



Building Better Communities

A ROTARY OCEANIA FUNDRAISING PROJECT

Project Setup Workbook

Rotary
ROZops Ltd
Oceania





Building Better Communities

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Club requirements for a successful implementation

1. POSITIVE MENTAL ATTITUDE

This project is an opportunity for your Club to embed itself solidly at the centre of your community by aligning itself with 20 (or more) businesses in your community. Your Club needs to be excited and positive about the project as it will lead to:

- A passive income for your Club
- A higher profile of Rotary in your community
- An increase in membership because your community understands more about Rotary and wants to participate.

2. DON'T PREJUDGE

Unless you own the business how do you know what their state of mind is. Let the business decide.

3. BE PROFESSIONAL

Make sure that you put your best foot forward when it comes to presenting the project to a potential business. Treat your presentation to a business like it was a business promoting a product to another business.

4. BE PROUD OF ROTARY

Rotary Clubs are not Social Clubs, your Club is one of 62,000 Rotary, Rotaract and Interact Clubs around the world made up of over 1,200,000 individuals who want to make their communities better. Be proud of Rotary and treat it with the respect it deserves when you present the project.

5. CHOOSE A CLUB CHAMPION

Have one person in your Club who is championing this project. Make sure that this person understands the project and is well supported by the whole Club. The role of the champion is not to do all of the work but instead to assemble a team and make sure that the best people in your Club are involved. There are several jobs that need to be done and so make sure that the best people in your Club for each task are involved.

- Booking appointments: who is the best at making appointments.
- Preparing the info pack: who has the computer skills to copy the letter and account application form and add your letterhead to it.
- Presenting the project to a business: who is used to doing this and will follow-up with each business.
- Allocate members to each business: they will be responsible for delivering the air fresheners and your Club's invoice to each business every month.



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6. USE SOCIAL MEDIA

Your Club will need to promote the businesses to your community via social media – most likely thru your local community page once or twice a month. A layout for the post is attached in the appendix. It is also important that your Clubs details be easily accessible on your social media page so that potential new members and businesses who want to get involved can contact you. Appoint a member familiar with social media to manage the pages and ensure that any messages are followed up quickly as first impressions count.

7. USE BRADFIELD'S DISTRIBUTOR

Bradfields distributor for your country will be running Q and A sessions over Zoom so that any uncertainties can be discussed. Alternatively you can email or phone them directly. Their goal is to make the setup of this project as smooth as possible for your Club.

8. HAVE FUN

This is an exciting opportunity for your Club to create a passive income, increase it's reach within your community and attract new members who want to help. While the setup of the project needs to be professional, it is important to remember that the activities within your Club should be fun and engaging and attractive to new potential members. Your Club is a group of like-minded individuals who enjoy each other's company and want to make your community better – celebrate this and enjoy yourselves doing it.





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General Questions about the Project

Can a Club have more or less than 20 businesses?

Yes – Counter Top Displays can be ordered in lots of 20.

It is important to remember that all businesses rely on having customers and so being held out to their community that they are helping to make it better is very attractive to them.

Can a business return unsold air fresheners?

No – it is important that the business is fully aware of the requirements before they agree to be part of the project.

Rotary Oceania's social media advertising is targeted at getting the businesses additional customers to purchase the air fresheners as they will not be available from any businesses not participating in the project.

There is also a reliance on the staff serving customers to promote the fundraiser as well.

- Is the project sticker prominently displayed
- Is the CTU in a prominent position – preferably on the counter
- Are the staff actively promoting the project – "Would you like to support Rotary?"
- The advertising is worthless if the public cannot find the product.

What commitment are we looking for from each business?

Having each business commit to the project for 12 months allows your Club to set up a standing order which reduces the workload for your President and Treasurer.

What if the business is part of a franchise or chain of stores?

These businesses still need customers and so are more likely to want to be associated with this project as it is about Building Better Communities which includes yours.

The only way to find out if they would be interested is to ring the manager and make time to go and present the proposal to them. The presentation must be done professionally as it may need to be approved at their Head Office. You may also find that managers have the discretion to sell products outside of the franchise inventory.

This is why each header card has its' own barcode so that it can be easily added to a business's Point of Sale system.

Imagine how you would feel if you weren't offered a chance to join the project and your competitor was.

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.



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Can a business approach Rotary?

Yes, they can either through Bradfields website or directly via your Clubs Social Media. Any enquiries through the website will be forwarded to your Club President.

What if a business only wants one CTU per month?

There is no rule that says that a business must take 2 CTU's per month. The goal is for your Club to pre-sell all of your CTUs before you place an order. If you can't pre-sell a full shipper reach out to your other Community Group Clubs and see if you can share a shipper between your Clubs. It is essential that all CTUs are presold before an order is placed.

Can we place one-off orders outside our standing order?

Yes, the standing order will supply the businesses that are participating and a one-off order will supply a special event where your Club wants to raise funds. A One-off order will arrive with your next standing order.

How will the business get its stocks each month?

Allocate a member to each business and have them deliver the new stocks and invoice each month.

This will put a face to Rotary and allow the members to build a relationship with the business.





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Questions to discuss about each business before adding them to your list.

Are they likely to be able to sell 1 air freshener per day?

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

Why would they want to be part of the project?

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

Is their community going to want to support the project?

The purchaser is receiving a long-lasting sustainable plant-based product for \$8 and they know that all of the profits are going back into their community to make it a better place. The header card will allow them to understand what Rotary is and how it is helping their community. Back in 2017 when the project was being developed, feedback from potential customers was that they welcomed the opportunity to support Rotary in a way that was similar to Lions Mints. Remember that ROZops will be advertising the project on social media platforms and creating awareness of the project.

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

Should I approach my local bar or hotel?

As long as the activity isn't illegal it is ok to approach a business as they are part of their community. A bar is often the social centre of a community and Clubs often meet at bars, hotels and Clubs. Make the decision from within your Club as to whether or not you approach them.

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

What if the business doesn't sell to the public?

They may have staff that they want to supply or they may want to supply their customers. Either way, they are part of your community.

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

What if...?

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

The business operates in our community but exports all of their production

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

I don't think that they would be interested

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

I think that they might only be able to sell 16 air fresheners per month – not 32

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

I think that most of them would be stolen in that business

The owners of the business may decide to give them away with large purchases and the businesses will treat them like any other product they purchase to sell.

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.



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List of businesses to approach

Fill out the list below with all of the businesses in each area and classification in your area. Your task at this stage is to fill in the blanks and not prejudge and decide anything at this stage of the process. It is important that the Clubs community may extend across many suburbs and towns. Include all of these on your list.

BUSINESS TYPE	BUSINESS	PHONE NUMBER	LOCATION	TO CALL Y/N
Auto Parts				
Bakery				
Bank				
Bar				
BookStore				
Bowling Club				
Churches				
Chemist				
Cleaning				
Community Centre				
Convenience Store				
Council				
Daycare				
Grocery				
Gym				



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BUSINESS TYPE	BUSINESS	PHONE NUMBER	LOCATION	TO CALL Y/N
Hardware				
Hire Centre				
Large Bus.				
Library				
Medical				
Music				
Nail Salons				
Paint Shop				
Phone				
Physio				
Plant				
Post Office				
Rental Car				
Restaurant				
Retirement				
RSA				
School				



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Review the List

Now that you have filled out the worksheet with all of the businesses in the areas and communities that your Club serves, it is time for you to start qualifying your list.

1. Go through your list and place on "N", in the column "To Call Y/N", next to every business that you know whose values and practices do not align with our Rotary Values. This is very subjective and based on local knowledge.
2. You now have your list of potential businesses to approach.

Select your Top 40 Businesses to Approach

You now have your list of potential businesses to approach and it is time to find your top 40 businesses from that list.

While you have not been prejudging up until this point it is important to have a level of common sense about which businesses you supply your air fresheners to.

1. Go through your list and place on "N", in the column "To Call Y/N", next to every business based on the whether or not it would have the potential client base to sell or use 1 air freshener per day based on the following criteria:
 - a. Your knowledge of the business
 - b. The size of the business
 - c. The retail presence of the business
 - d. The likelihood that the business might use the air fresheners themselves in their premises, staff and vehicle fleet. For example a car yard might include one with every car sold or serviced as a way to show their customer that they care about their community. This could apply to any business so if you are in doubt. Don't prejudge.
2. You now have your first list of potential businesses to approach.

You now have your first list of businesses to approach in your community.

After you have approached this list you may still be short a few businesses to completely allocate a 20 CTU shipper from Bradfields.

Simply start the selection process again as you have probably missed some businesses off your initial list or have been too harsh in your final culling of the list.

Remember that this is a long lasting Plant Based Air Freshener that is only available through this project. Other Bradfields Air Fresheners that are being sold are 100% plastic and perform the same as the Plant Based product.

Take for example a town that has multiple corporate service stations selling petrol and air fresheners. As a manager it would be important to me that I was part of this project as I would be seen to be supporting my community and the social media advertising should push customers towards my business because of this. Even if all of the service stations supported the project it is a win for everyone in the community and that business.



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Contacting the Business and Promoting the Project

How do I approach a business?

Once you have created your list of possible businesses it is time to approach each of them.

Points to remember before you start:

- Have you assembled the best team to make the appointments:
 - Are they used to making appointments over the phone?
 - Do they enjoy the process?
 - Do they come across as confident when they are on the phone?
- You are not representing yourself, you are representing your Rotary Club.
- Be proud of what you are doing.
- You are not looking for a decision straight away. **All you want is an appointment.**
- This is going to be the start of a great relationship between your Club and the business.
- This is an opportunity and a win/win proposition.
- Ask to speak to the owner or the manager.
- Use the power of silence, after you have said your statement, **WAIT FOR THEM TO ANSWER!**

DON'T PREJUDGE – make an appointment, present your proposal and let them decide.

Ring each business and make an appointment.

This is the most important part of the whole process as first impressions count. You need to be professional and friendly as the person probably doesn't know you but should be aware of Rotary at least by name.

Have the state of mind that the business owner or manager is busy – but so are you as you have a list of businesses to ring. Don't waste your time or theirs asking about their day or talking about the weather as it devalues Rotary and the Project. Stick to the script and focus on getting the job done.

Even if the person you are going to ring is your best friend, pay them and Rotary the respect they deserve and ring them and make an appointment as it frames the visit. It's very possible that because you are making the appointment, you are not going to attend the appointment and so your posture on the phone sets the mental picture of the Rotarian and Rotary – remember the Golden Rule - **the principle of treating others as one would want to be treated by them.** If you are happy and excited the business owner will be too.

Most of all – **BE YOURSELF AND HAVE FUN!**



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Appointment Script

Making an appointment is broken down into 4 Stages.

STAGE ONE

- Think about when you are going to make the calls – 30 minutes after they open is always a good time as the first meetings are normally over and they are settling into their day.
- Find a space to make your calls which is quiet and where you won't be interrupted.
- Have a list of available appointment times next to you so that you can offer an alternative time and be professional.
- Before you ring choose an appointment time which will be your "first offer."
- If you are unsure phone a friend and practice on them first.

STAGE TWO

The phone call is broken down into two parts.

- Get to speak to the decision maker
 - This is where your posture and confidence comes into play.
 - You are offering the business a great opportunity.
 - Don't beg or grovel – all you want is an appointment.
 - Do what a confident person would do if they weren't there:
 - Ask for their name
 - Ask when they would be available
 - Ask for their Cell Phone number.
 - If the person who answered asks what it is about reply with a statement and question.
 - "Our Rotary Club is running an exciting project called Building Better Communities which involves businesses in our community getting involved. At this stage, I am making appointments for Rotarians to come and present the project to businesses - Who would the best person in your business be to make an appointment with?"
 - Use the power of silence and wait for them to respond.
 - Note down the person's name.
 - "Would I be able to speak to _____?"
 - Ask when they would be available.
 - Ask for their Cell Phone number.
- **Go to the Close.**



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The Script

Part 1 – Finding the decision maker

Opening Phrase

You: "Hi, it's {First name} {Surname} here from the _____ Rotary Club.
Is your owner or manager available?"

Possible Replies

Them: "That's me!"

Go to the message.

Them: "Yes I'll just put you thru."

You: "Thankyou, would you mind telling me their name please?"

Them: "It's _____"

You: "Thankyou"

Go to the message.

Them: "They are not here"

You: "Thanks do you know when they will be available"

Them: "They will be back tomorrow"

You: "Would I be able to have their name please?"

Them: "Yes it's _____"

You: "Thanks I'll ring them tomorrow – is this a good time to ring?"

Them: "Yes/No – ring at this time"

You: "Many thanks I'll call back tomorrow"

Ring them back the next day and say that their staff that this was a good time to ring them.

Them: "They work from another branch"

You: "Would I be able to have their name please?"

Them: "Yes it's _____"

You: "Thanks can I also have their phone number and I'll ring them there"

Them: "Yes it's _____"

You: "Many thanks I'll give them a call."

Ring the other number and say that their staff said for you to ring them you this number.



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Them: "What's it for?" (many owners and managers have gatekeepers.)

You: "Our Rotary Club is running an exciting project called Building Better Communities which involves businesses in our community getting involved. At this stage I am making appointments for Rotarians to come and present the project to businesses - Who would the best person in your business be to make an appointment with?"

Them: "Yes it's _____"

You: "Thanks can I also have their phone number and I'll ring them directly."

Them: "Yes it's _____"

You: "Many thanks I'll give them a call."

Ring the other number and say that their staff said for you to ring them you this number.

At this stage you have reached the point where you are speaking to either the owner, manager or decision maker of the business.

The easiest way to get through your phone calls quickly is to try and get an appointment with whoever answers the phone – your success rate will be minimal because you have clearly conveyed to the business that you and your Rotary Club have no standing in your community as you were willing to blurt it out to anyone that would listen. Imagine as a business owner, how you would view a proposal that was offered to the person serving on the counter without any enquiry as to who the owner or manager was – naturally you would completely discount it as the fact that they couldn't take the effort to find the decision maker showed that you thought the proposal was worthless.

The Building Better Communities Project is an incredible opportunity for any owner of a business, big or small, as it is an opportunity for them to clearly tell their community that they care about it and what happens in it – and better still they are partnering with Rotary.

There are so many benefits for the owner:

- It doesn't cost them anything as they will recover all of their money through selling the air fresheners.
- Rotary Oceania's ongoing social media campaign will promote the project to their community and ask them to consider supporting participating businesses because they are proving that they care about their community.
- Your Club will regularly post a list of participating businesses on community pages.
- The product is plant based, long lasting and not full of plastics.
- The product is only available through participating businesses.
- Their business and staff get to have an alliance with a global service organisation.

Who wouldn't want to spend 10 minutes hearing about the project?



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Part 2 – The Message

Opening Phrase

You: "Our Rotary Club is running an exciting project called Building Better Communities which involves businesses in our community getting involved. At this stage I am making appointments for Rotarians to come and present the project to businesses in our community. Do you have 10 minutes for one of our Club members to visit you and present the project to you?"

Possible Replies

Them: "That would be great"

Go to the Close.

Them: "Can you tell me more about the project?"

You: "I'd love to but I would do it an injustice. This is a Club project and I'm focused on making the appointments. All I can say is that it is a win/win for everyone involved"

Them: "Let's make an appointment."

Go to the Close.

Them "I'm not sure if we would be interested?"

You: "I know that I would be if I owned a business, I think that it's a fantastic opportunity."

Them: "Okay let's make an appointment."

Go to the Close.

Them: "We don't support Rotary as we are members of Lions, Zonta or whoever."

You: "Great that means that you are familiar with service organisations. This project isn't about building a better Rotary Club but is about building a better community highlighting the businesses in our community that want to make it better. This is a win/win for you, your business and our community."

Them: "Okay let's make an appointment."

Go to the Close.

Them: "Sorry I'm not interested"

You: "Thanks for your time – have a great day."



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The Close

This is the final part of the call – remember all you are looking for is 10 minutes so that a Club representative can visit them and present the project proposal.

You: “Brilliant, how does _____ suit you?”

Basically you find a time from your list that suits them.

You: “Thank you for your time, Grant Drew from our Club will see you then.”

You have just made your first appointment – Congratulations!!!

Don't forget to complete the appointment form and pass it onto the Rotarian who will be visiting the business.



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The Appointment

This is what all of the work has been leading up to.

A chance for your Rotary Club to present a proposal to a local business owner and to get them involved in the Building Better Communities Project.

Points to remember before you arrive.

- You are not representing yourself, you are representing your Rotary Club.
- Be proud of what you are doing.
- You are not looking for a decision straight away, all you want is to present the information.
 - Some may decide on the spot to join
- They will still need to be followed up if they haven't sent you their Account Application Form and Order.
- Arrange for a second Rotarian to go with you to the appointment if need be.
- This is going to be the start of a great relationship between your Club and the business.
- This is an opportunity and a win/win proposition.
- Some businesses may only want 1 CTU and others may want more: this is OK.
- Make sure that the person has the decision making authority.
- DON'T PREJUDGE: make an appointment, present your proposal and let them decide.
- Have Fun!!!

Important Points

- Make sure that you have arranged a time to follow-up with them in the next few days.
- **ASK FOR THE SALE! Will you and your business support us and this project?**



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The Presentation Pack

The elements that you will need have been produced for you below and you simply just need to copy them and attach your Club logo and contact details to them.

Proposal Cover Proposal Cover to Proposal Cover - Appendix 1

This displays the window sticker that each business will receive

- Insert your Club name in the gaps provided.
- The business name.
- The date that the presentation is going to be made.

Cover Letter to Cover Letter – Appendix 2

This letter should be printed on the Club letterhead and signed by your Club President.

- Insert your Club logo at the top of the page.
- Your Club name in the gaps provided.
- Your Club contact details.
- Your Club meeting details.
- Your Club President's name and contact details.

Rotary Club Account Application Form to Rotary Club Account Application Form – Appendix 3

- Insert your Club logo at the top of this form.
- Your Club name in the gaps provided.
- Your Club email address at the bottom of the form.

Rotary Club Account Order Form to Rotary Club Account Order Form – Appendix 4

- Insert your Club logo at the top of this form.
- Your Club name in the gaps provided.
- Your Club email address at the bottom of the form.

Project Brochure for business owners to Project Brochure for Business Owners – Appendix 5

This will give the business owner an overview of the project.

Safety Data Sheets (SDS) to Safety Data Sheets (SDS) – Appendix 6

Bradfields website www.bradfieldmarketing.com has the SDS for each air freshener under the Rotary tab. Open and printout each of the four SDSs for the business owner and include them with your proposal.

There are 4 that need to be supplied:

- Fresh'n Cool
- Vanilla
- New Car
- Sandalwood



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The Follow-up

As agreed with the business owner it is important that you follow them up as you agreed as failure to do so is letting your Club and Rotary down.

Before phoning or visiting the business again as agreed, remember the following:

- You are not representing yourself, you are representing your Rotary Club.
- Be proud of what you are doing.
- This time you are looking for a decision: so expect a positive response.
- This is going to be the start of a great relationship between your Club and the business.
- This is an opportunity and a win/win proposition.
- DON'T PREJUDGE: make an appointment, present your proposal and let them decide

Three things may happen with the follow-up:

THEY SAY YES!!

This is the desired result and before you finish you need their commitment that they will complete the Account Application Form and the Order Form and return it to the email address on the forms who will then compile the information and:

- Pass it onto the Treasurer so that invoices can be prepared;
- Go to Bradfieldmarketing.com and place the order for your Club.

THEY SAY THAT THEY WILL WAIT AND SEE HOW IT GOES

This isn't a NO but still isn't where you want to be.

Discuss their situation with them and understand where they are coming from as it could simply be that 16 air fresheners per month is great but 32 is a stretch for them. If this is the case then get them to fill out the forms and only order 1 CTU per month. Make sure that the forms get sent to the email address on the form who will then compile the information and:

- Pass it onto the Treasurer so that invoices can be prepared;
- Go to Bradfieldmarketing.com and place the order for your Club.

If this isn't the case and they do want to wait and see, tell them that it is to do that however there may be an issue securing their air fresheners in future as they are delivered to the Club in 20 x CTU shippers and not 1 or 2 if they decide to join.

See how they respond accordingly with the best case being that you can re-connect in the future if you have air fresheners available for them once the project is up and running.

THEY SAY THAT ARE NOT INTERESTED

Thank them for their time and ask them to encourage their staff and friends to support the project by purchasing the air fresheners from one of the participating businesses as the goal is to help make _____ a better community.



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How do I open an account with Bradfields?

Before you can place an order you need to sign up for an account with Bradfields.

There are rules attached to each account:

1. Only one account per Club.
 - a. Only the Club President and Treasurer will have access to the account with oversight being given by the holder of the Club email account
 - b. In order to open the account you need to know certain things about your Club and yourself.
 - i. Club RI number
 - ii. Club email address
 - iii. President RI number
 - iv. President email address
 - v. Treasurer RI number
 - vi. Treasurer email address
 - c. When your Club first signs up for an account the applicant will have to choose whether they are the President or Treasurer.
 - d. They need to enter the Clubs details along with theirs and the email address of the other officer.
 - e. The other officer will then be sent an email inviting them to set themselves up on the system.
 - f. Both officers will need to upload a photo of their signature as well.
2. Once all of the information has been input and uploaded Bradfields will confirm the existence of your Club by confirming that the 3 RI numbers all relate to your Club.
 - a. This information is only obtainable if you have access to your RI information
 - b. All three email addresses will be notified when your account has been approved at which point you will be able to place an order.
3. Every time there is a change made to your account or order all three email addresses will be notified.
 - a. This is designed to create transparency within the Club officers.
4. Bradfields Terms of Trade (Appendix 6) need to be accepted as well.
 - a. All Rotarians understand the ethics surrounding your actions, Financial Institutions don't and so Bradfields is required to have a robust set of terms and conditions.

Go to the Bradfields website & open the Rotary Tab & sign-up for your account: www.bradfieldmarketing.com/rotary



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How do I place an Order

Once you have had your account approved your President or Treasurer is able to sign-in to your account thru the Bradfields website.

1. Sign into your account
2. Select Order Form
 - a. There are two important parts on the order form.

Delivery Address

- b. It is important that a business address is used so that someone will be there to accept the delivery & sign for it.
 - i. If your Clubs order is delivered to a residential address and the goods are stolen from your porch.
 1. The months order WILL NOT be replaced
 2. Your Club will miss out on their months profit
 3. Your District and Sponsoring Rotary entity will miss out on their royalties
 4. Your community will miss out on their ability to support your Club and Rotary
 5. Bradfields will recover their costs through their insurance company
 - c. The bottom line is that your Club has enlisted the support of 20 businesses in your community
 - i. Reach out to one and have them be your Clubs delivery address
 - ii. If you don't and the order is stolen your community will doubt to ability to do anything for them.

All Air Fresheners have been Sold

- d. Before you can complete your order you need to confirm that all of the air fresheners have been sold.
 - i. This project is designed so that your Club reaches out to your community and gets an order for air fresheners each month from businesses in your community.
 1. Each business commits to receiving their order each month for a minimum of 1 year.
 2. This means that your Club can setup a standing order so that the administrative overhead is reduced.
 3. The three registered emails for you Club will be notified each month prior to orders for the month closing which is when they can modify your standing order or place a one-off order.
 - ii. It is at this point in the project where the selection of your Clubs team to setup the project is vitally important.
 1. If a Rotarian wants to support the project by purchasing an air freshener they will need to go to a supporting business to do so.
 2. There should be no air fresheners left over for the Club members to purchase.
 3. Once your order has been placed or modified all an email will be sent to all three email addresses associated with you account.

It is important that you make full use of your Bradfields Distributor and attend their ZOOM Q & A sessions or contact them directly.