

Setting Appointments

Brad B. Boyd, Area Director
Global Membership & Engagement Team
Kiwanis International



Before setting appointments

Do your research

- Teamwork makes it work
- Prepare for organizational meeting

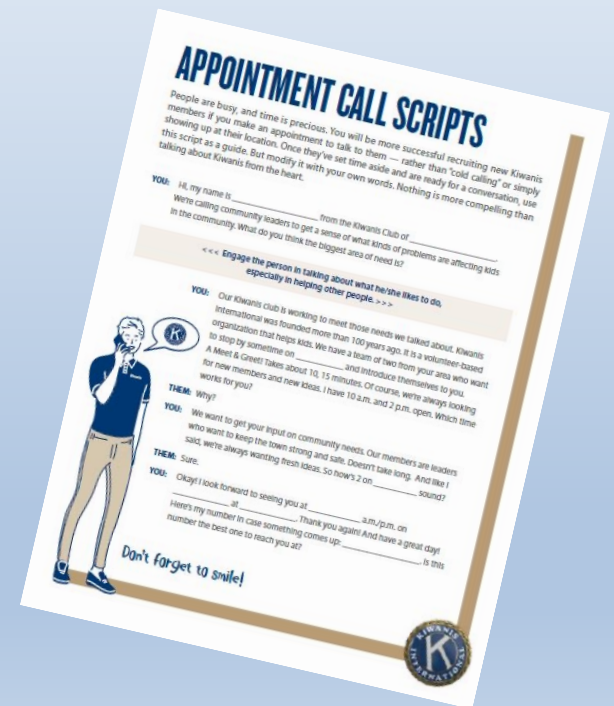




Before setting appointments

Next steps:

- Prospective member research
 - Know your prospect
- Communications
 - Be prepared





Setting appointments

Strategy tips:

- Key prospects on Day 1 to get good referrals
 - Educators
 - Financial services
- Identify member to 'pounce' on Facebook leads
- Keep it short, sweet and local
- Smile!



Setting appointments



During appointment call:

- Take notes, share on Google doc
- Suggest neutral, safe location
- Summarize details, seek referrals



After setting appointments

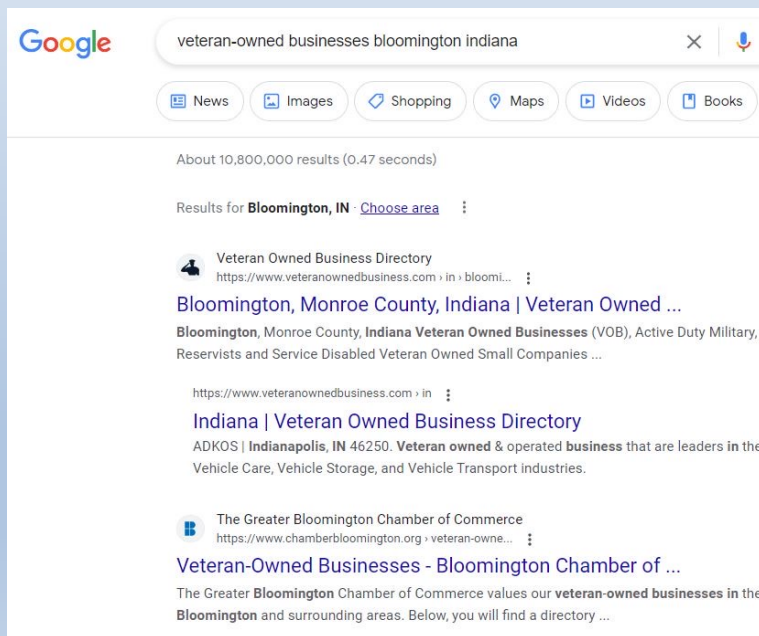
Post-appointment setting tips

- Follow up
- Keep each team on one side of town
- Mix it up



Keep it going

How to find more prospective members



- Use Google
- Strive for diversity to mirror the demographic complexion of the community
- Search using keywords veteran, woman, minority-owned businesses



Key community stakeholders

Four primary groups to reach

- Educators
- Government/public service officials
- Chamber chiefs/businessowners
- Nonprofit leaders



Appointment setting groupings

Educators

- Public, private schools
- Teachers/admins
- School boards
- Pre-K
- Higher ed





Appointment setting groupings

Government/public service officials



- City, town, county elected leaders
- Convention, economic development
- Library
- Literacy groups



Setting appointments – by group

Chamber chiefs / business owners

- Chamber of Commerce
- Better Business Bureau Business

Work through the groups



- Accounting/CPA/tax companies
- Banks/credit unions
- Real estate companies
- Funeral homes

Work through the groups



- Media outlets
- Ad/PR/social media agencies
- Grocery stores/pharmacies
- Restaurants/coffee shops
- Cinemas and art galleries



Focus on nonprofits

Nonprofit leaders and organizations

- Common goal
- Potential partners/sponsors

Setting Appointments

For additional information, contact:

Brad B. Boyd, Area Director
Global Membership & Engagement
Kiwanis International

bboyd@kiwanis.org