CHAPTER BUILDER

Goal: Use a system to streamline, simplify, and enhance the recruitment process. Engage in communication and grading of new members to increase our names list and accepted bids.

INPUTTING NAMES

After creating a names list based on referrals and tabling events, you now will input your list of prospects
- To input a prospect individually you will hit the upper left button "New Lead"
- To input a mass list all at once you will click the drop-down menu next to "New Lead" and select "Import Leads"
  - Download the template excel form to input the prospects name and contact info
  - Attach the finished Excel sheet for prospects to mass ad the prospects

A secondary way of adding names is through a form signup using the 'Forms' option on the left-hand side
- Create a form that gathers the necessary information you would want to know about a prospect
  - Name, Number, Email, Year in school, GPA, Major
- Once the form is created use a computer at events and tabling to have prospects to sign up for information
- Use the copy link function on the right side of the completed form to share digitally through group chats, posting on class pages, and the 'link in bio' option on Instagram.

THE PROCESS

The goal of Chapter Builder is to move a prospect through the letter process
- This process is not to rank/grade the prospects but rather to show where they are at in the process
  - A+: This prospect has accepted a bid into the fraternity is ready to go through initiation
    - Once a member has accepted a bid, select their profile and select "Review New Members" Adding New Members
  - A: This prospect has gone through the pre-close process and is ready for a bid at the next meeting
  - B: This prospect has been to an event or a 1:1 meeting, at this point he has an idea what the fraternity is
  - C: This prospect has been contacted and has agreed to go to a 1:1 meeting or to an event with the group

THE PROCESS

- D: This prospect needs to be contacted or we have not successfully set up a meeting/invite to an event
- E: This prospect has either told us or due to external factors (Grades, year in school, enrollment status) that he can not join this current semester but is still interested. Follow up potential
- F: This prospect has told us no even after discussing his objections
- G: We need more information on the prospect (Contact information)
- Every prospect starts at D unless the first interaction was at an event.

CONTACTING VIA CHAPTER BUILDER

If we have all the necessary contact information we can contact via Chapter Builder through texting, calling, and email.

- Utilizing the phone number ability in the 'settings' section you can create a phone number based on your local area
- Use this number to make phone calls, individual texts, or mass texts