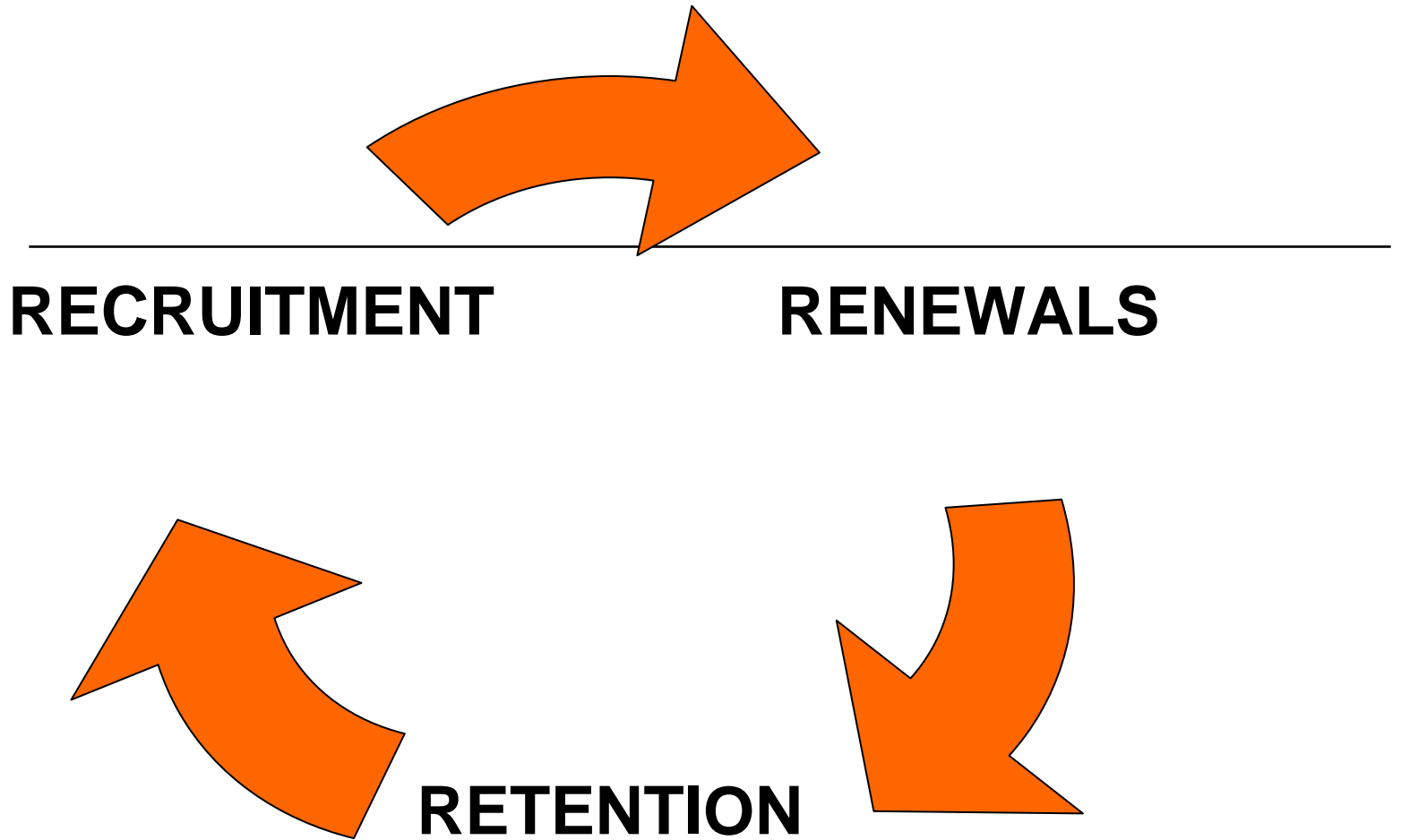


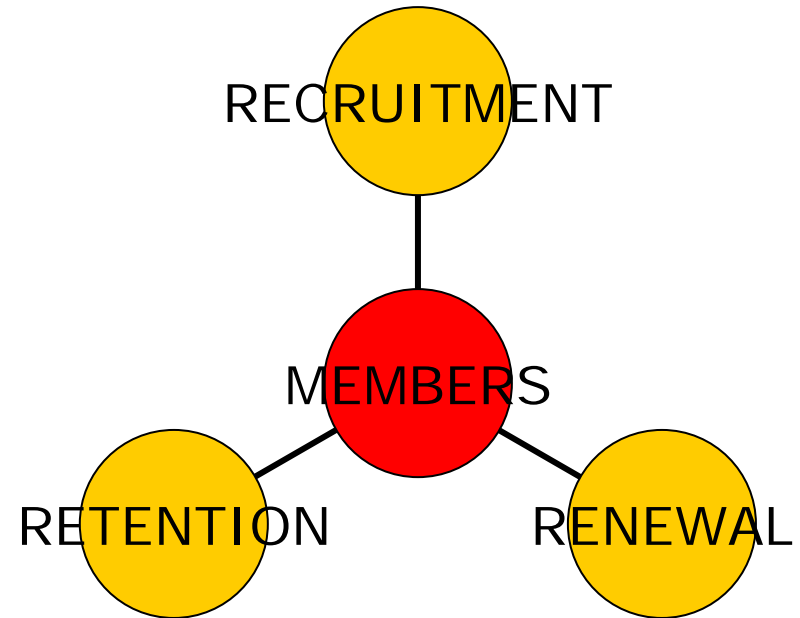
# They All Work Together



# Real Heart of the Membership Cycle is Learning How to Retain Members

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- Remaining Relevant
- Perception of Value
- Tracking Membership Trends
- Recruitment as a Strategy Plan
- Research for Retention
- Tips For Retaining Members





# Remaining Relevant

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- Get to know what your members want
- Surveys, Surveys & Surveys...
- Learn what current members value about their membership and in addition, what do they want that you are not offering
- Commit to follow-up



# Perception of Value

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Value of membership is based on a member's perception of value and as a small organization, the most valuable tools you have are:

1. Personal interaction with members  
Customer Service
2. Products & services
3. Opportunities available



# Perception of Value

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## ○ Customer Service

- In order to stay relevant you need products/services/benefits that members perceive as offering value to them in their career.
- But HOW you deliver these “goods” is what determines satisfaction
- Creating relevance by building relationships



# Perception of Value

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- Tracking incoming calls
  - What are member & non-members asking for
  - Need to identify complaints, problems and compliments
  - By tracking calls, you can be proactive and take steps to reduce future problems and highlight areas that generate satisfaction.



# Creating Opportunities

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## **Give them something to talk about**

- Member Benefit Open House
- Law Student Networking – Speed Dating with a Legal Twist
- Committees
  - Give away a book from the ABA
  - Provide lunch occasionally – paid for by vendor
- Lunch n' Learns sponsored by vendors



# Importance of Tracking Membership Trends and Maintaining Key Member Data

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- Review Monthly Member Totals
- Review Membership Trends & % Non-members
- You can't set a realistic goal without knowing where you have been.



# Key Member Data

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- Date of Birth
- Gender
- Date Joined
- Year admitted to bar
- Email address
- Zip Code



# Recruitment Plans Not Membership Drives

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- Review Recruitment Project Plan
- Review Non-member Recruitment Worksheet - Campaigns
- Recruitment shows short-term payback while retention is a long-term strategy



# Research For Retention

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## **Knowledge is power in the world of associations**

- For Members:
  - Average length of membership
  - Average age
  - # of members per age group
  - Who attends seminars
  - % of membership first year members



# Research For Retention

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- For Non-members:
  - Prospect files
    - Start gathering data at first inquiry
    - Keep a spreadsheet
    - Obtain important data to categorize this group
    - Follow-up and track responses
- For Non-Renewals
  - Maintain a historical file
  - Identifies what categories at risk
  - What do they have in common



# Research For Retention

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- Research for Satisfaction

- ASK For Feedback

- After a seminar
    - After welcome packet mailed
    - New member benefit

- ASK For Input

- What services/products do you use
    - What new services/products would you like



# Research For Retention

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Find why members leave and what prompts prospects to join

- Exit Surveys
  - Phone calls
  - Post cards
- Conversion Rate of Prospects
  - If low
    - Identify “barriers” to joining
    - Delay in responding to inquiries



# Research For Retention

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- To Increase conversion rate
  - Follow-up with hand written notes
  - Phone calls 2 weeks after inquiry
  - Ask “Why not joining” – get some valuable feedback about your current processes/procedures

Researching only those that leave is equivalent to shutting the barn door after the horse has left.



# TIPS FOR RETAINING MEMBERS

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- Welcome Aboard
  - Acknowledge receipt of membership immediately
  - Don't overwhelm with too much at one time
  - Send a personalized letter from president
  - Welcome new members at functions



# TIPS FOR RETAINING MEMBERS

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- New and Second-Year Members
  - Track 1<sup>st</sup> year retention rates based on how recruited
  - Measure retention rate of 1<sup>st</sup> year members; 2<sup>nd</sup> year members; compare to overall retention rate
  - What are your “high touch” activities aimed at 1<sup>st</sup> year members?
  - Do you know the top 3 reasons 1<sup>st</sup> year members join?



# TIPS FOR RETAINING MEMBERS

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- Plan a system for making specific contacts to first year members
  - They are most vulnerable in terms of dropping their membership if treated like every other member
  - Members recruited during campaigns are already high-risk members



# TIPS FOR RETAINING MEMBERS

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- Do the Math...
  - How many members?
  - Divide by 260 business days in a year.
  - Equals the number of handwritten notes you would need to write each day to extend a personnel greeting to your members.



# TIPS FOR RETAINING MEMBERS

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- Host a Members-only Contest
  - Contest for cover of legal directory
  - Contest to create a new marketing tag line
  - Publish submitted entries
  - Get a local firm, sports organization, new restaurant, etc. to donate a gift certificate



# TIPS FOR RETAINING MEMBERS

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- Simplify your application: send a member profile form to new members to gather information not included on membership application
  - Another contact during first critical year
  - If they do not send the form back, it's a sign they are losing interest and need extra mentoring



# TIPS FOR RETAINING MEMBERS

- Consider offering a money-back guarantee
  - Ultimate statement of confidence by the organization
  - Might help identify weaknesses in association
  - Forces association to make membership a “good” thing



# TIPS FOR RETAINING MEMBERS

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## ○ Dues Renewal

- Isolate new recruited members into separate table or spreadsheet
- Send their notice out with a hand written note – this is the first time they are going through this process



# TIPS FOR RETAINING MEMBERS

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- Invite new members to monthly/bi-monthly roundtable luncheons with executive director, board president and key staff persons. Small expenditure for a lasting impression.

# They All Work Together

