



## How to Make Retention Phone Calls

Calling members and asking them to pay their dues can be one of the worst duties of any council. If a council sets the wrong tone for this initiative, it can be difficult (sometimes impossible) to get people willing to be a Retention Chairman or a member of the Retention Committee. Here are some tips and best practices the Retention Committee should review and adopt prior to starting to make phone calls and contacts.

### CALLER ATTITUDE

First, and foremost, it's important to approach these members in an attempt to **"retain"** these men and get them more active in council activities. We are a Fraternal society and are interested in the care and well-being of our members. Approach these calls focused primarily on listening and understanding the issues these men have and helping to solve and remediate these issues. Collecting dues "maybe" appropriate but it also may NOT be appropriate.

Have realistic expectations and don't project your personal situation on other members. It's perfectly OK for brother Knights to rarely (or never) attend council meetings. It's perfectly OK for brother Knights to participate in as little as one activity (program) each year. The Knights of Columbus should "complement" someone's life not "complicate" it.

In preparation, ask yourself the following questions. As you contact these men and have a dialog, you very likely will find opportunities to share the answers to these questions with these men.

1. Why did I become a Knight?
2. What do I get from being a Knight?
3. What have I been able to give as a Knight?
4. Speak from your own experiences as a Knight
5. Speak sincerely brother to brother

### PREPARATION

If you fail to prepare for these phone calls, you are preparing to fail. Have your act together and be ready for each phone call.

1. **Have the calendar of upcoming events** for your council at hand. You may very well have an opportunity to invite him to participate in an upcoming council event (program).
2. **List of charities and service to the community and church.** Men who are inactive and delinquent in paying their dues, are typically also unaware of what good things your council has done. Having a list of these contributions to your community and church will be valuable information you may have an opportunity to share. Don't try to share it all but potentially share some of the contributions that you believe are of most interest to the member.
3. **Review and understand the benefits as a member.** [Knights of Columbus Member Benefits \(kofc.org\)](http://kofc.org)
4. **Review and understand the items in the "How to Execute the Retention Process".** **Link = TBD**



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### THE PHONE CALL

OK. You've now got your list, dialed the first member and he has answered the phone. What do you do now???

1. **Be friendly.** It's not a good idea to try and make these phone calls if you're in a bad mood, had a bad day at work, or just had a fight with your wife. You need to be positive. You need to show you care about this member and you are interested in what is best for him and his family.
2. **Provide a brief introduction.**
  - a. Hi, I'm (provide your name) and a member of the Knights of Columbus (and provide your council name).
  - b. I'm a member of the Council health and welfare committee and part of my job is to check in on members periodically to ensure they are happy, healthy and doing well.
  - c. We haven't seen you in a while. If you have 10 minutes, I'd like to just have a quick check-in with you. I promise I'll keep this conversation short.
  - d. Is this a good time? If not, when would be a good time for me to call you back?
  - e. Then, listen and be prepared to respond. If he's willing to talk, keep track of the time and proceed to step 3. If he is busy, get a time to call him back and proceed to step 3 at that time.
3. **Start the dialog and focus on making sure he sees the Knights of Columbus cares about him and his family.**
  - a. We haven't seen you in a while and just wanted to check-in and ensure you and your family are OK.
  - b. With the covid-19 pandemic, are you guys all healthy? Has your work been impacted? I've spoken to a number of brother Knights that have been laid-off or have had their hours reduced.
  - c. *Listen to the response and listen for any issues. Eventually, he will state why he hasn't been more active and respond accordingly. Seen section on EXCUSES.*
  - d. If they are all good and have no issues:
    - i. Say your glad everyone is OK.
    - ii. Ask if there is anything him (or his family) needs from the Knights of Columbus. We are a fraternal organization and we take very seriously our role to support our brother Knights and their families.
    - iii. Tell him the council has a prayer list of members (and family) that are in need of prayers. We can pray for them if needed.
    - iv. It's OK, at this time, to remind him we haven't received his dues and you just wanted to remind him to pay them. Be prepared with the details (amount, who to send them to and the mailing address for a check). Try and get a commitment. *If there are issues, see the section on EXCUSES.*
4. **Wrap up the phone call.**
  - a. Tell him you appreciate the time he spent talking to you.
  - b. Summarize and action items from the call (things you agreed to do & things he agreed to do)
  - c. Tell him about a couple upcoming activities he may be interested in and when the next council meeting is.
  - d. Make sure he knows it's OK to not be involved "at this time" if he's busy. But, we'd very much appreciate his assistance when it fits his schedule.
  - e. Tell him you'll be in touch again sometime within the next year.
  - f. Give him your name & number and tell him to call you if he ever needs anything.
  - g. If you feel it's appropriate, validate his information including marital status, wife's name, home address, home, cell and work phone numbers and email addresses. To stay in contact, it's vital we provide this information to the Financial Secretary so he can keep membership records up-to-date, complete and accurate.



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### LEAVING A MESSAGE VIA VOICE MAIL

Be prepared that 70%-80% of the phone calls you make will role to voicemail. It may be no one is home. It may be they don't recognize your phone # and therefore don't answer. We'd ask that you try three times (on 3 different days over a few weeks) to reach each member.

#### First call.

Hi Brother \_\_\_\_\_, this is (*your name*) from the Knights. We have noticed that we have not seen you for a while and I just wanted to let you know that for whatever reason we are growing apart, we miss you and we want to stay in touch. Would you please give me a call at your earliest convenience at xxx-xxx-xxxx? Thanks! I look forward to hearing from you.

**Second call** – Try to make this call within 1 week from the first call. Also try to call at a different time and day from the first call. If your first call was on a Monday at 7pm, try calling the second time on a Saturday at 10am.

Hi Brother \_\_\_\_\_ this is (your name) from the Knights, just a follow up to my earlier message, I just wanted to let you know just how valuable you truly are to me as a brother Knight. Your brothers value so much that we have continued to carry your council membership because we don't want to risk you losing your accidental life benefit for yourself and your wife not to mention you not having to experience a break in your membership. Please believe me that this is not a call about dues past or present. It's like I said earlier, we miss you and we want to stay in touch. Please give me a call at xxx-xxx-xxxx? Thanks! I look forward to hearing from you.

**Third Attempt** – OK. You've made 2 calls with no one home and no response. It's time to try something different. Different people prefer different forms of communication.

1. Try sending him an e-mail. Hopefully your Financial Secretary has his email address and can provide it to you. The email should have a similar message. We haven't seen him in a while & just wanted to check-in and make sure everything is OK. Ask him to call you or reply to the email.
2. Try sending him a text message on his cell phone with the very same message.



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### EXPECT EXCUSES AND BE PREPARED TO RESPOND TO THEM

Here is a list of common excuses and some best practice responses:

1. I have “**no time**” to actively participate in the Knights of Columbus
  - a. **Empathize** with this concern saying things like...
    - i. We want the Knights to **complement** your life not **complicate** it.
    - ii. Many of our members lead busy lives. That’s why we let each member decide when and how to be involved, even if you can only participate once or twice a year.
  - b. Here are some **appropriate responses**:
    - i. He may already be doing things that “count” as member involvement. Being a member of the choir, being a Eucharistic Minister or reader at church or any participation in the Parish activities counts as participation.
    - ii. He “maybe” saying the current council activities don’t interest him. Ask him what type of activity would interest him. Explain that the council is always looking for new activities to provide to our members, our Church and our community.
    - iii. He “may” have a financial hardship and may be too embarrassed to admit it. Listen for clues and (if appropriate) discuss how the council cares for it’s members and frequently waives dues when members are laid-off or have some sort of a personal crisis.
    - iv. Without being too blunt... ask him if he’s really too busy to spend 2 hours a year helping those in need in our community.
2. I have a personal situation (**hardship**) right now that makes it difficult for me to remain a Knight.
  - a. **Empathize** with this concern saying things like...
    - i. No member is quit or be suspended for financial reasons. We are a fraternal organization and part of our mission is to take care of each other.
    - ii. If he’s willing to share his personal situation (hardship), empathize accordingly.
  - b. Here are some **appropriate responses** if he’s willing to share the details of his specific hardship:
    - i. **Financial Hardship** – Tell him we’ll waive his dues this year or he can pay if/when he can and be prepared to offer help like... (helping him find a job, add him to the Council’s prayer list, etc...)
    - ii. **Health hardship** – Tell him we’ll waive his dues this year or he can pay if/when he can and be prepared to offer help like... (visit him in the hospital, add him to the Council’s prayer list, offer assistance like mowing his lawn, bringing meals, etc...) Also, be knowledgeable about the “Relief of payment of dues” process [application for relief from payment of council dues and supreme and ... \(kofc.org\)](http://kofc.org) for members who are disabled and share this with the member if appropriate.
    - iii. **Spiritual hardship** – Some people want to quit because the Knights and/or the Catholic Church supports a specific teaching that he disagrees with. Don’t tell him he is wrong. One approach is to admit that you also don’t agree with every single teaching of the Church but you do agree with most of the teachings. Suggest he focus on what him and the Knights and the Catholic Church have in common and participate and support those things. I don’t like everything about my wife but the things I do love about her far outweighs her shortcomings. So... I remain happily married.
    - iv. Meanwhile suggest that he get more active in the council activities. Being active and helping those in need is substantially more important than paying dues.



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3. The Council no longer has a **building (Hall)** and that was my main reason for joining
  - a. **Empathize** with this concern saying things like...
    - i. It's unfortunate we were not able to maintain our building and hall. You miss it as well
    - ii. It's important for men to have a way to relax and spend time building fraternal relationships.
  - b. Here are some **appropriate responses**:
    - i. We do still get together and relax and spend time building fraternal relationships.
    - ii. It's actually great that we no longer have the burden, hassle, work and upkeep of the building.
    - iii. Most councils that move from a building to a church have a surge in activities and membership. Give us a year.
4. I have **moved and/or relocated** and no longer attend the same Church or live too far away.
  - a. **Empathize** with this concern saying things like...
    - i. I fully understand.
    - ii. It doesn't make sense to remain a member of a council that is impractical for you to participate in.
    - iii. It's hard for you to feel connected and involved.
  - b. Here are some **appropriate responses**:
    - i. We'd hate to lose you. Can I help you find a council near you that fits your needs?
    - ii. May I suggest you pay your dues for this year and let's focus on finding you a council that you can be involved in.
    - iii. We have a form of membership called an e-member. This is someone who is a member of the Knights of Columbus but is not a member of a council. The dues are less and you can still be connected, enjoy the benefits of membership, and participate in activities wherever and whenever you want.
  - c. **Note:** *This situation should never occur although we all know it does. If a Retention Committee is proactive, they should be aware and know when members move and/or relocate. It's best to get involved and work on transferring the men when they move and not wait until they decide to quit. Plus, when a man (and his family) moves, it's very comforting when a new council (close to the new home) calls him, invites him to meetings and events and welcomes him and his family to the new community/Parish.*
5. **I No longer want to be a member**
  - a. If possible, find out "**why**" he no longer wants to be a Knight. You really can't respond if you don't have any details. Ask him why he no longer wants to be a Knight. Let him do the talking. Find out what his concerns are and respond to those concerns
  - b. **Empathize** with this concern saying things like...
    - i. I understand. Whatever his concern is... it's a real concern and needs to be taken seriously.
    - ii. Make sure he knows you understand and empathize with his situation
    - iii. Maybe offer to pray for him and his concerns.
  - c. Here are some **appropriate responses** based on what the concerns are:
    - i. If he had a disagreement (run in) with another council member, maybe suggest he just avoid this person for a while. If his disagreement was with the Grand Knight, tell him the Grand Knight will step down within a year or two. Ask him to hang in there until a new Grand Knight is assigned.
    - ii. If his experiences with the Knights have not been satisfying, tell the member about your experience as a Knight, why you became a Knight, what you have gotten by being a Knight, what you have been able to give as a Knight. You should offer to get him engaged in different ways that would better fit his preferences and help him feel more fulfilled.
    - iii. If he doesn't see the value of being a Knight, review the benefits of membership & council activities.



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- iv. If he doesn't believe in the principles of the Knights of Columbus, my guess is he agrees with most of the principles but has a specific principle he strongly disagrees with. Remind him no organizations are perfect. Ask him to participate and be involved in the activities and principles he agrees with and avoid the activities that he finds offensive. (i.e. If he supports abortion, he can just not volunteer in pro-life activities. Instead he can focus on feeding the poor or whatever programs he does support).
- v. Suggest he consider his dues as a charitable donation with the idea that he will still get all the benefits as a knight (Columbian magazine, social events, family events).
- vi. Ask him to pray on it for a week or 2 and get back to you.
- d. If the member starts to get upset or angry, it's time to back off and accept defeat. Get him to provide you written notification that he wishes to withdraw from the Knights and you will process his request.



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### LOCATING LOST MEMBERS (THOSE WHO'S ADDRESSES, PHONE #S AND EMAIL ADDRESSES ARE INVALID)

Here are several free online tools to locate lost members. These tools have been more effective than only relying on the phone company's directory assistance. The percentage of contacts that I succeed in making has been greatly increased by accessing the following resources that are available to most everyone through the Internet.

1. <https://PeopleLooker.com> I am an app only free user, but my greatest number of successes in talking with members in arrears have come from this app. I have an android phone and was able to install the app from Google Play Store. It should also be available for iPhone users.
2. <https://thatsthem.com> This site was suggested for my use by the office of a Knights of Columbus Insurance General Agent. I find this to be a major source of phone directory and email information
3. <https://www.whitepages.com> This is the largest and most trusted internet source for people, businesses and phone numbers.
4. <http://www.yellowpages.com/whitepages> YP.com provides an extensive online white pages directory where you can find the person you're looking for.
5. <http://www.referenceusa.com/Static/LibraryLocator> To access the ReferenceUSA database, you need to be a member of a local library. It's a free service and there are many libraries in your area to choose from. Just enter your zip code at <http://www.referenceusa.com/Static/LibraryLocator>. Once you have logged onto the site, you can access the Residential Databases and choose "U.S. Consumers / Lifestyles". Use this database of over 271 million U.S. Consumers to locate lost members of your council. These records are continuously updated and processed against the USPS National Change of Address (NCOA) and Delivery Sequence File (DSF).

Your chances of finding a lost member will increase if you also try to find him on Facebook, Google, LinkedIn, Twitter, and other social networking sites.

Here are other suggestions:

- [thepublicrecords.com](http://thepublicrecords.com)
- [peoplelookup.com](http://peoplelookup.com) (\$\$\$)
- [intelius.com](http://intelius.com) (\$\$\$)
- [searchbug.com](http://searchbug.com) (\$\$\$)
- Contact the parish office for possible unlisted phone numbers and see if they are willing to share this information.
- Contact proposer for more information. The Financial Secretary should be able to provide you the name and contact information for the proposer.
- Use contact information from the admissions committee questionnaire.
- Contact your State Deputy Regional Representative (SDRR). He may have access to one of the paid services and can assist in looking people up.