MEMBERSHIP RETENTION KIT
best practices and templates
4 Month One | Welcome

It's important to follow through in a timely manner. Be proactive and extremely responsive so that you start off on the right foot. Make sure to spread out actions enough to avoid appearing spammy.

7 Month One Checklist

By the end of this month, you should have completed a number of activities to sufficiently welcome your new members.

8 Month Two | Connect

This month is all about deepening your connection with new members. Personalize the experience to truly welcome them into your organization.

11 Month Two Checklist

Month two is full of ways to connect with your new members and make them feel a sense of belonging.

12 Month Three | Engage

It is important to get your new members to engage with you as early as possible. This is fundamental to retention. Use month three to make sure your first two months' strategies were successful.

14 Month Three Checklist

By the end of month three, you should have welcomed, connected and engaged with new members in a way that is meaningful to them. Use this month's checklist to do all the necessary follow-ups.

15 Focus on Retention

Your new members are now active members, and that means it is time to pull out all the stops. Retaining members is less expensive and time consuming than attaining new members, so it's important to do your best to keep the ones you have.

17 Survey Samples and Best Practices

Surveying your members ensures you're meeting their needs and allows you to identify areas where you can make improvements. In this section, you will find a variety of sample surveys to spark some ideas.
20 How to Demonstrate Benefits

Members need to feel like they are getting promised benefits. It’s up to you to demonstrate them through all of your communications.

24 Retention Best Practices

Follow these tried and true retention best practices to fortify your retention strategy.

25 Using Your AMS for Retention

Many AMS systems have a variety of tools that can help you with retention. Make sure you are leveraging your software in your retention efforts.

26 Countdown to Renewal Calendar and Templates

The renewal process should begin 90 days before expiration. Once you have your templates, these touchpoints require minimal effort and can provide exponential reward.

34 Retention Webpage

Create a retention webpage on your website to highlight your benefits, answer frequently asked questions and directly link to the renewal application.

35 Email Best Practices

Increase the chances of getting your message past SPAM filters and get a higher open rate by following email best practices.
It’s important to follow through in a timely manner. Be proactive and extremely responsive so that you start off on the right foot.
Send a welcome email with login credentials to the Members Only resource. Need some ideas? Download sample emails.

Dear [First Name],

Welcome to the [THE ORGANIZATION]! We’re glad you have chosen to invest in your community through your membership in [THE ORGANIZATION], and we hope you take advantage of all the services we offer our members.

The information and preferences that you provided on your membership application are already in our database and will allow us to match our services to your needs. Some benefits require activation so, please log on as soon as possible to the Members Only section of our website [PORTAL LOGIN CREDENTIALS LINK]. Your login information is below.

Username: 
Password: 

From this Members Only portal of our website you can:
- Review your contact information for accuracy
- Request more information on opportunities to promote your business through advertising or event sponsorships
- Express interest in serving on networking, educational or other committees
- Receive information about an upcoming educational or networking program
- Utilize the job bank to post and review job openings
- Create e-coupons to promote specials, discounts and free offers to the public.

At any time you may use [PORTAL LOGIN CREDENTIALS LINK] to update your membership listing, view and pay any open invoices you have from the

Post a hearty welcome on your website. Not only will you be promoting your new members, you will give them content to share on their own social media channels.
Follow-up with a phone call. Within a week of sending login credentials, contact all new members who have not accessed the Members Only area to make sure they are not having login difficulties.

Use social media to welcome your new members. A quick tweet or Facebook post garners attention for your new members and is an easy way to give them VIP treatment.

Prepare to welcome your new members in your next newsletter. Keep a running list of each new member between newsletters to be sure you don’t miss anyone.
END OF MONTH ONE CHECKLIST

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

This month is about deepening the connection. Take the time to make personal touchpoints with 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 the sample note from the link below.

Sample note: [Download Word Doc]

Schedule a ribbon cutting, open house and/or other celebratory events. Market the event(s) on your website, Facebook and Twitter pages, as well as any SMS text message system that you run. Your goal is to introduce new members to as many current members as possible.
Set up a forum or other personalized area just for new members.
Engage them in conversation, answer questions and share announcements through the circle on a weekly basis.

Introduce them to a member ambassador. Match newbies with current members who meet the new member’s area of interest, expertise, age or other key demographic. This kind of mentoring can make an easier transition for your new members.

Make a special delivery. Hand-deliver something special. Make sure to talk to the members so you can answer any questions they may have and remind them of upcoming events and ways to connect. Bring a framed photo or plaque from the ribbon cutting, a logo mug filled with candy, free tickets to an event or continuing education course along with a welcome note from the President or other leader in your organization.
Send a handwritten, personal note

Schedule and market celebratory event

Invite to Google+ circle for new members

Introduce to mentor

Make hand-delivery

Deepen the connection!
By the end of the third month, you want your new members to be engaging freely. At this point, you should have demonstrated your value and helped them find how they fit in with your organization.
**Publish posts and photos about celebratory events.** Take to your website and social media and publicize your new member celebrations. Make sure to add links back to the member’s website when you can.
**Follow up with member ambassadors.** Call or email the member ambassadors to see if there is anything you can do to support them as they help to engage your new members.

**Send a postcard.** Have your administrative staff mail a postcard to check in with members and encourage event attendance. Be sure the postcard includes a calendar listing of upcoming events for their reference.

**Reach out.** Call new members to discuss how their membership is serving them. Talk about upcoming events, discuss referral reports and discover ways they would like to engage more with your organization. If they haven’t attended a new member orientation, this is a perfect time to sign them up for one.
END OF MONTH THREE CHECKLIST

- Publish photos and posts to website and social media
- Follow up with ambassadors
- Send postcard of upcoming events
- Call new members

Get social!
Once your new members have engaged with your organization, they are current, active members. Therefore, it is time to employ your retention strategies.
You have promised a number of benefits, so you need to know if you are delivering satisfactorily. Surveys are an excellent way to find out if you are meeting member expectations. Use volunteers if you don’t have the time to create and conduct the surveys. Mix it up by offering different types of surveys throughout the year, depending on your goals. See some examples on the pages that follow.

**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/programming
- ○ 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.)

Monday through Friday, during which times are you most able to attend meetings? (Mark all that apply)

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

A short survey is good to have on-hand at meetings or other brief encounters with members.
10-Minute Survey

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

☐ Networking with other members
☐ Continuing Education
☐ Annual Conference
☐ Legal Advocacy
☐ Small Business Resources
☐ Guest Speakers
☐ Other: _______________________

A 10-Minute Survey is not exhaustive but will allow you to dig a little deeper into your members’ interests without taking a significant amount of time.

Detailed Annual Survey

Thank you for your membership! As a member, you play an important part in our planning process. As the Board of Trustees prepares for its upcoming planning session, it is important for us to hear from you. Your valuable input will be used as we plan our role in the newest development initiatives targeted to drive the regional economy and improve our community. 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). Overall 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

A Detailed Annual Survey involves more time and incentive than shorter surveys, so be sure to let your members know why this is important with a nice note from executives.

Download sample questions. You may be surprised that you hadn’t used some of them before now!
SURVEY BEST PRACTICES

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

» **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.

» **Address negative feedback.** Route negative feedback to the proper department or person so that they may work out the situation.
HOW TO DEMONSTRATE YOUR BENEFITS

*Use all your communication channels to remind members of all your benefit offerings.* You send newsletters, emails, postcards and premiums, event invitations and mailed notices (i.e. invoices/statements). You speak from the podium, on the phone and one-one-one. Use all of these opportunities to communicate your value added.

The Newsletter /Magazine

Dedicate a small section in your newsletter or quarterly magazine to highlight (bullet point) your member benefits.
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

Hobnob Candidate Forum
Wednesday, April 27
Scottish Rite
5:30-8:30 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
9/18

Register today at indychamber.com/events

Event postcards can serve as a great reminder that you are providing value through solid programming. Make sure to list dates, times and the call to action, or registration url.
In this example, WebLink Connect™ allows member-based organizations to graphically display the value of membership on renewal invoices.
RE T E N T I O N  B E S T  P R A C T I C E S

» **Record preferences.** Survey your new members to discover their communication, availability and topic preferences.

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

» **Use reports.** Show your members how you are 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.

» **Send a reminder email or place a call** and encourage members to log in to the *Members Only* section of your website to take advantage of the resources that are only accessible to members.

» **Encourage profile accuracy.** Remind them that it is important to keep their member information up to date. Updated profiles ensure continued communication with you. Furthermore, their membership information acts as an advertisement on the association directory.

» **Periodically send premiums** imprinted with your logo and the dates of the meetings or special events. Something nice to set on the desk will keep you top of mind.

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

[Image: Do this!]
USING YOUR AMS FOR RETENTION EFFORTS

Many AMS systems have a variety of tools that can help you with retention. Make use of the software and use it to help your retention efforts.

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

» AMS profiles. Track all contact you have with members and non-members alike. You can see how many contacts have been created and how many communication touchpoints have been made to 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 re-create every step of your planned communications for each member.

» Affiliations. 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 allow you to filter your profiles by any criteria you can think of, and then send targeted communications specifically to members within an identified affiliation.

» Measure retention. Use the member retention report to track member renewals by both units and by dollars.
The renewal process should begin 90 days before expiration. Once you have your templates, these touchpoints require minimal effort and can provide exponential reward.
90 days before expiration, send a soft email. This email simply alerts members to the upcoming expiration date and serves as a reminder of the benefits their membership provides. This is also an excellent time to be sure you have happy, engaged members. If not, you still have the opportunity change that.

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Dear [First Name],

First and foremost, we want to thank you for your continued investment with [ORGANIZATION NAME]. Without your loyalty and support we would not be able to continuously provide our members with valuable benefits and actively develop our [community OR industry.] Put simply, you make what we do possible.

Can you believe that it’s been 9 months since you first joined? Since that time your membership has enabled us to accomplish so many initiatives.

- Example One – We were able to...
- Example Two – We held our...
- Example Three – We developed...

We hope you have been able to personally benefit from your membership. If not, let us fix that right away. Call [REPRESENTATIVE NAME] at [phone number], or email him/her at [email address] to see how we may better meet your needs.

If, like the majority of our members, you are satisfied with your membership, consider renewing now at [renewal url]. Your early renewal will help us plan for next year’s programming. Make sure to let us know if you have suggestions. We love to hear your feedback.

Kind regards,

[Director]

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90 Day Email:  Download Word Doc | Download Outlook Template
Dear [FIRST NAME],

First and foremost, we want to thank you for your continued investment with [ORGANIZATION NAME]. Without your loyalty and support we would not be able to continuously provide our members with valuable benefits and actively develop our [community OR industry]. Put simply, you make what we do possible.

This is a friendly reminder that your membership is up for renewal! If you have already sent in your renewal, thank you! If you still need, we offer several different payment options for your convenience. You can see available methods of payment on the next page.

Every day our [chamber OR association] works hard to enhance the [local community OR industry] in which we serve, as well as work collaboratively with other local and/or industry-related organizations and legislative officials to address challenges and drive growth, represent and advocate for your best interests and provide member value-added benefits to your organization.

Over the course of the past year, your membership has enabled us to accomplish so many initiatives.

- Example One – We were able to…
- Example Two – We held our…
- Example Three – We developed…

We’ve included a copy of our YEAR Annual Report so that you can take a look at all of the other great things that we have been able to achieve. In addition to these undertakings, we’ve had the opportunity to create value and promote growth specifically for your business/organization. We’ve enclosed a copy of your YEAR Referral Report so that you can see firsthand how many times your business was referred during the year.

Looking ahead, we cannot wait to accomplish even greater things for our members and our [community OR industry]. In the coming year, we’re excited to:

- Example One – Launch a program to…
- Example Two – Continue advocacy efforts…
- Example Three – Enhance member value by…
- Example Four – Collaborate with…

Again, thank you for your loyalty to the [ORGANIZATION NAME]. We look forward to continuing our relationship and partnering with you for years to come. For your convenience, on the following page we’ve included several a few different payment options. If you have any questions regarding your membership, benefits, or renewal, we’d be happy to speak with you. Do not hesitate to call us at [PHONE NUMBER].

Regards,

[NAME]  
[Executive Director]

**PAYMENT OPTIONS**

   - Simply click on the “Membership” tab and select “Members Login” from the drop-down menu. Login with your username and password to access your account and make a payment.
   - Username: [username]
   - Password: [password]

2. Payment by Mail: Send a check for your outstanding membership dues to us at: [Address]
   - We’ve enclosed a self-addressed stamped envelope for your convenience.

Total Membership Dues: [$150.00]  
Due by: [DATE]

45 Day Direct Mail (Letter): Download Word Doc
30 days before expiration, send a direct mail piece. Consider outsourcing the design for postcards to increase your read rate. Highlight your benefits, and make a small offer such as a restaurant gift card, t-shirt or other premium to encourage renewal.
15 days before expiration, send an email reminder. Consider deeper incentives such as a percentage off discount on an early renewal or free registration to the annual conferences.

15 Day Email: Download Word Doc | Download Outlook Template

The early bird is a happy bird! Chirp!
The day of expiration, send a morning email and follow it up with an afternoon phone call. For a variety of reasons, many members will wait until the last minute to renew. Do them a favor and remind them on the last day in case they forget. You may want to have lower rates for renewals than new members so that there is an automatic, extra incentive to renew year after year.

Expiration Day Email: Download Word Doc | Download Outlook Template

Remember to follow up with a phone call!
30 D AY S P A S T D U E C O M M U N I C A T I O N

30 days after the renewal expiration, send a postcard. Let your non-renewing members know that you noticed their absence and highlight current and upcoming benefits. Let them know that you understand how “things happen” and you would love to have them renew as soon as possible. Make sure to leave your contact information and encourage them to contact you in case there are special circumstances preventing them from timely renewal.

60 D AY S P A S T D U E C O M M U N I C A T I O N

60 days after the renewal expiration, telephone non-renewing members. You want them to know that you have noticed that they have not renewed and that you want to make sure that they received all the promised benefits that they expected upon becoming members.
90 Days Past Due Communication

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

90 Days Past Due Email:  Download Word Doc | Download Outlook Template

Last call!
Within 30 days from the final email notice, mail the drop letter. In it, you will express your regret in losing them and remind them of the benefits they will no longer receive.

Dear NAME:

You will be missed!

We regret to inform you that your membership with the [ORGANIZATION NAME] has been canceled.

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

- Benefit – Networking opportunities that give you the opportunity to connect with other [community OR industry] business professionals
- Benefit – Education, Training and Certification
- Benefit – Business and Industry Development (referrals and visibility)- Online directory, business growth
- Benefit – Legislation

Please know that your business and participation with the [ORGANIZATION NAME] are always welcome, and it is the investment from businesses/organizations like you that allow us to better serve our [community OR industry].

In the coming year, we are excited to take on many new initiatives, including:

- Example One – Launch a program to...
- Example Two – Continue advocacy efforts...
- Example Three – Enhance member value by...
- Example Four – Collaborate with...

We want you to have the opportunity to take advantage of the benefits each of these initiatives, as well as all of the other great things we have planned to accomplish.

If you have any questions or would like to discuss rejoining the [chamber OR association], please do not hesitate to give us a call as we’d love to visit with you. You can reach us at [NUMBER or EMAIL].

Regards,

[NAME]
[TITLE]

Drop Letter:  Download Word Doc
RETENTION RENEWAL WEBPAGE

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

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, 52 substantive Committees to choose from, CLE programs, SoloStats, 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 filers, dues are 97.5% eligible as business expense deductions.
EMAIL BEST PRACTICES

» **Avoid using certain words and characters** such as $, Free, !!! and ALL CAPS because they are known to be SPAM flags.

» **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 in your subject line.** 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 first get your point across, then let them read the details.

» **Use a simple, clean layout.** This way, you can test your messaging knowing that the design is not 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 clear about what they will receive—continuing education credits, networking opportunities, an eBook or webinar.

» **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 your members are not getting your emails, they likely aren’t reaping the benefits of membership.
Imagine a world where ...

Members look forward to hearing from you.

Communications are clear, strategic and efficient.

You are a business and social switchboard.

Street buzz makes membership a must.

Data is centralized and reports are trusted.

Renewal crickets are a thing of the past.

Realize your goals with WebLink. Visit us at weblinkinternational.com today!