

5 Steps to Effective Peer Recruitment

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Leslie Franklin

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Your presenter

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Leslie Franklin

- **30 years:** Marketing, Communications, Journalism, Publishing
- **40 years:** Volunteerism
- **Industries:** Financial Services, Health Care, Education, Consumer Products
- **Independent Consultant:** Volunteer- and Member-Driven Organizations
- **Metro Volunteers:** Client Services Manager
- **Areas of Expertise:** Recruitment, Engagement, Skilled Volunteers

Advantages of peer recruitment

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Advantages:

- Implied endorsement
- Leverage existing pride
- Built-in role model
- Greater satisfaction for all
- Expand bandwidth with little effort
- Improved retention

Definition of peer recruitment

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Peer Recruitment:

The active engagement of current stakeholders in the solicitation of additional stakeholders

Which stakeholders?

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Target audiences:

- Board members
- Coworkers
- Suppliers and other partners
- Clients and their family members
- Your own support network
- Existing volunteers

How can a volunteer become a recruiter?

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Volunteers may be great workers but NOT great salespeople

But ANYONE can be a good recruiter if YOU provide:

- Awareness
- Guidance
- Tools
- Management and monitoring
- Encouragement

The 5-Step Process

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The 5-step process

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Step 1

**Brainstorm
PROSPECT
CATEGORIES**

Step 2

**Determine
CONTACT
STRATEGIES**

Step 3

**Document
BENEFITS &
KEY MESSAGES**

Step 4

**Identify &
Combat
OBJECTIONS**

Step 5

**Develop
SOLICITATION
SCRIPTS**

Who is this information for?

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You:

- Strategic guidelines
- Tactical tips

Your recruiters:

- How-to tips
- Turnkey tools

Step 1: Brainstorm Prospect Categories

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Who makes a good peer prospect?

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Good candidates:

- Friends
- Family members
- Coworkers
- Business/professional associates
- Members of groups
- People like you!

Why are peers good prospects?

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Why solicit peers:

- Respect and influence
- Similar values
- Flattering
- Common characteristics
- Keep up with the Joneses
- **Busy people get things done**

Step 2: Determine Contact Strategies

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Where will you find these prospects?

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Target Audience	Location(s)
Friends	Social gatherings, public places
Family members	Family gatherings, home
Coworkers	Work
Business/professional associates	Professional meetings, office
Members of groups	Group functions
People like you	Anywhere YOU go!

How will you reach these prospects?

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Outreach approaches:

- Email
- Mail
- Social media
- In person
- Phone
- **Whatever works best for the PROSPECT**

How does timing factor into the equation?

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Do not solicit during:

- External events (holidays, life cycle events, etc.)
- Travel periods
- Busy time at work

Always consider:

- Time of day
- Day of the week
- Time of year

Step 3: Document Benefits & Key Messages

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What are you selling here?

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Overarching benefit:

Opportunity!

What's meaningful to prospects?

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What's In It For Me? (WIIFM)

- Camaraderie, social interaction with peers
- Support a common interest
- Advance a worthwhile cause
- Put skills and talents to good use
- Develop new skills
- **Feel wanted and needed**

What's the elevator pitch?

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Who/what/where/how/why: 30 seconds or less

Where you can find it:

- Website
- Phone greeting
- Annual report
- Stationery

How do you convert the pitch to sound bytes?

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Key components:

- Headlines
- Bullet points
- Benefits
- Eliminate fluff
- Key statistics
- Focus on results

Step 4: Identify & Combat Objections

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Why might a prospect say no?

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Common objections:

- No time, too busy
- Already volunteer somewhere else
- That's your passion, not mine
- I won't make a difference
- Now isn't a good time

Let's tackle these objections one at a time.

Turn a negative into a positive

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The glass is half full:

- **No time:** Let's do it together, it'll be OUR time.
- **Already volunteer:** Then you know how good it feels!
- **Not my passion:** Let me tell you why it's so important to ME.
- **No difference:** You'd be surprised how much good you can do.
- **Not a good time:** When can I ask again? The need will still be there.

Step 5: Develop Solicitation Scripts

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The purpose of a script

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Why use a script:

- Save time and energy
- Easily customizable
- Cover important points
- Consistent messaging
- Show commitment
- **Maintain focus**

Different channels require different tactics

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Target Audience	Suggested Tactics
Email	Quick hello/update, mostly short paragraphs
Mail	Letter of any length, photo
Social Media	Brief appeal, photo
In Person	Elevator pitch, business card with contact info
Phone (live)	Quick hello, bite-sized bits of info
Phone (message)	Quick hello, “Call me!” teaser

Key solicitation elements

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Always include:

- Name of organization and volunteer position
- Mission and purpose (paraphrased)
- Relevant statistics
- Time commitment
- Favorite aspect (the more personal, the better)
- How/where to say yes
- **Specific request**

Script do's and don'ts

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Do:

- Draft sample scripts
- Color-code any customizable text
- Include instructions for customization
- Send electronic files to copy/paste

Don't:

- Be too flexible
- Forget to say thanks

Step 6: Assemble Recruiters & Implement

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There's a Step 6?

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WHAT?!

Assemble your team

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Schedule a pep rally

- Get everyone on the same page
- Outline goals
- Set deadlines
- Display resources
- Practice through role play
- Share enthusiasm
- **Provide encouragement**

Provide lots of information

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Menu options:

- Website link
- Brochure or flyer
- Annual report
- Client testimonial
- Prospect lists (if applicable) or suggestions
- Actual scripts

Provide how-to tips

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Sample pointers:

- Contact people you know well
- Call when it's convenient
- Make pitches in person whenever possible
- Ask for immediate help, not a long-term commitment
- Share your own experience
- Include follow-up instructions

Pulling it all together

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Success is driven by convenience and diligence

- **Make it easy:** Do all the heavy lifting
- **Make it turnkey:** Offer step-by-step instructions and hands-on tools
- Send reminders
- Send more reminders
- Remind your recruiters to send reminders
- **Repetition = importance, understanding, and intent**

15 How-tos


- 1 Logo
- 2 Introduction, goals
- 3 Who to approach
- 4 What to do
- 5 How to do it
- 6 Important message
- 7 Page turner
- 8 Closing the “sale”

MEMBER RECRUITMENT TIPS & TRICKS

Recruiting new members to the Alliance can be easy if you set your mind to it and take advantage of available resources. These Tips & Tricks have been assembled to get you started and give you confidence for the task ahead.

It's actually easy to “sell” what you are passionate about. Your past Alliance involvement makes you well-qualified to introduce others to this organization and enlist their help to reach a common goal. In fact, because peer-to-peer outreach is often the most effective way to recruit new members, YOU may be the very best Alliance ambassador!

This information is based on industry best practices for membership organizations, as well as proven tactics from Alliance groups around the country. While there is no “magic recipe” that works for everyone or in every community, these pointers will help make recruiting a pleasant, comfortable, and successful experience for you.



WHO TO APPROACH

- **Contact people you know well**
Friends, family, and colleagues will likely respond to you and are also more likely to say yes when you ask.
- **Reach out to former members**
It's easier to regain a lost connection than build a brand new one. Former members may simply have forgotten to renew their dues; give them a second chance now. And let them know how much they've been missed!
- **Consider everyone a prospect**
Since AADA membership categories expanded, Alliance membership is open to ANYONE who wants to support the dental profession. The sky's the limit!
- **Look for people like yourself**
Attend functions where people like you will be present. Then create and take advantage of a chance to recruit.
- **Be open to all types of members**
You need people who DO and people who PAY. Not everyone wants to be active, let alone a leader.
- **Don't overlook the obvious**
Is YOUR spouse, child, sibling, or best friend an Alliance Contributing member? What about contacts in other states? Your first recruiting success could be right there!

WHAT TO DO

- **Make your pitch in person whenever possible**
A live or phone conversation conveys your passion and allows for Q&A. Also, it can be tougher to say no to you directly!
- **Leave a message if you don't connect**
Explain your purpose and promise to call back. Then do.
- **Send a follow-up email**
Repeat your request and send more info if asked. Send a PDF of the Membership Application for easy follow-up.
- **Send reminders**
Despite interest and enthusiasm, a willing prospect may not follow up right away. It's common to forget, get interrupted, or be distracted by other priorities. Those who truly want to join will appreciate your repeated attempts. Persistence pays off!

HOW TO DO IT

- **Be brief**
Everyone is busy. Get to the point quickly.
- **Call when it's convenient**
A good time for you could be good for a prospect too—during lunch, after dinner, or while doing desk work.
- **Include a personal comment**
Mention the last time you saw each other, mutual friends or family, or a shared interest to establish rapport.
- **Ask for something limited, not a long-term commitment**
A prospect is more inclined to do a specific task than to accept an open-ended obligation. Even someone who says no initially may say yes to a small request with limited scope—like “Come to our next event” or “Let me tell you what I learned at Conference.”
- **Share your own experience**
Your passion and enthusiasm can be contagious! Stories about the Alliance members you have met may inspire someone else. Also explain how membership has affected you—and your spouse/practice—personally.
- **Say what you love best**
Personal satisfaction is a strong motivator. What makes the Alliance great to you could be valued by others too.

CLOSING THE “SALE”

Make it EASY to take the next step! Always include follow-up information in your pitch, so your prospect knows how to proceed when ready. Include phone number, email address, and the Alliance website. And don't forget to attach a PDF of the Membership Application to every email you send!

ON BACK: More tips plus a sample script!

Important message: Members enable the Alliance to function, to sustain programs, and to support activities. ALL types of members are needed and valued!

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15 How-tos

- 9 Permission
- 10 How-to reminder
- 11 Key benefits
- 12 Sample script
- 13 Customizable content
- 14 Overcoming objections
- 15 How to get help

PUTTING WORDS IN YOUR MOUTH

An organized pitch will help you stay focused and look professional as you recruit. Use these ideas and sample script for your own outreach, customizing messages to reflect your taste and personality. Refer to the Alliance website for supplemental program or event information.

KEY MEMBER BENEFITS

What appeals to each member prospect will be different, but these benefits underscore the Alliance goals of support, advocacy, and outreach. Remember to convey whatever YOU most love about the Alliance too—your enthusiasm can be infectious!

- Support your dental practice at work and at home**
Gain insights to both practice operations, marketing, staff management, or finance. Learn how to create and preserve well-being and work-life balance. Alliance resources prepare you to offer many types of hands-on and behind-the-scenes support.
- Experience camaraderie, networking, and a chance to pay it forward**
There is always a fellow Alliance member who has been there before you, willing to offer advice or living proof you'll make it too. Gain a new perspective while you gain friends and professional contacts; there's comfort in shared experiences and shared goals, and you can share your own wisdom to help others as well.
- Expand dental health education and service in your community**
Share your knowledge, expertise, commitment, and compassion through activities and programs that address your community's needs. Outreach in any form is good for business and good for your neighbors too.
- Speak up for dentistry and related causes**
Decisions by lawmakers affect small business as well as consumers. Add your voice to the causes of dentistry—fluoridation, preventive sealants, HIPAA regulations, licensing standards, and more. The Alliance advocates alongside the ADA as a unified

RESPONDING TO OBJECTIONS

There are lots of reasons someone may say no when you first pitch Alliance membership. Here are common objections and how you might respond if you're comfortable doing so:

- I already belong to a professional dental organization**
Then you know the value of supporting dentistry. The Alliance is the only organization for EVERYONE who supports dentistry—regardless of age, occupation, rank, or title.
- I support my own career, practice**
As you should! Since you have a vested interest in the success (and financial trajectory) of your partner's career as a dentist, it's important you support BOTH professional communities. The Alliance gives you an easy, no-obligation way to do just that.
- I'm not married to a dentist**
Today the Alliance includes more than dental spouses—children/siblings of dentists, hygienists and other allied staff, family friends, corporate sponsors, dental school faculty, association staff, and even dentists themselves... anyone who wants to build and protect the future of dentistry.
- The Alliance is just a group for "ladies who lunch"**
Alliance members are ACTIVISTS—meeting with lawmakers and following proposed legislation, conducting service projects, educating children and seniors on good oral hygiene, mentoring the next generation of dental families. Many members also work in private practices or community clinics.
- The Alliance is outdated**
Then you haven't seen the Alliance lately! Current programs include bilingual education for new mothers, goodie bags of personal care essentials for people in need, and grants that support dental health education. Alliance members are active, involved, and visible in large numbers, both locally and nationally.
- There isn't a local Alliance in my state**
You simply join the national organization as a Member at Large (MAL), yet have access to all the resources and programming available to ALL Alliance members. And if at any time you want to help establish a local group, the Alliance will welcome your help!

SAMPLE EMAIL SCRIPT

Hi _____.

[Insert personal comment/introduction]

I'm writing today to invite you to join me in something I'm passionate about, which gives me great joy and satisfaction too. I am a member of the Alliance of the [American or State] Dental Association, which actively works to create stronger dental practices, stronger marriages, and healthier communities all over the country. I first joined the Alliance in year, and I've gained so much in the [many] years since.

Nationwide, there are more than 2,500 Alliance members! We interact with lawmakers and lobby for dental causes, provide community service, educate kids and seniors, fund grant requests for dental health education, and mentor young dental professionals. For just \$50 you can join us... and get involved as little or as much as you want.

If you're like me, \$50 is a lot to spend while shopping or dining out... and yet there's often little to show for it. But your \$50 investment in Alliance membership will help connect YOU with others who care about a better future for oral health, and also help US grow stronger and do even more. It will give you and me one more thing in common, too.

It's quick and easy to join: Just visit the [Alliance website](#) and click "Join" at the top of the page; you'll create an account and pay your first dues online. Or you can use the attached membership application and send your info by mail or fax. I hope you will join me as a proud Alliance member; together, we can really make a difference!

Thanks for your consideration,
[Signature]

NEED MORE HELP?

For more recruitment ideas, support, or encouragement, or to share your Alliance success stories, contact:

Leslie Franklin
snowgumbo@gmail.com
303-725-1363

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Ways to apply & adapt this material

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How to customize:

- Use what you know works
- Ask existing volunteers what “hooked” them
- Emphasize current needs
- Test multiple approaches
- Solicit feedback, revise as necessary
- Gauge effectiveness during orientation

Your role as cheerleader

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Go team!

- It's a team effort
- Keep efforts in sync
- Remove road blocks
- Recognize effort as well as progress
- Share success stories
- Say thank you

Thank you!

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Leslie Franklin

Metro Volunteers

303-282-1234 or LFranklin@MetroVolunteers.org

Snowgumbo Services

303-725-1363 or snowgumbo@gmail.com