Instructions- Lead Generation Data Input
Volunteers

Paper Lead Sheets

1. Reference: <u>Join Interest form Open House Paper crossroadsbsa.org/recruitment)</u>

   This form will be used at school open houses to collect customer information. We must put the customer information from this sheet into www.JoinScoutsIN.org as soon as possible (within 24 hours of the event).

   There are 2 options to get this data to council:
   - i. Deliver the lead sheet in person, by email, scan, or fax to your district executive within 24 hours.
   - ii. Input the lead information on our website: <u>WWW.JOINSCOUTSIN.ORG</u>, review instructions below

2. Instructions to input data yourself:
   - a. Make sure that the bottom of the lead sheet is filled out:
     - i. Necessary Information
       1. School Name- no info should be put into the system without this.
     - ii. Not necessary but preferred
       1. District
       2. Open House Date
       3. Unit

   - b. Start typing data for each lead into <u>WWW.JOINSCOUTSIN.ORG</u>
     - i. Do your best to get all information provided onto the form on the website, sometimes handwriting is hard to read- try your best, we will know if our emails are bouncing back due to incorrect email addresses.
     - ii. If information is missing, like the address, type "N/A"
     - iii. If other information is missing like the email, highlight these rows, we won't be able to put them in our system. Any sheets with this issue should be given to your district executive after the all other leads have been placed in the system.
     - iv. If information like gender is missing, use the scouts name to determine gender, default to male if needed.
     - **v. If any other questions or issues arise, email Karrie Baxter.**

Excel Lead Sheets

1. Reference item: <u>Join Scouting Interest form- lead generation excel (crossroadsbsa.org/recruitment)</u>

   This form will be used at school open houses to collect customer information on a computer or tablet. These sheets should be emailed to District Execs within 24 hours of the event.

Direct Website Leads

1. Online Lead Collection-

   You can urge parents to visit joinscoutsin.org on their phone and fill out the information. They can also text SCOUTING to 38470 for a link to be sent to them via text. These leads will go directly into our system for follow up. If you want a copy of these leads, please ask your district executive after the event.