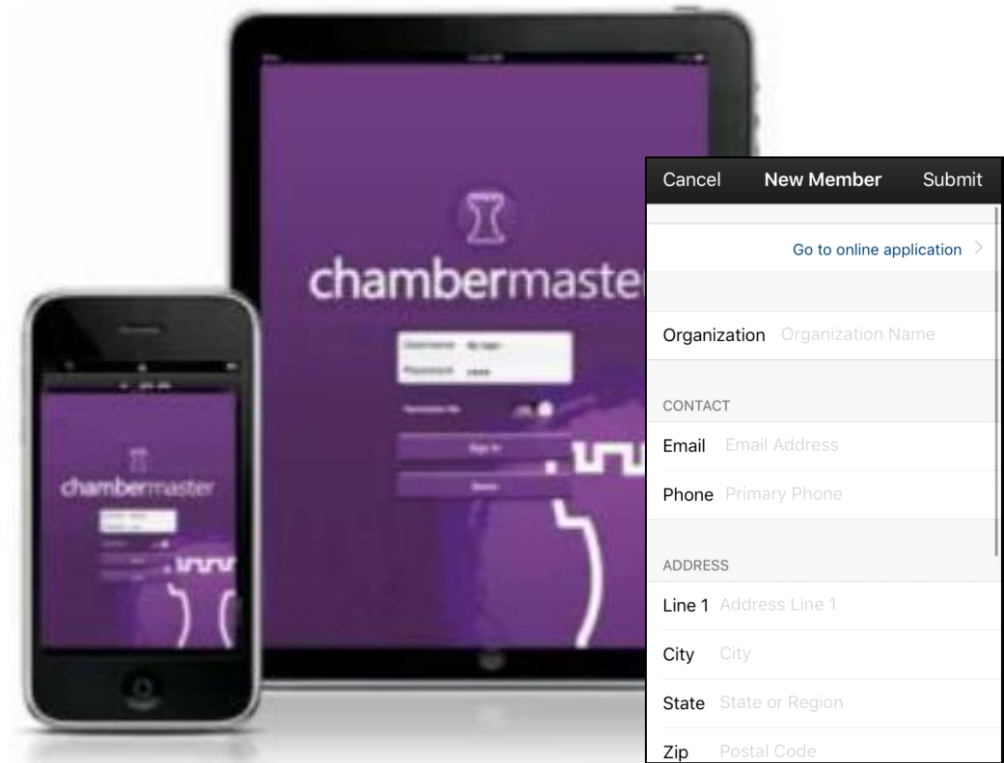
Guest List 300 per page 1 - 5 of 5

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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

Additional Information

File-By Name: [use Company Name](#)

Membership Status: Prospective

Membership Type: [edit member types](#)

Join Date:

Sales Stage: 1st Call Back [edit stage options](#)

Drop Date:

Chamber Rep: Dana Hesse

Established Date:

Modified Date: 4/25/2018 12:06:13 CDT

Created Date: 4/25/2018

Full-Time Emps: Part-Time Emps:

Primary Rep: Megan

[change rep](#) 1634 North Main Street
[remove rep](#) High Point, NC 27262
 336882500 (work)

Billing Rep: Not Found [select a billing rep](#)

Comment/Notes:

National Sales Executive Association

3...Track Important “Sales Funnel” Information

3...Track Important “Sales Funnel” Information

- 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
FVCO	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

Report generated 7/23/2018, 8:09:33 AM.

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

Member Correspondence

Filter Options

Date From: Tasks/Categories:

Through: Staff Contact:

Member Rep:

Display **bulk mail** correspondence entries in the table below.

Display results per page.

Email dates listed below are based on the date sent from the Central time zone. to the email to view the date/time in your own time zone.

entries 1 - 0 of 0

Subject	Date	Follow-Up	Task	Contact	Association Rep
No entries have been made for Rabos Pizza.					

4... Develop a Touch-point program

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

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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](#)

Prospects and Communication by Rep; Detail

Rep (Hold 'ctrl' to select multiple): (All) [Select All](#) / [Unselect All](#)

[Refresh Report](#)

1 of 1 | Save as [PDF](#) [Excel](#) [CSV](#)

Prospects & Communication Detail

Rep	Lead	Days Since Contact
Cheri Petterson	Todd's Shoes	5
	Total: 1	Average: 5
Dana Hesse	Woody's Woodshop	6
	Total: 1	Average: 6
Greg Lansonne	The Yankee Shop	139
	Total: 1	Average: 139
Harold Landon	BHP Chamber	88
	Rabos Pizza	0
	Total: 2	Average: 44
Harry Landon	Eno State University	89
	Nancy's Donuts	10
	Total: 2	Average: 49

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](#)

Prospects and Communication by Rep; Detail

Rep (Hold 'ctrl' to select multiple): (All) [Select All](#) / [Unselect All](#)

1 of 1 | Save as [PDF](#) [Excel](#) [CSV](#)

Prospects & Communication Detail

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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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