MAKING THE MOST OF *In-House Prospects*

BY ELLIS M. M. ROBINSON

In-house prospects are foks who contact your organization independently, having decided that your group has a mission or programs that they find of interest. They may call you on the phone, send a letter or postcard, or visit your Web site. *Someone who contacts you "out of the blue" is one of your best prospects for becoming a new member.*

Every time your group is contacted by someone who is so motivated by your issue that they maneuver past all of the other clutter in their day and actually reach your organization, you want to make sure that you are prepared to jump on that interest and respond to it as quickly and completely as possible. This article suggests ways for you to establish reliable systems for collecting information about these prospects and converting them into members or donors.

Establish a central system for fulfilling inquiry requests and a routine process for collecting information.

CAPTURE EVERY CONTACT

To make the most of in-house prospects, begin by identifying the many ways your organization and the people associated with it connect with potential prospects in your community. Then, make sure that the names and contact information for those prospects are captured at every step along the way so you can invite them to become members. Here are just a few of the options to consider.

Telephone Inquiries: One of my most memorable learning experiences involves the case of the enthusiastic new secretary. When this dedicated young woman joined the staff of a whistle-blower organization, she noted very clearly the importance of responding quickly to people who requested additional information about the organization by sending them a copy of the latest newsletter. A few months after she was hired, we noticed that the size of the in-house prospect file was exactly the same as it had been four months before. Something was wrong there! Turns out that our dedicated, responsive secretary was indeed sending out newsletters immediately to everyone who phoned asking for additional information. Her very efficient method was to grab a newsletter while the person was still on the phone, write their name and address in the address block, and drop it in the mail. Unfortunately, those names and addresses were never seen again and never captured in the information database.

This simple example illustrates how easy it is for even your most well-meaning colleagues to misunderstand the importance of collecting prospect names. To eliminate these kinds of errors establish a central system for fulfilling inquiry requests and a routine process for collecting information. If your organization uses a voice-mail system to direct calls, have it forward requests for more information to a single mailbox that one person has responsibility for servicing. Moreover, train other members of your staff and volunteers to direct such inquiries to that person.

Contact Record Forms: You can use a simple form to help systematize the information that you and your colleagues capture about each new prospect (see Contact Record Form sample). Make sure the form has all the information you need, in the order you need it, for processing a new inquiry and retaining the necessary information in your database. You can have your local copy shop print these up on a very bright, difficult-to-miss colored paper and padded into small tablets. Keep everyone on your staff supplied with a couple of pads, and give some to your board members and key volunteers. Then, as your colleagues are introduced to a new contact or get a request for information about the group, they can complete this form and deliver it to you for fulfillment.

Collect E-Inquiries: The World Wide Web offers an additional challenge to tracking and encouraging folks who are interested in your organization: many people visit your Web site, read your materials, and disappear without leaving a clue as to how you can contact them again.

Northwest Coalition for Alternatives to Pesticides has worked out a system for efficiently distributing information through their Web site and collecting mailing addresses. In response to a phone or e-mail inquiry, Public Education Coordinator Megan Kemple lets the prospect know that the Coalition has some great information she can mail to them, if they like. She then gets their name and address. At that point (and not before), she asks if the caller or e-mailer has Web access. If so, she directs them to the organization's Web site for free information as an alternative to mailing them information for a fee.

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Once Megan has the address, she handwrites a half-sheet note that thanks them for getting in touch and asks them to join. She includes a membership response form, return envelope, and two brochures describing their publications and services. In nine months, Megan has sent out 106 letters and received 11 memberships, in addition to 34 generated directly from their Web site. Development Director Becky Long writes, "In 2001, our Web site hosted 112,000 sessions and we generated 13 memberships for $335. For the first ten months of 2002, we hosted 145,000 sessions and

CONTACT RECORD

☐ Mr. ☐ Mrs. ☐ Ms. ☐ Miss ☐ Dr. ☐ Other: ____________

First Name: ____________

Last Name: ____________

Street or P.O: ____________

City: ____________

State/Province: ____________ Zip: ____________

Telephone: ☐ (day) ____________ ☐ (eve) ____________
IF THERE IS A CALLING PREFERENCE, PLEASE CHECK

Fax: ____________

E-Mail: ____________

Source: ____________

Notes: ____________

____

Action Required: ____________

____

☐ New ☐ Update ☐ Action Required

Date : ____________ By: ____________

CONTACT RECORD FORM DIRECTIONS

This form will help us retain accurate information about members and others interested in our organization. Please complete one of these forms for every phone or personal contact you make. If easier, simply staple the business card or meeting sign-up sheet to this form, complete the bottom half, and send it along. Thanks!

TITLE: Please check appropriate title.

FIRST NAME: Fill in first name or names. List any initials here.

LAST NAME: Fill in last name. If a couple with different last names, put one in "First Name" and one in "Last Name".

STREET OR P.O: Enter complete mailing address.

CITY: Enter full city name.

STATE/PROVINCE: Use appropriate two capital letters.

ZIP: Enter zip or postal code.

TELEPHONE: Include area code & number; circle any calling preference.

FAX: List area code & number.

E-MAIL: Pay special attention to capitalization.

SOURCE: List how the person found you, what meeting or event they attended, or otherwise how this initial contact was made.

NOTES: Include any special information we should be aware of about this person. Is their job connected with our work? Did they offer assistance?

ACTION REQUIRED: Specify any follow-up needed and by whom. If action is to be completed by another, please designate by whom & check box below.

NEW, UPDATE, ACTION REQUIRED: If you know the contact's status (New or Update), check the box. Check if action is required.

DATE, BY: Indicate the date of your contact and initial the "By" box. Please forward this form to: ____________.

Thank you!

Print up pads of a form like this one and distribute them throughout your organization to make it easy for your colleagues to collect prospect names.

through December 2nd generated 34 memberships for $1,070. In December 2001, we made it possible for people to use a credit card to join from our Web site. I believe that's what accounts for the increase in memberships from 2001 to 2002."

MAKE SURE PROSPECTS CAN FIND YOU

So far we have discussed how to get information about people who are successful in contacting you directly. What about folks who hear about you but can't figure out how to reach you?

There are two key places that prospects who want to find you will look: the telephone book and the Web. First ask yourself, Can your prospects find you in the phone book? When I lived in Seattle, three different telephone service providers covered King County alone. In order to be accessible to most of the metropolitan area, a group needed to be listed in all three of those phone books, at a minimum. If yours is a statewide organization, you will want to be listed at least in the phone books for each major metropolitan area.

Fortunately, the cost of an additional listing is as low as $1.00 a month. At this rate, you may want to list your organization under every name it may be known by — and even the names people sometimes confuse as yours. For example, Northwest Coalition for Alternatives to Pesticides may increase the probability that people will find them by also listing as "Pesticides, Northwest Coalition for Alternatives to." Also, if your organization has recently changed its name, make sure you remain listed by both names for a year or two.

These days, lots of people don't bother with phone books — they just look up phone numbers on the Web. For that reason, your organization's location in cyberspace is increasingly important. To maximize your contact with potential prospects, make sure your group can be found by the top search engines and list with them the key words people may use when trying to find you. Those can sometimes be surprising. Alaska Wilderness League, for example, discovered that the second most frequently used keyword people tried was "Artic," a misspelling of "Arctic."

Many organizations have a button on their Web site that allows visitors to send a message directly to the organization. These buttons may read, "Ask us a question," "For More Information," or "Get in touch with us." Make sure these messages are responded to promptly (within a maximum of 48 hours), given the expectations of speed among e-mail communicators.

Another simple fix in the "can they find you" department is to make sure someone can leave a phone message for you 24 hours a day. Then, close the loop by establishing a reliable system for retrieving those messages daily and responding to them.

Once you've set up these response systems, be sure to test them regularly. Horror stories abound of e-mail messages being misdirected to a vacant in-house address or messages languishing on an answering machine for weeks. Treat every contact as the potential member that they are. Mark your calendar to personally test your inquiry response systems at least once a month.

HOW TO GET MORE MEMBERS FROM YOUR PRESENTATIONS

Despite the astounding number of obligations people squeeze into their days and nights — job, family, friends, finances, household chores, and more — many of them also make the time to come to your organization's slide shows and other events! While in attendance, they receive helpful and valuable information and have an opportunity to see, hear from, ask questions of, and perhaps even shake hands with an official representative of your organization.

Prepare a script speakers can use to ask for memberships.

So why don't these people join your organization? The answer is most likely that *they were not asked in a compelling manner nor were they provided a convenient way to respond at the moment.*

With a little advance preparation and training of your colleagues and volunteers, you can make your organization's many routine presentations into a powerful membership recruitment opportunity. Here's how.

First, put together a membership information kit and get it into the hands of your presenters before each scheduled meeting. This presentation kit should include a couple of clipboards with your standard sign-up sheet and a pencil or a pen on a string, enough remit envelopes or brochures with return envelopes for every expected attendee to receive one, six to twelve copies of your most recent newsletter, and a table tent card or display inviting participants to join.

Here's where the training comes in. Instruct your presenter to put a remit envelope or a copy of your brochure with return envelope on every chair (recruit a volunteer or early arrival to help, if possible). If there are extras, stack them on a table in the back of the room, along with your spare newsletters and your "invitation to join" sign. Then, ask the volunteer to begin circulating the clipboards with their sign-up-sheets from the front of the room just moments before the speaker begins.

Most of your organization's presentations probably include a standard educational talk (perhaps with slides or other visuals), followed by a question-and-answer session. Prepare your speakers to capture that moment after the more formal educational presentation and before questions and answers to ask for memberships. At that moment, your speaker can take advantage of the fact that attendees have been delivered valuable, engaging information (usually for free), and these attendees are still going to be seated for at least some length of time while the speaker addresses specific questions and concerns. To make this role even easier for your speakers, prepare a draft script they can use as a reference to transition from the formal presentation into the question-and-answer period with a membership ask. Here's a draft to work from:

> That concludes my formal presentation for this evening. I appreciate the opportunity to speak with you. I suspect you have questions, and I look forward to responding to them in just a minute. Before we begin, however, I'd like to remind you that I am here tonight because of the generosity of members of [organization name]. Working on your behalf in our community for more than __ years, [organization name]'s successes and programs have been possible thanks to the support of more than [#] members — people like you who also care about the issues we discussed tonight and the future of our community.
>
> On your chair when you came in tonight was a copy of an [envelope or brochure] like this one. [Wave remit or brochure.] I hope you will take a moment to also become a member of [organization name]. Your support now will truly make a difference. Simply complete the form and drop in your check, cash, or fill in your credit card information. If you hand them to the volunteer at the back of the room tonight, I'll make sure they get to our membership director tomorrow morning to put you on our roster right away. (Thanks for your help [name of volunteer].) Thank you again for coming tonight and thank you in advance for your support. Now, who has the first question?

This kind of request takes less than a minute to deliver, yet makes the important connection between the presentation that attendees just heard and membership in your organization. By working with your presenters to help them become comfortable with delivering this ask, you will increase the number of memberships received from such presentations considerably.

You can also recruit members, using this technique, at paid events. Earth Charter of Sanibel launched its formation with a literary reading by award-winning authors Peter Mattheissen and Janise Ray. Tickets cost $10. The printed program for the evening, distributed to attendees as they entered the auditorium, and an announcement by ECOSanibel's chair at the close of the readings (but before the Q&A), invited the attendees to join the new organization and apply the price of their ticket to the membership rate. About 15% of the hundreds of people who attended took advantage of that special offer and joined the organization that night or later mailed back the form from the program.

PIGGYBACKING ON OTHER COMMUNICATIONS

You can significantly improve the efficiency of your prospect identification program by working with your colleagues to help existing outreach activities do double-duty. Once you and the rest of your team begin to view every communication as a potential membership recruitment device, you'll see countless, simple opportunities for capitalizing on existing efforts. Here are some examples:

News Releases: Craft a standard descriptive paragraph to be included at the end of each of your news releases that describes your organization and invites inquiries. Incorporate your elevator/positioning statement (see *Grassroots Fundraising Journal,* July/August 2002 for how to develop a brief statement that explains what your organization is and what it does), your phone number, and your Web site address. Consider inviting readers to sign up for your e-mail newsletter with more information about the news release topic. Most newspapers will not include all that you have given them, but frequently local weeklies and neighborhood shoppers (publications with a very high cover-to-cover readership rate) will include your entire news release.

As you attract more and more prospects, information like original contact date and original source will be helpful in managing who, when, and how you follow up.

Op-Eds and Letters to the Editor: In most newspapers, the editorial and opinion pages are among the most-read sections. When your chair, executive director, or other staff member has an opinion piece featured, be sure to include a paragraph similar to the one for news releases that describes the purposes and benefits of your organization and how to get in touch. A similar paragraph should be included with magazine articles. Whenever someone from your organization sends in a letter to the editor, be sure they include your phone number and Web site address in their identifying information. If you have a special event, consider sending a letter to your neighborhood paper thanking volunteers and other participants for your success — and encourage folks to contact you to be notified of future such events.

E-mail Signatures: Every e-mail message distributed by someone on your staff or board offers one more opportunity to reach a prospect. Work with your leadership to create a standard e-mail closing that includes your elevator statement and an invitation to join the organization. Make sure everyone on staff uses it. Here is a great example:

> Not a member of Chicagoland Bicycle Federation? Join today and add your voice to the thousands of local bicyclists who already look to CBF to protect their rights and promote their dreams of making Chicagoland a safer and more enjoyable place to ride: www.biketraffic.org

Action Alerts: By including a standard description of your organization and a reminder of the number of members and communities you represent, you not only provide reinforcement of a common message to your activists who are receiving your action alert, but you also reaffirm the importance of their participation as a member (and give them another nudge to join if they have not done so already).

Voice Mail: Be sure options for getting more information about your organization and joining your group are clearly identified on your organization's main voice mail system. In addition, if you have a hold cycle of your phone system, consider recording some motivational membership messages. Save the Manatee Club co-founder Jimmy Buffett is featured on their hold system with informational and membership messages. To hear them yourself, call 1-800-432-JOIN (and ask to be put on hold).

These are just a few of the myriad opportunities you have for piggybacking on existing efforts to encourage inquiries and membership.

MANAGING YOUR IN-HOUSE PROSPECT FILE

Once you start collecting all these in-house prospects, what do you do with all the data? I'm a big fan of including all of your in-house prospect and membership names in one database. (I'm talking about in-house prospect names here — names you own — not the rental and exchange names from other groups that you borrow for one-time-only use in recruitment campaigns.)

The advantage of combining all your in-house files is that you are more likely to minimize duplicates and any confusion about who are members and who are prospects. In addition, your database allows you to collect additional information about a prospect, especially how they found you (their origination source code) and when the initial contact was made. Then, when this prospect eventually becomes a member, you are able to identify what method originally brought your organization to the (now) member's attention. By tracking this kind of data, you can begin to further streamline your outreach efforts to focus on those that are most likely to produce prospects who convert to members.

As you attract more and more prospects, information like original contact date and original source will be helpful in managing who, when, and how you follow up. For example, if you are preparing a special appeal around a clean water protection theme, you could reasonably expect this letter to be of interest to those folks who signed your clean water petition. If all your prospects are also in your master database, you can accomplish this by extracting a file of everyone with the clean water petition source code, with an original contact date between a specific date range, who have contributed zero dollars.

At the other end of the spectrum, should you get to the point where the number of prospects overloads your system, you can archive less current contact information in a file outside your database, sorted by the date and source code information you have collected.

Don't ever totally purge these or any other data, however. Rather, store them in a way that — should you end up with a hot campaign that

CAPTURING IN-HOUSE PROSPECTS: A CHECKLIST

In-House Prospect processing system established: Goal = 72 hour max. response

Database is Functioning
- Capturing name, address, phone, email, source, and origination date
- Incorporate into primary membership database to avoid duplications

Logical, Comprehensive Phone Book Listings
- All logical names
- All logical locations
- White & Yellow Pages

Web site listed with search engines
- "Contact Us" or similar button on most pages
- Invitation to register for e-newsletter on several pages
- Invitation to join on several pages; accept credit cards
- Email response within 48 hours
- Check response system monthly

Contact Record Forms printed and distributed
- Reception/Phone Answerer
- Program staff
- Outreach staff
- Key Board and other volunteers
- Other

After-hours answering system in place; system for collecting inquiries

Speakers collecting attendees' names & making membership ask
- Sample sign-up sheet developed
- Membership Information Kits provided to speakers

is bringing in people you haven't heard from for a long time — you can then reactivate your archived files, update them against the National Change of Address system (www.nationalchangeofaddress.com — this is a private vendor that charges a fee to use the system) to catch any address changes, and contact those older prospects for support as well. For example, NARAL has successfully reactivated in-house prospect names and long-lapsed members from the early 1990s in response to new threats to choice.

By maximizing your collection and follow-up to in-house prospects, you save your organization money and effort while enlisting the support of those people most likely to be dedicated to your cause.

Converting individuals who have shown interest in your work into members can be exponentially more successful than cold prospecting. One big reason for this difference is that a request for membership in response to an individual's inquiry is usually perceived as professional and appropriate, whereas a cold approach — by letter, phone, or e-mail — can be perceived as intrusive or never make it into the prospect's awareness at all. The more you can encourage and efficiently cultivate in-house prospects, the more likely you are to turn them into members who support your organization and work for your cause. GFJ

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