

PHONE CALL TRAINING

LUKE

15: 3-6



PHONE CALL TRAINING

THE GOSPEL OF LUKE CHAPTER 15 VERSES 3-6

So to them He addressed this parable. “What man among you having a hundred sheep and losing one of them would not leave the ninety-nine in the desert and go after the lost one until he finds it? And when he does find it, he sets it on his shoulders with great joy and, upon his arrival home, he calls together his friends and neighbors and says to them, rejoice with me because I have found my lost sheep.”

PHONE CALL TRAINING

TWO MODES

- The retention team has two modes. PROACTIVE and REACTIVE. The calling procedures for each mode are similar.
- Proactive retention is for members that are ill, older, members that have not been to meetings in a long time or are behind in dues payments, and widows. it is conducted through out the year. Only one attempt at contact is required. Leaving a message is acceptable

PHONE CALL TRAINING

TWO MODES

- Reactive retention is a result of a brother being delinquent in his dues and faces suspension. It is conducted during a two to six week period starting one month after the dues second notice is sent.
- Actual personal contact is a requirement. At least three attempts are acceptable if the member is over one full years in arrears. Contact attempts and the results must be documented on a work sheet (retention report)

PHONE CALL TRAINING

LEAVING MESSAGES

Here are three brothers that are members of the Albany Council and are behind in their dues.



PHONE CALL TRAINING

LEAVING MESSAGES

Brother Bill is married with two children and one due in three months. He is an 8 year member of his council. He makes good money but his company has just canceled medical insurance on family members.



PHONE CALL TRAINING

LEAVING MESSAGES

Brother Sam is married with three children. He is a 4 year member of his council. He lost his job three months ago when the mill shut down. He has taken a job at Wal-Mart for \$10.00 an hour less than he was making at the mill. The mortgage is due next week



PHONE CALL TRAINING

LEAVING MESSAGES

Brother Ralph is married with two children and three grandchildren. He is a 74 year old 24 year member of his council. He has a good retirement and he has Alzheimer's. His wife Mary takes care of things.



PHONE CALL TRAINING

LEAVING MESSAGES

The brothers sit in their chairs and start watching TV. The show goes to a commercial and Joe, a retention committeeman starts calling his list of members



PHONE CALL TRAINING

LEAVING MESSAGES



RING! Brother Bill picks up his phone and looks at the screen. He shakes his head and puts the phone down.

Joe hears “please leave a message after the beep”.
BEEP! He then leaves a message

PHONE CALL TRAINING

LEAVING MESSAGES

Bill this is Joe Jones with the council. Your dues are past due and we will have to suspend you if they are not paid in the next two months. Call me back at 555-555-5555



He then calls the next member

PHONE CALL TRAINING

LEAVING MESSAGES



RING! Brother Sam picks up his phone and looks at the screen. He shakes his head and puts the phone down.

Joe hears “please leave a message after the beep”.
BEEP! He then leaves a message

PHONE CALL TRAINING

LEAVING MESSAGES

Brother Sam this is Joe Jones with the Knights . We have not seen you in a while. GK Keefer asked me to call and check on you. Please call me back at 555-555-5555. Oh! by the way your dues need to be paid.



He then calls the next member

PHONE CALL TRAINING

LEAVING MESSAGES



RING! Brother Ralph looks around the room

Joe again hears “please leave a message after the beep”. BEEP! He then leaves a message

PHONE CALL TRAINING

LEAVING MESSAGES

Brother Ralph this is Joe Jones with the council. We have not seen you or Mary in a while. GK Keefer asked me to call and check on you. Please call me back at 555-555-5555.



PHONE CALL TRAINING

LEAVING MESSAGES

We can have Communion taken to you if you cannot go to Mass. Mary, if you get this, please call me and let me know if there is any thing that we can do for you



PHONE CALL TRAINING

LEAVING MESSAGES

Who do you think will call back
or answer the phone the next
time?

PHONE CALL TRAINING

LEAVING MESSAGES

Bill?



Most assuredly not. Joe was very blunt. No concern for Bill or his family was expressed. Joe just wanted money.

PHONE CALL TRAINING

LEAVING MESSAGES

Bill?



Not very fraternal

PHONE CALL TRAINING

LEAVING MESSAGES

Sam?



Perhaps, but probably not. Joe expressed some concern about Sam, but seemed to only to be after money

PHONE CALL TRAINING

LEAVING MESSAGES

Sam?



Still not very fraternal

PHONE CALL TRAINING

LEAVING MESSAGES

Ralph or Mary?



Probably. Mary obviously needs help and may not know who to ask.

PHONE CALL TRAINING

LEAVING MESSAGES

Ralph or Mary?



Joe was fraternal

PHONE CALL TRAINING

- Any message that we leave should be positive
- Never mention dues or money when leaving a message
- Bill and Mary were offered something
- They may answer the next time that they are called

PHONE CALL TRAINING

- This is applicable when calling on a proactive or reactive retention call
- If the call was proactive, you only need to make one attempt.
- If the call was reactive, you will need to call again in 3 days to a week and up to a minimum of 3 times if you do not talk to the brother.
- Document your attempts on the worksheet.

PHONE CALL TRAINING

- We should not discuss the brother's dues in a proactive call unless he brings it up
- If he mentions being delinquent, refer him to the Financial Secretary or online payment site
- Invite to one of the functions on your calendar
- Try to find any reason for your brother not paying dues or is wanting to withdraw

PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

The phone rings and brother Sam answerers. Brother Joe, the retention committeeman is calling.



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Hello



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Hi brother Sam this is Joe Smith with the Albany Council Knights of Columbus. Grand Knight Keefer asked me to call you and see if everything is OK?



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

We are
all OK



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Good. We
have not seen
you at a
meeting in quite
awhile.



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION



I guess that I
am not
interested in
being a
member.

PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Why not Sam, have we done something to offend you? I've been a member for 15 years and my membership means a lot to me.



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION



I am just
not
interested.

PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Did you know that you have \$2000 in accidental death benefit on you and your wife that you could probably not replace for the cost of your dues



The amount is listed on the Member/Spouse Fraternal Benefit flyer #2773

PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

I did not know that



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Well Brother Sam, I want you to think about continuing your membership.



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

I am not sure that you are aware that last year with our PFH drive, Seminarian fund, and scholarships, our council gave over \$5000.00 to charity.



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

We re having a fraternal benefits dinner it the 16th of next month. It is free to members and their families. Your wife will not have to cook that evening



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

We need all of our members helping to continue our efforts. May I call you back tomorrow to give you time to think and talk with your wife?



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Well, OK



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Good, I will call you tomorrow evening and we will see what we can do to re interest you in the knights. We'll talk then, promise?



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Yes



PHONE CALL TRAINING

SAMPLE PHONE CONVERSATION

Good, Talk with you
tomorrow. God
bless



PHONE CALL TRAINING

That preceding was just a sample of a retention conversation. Dues or money should not be mentioned until the brother seems comfortable with you. Near the end of the conversation, talk to him about his dues and to please attend a meeting soon. Try to find out why he has become delinquent. Your council may have a means to “work off” the arrears.

PHONE CALL TRAINING

- In the past conversation, Joe reminded Sam that he and his wife were covered by the orders accidental death benefit
- If the member is approaching Honorary or Honorary life status, he should be reminded of it.
- Honorary status is 25 years continuous service and 65 years of age. Honorary life is 25 years continuous service and 70 years of age.

PHONE CALL TRAINING

- There are no dues for Honorary Life membership. Many councils do not bill Honorary members.
- Other benefits of membership are explained in the flier #2773 and on the state retention web site.
- Joe offered Sam and his family a free dinner

RETENTION COMMITTEEMAN TRAINING

DOCUMENTATION

KNIGHTS OF COLUMBUS
IN SERVICE TO GOD, IN SERVICE TO ALL

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March 03, 2015

Retention Committee Report

Members in Danger of Being Suspended

Member Information	Contact Notes
<p>Brother Name: # 1234 567890 Spring Lake, NC 28380-1234</p> <p>Res Phone: Cell Phone:</p>	<p>Amount Due: 43.55</p> <p>Date: ___/___/___</p> <p>LM VM 12 Mar 2016 6:30 PM</p> <p>Email: Proposer: Proposer Tel #:</p>

Whatever form your council uses, document your attempted contact on the worksheet. Include the date and time that you left a message. Also document what the brother said if you make contact. You may hand write the form. Use the back for more space. Note, LM VM means left message voice mail.

PHONE CALL TRAINING

MEMBERS OFTEN MOVE

- He may have moved. Verify his address and e mail address. Tell him that we will send a transfer packet if he has moved away.
- We have found that often the brother wants to remain in the order, but does not know how to transfer. We can make it easy for him.
- The FS or GK can send an e mail to the State Membership Retention Chairman (SMRC) and a transfer packet will be returned to the council.

PHONE CALL TRAINING

- Younger men on their way up can learn to managing projects and have brothers willing to mentor them.
- The state meetings offer corporate training that is applicable to many occupations.
- Catholic education courses are offered online at our supreme web site <https://www.kofc.org>.
- Dues from the members help with the orders charitable works: Coats for Kids, RSVP, etc. See <https://www.kofc.org/un/en/todays-knights/what-we-do.html>

PHONE CALL TRAINING

**HAVE TRAINING
SESSIONS WITH YOUR
TEAM AND INCLUDE
MOCK CALLING TO
PRACTICE YOUR SKILLS.**

PHONE CALL TRAINING

**Go Make
A Difference**



PHONE CALL TRAINING

Thank you for your dedication to
RETENTION

God bless you
God bless America

PHONE CALL TRAINING

LUKE

15: 3-6



“It is better to light one little candle than to curse the darkness”