

Membership **Retention Kit**

Best practices (and communication templates)
to get your members to STAY

Member retention is the engine that keeps your organization running... but is your renewal process up to the task?

In this kit, you'll find ideas and checklists for each stage of a member's journey to renewal, communication best practices, and email and letter templates to help automate some of those recurring tasks.

Click here and download our sample content kit to follow along!

As you're reading:

Use the sample email and letter templates provided in this complementary PDF as a reference. Easily customize each section to best communicate with your members!

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Month 1

Welcome



When a member first joins, it's important to reach out to them in a timely manner. Be proactive and extremely responsive (you want to start off on the right foot, after all!). That said, you don't want to come across as spammy, so spread your communications out, at least a little bit.

► **Send a welcome email with login credentials to the members-only portal.**

Need some ideas? Download a few sample emails below.

► **Post a hearty welcome on your website.**

Not only will this promote your new members, but it will give them content to share on their own social media channels as well.

► **Follow up with a phone call.**

Within a week of sending login credentials, contact all of your new members who have NOT accessed the members-only portal. (You want to make sure they're not having login difficulties.)

► **Use social media to welcome your new members.**

A quick tweet or Facebook post garners the attention of your new members and gives them that "VIP" feeling. (Who doesn't love a shoutout?!)

► **Prepare to welcome your new members in your next newsletter.**

Keep a running list of all your new members (particularly as they fall between newsletters) and make SURE you don't forget anyone.

Send a welcome email with login credentials to the members-only portal. Need some ideas?

Download a few sample emails!

See page 2 in the sample content kit.

Month 1

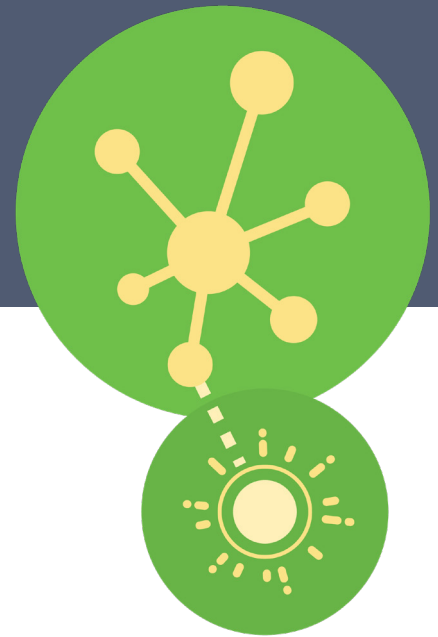
Checklist



- Send a welcome email.
- Post a special welcome message on your website.
- Follow up with a phone call.
- Use your social media platforms to welcome new members.
- Welcome new members in your newsletter.

Month 2

Connect



This month is all about deepening the connection you have with your new members and strengthening their sense of belonging within your organization. Take some time to create personal (and unique) touch points for your new members.

► **Write and mail a personal note.**

Among all the emails, texts, and letters with digital signatures, a simple handwritten note can really stand out. Not sure what to say? Download our sample note from the link below.

► **Schedule a ribbon cutting, open house, and/or other celebratory events.**

Market the event(s) on your website, social media channels, and via email. Your goal should be to introduce your new members to as many current members as possible.

► **Set up a forum or other personalized area just for new members.**

Every week, engage your new members in conversation, answer their questions, and share announcements (via a new-members-only circle). The more you initiate conversation, the more they'll likely partake.

► **Introduce them to a member ambassador.**

If possible, match your newbies with current members who have similar interests and/or expertise. This kind of mentoring can help your new members get acclimated (and engaged) at a quicker pace.

► **Make a special delivery.**

Surprise your new members with a special delivery! If you hosted an event (for example, the ribbon cutting), bring a framed photo or a special plaque. Other ideas: A branded mug filled with candy, or free tickets to an event with a welcome note from the president.

Download our sample welcome note!

See pages 2 – 5 in the sample content kit.

Month 2

Checklist



- Send a handwritten welcome note.
- Schedule and promote a celebratory event.
- Invite to a new-members-only forum.
- Introduce to a member ambassador.
- Make a special delivery.

Month 3

Engage



To boost retention, it's crucial to engage your new members as soon as possible. Use month three to make sure your first two months' strategies were successful. By the end of month three, you should have welcomed, connected, and engaged with new members in a way that's meaningful to them.

► **Post pictures from your celebratory events.**

If you hosted any new member celebrations, post about them on social media! This is a great way to keep that excitement (and engagement) going.

► **Follow up with your member ambassadors.**

Call or email your member ambassadors to see how things are going and if there's anything you can do to help them engage your new members.

► **Send a postcard of upcoming events.**

Send your new members a postcard with a calendar listing of upcoming events. This will be a great resource for them to reference in the future.

► **Reach out.**

Call your new members to discuss — one-on-one — how their membership is going so far. Mention upcoming events, referrals, and specific ways to get involved. (If they haven't attended a new member orientation yet, this is the perfect time to sign them up.)

Month 3

Checklist



- Post pictures from celebratory events.
- Follow up with member ambassadors.
- Send a postcard of upcoming events.
- Reach out via phone call.

Focus on retention

Survey your members

Your new members are now active members, and that means it's time to pull out all the stops. Retaining members is less expensive (and time-consuming) than obtaining new members, so it's important that you do everything you can to keep the ones you have.

You've promised a number of benefits, so now you need to know if you're delivering satisfactorily. Surveys are an excellent way to find out if you're meeting member expectations — and find out how to improve if you're not.

Don't have time to create and conduct the surveys? Ask volunteers for help! And to garner more interest, try sending different types of surveys (short, long, open-ended, close-ended, etc.) throughout the year. See some examples on the pages that follow.

► **A short survey** is good to have on hand at meetings or other brief encounters with members.

Short, preference survey

How many events did you attend in the past 12 months?

- 0-2
- 3-5
- 6-10
- 11-15
- 16-20

When you don't attend events, what are the reasons why? (Mark all that apply.)

- Inconvenient place
- Inconvenient time
- I forget
- Something comes up at work
- Something conflicts at home
- Not interested in the topic
- Other reason: _____

As a member, are your expectations being met?

- Yes
- Sometimes
- No

What can we do to better meet your needs? (e.g. topics, timeframes, etc.)

During which times, Monday through Friday, are you most able to attend meetings?

- Early morning (6-8 am)
- Mid-morning (9-11 am)
- Lunch (12-2 pm)
- Late afternoon (3-5 pm)
- Early evening (6-8 pm)

10-minute survey

▶ A 10-minute survey

isn't exhaustive, but it will allow you to dig a little deeper into your members' interests without taking a significant amount of time.

Rate our benefits on a scale of 1 to 5, with 1 being least valuable and 5 being most valuable.

- Networking with other members
- Continuing education
- Annual conference
- Legal advocacy
- Small business resources
- Guest speakers
- Other: _____

Detailed annual survey

▶ A detailed annual survey

requires more time than shorter surveys, so be sure to let your members know why capturing this type of information is important.

Thank you for your membership!

As a member, you play an important part in our planning process. We are preparing for an upcoming planning session, and we want to hear from you! Your valuable input will be used as we plan upcoming initiatives. Please take the time to respond to this important survey. Members who take the survey will automatically be entered to win a \$100 gift card (you must include your contact information to qualify for the drawing). Survey results will be shared with you, but your specific details, comments, and individual responses will remain confidential.

Thank you!

John Smith, *President & CEO*

Susie Jones, *Incoming Board Chair*

Focus on retention

Survey best practices

- **Conduct short surveys and polls** during your events while you have a captive audience.

- **Present long surveys less frequently** to avoid survey burn-out. Also, make sure you don't put too many questions on the first screen/page to cut down on your abandon rate.

- **Consider using an online survey process** to make it more convenient for your members to complete on their own time. Doing so will also make the data analysis much easier for you.

- **Get member volunteers involved in the process.** This will save you time and give your volunteers a chance to engage and contribute to the improvement of your organization.

- **List membership benefits** and have members rank the value of those benefits. Knowing what your members value most will be helpful when developing your marketing plan and future programming.

- **Don't assume members will automatically understand** the importance of your surveys. Always tell them why you need their input.

- **Help respondents be specific.** Include "Not Applicable" as a possible response to survey questions or add an "Other" field for further explanation. This will prevent skewing your data with a false positive for another choice on those questions.

- **Experiment and learn from your surveys.** Make adjustments to the wording of your questions, the order of your questions, the number of your questions, etc. as you see how people respond.

- **Address negative feedback.** Route negative feedback to the proper department or person so that they may work out the situation.

- **Provide incentives** such as gift cards to encourage participation in your surveys.

Focus on retention

How to demonstrate your benefits

Use your communication channels to remind members of all your benefit offerings.

You send newsletters, emails, postcards, event invitations, and mailed notices (i.e. invoices/statements). You speak from the podium, on the phone, and one-on-one. Use ALL of these opportunities to communicate the immense value your association provides. Check out these examples!

ORA MEMBER BENEFITS

ORA STRATEGIC PARTNERS

ORA ASK THE ATTORNEY

ORA MEMBER BLENDER

ORA RESTAURANT EDUCATION SERIES

SEVERE SAFETY

UNITEHEALTHCARE

ORA'S 25-YEAR PLATINUM MEMBERS

ORA'S NEW MEMBERS

Your newsletter or magazine

Dedicate a small portion of your newsletter and/or quarterly magazine to highlight (bullet point) your member benefits.

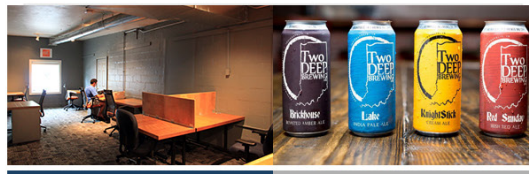
Your weekly email brief



All Things Entrepreneurial

Nearly 1.2 million Hoosiers are employed by a small business, with more than 97 percent of all Indiana businesses being classified as small. Entrepreneurship Week shines a light on those trailblazers who turn their passions into reality and are igniting Indiana's economy. Read more about how you can get involved.

[LEARN MORE](#)



Collaborate & Listen

Coworking spaces across the state are fostering home-grown entrepreneurs and attracting new talent, fueling the fire of Indiana's future economic success. Creative and collaborative environments, coworking spaces are changing the entrepreneurial landscape!

[LEARN MORE](#)

TwoDEEP to Turn Back

After cracking open his first two home brew bottles, TwoDEEP Brewing Company founder Andy Meyer knew he was in too deep to turn back on his love for home brewing. Hosting our upcoming [Lagers and Leaders](#) event, TwoDEEP has been a big hit in Indy!

[LEARN MORE](#)

MEMBER NEWS

- [Celebrate Entrepreneurship Week with Ping Pong Tournament June 22](#)
- [IU Health Plans saves \\$1.7 million for Wayne Township Schools](#)
- [2016 Status Check: Is your growth goal for your company on track?](#)
- [DWD Technology Group Named to Bob Scott's Insights Top 100 VARs](#)
- [Volunteers Brighten Up Northwest Way Park in Indianapolis](#)
- [Eleonora Anastasia Scipio Receives Prestigious Industry Award](#)
- [Professional Coaching Conference June 23-25](#)
- [Axia Technology Partners Offering Network Security Seminar](#)



Lagers and Leaders

THURSDAY, JUNE 23, TWODEEP BREWING, 5:30-7:30 PM

You won't want to miss our next installment of Lagers & Leaders as we welcome Betsy McCaw of Central Indiana Corporate Partnership and 16 Tech Community Corporation Inc. and Danielle McDowell of the Speak Easy as they discuss the present and future of Indy's innovative ecosystem. Raise a glass to innovation!

[REGISTER TODAY](#)

MARK YOUR CALENDARS

- AUGUST 4, 2016
- CONEXION
- AUGUST 9, 2016
- FORWARD
- AUGUST 18, 2016
- PLACES & SPACES BIKE TOUR

- JULY 7, 2016
- KEYS TO GOVERNMENT CONTRACTING
- JULY 21, 2016
- WOMEN OWNED SMALL BUSINESS ADVANTAGE
- AUGUST 23, 2016
- HOW TO GET CERTIFIED WITH THE CITY, STATE, AND FEDERAL GOVT

[FULL 2016 EVENTS CALENDAR](#)

Networking opportunities and free promotion of member-hosted events

Business resources and member highlights

Member news

Speaking series and continuing education

Upcoming events



LET US HELP **CONNECT THE DOTS.**

IT'S ALL ABOUT CONNECTIONS. Our events calendar was created with one goal in mind: providing Indy Chamber members valuable opportunities to build relationships and grow their business. We enable this in a variety of ways - through education, advocacy, networking, visibility and professional development. There's no single way to utilize the Indy Chamber...there's only *your* way.

WOMEN IN BUSINESS RETREAT

FEBRUARY 11-12
CONRAD INDIANAPOLIS
TWO-DAY CONFERENCE

Indy Chamber **ANNUAL EVENT**

WEDNESDAY, APRIL 27
SCOTTISH RITE
5:30-8:30 PM

HOBNOB CANDIDATE FORUM

THURSDAY, SEPTEMBER 1
CROWNE PLAZA INDIANAPOLIS
DOWNTOWN UNION STATION
5:00-8:00 PM

LEADERSHIP EXCHANGE: TWIN CITIES

SEPTEMBER 25-28
BY INVITATION ONLY



MONUMENTAL
AWARDS

THURSDAY, OCTOBER 20
THE INDIANA ROOF BALLROOM
5:30-8:30 PM

PLACES & SPACES
BIKE TOUR
8/18

REGISTER TODAY AT INDYCHAMBER.COM/EVENTS

Your event postcard

Event postcards can serve as a great reminder that you're providing value through solid programming. Make sure to list dates, times, and of course, the call-to-action (or registration URL).

Your invoice

A great way to tie the benefits of membership to annual dues is to visually display the value of their investment directly on their invoice. Take a look at your AMS to see what options you have for adding customized graphics to invoices!

Mr. Richard Broider Creative Web Technologies 8230 Old Courthouse Rd 123 Main Street Claremont, AB T4N 5A9	Customer ID 169	Invoice No. 2206 Date Due 08/17/2006
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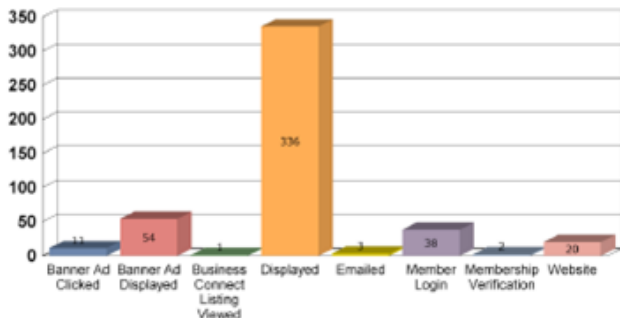
Item/Description	Qty.	Rate	Amount
Gold Dues	1.00	0.00	750.00
Total			750.00
Amt Paid			0.00
Balance Due			750.00

A finance charge of 5% will be applied to all outstanding invoices after 30 days.

Thank you for your membership at the Gold Level during the past year. Below is a summary of some of the benefits received during this time.

Referrals received from the Chamber in the past year:

Value of referrals: \$1,200



Category	Count
Banner Ad Clicked	11
Banner Ad Displayed	54
Business Connect Listing Viewed	1
Displayed	336
Emailed	3
Member Login	38
Membership Verification	2
Website	20

Benefit Programs Utilized:

Office Depot Discounts
Appr. Amount Saved: \$575

Health Insurance Program
Appr. Amount Saved: \$3,500

Brochures in Chamber Lobby
Appr. Value: \$860

Events Sponsored:

Annual Golf Tournament @ \$500 Value: \$1500

Exclusive Content Accessed:

Small Business Survival Guide - 2 times
Communications Tool Kit - 1 time

Government Affairs Efforts:

Defeated new business tax
Appr. savings to your business: \$1500

Looking for even more benefits from the Chamber? Upgrade your membership to the Platinum level to receive:

- Free full page ad in Chamber newsletter each quarter - \$2,000 Value
- Breakfast with Chamber President twice a year - \$100 Value
- Free admission to all luncheons and mixers - \$500 Value
- Plaque in Chamber office lobby - \$5,000 Value

Focus on retention

Retention best practices

- **Record preferences.** Survey your new members to better understand their communication, availability, and topic preferences. Be sure to keep track of this information in your AMS so it's always easy to refer back to!

- **Encourage profile accuracy.** Remind your new members how important it is to keep their information up-to-date. Updated profiles ensure continued (and accurate) communication with your association.

- **Show value-added in all communications.** Whether you're sending emails or invoices, you should be able to demonstrate the benefits that you regularly provide in exchange for membership.

- **Periodically send promo items** imprinted with your logo. Giving your members something nice to wear or put on their desks will keep your association top-of-mind.

- **Use reports.** For example, show your members how you're helping web visitors find them through website referrals. Keep a link to referral reports in your members-only area so they can easily access these valuable reports at their convenience.

- **Thank and recognize your members** as often as possible on your website, on social media, and in person. Specific milestones in their membership are a perfect opportunity for this.

- **Call your new members and/or send an email,** encouraging them to visit your website and access all of those members-only resources. Keep login information handy, in case a new member has forgotten theirs.

Focus on retention

Using your AMS for retention efforts

Many AMS platforms have a variety of features that can help with membership retention. Use the software to your advantage!

► **HTML email templates.**

In your AMS, set up eye-catching templates that you can use for recurring email communications.

► **Profiles and contact records.**

Track all contact you have with members and non-members alike. You can see how many contacts have been created and what communication touch points have been made in any profile.

► **Project templates.**

It's very helpful to be able to schedule and automate tasks. If you create project templates, you don't have to recreate every step of your planned communications for each member.

► **Affiliations or saved searches.**

The ability to parse, or sort, your data is highly valuable when you are sending mass communications. You don't want to send everything to everyone, so affiliations/saved searches allow you to filter your profiles by any criteria or attribute you can think of, and then send targeted communications specifically to members within an identified affiliation.

► **Measure retention.**

Use the reporting feature to track membership renewals by both individuals and dollars.

Renewal countdown



90 DAYS



90-day communication

90 days before expiration, send a soft email. This email simply alerts members of the upcoming expiration date and serves as a reminder of the benefits their membership provides. This is also an excellent time to check in with your members and ensure they're happy and engaged. (If not, you still have time to fix that!)

45 DAYS

30 DAYS

15 DAYS

EXPIRATION DAY

-30, -60 DAYS

-90 DAYS

Download the email template here!

See page 6 in the sample content kit.

Renewal countdown



Thank you for being a valued member.

45 days to renew!

90 DAYS

45 DAYS

30 DAYS

15 DAYS

EXPIRATION DAY

-30, -60 DAYS

-90 DAYS

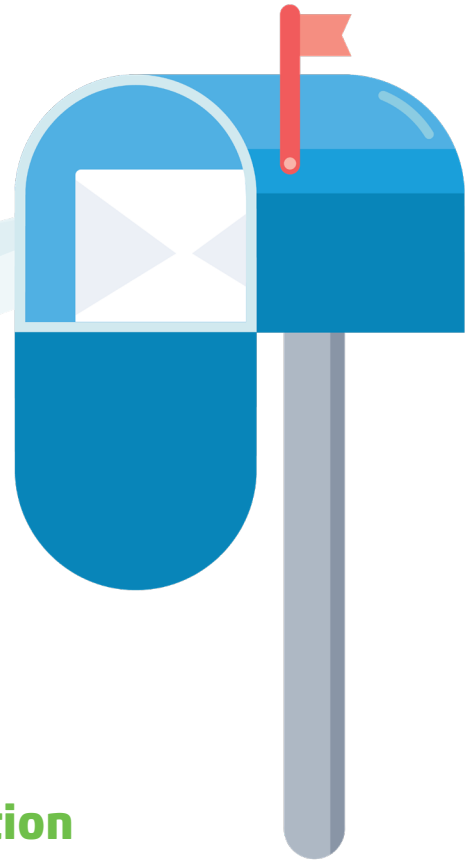
◀ **45-day communication**

45 days before expiration, send a letter from a leader in your organization. Along with thanking your members, your letter should outline current (and possibly even future) benefits — and, of course, remind your members of their upcoming membership expiration date.

Download the letter template here!

See page 7 in the sample content kit.

Renewal countdown



90 DAYS

45 DAYS

30 DAYS

15 DAYS

EXPIRATION DAY

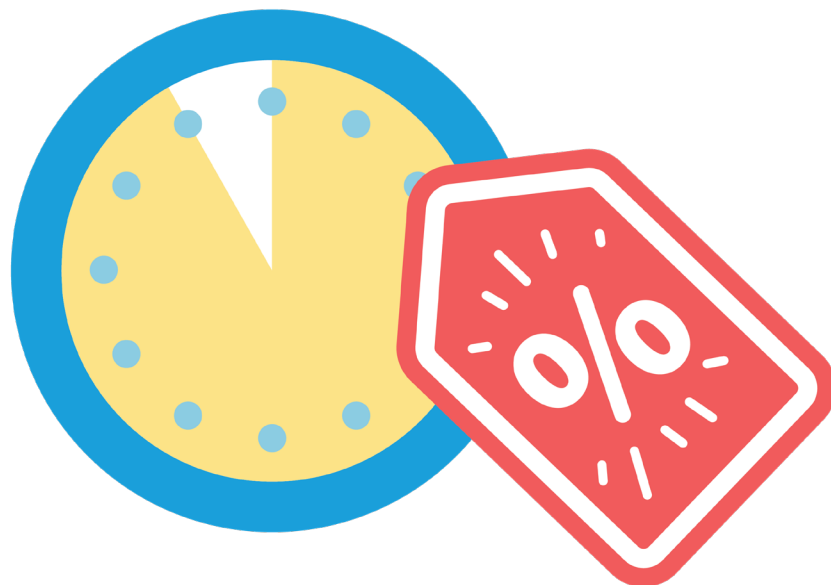
-30, -60 DAYS

-90 DAYS

30-day communication

30 days before expiration, send a direct mail piece. Consider outsourcing the design for your postcard to increase the read rate. Highlight your association's benefits and maybe even offer something small, such as a restaurant gift card or a t-shirt, for renewing early.

Renewal countdown



90 DAYS

45 DAYS

30 DAYS

15 DAYS

EXPIRATION DAY

-30, -60 DAYS

-90 DAYS



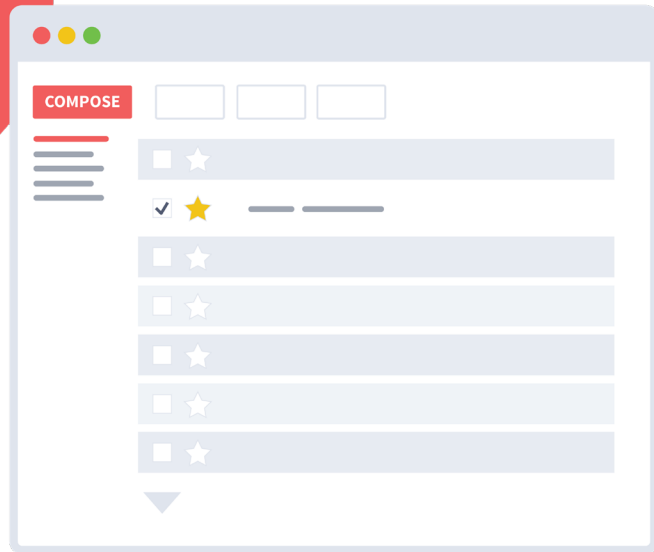
15-day communication

15 days before expiration, send an email reminder. Consider deeper incentives, such as a percentage off for early renewal or a discount on conference registration.

Download the email template here!

See page 9 in the sample content kit.

Renewal countdown



90 DAYS

45 DAYS

30 DAYS

15 DAYS

EXPIRATION DAY

-30, -60 DAYS

-90 DAYS



Expiration day communication

The day of expiration, send a morning email and follow it up (if you can) with an afternoon phone call. For one reason or another, many members will wait until the last minute to renew. Do them a favor and remind them on that last day — just in case they forget. You may even want to offer a lower renewal rate for your non-first-year members, so there's an extra incentive to renew year-after-year.

Download the template here!

See page 10 in the sample content kit.

Renewal countdown



90 DAYS

45 DAYS

30 DAYS

15 DAYS

EXPIRATION DAY

-30, -60 DAYS

-90 DAYS

30-days-past-due communication

30 days after the renewal expiration, send a postcard. Let your non-renewing members know that you noticed their absence and re-emphasize current member benefits. Let them know that you understand how “things happen,” but that you’d love for them to renew as soon as possible. You may even want to leave your contact information in case there are special circumstances preventing them from a timely renewal.

60-days-past-due communication

60 days after the renewal expiration, give non-renewing members a call. Let them know you’ve noticed they haven’t renewed and check in to see if they received all the benefits they were promised upon becoming a member.

Renewal countdown



90 DAYS

45 DAYS

30 DAYS

15 DAYS

EXPIRATION DAY

-30, -60 DAYS

-90 DAYS

Download the email template here!

See page 11 in the sample content kit.

◀ 90-days-past-due communication

90 days after the renewal expiration, send an email. This email should serve as a final notice to non-renewing members.

Renewal templates

Drop letter communication

Within 30 days of the final email notice, mail the drop letter. In it, express your regret in losing them as a member and remind them of all the benefits they'll no longer receive.

Dear Sarah,

You will be missed!

We regret to inform you that your membership with the Association of XYZ has been cancelled.

We want you to be informed that as a result of your non-membership status, your organization will no longer have access to the many benefits a membership, including:

- Networking opportunities
- Education, training and certification
- Business and industry development
- Legislation

Download the complete letter template here!

See page 12 in the sample content kit.

Renewal templates



GPSolo: Where You Belong
FAQ: Renewing Your Membership

Why should I renew my GPSolo membership?

Your GPSolo membership matters to every solo, small firm and general practitioner lawyer. When you renew, you receive exclusive benefits to thank you for your ongoing Membership. You also enjoy the satisfaction of helping to support a broad range of GPSolo initiatives.

As a member, what benefits will I receive?

All members receive a subscription to *GPSolo* Magazine, *GPSolo eReport* Newsletter, free monthly virtual Brown Bag Sessions, 32 substantive Committees to choose from, CLE programs, SoloSez, and various **Members-only** special offers and invitations.

I have already renewed but continue to receive renewal reminders. Why?

If you receive a renewal reminder after sending your payment, it's possible that your payment was not processed until after the date the reminder was sent. Please [contact](#) the ABA Service Hotline at **800-285-2221**, Monday–Friday, 9:00 a.m.–6:00 p.m. ET.

How do I renew my membership online?

Please renew [here](#).

Are my dues tax deductible?

You should consult your tax professional for advice. Generally, ABA dues are **not** eligible charitable deductions. For many tax filings, dues are 97.5% eligible as business expense deductions.

Retention webpage

Dedicate a page on your website to all things renewal. Here, you can highlight member benefits, answer frequently-asked questions, and link directly to the renewal application.

Email best practices

■ **Be cautious of certain words and characters** such as \$\$\$, Free, !!!, and ALL CAPS. These can sometimes trigger SPAM filters.

■ **Use actionable calls-to-action** such as *Register for Morning Meetup* and *Download New eBook* in your subject line to increase open rates.

■ **Create a sense of urgency.** Subject lines such as *Registration Closes Tomorrow*, *Discount Expires Friday*, and *Limited Seats Available* all encourage a speedy response.

■ **Place calls-to-action in the top one-third of your emails.** You want to get your point across first, then list out the details.

■ **Use a simple, clean layout.** That way, you can test your messaging knowing that the design isn't a factor in the email's performance.

■ **Be clear about what action you want them to take.** *Register Today* and *Download eBook* are much more obvious calls-to-action than *Submit Now* or *Click Here*.

■ **Make offers clear.** Be transparent about what they will receive — continuing education credits, networking opportunities, an eBook, or webinar access.

■ **Limit time of offer availability.** Doing so will encourage your members to act more quickly than if the offer was ongoing.

► Research your bounces.

If members aren't getting your emails, they likely aren't reaping the benefits of membership.

If any of these retention tactics seem overwhelming, remember: an AMS can assist with most of them. With an AMS, you can set up one-click renewals, send out personalized and automated dues renewal reminder emails, toggle between your active, graced, and lapsed members (and communicate with them accordingly), and more.

Want to see how else an AMS can help, not only with membership retention, but with membership management as a whole?

Check out our free guide, **What Is an AMS?** here!



Click here to check it out!

More about MemberClicks

MemberClicks offers all the tools that membership organizations need to make the most of the web. From online databases and event registrations to custom-designed websites and member communities, our products are tailor-made for professional associations, trade associations, and chambers of all sizes.

For more information:

- ▶ **Visit us at**
www.memberclicks.com
- ▶ **or call us at**
800.914.2441



Personify
MemberClicks