



NOT JUST A MAN. A MASON.™

MASONIC MARKETING SERIES

Follow-Up: Freemasonry's Not-So-Secret Weapon

HOW TO WIN THE HEARTS OF HOPEFUL MASONS, GROW YOUR BROTHERHOOD, AND SUSTAIN FREEMASONRY FOR FUTURE GENERATIONS.



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The Path Forward Depends on Follow-Up

Since the launch of *The Path Forward*, there has been renewed energy behind growing the ranks of Freemasonry. We've seen increasing interest in joining. However, following up with prospective members in a timely fashion remains an Achilles' heel for many. Following up with potential members is the crucial step that can determine the difference between a missed opportunity and a thriving relationship. This e-book explores the significance and benefits of effective follow-up strategies in engaging and converting prospective members into loyal and active Freemasons.

New research outlined in the book *The Path Forward: Empowering the Future of Freemasonry* demonstrates that Freemasonry and the Scottish Rite are organizations in step with modern society. Our core values and identities remain timeless, and there is a renewed interest in Freemasonry among American men. Global trends and cultural pressures are powerfully aligned to support a sustained period of growth for our Craft.

TODAY, AN ASTONISHING 83% OF THE MORE THAN 100,000+ INQUIRIES SENT TO GRAND LODGES THROUGH BEAFREEMASON.ORG HAVE NOT BEEN FOLLOWED UP.

This lack of follow-up is likely the single most destructive force undermining a full resurgence of Freemasonry and its appendant bodies.

WE DON'T NEED MORE OR BETTER MARKETING, WE NEED BETTER FOLLOW-UP.

In this e-book we examine the outcomes of effective follow-up, which illustrates the devastating consequences of not changing course:

BUILD TRUST AND ESTABLISH CONNECTION:

Effective follow-up strategies play a vital role in building trust and establishing a genuine connection with prospective members. When a Grand Lodge or Scottish Rite Valley takes the initiative to reach out after an initial interaction or inquiry, it demonstrates commitment and interest in the potential member. This personal touch helps forge a connection, making the prospective member feel valued and acknowledged. By demonstrating attentiveness and responsiveness from the first touch, organizations earn the trust of potential members and create a solid foundation for a long-term relationship.



This is increasingly important when you consider that, according to our research, almost one-third of American men frequently feel lonely and 60% have not made a close friend in the last two years.¹ Many men today are starved of friendships and social connection, making the need for a warm welcome to Freemasonry more critical than ever.

“The kindness I was shown reinforced my decision to join. Masons aren’t like normal men, they are kind and intelligent.”

A response from a survey participant who cited as being more interested in joining Freemasonry after follow-up from his local lodge.

FOLLOW-UP IS A SERIES OF ENGAGEMENTS

After your initial call, it’s important to treat follow-up as a series of engagements. These interactions provide an opportunity to enhance communication and engagement with prospective members. Through continued conversations, Lodges and Valleys can gather more information about the interests, needs, and preferences of the potential member. This enables you to tailor conversations accordingly, increasing the chances of meeting expectations. Regular and meaningful communication also ensures that the potential member feels involved and engaged, fostering a sense of belonging even before joining a Lodge or a Valley.

“The representative invited me to a meeting but said he would call me back and let me know the details... it took him more than 2–3 months to get back to me, even though I had sent him a couple of messages. So, I just assumed that the lodge wasn’t interested in having me join.”

Quote from survey respondent who was now less interested in Freemasonry due to lack of follow-up

¹ Freemasonry Awareness and Perception Survey, 2023, Scottish Rite, NMJ



ADDRESS CONCERNS AND OVERCOME OBSTACLES

When a man considers joining a group, it's natural to have hesitations. It's important to look at these “objections” as opportunities to help your prospect along in his decision. Each time you identify an obstacle is the chance to overcome it with the right information.

STRENGTHEN FREEMASONRY'S IMAGE AND REPUTATION

Consistent follow-up efforts contribute to strengthening Freemasonry's image and reputation. When organizations are diligent in following up with potential members, they:

- Project an image of professionalism, reliability, and commitment
- Increase credibility and word-of-mouth recommendations, attracting more potential members in the process.

By ensuring a positive follow-up experience, Lodges and Valleys bolster their brand image and credibility.

DRIVE CONVERSIONS AND MEMBERSHIP RETENTION

The ultimate goal of following up with prospective members is to drive conversions and foster long-term membership retention.

Nurturing relationships through consistent follow-up communication is a powerful tool to:

- Convert potential members into active participants.
- Address concerns and create a positive member from the outset.
- Foster long-term relationships and increase member retention.

Follow-up goes beyond a mere formality and becomes a significant catalyst for building trust, enhancing communication, addressing concerns, and ultimately driving conversions and long-term membership retention. By implementing robust follow-up strategies, organizations can unlock the full potential of their prospect pool, creating a thriving community that benefits both the members and the organization overall.



The Recruitment “Funnel”

A DEEPER DIVE INTO THE CRUCIAL ROLE OF FOLLOW-UP IN MEMBERSHIP RECRUITMENT AND THE SCOTTISH RITE, NMJ’S PROVEN MODEL

To fully understand and appreciate the role of follow-up in recruiting and retaining members, it’s helpful to examine the full recruitment “funnel,” as well as how the Supreme Council of the Scottish Rite, Northern Masonic Jurisdiction (NMJ) has leveraged this concept to attract new men to Freemasonry through an online advertising campaign.

WHAT IS THE RECRUITMENT “FUNNEL”

Referred to in other industries as the “marketing funnel,” “buyer’s funnel,” or “purchase funnel,” in Freemasonry, we refer to the recruitment funnel as a model for how a man interacts with Freemasonry – from initial discovery to initiation.

There are four phases of the recruitment funnel:





AWARENESS

This is the stage in which a man discovers Freemasonry for the first time. Men in this stage most commonly become aware of Freemasonry either through family member, word-of-mouth or local attractions (like a sign for a Masonic lodge), or via online mediums such as Google search, social media, or digital advertisements.

The awareness phase is sometimes called the “attraction” phase because men truly only enter the funnel when they become aware of and attracted to a “solution” to their problem, want, desire, or need. In Freemasonry, our solution is a path to brotherhood, enlightenment, charity, and a deeper sense of purpose.

CONSIDERATION

During this phase, men move beyond awareness and express interest in our fraternity. This interest is expressed by certain actions – completing an online form, an email to a lodge or Grand Lodge, a social media message, or a phone call.

Men who progress to this phase are called **leads** (also known as prospective members) because they have taken initial action to indicate potential interest. Our organization can be led to believe this man is interested in joining.

Follow-up plays an important role in this stage of the funnel; men are not yet certain to join at the consideration stage. If their interest and questions aren't responded to, their attraction may wane, and they may drop out of the recruitment funnel altogether.

CONVERSION

At this phase of the recruitment funnel, a man has joined or taken action towards joining. In the business of membership and fraternities, there are often many conversions along the way to initiation such as:

- Completing an application
- Visiting the lodge/Valley
- Receiving the Entered Apprentice degree
- Paying dues



Follow-up is critical at the conversion phase as well; becoming a Mason is often a long process requiring deep introspection, commitment, and attendance. Effective follow-up communication can ensure a man continues on his path to the East by providing helpful information, support, motivation, and reminders.

LOYALTY

During the loyalty phase, a man is now a full-fledged Master Mason. Efforts in the loyalty phase of the recruitment funnel focus on retaining members and creating such high satisfaction that they become advocates for other men to join.

Again, follow-up can be a powerful tool in this loyalty phase as well. Follow-up, while paramount in earlier stages, is not just a tactic for attracting non-Masons, but in retaining Brothers. Consider following up with members regularly to ensure they're satisfied with their membership and overall experience. If they're not satisfied? You've given the fraternity an opportunity to address and rectify the issue before losing their membership altogether.

The Role of Follow-Up in the Recruitment Funnel

WE DON'T NEED BETTER MARKETING, WE NEED BETTER FOLLOW-UP

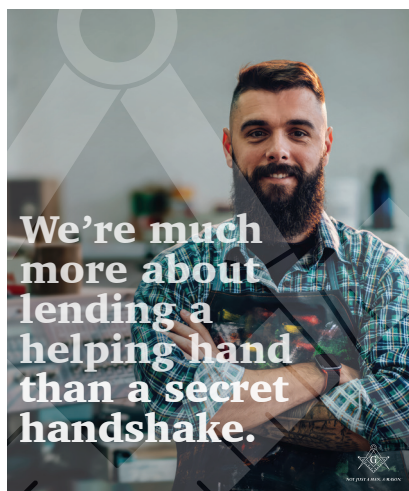
Results from the Scottish Rite, NMJ's first survey examining Freemasonry in 2016 created what is now called [The Path Forward program](#). The Path Forward program brought to light three promises that must be fulfilled to secure the success and future of Freemasonry and the Scottish Rite:

- 1** WE WILL increase our engagement with members of the Scottish Rite.
- 2** WE WILL embrace technology to further engagement in between the times that we see our Brothers in person.
- 3** WE WILL become a strong and clear voice for Freemasonry, working with all Brethren to attract good men to the Craft, and in turn, 32° Scottish Rite Freemasonry.



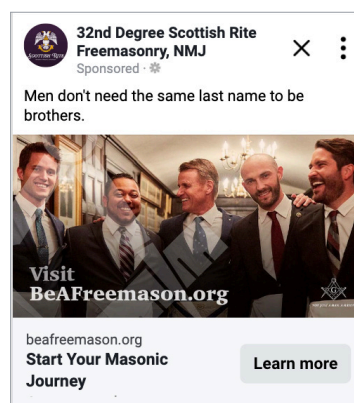
One outcome of this program and its findings was the creation of a digital recruitment program for Freemasonry, spearheaded by the Supreme Council of the Scottish Rite, NMJ.

The digital recruitment program was created to modernize how the fraternity engages with prospective Masons, as well as to show the world what it really means to be a Freemason. This was achieved through:

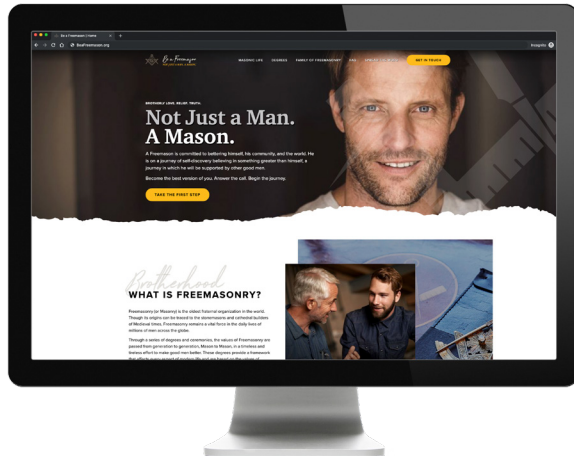


The creation of the award-winning “Not Just A Man. A Mason.” (NJAMAM) campaign by the Scottish Rite, NMJ. This inspiring, anthemic ad series brought initial survey findings on what men value about Freemasonry to life through video, print, and digital assets.

A Facebook ad campaign, leveraging the NJAMAM materials, to help lodges nationally raise awareness amongst more US men.



An automated and personalized email campaign for men who express interest in learning more about or joining Freemasonry. This email campaign, sent at regular intervals, helps nurture leads by providing them with information on who we are, what we do, and how to join.



The development of BeAFreemason.org to serve as a virtual “front door” to Freemasonry. This collaborative effort is supported by the Scottish Rite, NMJ and Southern Jurisdiction, and Shriner’s International. The site includes an online application, contact form, and one central place to find essential information about Freemasonry.

The combination of these efforts has helped fill the top of the recruitment funnel (awareness and consideration phases) for Freemasonry.

- Our NJAMAM materials, Facebook ads, and website help us reach men across the U.S., raising awareness of Freemasonry.
- They then move into the consideration phase by signing up to receive more information via email on an ad landing page.
- They continue to move through the consideration phase, receiving regular emails, until they enter the conversion phase of the recruitment funnel by filling out our online application.

Further proof of the program’s success? Since launching in 2020, we have accumulated over 100,000 leads and generated over 972,000 organic site visits to BeAFreemason.org.

Despite our sustained success in securing interest in the Craft, we have not yet seen the same level of membership growth. Why? **Because results of our 2023 survey with BeAFreemason.org leads showed that 83% of men have not heard back from their lodge after submitting an inquiry.**

In other words, once leads are handed over to Grand Lodges and/or Lodges, in many instances, the ball drops. No one has been held accountable for continuing to push leads through the recruitment funnel to convert leads to members.



Despite this shortcoming, there is hope. **98% of leads surveyed are still interested in becoming a Freemason.** We have a huge opportunity to bring in new members by simply following up.

The Fundamentals of Effective Follow-Up

Despite successful recruitment marketing and data that confirms interest in Freemasonry, decades of stagnant membership growth indicate that lodges are not doing enough to welcome new Masons.

Whether this is due to time, effort, resources, or know-how, the fraternity must do better if we hope to keep the light of the Craft glowing for future generations. Before we can invest in resources and implement processes to make follow-up not only effective but simple for lodges, it's important we understand the basic tenets of professional follow-up communication.

“THE PERFECT CRAFTSMEN’S PROMISE”

Productive follow-up conversations with prospective members will rely on each lodge or Valley practicing the tenets of “**The Perfect Craftsmen’s Promise**”:

Timeless

When a man has expressed interest in joining, whether by submitting an application or sending a general inquiry, it's vital that they are followed up within 24-48 hours.

Sending a prompt response to a hopeful Mason not only ensures that time doesn't dissuade their interest or enthusiasm, but increases the respect, rapport, and trust between both parties. Plus, in today's digital era, timely responses are expected; research from Salesforce found that 83% of customers expect to interact with someone *immediately* when they contact a company.

Consider outlining a timeline for follow-up on your website or through an automated response system to set expectations.



Personalization

Freemasonry is in the “business” of relationships. We must make a concerted effort to make each prospective member feel seen, heard, and respected. When following up on an inquiry, we should strive to personalize each encounter. Some simple ways to personalize responses include:

- Using their name
- Referencing details from their application or message
- Mentioning common connections such as mutual acquaintances, hobbies, occupation, etc.
- Ask questions - what motivated him to reach out? What does he know about the Craft?

However, the most important thing you can do to personalize your follow-up is show genuine enthusiasm. Be warm, friendly, and inviting.

Clear Communication

The goal of follow-up is to increase conversions – or, in other words, increase the likelihood that a prospective member will join and become a Brother. A conversion cannot occur without clear communication of the process, expectations, and next steps.

At every follow-up encounter with a prospect, we should:

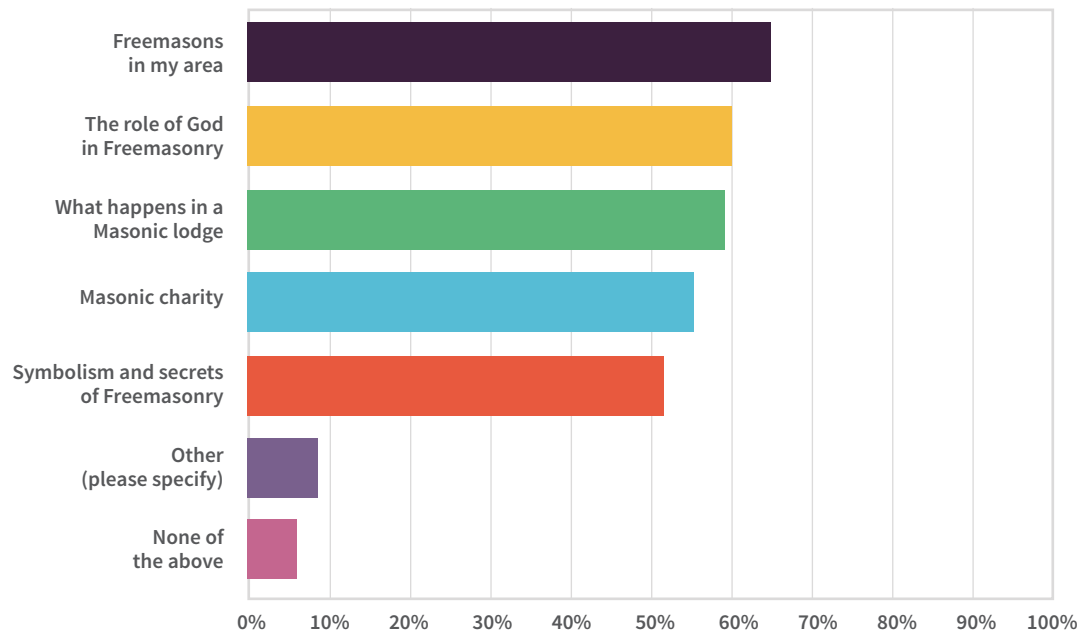
- Answer all their questions
- Inform them of what will happen next in the process
- Share relevant resources they’ll need to take action or learn more
- Provide a timeline of when they can expect to hear from you next

Joining a new organization can be a daunting experience, especially if the prospect is like the men found in our research and is experiencing a friendship recession.² Providing clear communication in your follow-up will give them the confidence they need to move forward in the process of joining.

² Freemasonry Awareness and Perception Survey, 2023, Scottish Rite, NMJ



MOST COMMON QUESTIONS/AREAS OF INTEREST EXPRESSED BY MEN INTERESTED IN FREEMASONRY³



Persistence

Follow-up is more than the first phone call or email. A study by the Brevet Group found that 80% of sales require five follow-up calls after the initial meeting. It may feel strange to think of yourself in a “selling” position, but every interaction you have with a prospective member is truly a chance to win them over or turn them away. Until they’ve been initiated, they have not yet “bought in” on joining.

Furthermore, people are busy. Between work, family, and social obligations, it is easy for one to forget or delay the next step. Increase your chances of a prospective member joining AND show you care by being persistent in your follow-up.

Follow-ups don’t have to – and should not – come across as nagging or begging. A follow-up note after initial contact could look like:

- Being helpful – “Do you have any questions on the document I sent you?”
- Inviting them to an upcoming event – such as a charity fundraiser, a Brotherhood event, or even something as simple as a coffee meeting.
- Sharing a resource - Masonic or unrelated - that made you think of them (another reason it’s important to personalize your communications and ask questions!)

³ BeAFreemason.org Prospect Survey, 2023, Scottish Rite, NMJ



Overcoming Objections

While it's not necessary to follow-up every day, regular communication on a weekly basis can go a long way in helping a man feel supported in taking the next step

An important part of the follow-up process is overcoming objections. Objections are good. Objections help us understand exactly where the prospect needs more information to feel comfortable enough to join. Take each objection one at a time by following these three steps:

- 1 Identify obstacles.** Listening is the most important tool at this stage.
- 2 Address each obstacle with the right information.** There is often a series of objections and information sharing. Address each concern as they are shared. Eventually, there will be no more objections and the prospect will either join Masonry or be well-informed enough to decide that it's not the right fit for them.
- 3 When all concerns have been addressed, ask them to complete a petition.** If they don't return it promptly, this usually means we haven't cleared all obstacles. Start the process again.

This proactive approach demonstrates the organization's dedication to customer satisfaction and shows potential members that their concerns are heard and taken seriously.

Building and Implementing Follow-Up Processes

We understand that Freemasonry is sustained by the generosity of volunteer Brethren; follow-up, especially during an influx of inquiries, can feel overwhelming.

Implementing a process involving other members of your lodge can help calm anxieties you or your Brethren may have in keeping up with prospective members, while also helping ensure every prospect has a positive and equal experience.



Below we provide an overview of the basic necessities to keep in mind as you brainstorm a process that works for your Brotherhood. Over time, you may find new or unique systems that enhance your follow-up communications...*when you do, share them with us!*

1. ASSIGN OWNERSHIP

The fastest way to ensure your follow-up efforts fizzle is to leave it to chance, to assume someone will respond back. Assigning ownership is a non-negotiable; ask one or many Masons to be responsible for monitoring and responding to inquiries.

The best way to assign and share responsibility will vary depending on the size, experience, and skills of your lodge. We've identified below two main roles that must be fulfilled to create an effective process, whether performed by one or multiple Brothers.

- **Communications Manager:** This Brother is responsible for monitoring and processing inquiries in a timely manner. They ensure each inquiry is followed up with by assigning contact with a prospect to another Brother. They stay organized and help keep records of interactions with prospects, measure performance, and act as the overall follow-up team manager.

In many lodges, these duties can be fulfilled by the secretary.

- **Communicator:** Brothers in this role will craft timely, personalized, and clear follow-up communications with prospective members. They should be friendly, warm, and passionate about our Craft.

Communicators should record the date, time, and nature of their interactions with each prospective member, take notes from their conversations to help other Brothers craft a personalized experience, and be available to provide assistance to prospects when needed.

2. SET GUIDELINES FOR FOLLOW-UP

Well-intentioned plans often fail when internal expectations and guidelines aren't set appropriately. Gather a small council to decide on the following parameters, keeping in mind that rules should be both feasible for your



lodge, but also respectful of the prospective member.

- *How long does a Brother have to follow-up before they are considered “late?”*
- *How many follow-up messages will your Brothers send before deeming a prospect uninterested?*
- *How are Brothers expected to keep a record of their interactions?*
- *How often will you measure your lodge’s performance?*

3. CREATE “SAMPLE PROCEDURES”: SCRIPTS, TALKING POINTS, AND FAQs

After you’ve determined what expectations to set for smooth follow-up, you can begin to think about what you should say and discuss at each follow-up interaction. We advise every lodge to create a series of “sample procedures,” such as email and phone scripts, or frequently asked questions and answers, to standardize how every member engages with leads.

How do you determine what kind of “sample procedures” to draft? Start by mapping out the journey of a prospective member, from when they first engage (“consideration” stage), to when they become an Entered Apprentice, all the way to Master Mason.

What questions do you expect at each part of their journey? What information do they need to continue moving forward in their journey at this stage?

Use your answers to these questions to create sample procedures that members involved in follow-up can refer to.

4. INVEST IN A CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM

While some lodges may be able to facilitate a follow-up system using the honor system or good old-fashioned pen and paper, an investment in a CRM system can help avoid mistakes, hold Brothers accountable, and create a smooth and equal experience for every hopeful Mason.

CRM systems – like HubSpot, Mailchimp, Constant Contact, or Salesforce, among others – provide one home for all data points and tools you’ll need to keep a follow-up team running. Many, if not all, of these platforms provide time-saving features like:



- **Centralized database of prospective members:** Allow everyone on the team to see who has inquired and record notes on interactions with each prospect. You'll be able to easily see who has not yet been contacted or contacted recently, as well as what was last discussed in case a different member needs to pick the conversation back up.
- **Automated messages via email or SMS:** Want prospective members to get a confirmation email after submitting an inquiry? Have news you want to broadcast to all potential members? Simply want to make sure you don't forget to reach out? Use a CRM system to create automated emails and/or text messages.

You can identify the criteria for sending an automated response (i.e. "has not been contacted in seven days") and craft messages unique to your lodge (complete with custom branding!)

- **Create reports and dashboards:** CRM systems will remove the manual process of measuring performance metrics like total inquiries, average response time, number of calls/emails, time to conversion, and conversion rate. Better yet, they'll create visual reports that help everyone on your team easily understand how effective your follow-up efforts are.

5. SET GOALS

Freemasons are committed to self-improvement. This extends to our work in recruitment and follow-up. Set goals to unify Brothers' efforts and find opportunities to optimize. Some metrics to consider measuring include:

- Number of inquiries
- Number of applications
- Number of new members
- Average response time
- Average time to convert (whether a conversion means filling out an application or joining via initiation)
- Average open rate (for automated emails)
- Number of calls/emails/texts

Start by measuring or estimating your current metrics – create a benchmark. From there, brainstorm together what a reasonable improvement could look like. Measure your performance regularly, celebrate your successes, and collaborate on shortcomings to refine your follow-up process further.



Case Studies: How Follow-Up is Working in Freemasonry

You don't just have to take the Supreme Council's word for it – read what's working in recruitment marketing and follow-up at lodges and Valleys across the Northern Masonic Jurisdiction through case studies from fellow Brethren.

Our Case Study Council includes leaders from various lodges and Valleys in the NMJ who have implemented follow-up procedures with their local Brethren and are finding success. If you have questions or would like to learn more about their approach, contact our council leaders via email.

GRAND LODGE OF WISCONSIN

For questions, email: Brother Mike Burnham, Membership Committee Chairman, Grand Lodge of Free & Accepted Masons of Wisconsin, mike.burnham@wimasons.org

GRAND LODGE OF ILLINOIS

For questions, email: Brother Wayne Spooner, Grand Lodge Membership Committee Chairman & Grand Lodge Masonic Awareness Committee Chairman, Grand Lodge of Illinois A. F. & A. M. glccmemb@ilmason.org

GRAND LODGE OF OHIO

For questions, email: Brothers Jim Hall, Director of Programs and Keith Newton, Grand Secretary at the Grand Lodge of Free & Accepted Masons of Ohio
jhall@glohoio.com
GS@freemason.com

GRAND LODGE OF NEW JERSEY

For questions, email: R.W. Art Campbell, PGC, Chair for the Grand Lodge of New Jersey Membership Committee, Grand Lodge of New Jersey, Free & Accepted Masons
arthurjcampbell@outlook.com



CASE STUDY:

Grand Lodge of Wisconsin

Accountability, formalized processes, and empathy for their Brothers and prospective Brothers are key contributors to the Grand Lodge of Wisconsin's success in making follow-up a turn-key initiative. Using technology to organize, automate, and measure their efforts, these Brothers have created a replicable framework for Grand Lodges across the jurisdiction. Using this process, Wisconsin effectively manages an average of 120 inquiries each month.

WHAT THEY'RE DOING:

Trusting the role of a “District Membership Representative” (DMR), a highly-knowledgeable and friendly Brother responsible for conducting outreach to prospective Masons. DMRs receive prospects from a small team at the Grand Lodge that filters inquiries to ensure they meet the most basic standards of Freemasonry.

Personalizing the prospect's experience and creating a warm introduction to Freemasonry. DMRs learn enough about each prospect through follow up conversations to “make a marriage” with a lodge, introducing hopeful Masons to a lodge they believe would be the best fit.

Recording every inquiry and interaction in HubSpot, a customer relationship management (CRM) tool, so that leaders at the Grand Lodge and district level can understand: how many prospects are coming in, when and who is following up with them, what they discuss, and which prospects join.

Hosting bi-weekly standing meetings between the Grand Lodge and DMRs to hold each member accountable, evaluate their efforts, and continuously improve.

“The digital resources provided by NJAMAM have been nothing short of transformative for our membership recruitment initiatives. We've integrated these valuable materials across multiple platforms, including our Grand Lodge website, various digital marketing campaigns, and our social media channels. This integration has not only enhanced our online presence but also ensured consistent branding and messaging, which are pivotal in representing the esteemed values and traditions of Freemasonry.”

THE BOTTOM LINE: States can rise to the challenge of managing a high volume of inquiries when roles and expectations are set, and each team member is held accountable. Personalizing each follow-up interaction shows empathy for the prospect, enabling more successful outcomes, and shows respect for your Brothers' time, bringing them men who meet the qualities they seek.



CASE STUDY:

Grand Lodge of Illinois

The lessons from our degrees have demonstrated how perceptions can shape reality and motivation. Yet, have you considered how your Brothers' perceptions might influence their response to inquiries from prospective Masons? The Grand Lodge of Illinois has implemented a follow-up strategy that focuses on ongoing education for members at each stage, creating a high-functioning recruitment team.

“ *In Illinois Freemasonry, we are actively telling our authentic story about the amazing value that being an active and engaged Freemason can have on the lives of good men across the state. Using a combination of uniquely designed marketing approaches along with the resources provided by the ‘Not Just a Man. A Mason.’ marketing campaign, we are attracting interest from membership prospects and connecting them with local Masonic leaders for follow-up. That teamwork is helping to fuel the early stages of a Masonic Renaissance in Illinois.* **”**

WHAT THEY'RE DOING:

Reframing the opportunity of an online prospect. It may be surprising to note that, historically, prospects who inquire to join through an online query have been viewed as “spam” or deemed less worthy of membership. There was an unintentional perception in some lodges that men who inquire online won’t meet their standards for membership, with comments like “It’s a small town, how come I don’t know them?” Taking initiative to help members understand the varied approaches to research, inquiry, and communication across different generations is shifting this narrative.

Assigning clear roles and responsibilities to create a well-defined follow-up structure. A centralized team at the Grand Lodge qualifies prospects, who are then referred to a regional team for a recommendation to a local lodge based on the “best fit.” The Worshipful Master, Junior Warden, and Lodge Secretary are responsible for conducting follow-up outreach.

Creating a closed-loop process by operating with transparency. Every inquiry is tracked in a shared spreadsheet and all teams have access to this data. Lodges confirm communication with a lead, reporting to their “Assistant Area Manager,” a newly established role managing follow-up regionally. Data is consistently used to evaluate performance and make improvements.

Defining what “good” follow-up looks like by setting clear expectations on what their messaging should consist of, as well as when, where, and how often to communicate.



CASE STUDY:

Grand Lodge of Illinois (continued)

THE BOTTOM LINE: It's crucial to recognize that personal experiences and backgrounds can influence beliefs. Taking the time to kindly explain to Brethren why digital recruitment and follow-up are worthwhile, while implementing systems to encourage initiative, transparency, and accountability, can ignite motivation and unite Masons to support the growth of their Brotherhood.



CASE STUDY:

Grand Lodge of Ohio

Spotting the ideal individual, the “spark plug,” within Freemasonry is the key factor driving the Grand Lodge of Ohio’s Brotherhood growth. By leveraging the unique talents of their Brethren, they’ve developed a follow-up process rich in human touch. Initiated in 2019, this workflow empowers Brothers at all levels to take initiative, fostering positive effects throughout the recruitment funnel. As of this writing, Ohio’s process has helped welcome and raise over 600 Master Masons to their fraternity.

WHAT THEY’RE DOING:

Looking beyond leadership to pinpoint Brothers who can best serve as the warm welcome to Freemasonry. Recognizing that not every Brother is inclined toward follow-up outreach, they collaborate with district and lodge officers to identify passionate, friendly, and motivated Masons eager to undertake this crucial task. Brothers who are the “spark plug” of a lodge or district are particularly suited for this role.

Creating formalized roles to hold Brothers accountable and provide a sense of ownership. Ohio has “Prospect Managers” at the district and lodge levels, creating a clear order of operations and a team-oriented culture that inspires continual improvements to their workflow.

Guiding prospects to their “best fit” lodge by having District Prospect Managers conduct initial follow-up. District Prospect Managers personalize their outreach, asking pertinent questions and listening closely to facilitate a smooth hand-off to a Lodge that meets their interests and lifestyle. All interactions are logged in their system (Grand View) so one Brother can pick up where another left off, and prospects feel heard and valued.

Offering potential Masons a look inside the lodge by encouraging Lodge Prospect Managers to invite prospects to dinner or to hang out before a lodge meeting. This not only helps lodges better understand whether a prospect is fit to file a petition but also creates a welcoming environment for prospects. Potential new Brothers can find their understandable anxiety resolved as they meet the larger Brotherhood, ask questions, and see what Freemasonry is really all about.

“All of these positions – from the District Prospect Managers to the Lodge Prospect Managers – are volunteer positions. So, it can be difficult at times to get a Lodge motivated to work their Prospects. That is why it is essential that you get that guy who is a ‘Masonic Spark Plug’ to serve as that warm welcome to Freemasonry.”



CASE STUDY:

Grand Lodge of Ohio (continued)

THE BOTTOM LINE: Given the opportunity, support, and structure to succeed, outgoing Brothers passionate about Freemasonry can serve as remarkable leaders in recruitment initiatives. States can rally together to provide these opportunities, growing their Brotherhood in terms of size and skill set. Best of all, when Brothers are excited about their work, they'll go the extra mile and personalize their outreach to propel positive outcomes and experiences for new Masons.



CASE STUDY:

Grand Lodge of New Jersey

In 2018, only 48% of New Jersey lodges had a website, or had a website that had years-old content (i.e., outdated officers, events, and contact information). New Jersey was losing 1,000-plus members a year. Leveraging BeAFreemason.org for lead-gathering, the Grand Lodge of New Jersey formed four committees: Mentorship, Education, Membership, and Technology -- all aimed to recruit, retain, and restore members. Their efforts are proving fruitful, with 12,000 members strong and a clear path for future growth.

“Look at any company that is 100 years old ... look at Sears — they were all wiped out because the world changed, and they didn’t. Remember the Sears catalog? That went to everyone’s home and people loved it. When you look at Amazon today, you see that all Sears had to do was put that catalog online, and they would have been equitable with Amazon. But they didn’t want to... they dug their heels in and clung to the old ways.”

WHAT THEY'RE DOING:

Embracing Technology. Leveraging Grand View as their member management platform, NJ Grand Lodge’s Technology Committee sets up new member communication via phone, text, and email to ensure they receive a welcome. Days are tracked from the point of initial contact to follow up from the District Ambassador to the Lodge Ambassador.

Making Leaders Accountable. District Ambassadors are responsible for qualifying prospects to learn which lodge would be the best fit based not only on where a prospect lives and works, but his hobbies and interests. The District Ambassador then passes the prospect on to that specific Lodge Ambassador. If a District Ambassador feels the Lodge Ambassador has not followed up, the District Ambassador gives the prospect to another lodge instead.

Combining traditional and online outreach. In 2024, NJ Grand Lodge has plans to further leverage their social media outreach, particularly with Facebook and LinkedIn advertising. In addition to online outreach, they will hold two “old school” open houses. Master Masons who have gone through New Jersey’s Ambassadors program will serve as Ambassadors for those two onsite events. Leaders will conduct a post-event analysis to gauge attendance and determine whether open houses are a viable outreach program in the future.

Monitor, measure, and refine wherever necessary. The average age of prospects coming in through the Be A Freemason.org site is 36. NJ Grand Lodge’s Membership, Education, Mentorship, and Technology committees gather and analyze insights like these and work cohesively to ensure an optimal member experience for both new and long-standing Brother Masons. Success of recruitment efforts is based upon ROI of dollars invested.



CASE STUDY:

Grand Lodge of New Jersey (continued)

THE BOTTOM LINE: States can leverage both modern and traditional approaches to their recruitment efforts, so long as the success of each approach is effectively measured. Leader accountability is key to ensure prospect follow-up and evaluate wins and losses. If certain approaches prove ineffective, leaders must work cohesively to refine their strategies, keeping innovation top of mind.

We will maintain this list and e-book with regular updates as more resources and contacts are available. Have a success story you want to share with the Craft? Interested in being a resource and joining our Case Study Council? Email us at communications@srmnj.org.



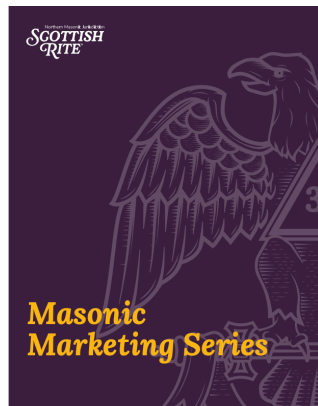
Resources for Lodges

The Supreme Council of the Scottish Rite, NMJ has been working with lodges and Valleys across the U.S. for years in developing and optimizing their own recruitment efforts – including follow-up. As such, we’ve built a library of resources, case studies, and contacts to help lodges better understand and commit to follow-up.

BEST PRACTICES:

Since the introduction of The Path Forward in 2016, the Supreme Council has created a number of case studies, articles, and e-books on how to market Freemasonry.

Visit our best practices library to explore our *Masonic Marketing Series*, a series of free, easy-to-follow e-books from the Supreme Council on everything from email to social media marketing tactics. These beginner-friendly resources are designed to empower Brethren to stoke Freemasonry’s visibility in their own lodges and Valleys.





Conclusion

Today, there is a tremendous opportunity to reinvigorate the Craft and secure Freemasonry's rightful place in American culture for generations to come. Men are more aware and interested in Freemasonry than ever before...but need help in beginning their path to the East.

Follow-up is necessary for every lodge interested in sustaining the Craft – and is simple to do. We hope these tips and ideas inspire you to help grow Freemasonry and fulfill the worthy mission of creating better men, in a better world.