

New-Club Sales Process

This document outlines the typical steps in starting a new club. In some cases, there may be exceptions to this process. At each step in the process, there's an action we can take, and an outcome (or close) that we work towards. At each step, we simply work towards the next step, taking the entire process 1 step at a time. Trying to leap/jump steps usually leads to the prospect feeling like he/she is being sold, and that'll yield an undesirable result.

1. **Inbound Lead:** A lead comes from TI or elsewhere (referral, research, etc.).
 - **Action:** Call and/or email to make contact, introduce yourself and Toastmasters. The intent is to see if there's interest in learning more, and if there's a fit.
 - **Close:** Set up a 30-minute call/meeting to learn more about needs, discuss Toastmasters, and see if there's a fit.

2. **Introductory Call/Meeting:** A 30-minute meeting to each party to learn more about the other.
 - **Action:** Ask questions to understand the prospect's needs/goals, and uncover gaps in professional development. *Listen and ask probing questions of the prospective lead/contact.* For example:
 - i. Why did you seek out Toastmasters?
 - ii. Are you familiar with the Toastmasters program?
 - iii. Do you know a Toastmaster?
 - iv. What do you see as challenges and opportunities in your organization?
 - v. Do you have employees with high potential, but lack communication or leadership skills?
 - vi. How does your organization help employees develop communication skills? Leadership skills?
 - vii. How does the employee gain those skills without risk (ex. losing customers, losing confidence in himself/herself, or from peers/management)?
 - viii. What happens if the organization can't develop leaders within? Is that costly?
 - **Close:** Use the information learned to share how Toastmasters can fill the gaps or needs of the organization. Set up a 1-hour information session for interested individuals to learn more about Toastmasters.

3. **Information Session:** A 1-hour information session intended to show why/how Toastmasters can benefit the organization's leaders and employees.
 - **Action:** Perform a 1- or 2-person session that shares why Toastmasters is important to help each individual address the critical things holding his/her career back. Share how the program is different than typical methods that most people want to run away from. That is, the program is self-paced, peer-led, positive/supportive, fun, and experiential (learn-by-doing). Demonstrate the typical activities within a meeting by getting the audience involved. Potential sponsors can be included.
 - **Close:** At a minimum, understand if there's interest from the organization and some employees in moving forward. Through a simple poll (a show of hands), determine if there's 10, 15, or 20+ that want to start a club. Find the champions

that really want to start a club and will work to organize and promote on our behalf. If interest is strong, ask for individuals to complete membership applications at the end of the meeting.

4. **Demo Meeting:** The 1-hour kickoff meeting is intended to be the first real meeting for the club. At this point, some prospective members can fill roles, and some can take on club-leadership roles. The goal is to reach 20 paid members soon.
 - **Action:** Bring enough help to fill Toastmaster, speaker, and evaluator roles. The rest of the roles can be filled by the audience or committed individuals. Sponsors can/should be included.
 - **Close:** Collect membership applications, fill roles for next meeting, encourage members to promote and reach 20 members as soon as possible. Use the space shuttle's liftoff analogy (2 minutes of intense energy, lots of fuel, and extra rocket boosters to put the shuttle into orbit). Elect officers as soon as possible. A club will charter faster when leaders are already in place and performing their roles.

5. **On-going Meetings:** The club can continue meeting while it builds membership to 20 members. However, it must not fall into "meeting mode", where energy is only spent on meetings and not on promotion. The goal is to charter, and it takes promotion for that. To guard against this pitfall, have sponsors frequently serve as Toastmaster until the club charters. This allows us to sell and ensure that guests are invited to join.
 - **Action:** Support meetings and remind the club that the goal is to get to 20 members. Work with champions/officers on how to reach 20 quickly.
 - **Close:** If progress slows, and a club takes more than 2 months, discuss concerns and options with champions/officers. Help them set a deadline to charter by. Offer an incentive to help increase the urgency.

6. **Chartering Requirements Met:** The club reaches 20+ paid members. Collect the applications and payment as soon as possible. If sponsors perform this step, they should understand how to fill out the paperwork. Review the paperwork before sending to TI, because it's easiest when TI doesn't require corrections. Scan the paperwork, put on Dropbox, and send link to bensmithtm@gmail.com. Send any checks/payment via certified mail. Find or notify mentors that the club is chartered.

Note: For a club where all fees are covered by the organization, the entire chartering can be done in 1 meeting. Have the employees complete applications on the spot, and tell the champion to find 20 to wrap up the process soon. Simply handout an application to each person and ask the group to complete the application before leaving the meeting.