

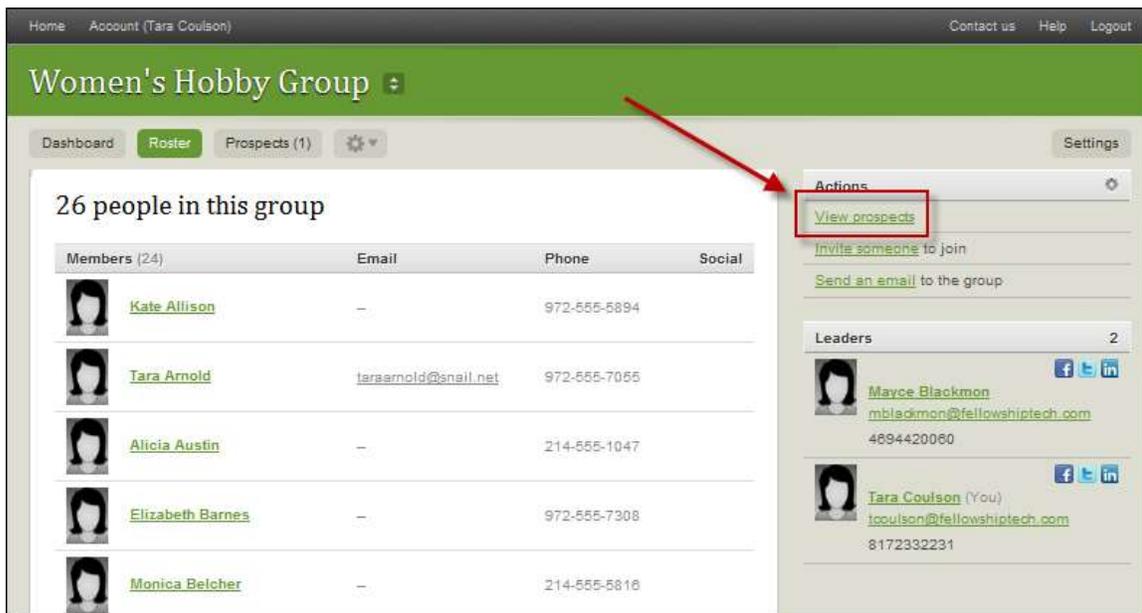
Working with Prospects-Before They Become Members

Prospects is a list of people who have searched for and expressed interest in a group or people who have been invited to join the group by a leader or member. Prospect requests will be emailed to group leaders, but the leader must sign into InFellowship to work the prospect.

To view the prospect list:

1. Login to InFellowship and click on the group to work with. The group roster appears.

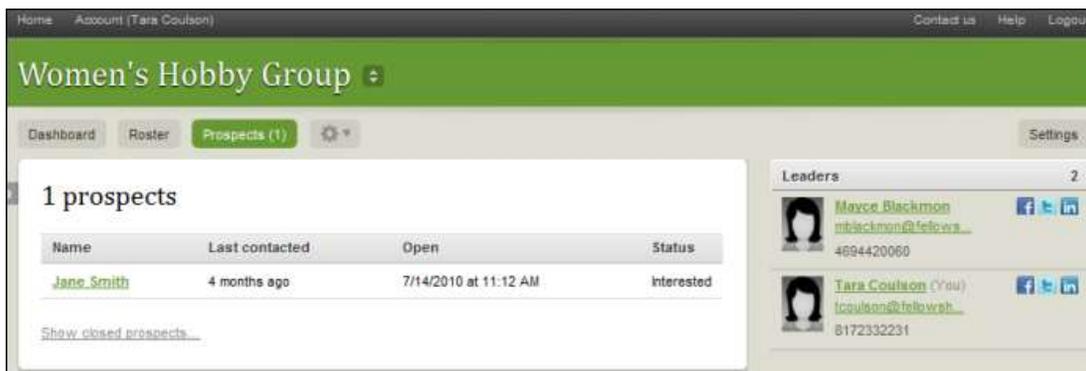
[Group Roster - View Prospects](#)



The screenshot shows the 'Women's Hobby Group' page. At the top, there are navigation links: Home, Account (Tara Coulson), Contact us, Help, and Logout. Below the group name, there are tabs for Dashboard, Roster, and Prospects (1). The Roster tab is active, showing a list of 26 people in the group. On the right side, there is an Actions list with a red box around the 'View prospects' link. Below the Actions list, there are sections for Leaders, including Mayce Blackmon and Tara Coulson (You).

2. Click **View prospects** in the Actions list on the right side of the page. The prospects list also appears when you click the **Prospects** tab at the top.

[Prospect List](#)



The screenshot shows the 'Women's Hobby Group' page with the 'Prospects (1)' tab selected. The prospect list is displayed, showing one prospect: Jane Smith, last contacted 4 months ago, with an open date of 7/14/2010 at 11:12 AM, and a status of 'Interested'. There is a link to 'Show closed prospects' below the list. On the right side, there is a Leaders section with Mayce Blackmon and Tara Coulson (You).

Please use inFellowship to send an email and to keep notes on prospect interactions by clicking the prospect's name. Using inFellowship allows the LG Office and your LG Coach to see if your group prospects have been contacted and

whether help may be needed to make sure prospects are contacted within 12-24 hours. Any group leader can record prospect interactions in any of the following ways:

- Sending an email
- Recording phone call notes—the phone number is only available if the prospect elected to type it into the request form (it is not a required field, so a phone call may not be an option)
- Recording face-to-face meeting notes
- Recording personal notes (comments)

See [Prospect Communication and Notes](#) for more information.

Accepting a Prospect

If you and the prospect have communicated about and determined that your group is a good fit for them, make sure that you record these notes.

After recording them, then click on **Allow** in the upper right hand corner. This will send an email to the person that will give them the option to choose to join or not.

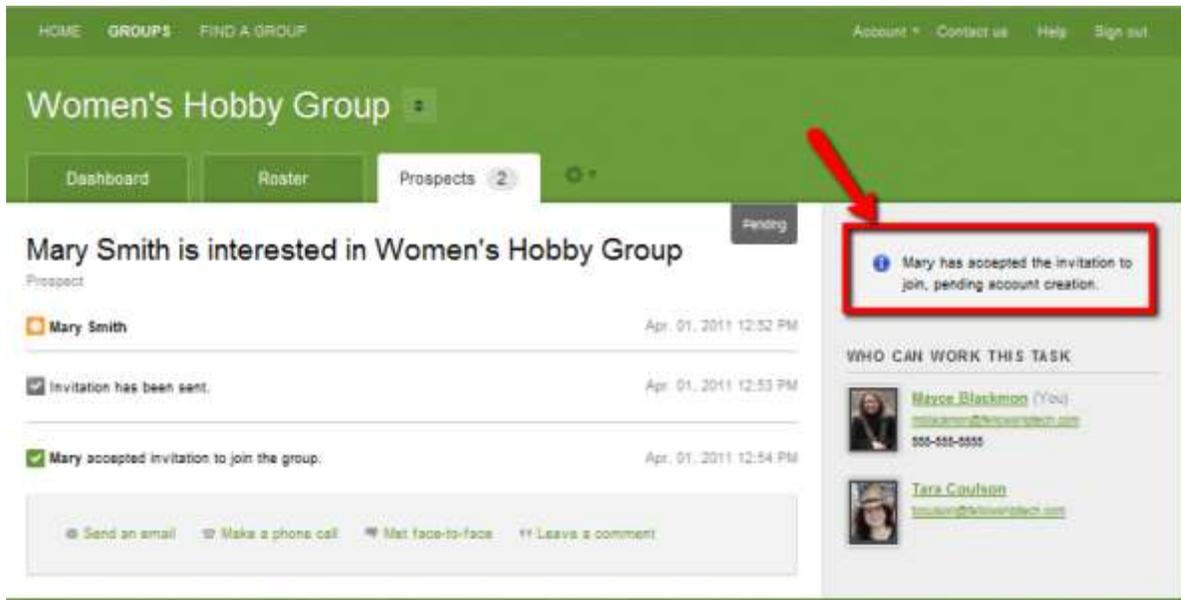
Note: It may seem odd that they've expressed an interest and now they have a chance to join or not - they get the final say!



If A prospect Agrees to Become a Member

Once the prospect accepts the invitation and joins the group, the system will determine whether or not he or she is new and needs to create an account. If the prospect already has an InFellowship account then no information is needed, if the prospect is new he or she will need to complete the account information before their membership is accepted.

Note: If for some reason the prospect does not complete the account information request, he or she will remain in the prospect list and not be added to the group roster until the request is completed. However, if you think they may have missed the email or forgotten to respond to your invitation/email link, then email them or give them a call.



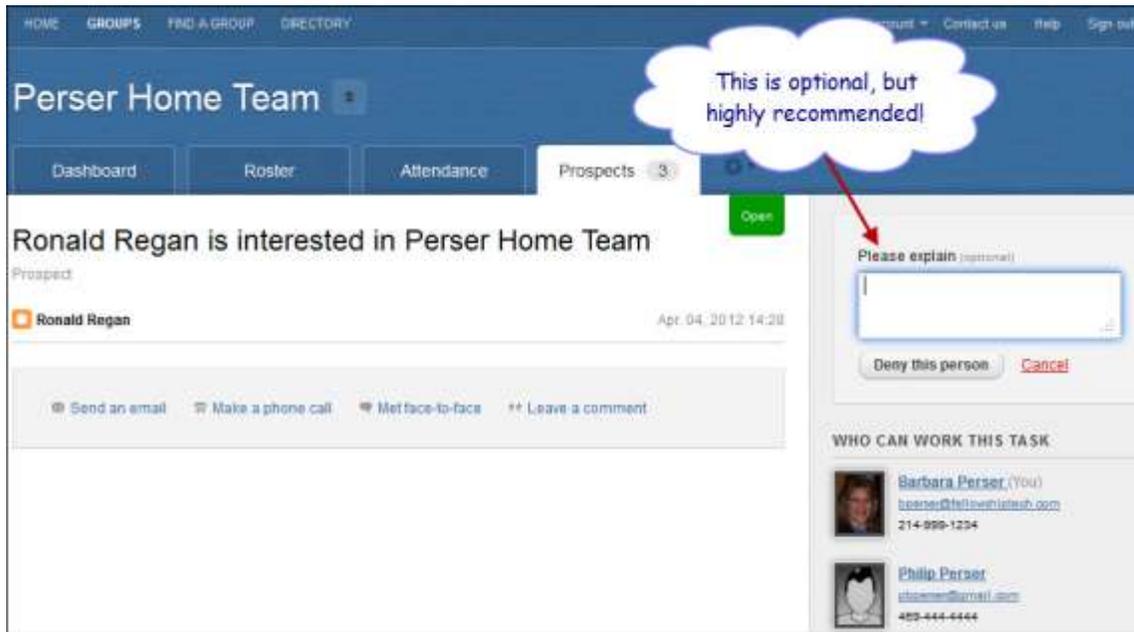
In this case the prospect will need to refer back to the invitation email and use the link to access InFellowship and complete the account creation. Once that is done, the prospect becomes a member of the group. (If you or your prospect need additional help at this step in the process, feel free to contact your LG Coach or the LG Office for help.)

Denying a Prospect

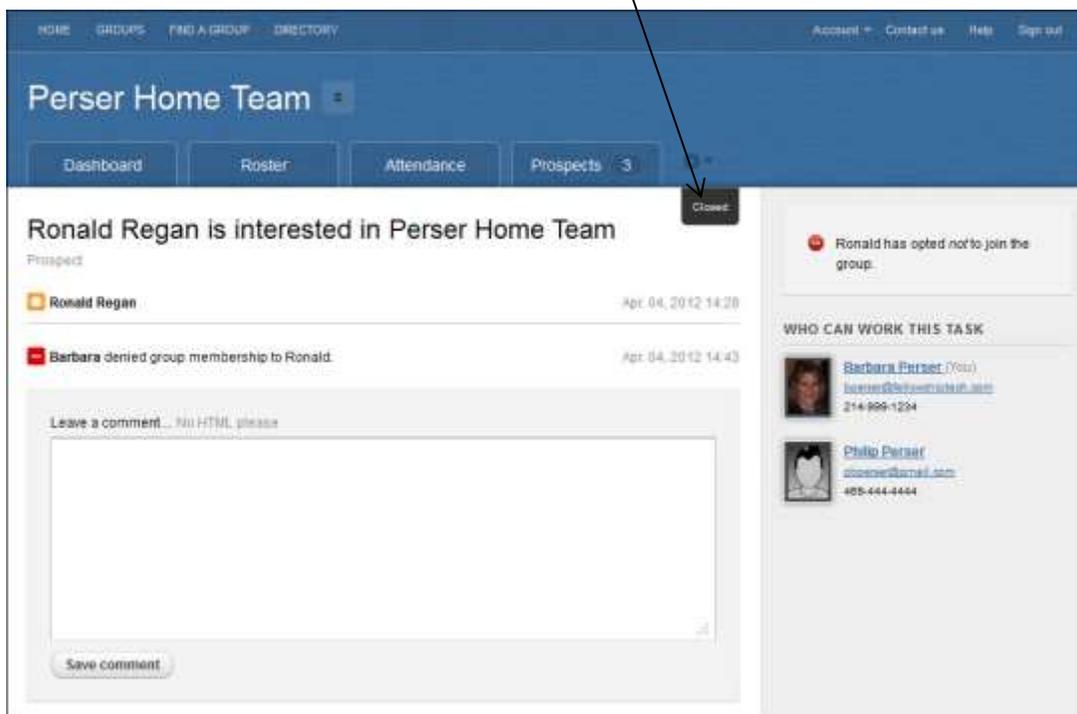
If your group has suddenly met capacity or the prospect is unable to join at this time, please send them an email or talk to them on the phone about this. This is very important. **If you skip this step and simply click Deny, this person will never receive notification from you and will be left hanging wondering if they can or have joined your group or not.**

After you have communicated with the prospect and it has been made clear that they will not be joining your group, then simply click **Deny** in the upper right hand corner of the screen. It will give you the opportunity to type in a comment there for your records – again, **NO comment or communication is sent to the prospect by clicking Deny.**

[View Deny Comment Box](#)



The Prospect record will be **"Closed"** and come off of your Pending Prospect List after you click **Deny** OR after they have declined or accepted your invitation (and created an account) to join your group.



IMPORTANT: Please work your prospect all the way to the "Closed" status. One other important point, if you add a **Pending Prospect** to your group roster using the manual search/add to group option, they will still remain in your Pending Prospect list. To move their prospect listing to the closed status, after you manually add them to your roster, click Deny on their Pending Prospect record – be sure to record a comment. If you need additional help at this final step in the process, feel free to contact your LG Coach or the LG Office for help.