



U.S. Chamber of Commerce
Institute for Organization
Management





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Recruit, Engage and Retain Your Members



Course Objectives

Understanding typical member retention rates and patterns.

Identifying ways to gauge member needs and satisfaction.

Implementing techniques to identify and deliver the products and services your members want.

“The future of the Chamber or Association movement is to engage those who believe in our purpose, instead of trying to find people who will belong to our organization”

*Mark Wilson, President/CEO
Florida Chamber of Commerce*



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Volunteer Membership Drives



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Recruiting New Members AND Keeping Them



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Do you know?

Your Retention Rate?

Your Market Penetration?

- How many potential prospects are out there?
- Where are your members?

Members by Category/Industry Sector?

- Who joins? Who stays? Who gets involved? Who doesn't join?

What types of new members do you need and want?

- Staff & Board analysis

Where do you find your prospects?

Advertising

- Your chamber/association advertising
- Ads from local publications

Referrals/Word of Mouth

Business License Listings

Where else?

Three basic types of businesses/members:

- 1 – Strong Potential for Retention
- 2 – Good Chance of Retention
- 3 – Less Likely to Remain a Member



Member Mindsets

Mindset 1

- Honors tradition
- Values loyalty
- Enjoys meeting socially
- Sense of obligation
- Respects authority and titles
- Concerned with policies and procedure
- Willing to serve on a committee
- Values Membership

Mindset 2

- Values freedom from tradition
- Values integrity
- Meetings need to have a purpose
- Want to make a difference
- Values people for who they are –not titles
- Values freedom to create and make changes
- Willing to do the work
- Values participation



The Decision to Join

Why do they Join?

- Information
- Communications
- Government Relations/Advocacy
- Meetings & Education
- Technical Assistance
- Specific Service(s)
- Insurance and other Discounts
- Increase Exposure in the Community

Why don't they join?

- Association/Chamber doesn't meet their needs
- Perception – Ineffective
- Too attached to government
- No perceived benefit
- High Dues
- Past Experience or negativity from another business
- Never been asked

What else?



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How do you know what the prospective member needs? **YOU ASK!**

- Who is the perfect customer/client for you?
- What do you want people to know about your business?
- Do you need help with your technology?
Social Media?
- What else do you ask to get to know the business and how YOU can help them?

Evaluation of Your Chamber or Association

- Are you meeting the needs of the businesses in your community? Are any industry sectors lacking in benefits?
- Do you have a variety of programs that are of value to different types of businesses?
- Do you offer training for businesses and their employees?

Evaluate Your Value Proposition

SWOT Analysis

Strengths
Weaknesses
Opportunities
Threats

Evaluate Your Value Proposition

- Your Events
- Your Brand
- Your Education & Training
- Your Advocacy
- Your Workforce Development Efforts
- Your Fundraising
- Your Marketing & Online Resources
- Your Affinity Programs
- What else?

Onboarding a New Member

- Emails
- Meet the staff
- Do the board or ambassadors play a role?
- Do you welcome them on social media?
- Do you host a new member orientation?
- Do you invite them to join a committee, task force group, referral group?
- How do you invite them to your meetings and events?

New Member Email Campaign

- How many of you do this?
- A Campaign Example:
 - Email at 2 weeks
 - Email at 30 days
 - Email at 60 days
 - Email at 90 days
 - Email at 120 days
 - Email at 180 days



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Member Retention

- When does it start?
- Deliver what you PROMISE
- Communicate
- Engage
- Schedule a follow-up
- Use what you know about the member
- Find out what you don't know



Member Retention & Referrals

- **Experience** – Create opportunities for volunteer and members to interact and make them personable and memorable. What types of experiences are you offering?
- **Engagement** – This is so important – it's the member investing time and/or money with your chamber/association. Do your members want to be engaged?
- **Sharing** – When members have a great experience, they are engaged, and they share. What are your members sharing?

Exploring the WOW Factor

The Wow Factor – “a quality or feature that is extremely impressive”

- **How has your experience** at Institute been so far. If it's been great, what's made it that way and how can you do something similar at your chamber/association?
- **Were you made to feel welcome?** How could you use what made you feel welcomed and make it work for your chamber or association?

Let's explore Member Experiences and Engagement a little further...

- How have you found investing in database and support systems improves member tracking?
- How do you engage with your members through social media and email marketing?
- How do you figure costs of member recruitment? Member service costs? Your membership retention rate?
- How do you encourage members to volunteer?
- How do you survey your members?

Invest in Systems, Databases and Supporting Technology

Some Key Functions of Member Database Systems

- Member Contact Information
- Prospect Management
- Involvement Tracking
- Sales Forecasting
- Marketing Automation
- Sales Analysis
- Reports & Dashboards
- Mobile Apps
- Sales Data
- Campaign Management
- Connection to accounting software
- And MORE....



Membership Management System

Find the best system for your chamber or association.

- Talk to your colleagues about what they are using and what their systems include from your full wish list.
- Then, schedule demos with the software companies to include features and costs.
- Then what? Do you review with staff? Key members?
- Remember – it's a good idea to do some data clean Up before a transfer to a new system.



Social Media & Email Communications

Social Media

- Connect with them on all platforms – LinkedIn, FaceBook/Meta, Instagram
- Engage with them – become part of their on-line life – like & comment on posts & updates
- Keep yourself “top of mind”

Email Communications

- When do you send out the emails and how many are opened?
- Who is opening the emails?
- How many people click, who is clicking and what types of links do they click?
- Has anybody designed and implemented a successful target marketing campaign?



Let's do some math!

RETENTION RATE: (End Count - New Members) ÷ Start Count

Example: At the beginning of 2021, there were 500 members (start count). At the end of 2021 there were 600 members (end count), which included 120 new members

$$600 - 120 = \mathbf{480} \text{ (end count - new members)}$$

$$480 \div 500 = .96 \text{ (end count } \div \text{ start count)}$$

$$\text{RETENTION RATE} = 96\%$$



Let's do some more math!

Member Service Cost per member: Total expenses ÷ Total Number of Members

Example: In 2021, the total expenses at year end were \$350,000. Total membership was 600.

$$\mathbf{\$350,000 \div 600 = \$583}$$

$$\mathbf{\text{Member Service Cost} = \$583}$$

Member Recruitment Costs: Total costs ÷ Total New Members

Example: In 2021, \$30,000 was spent on new member recruitment and 120 new members joined.

$$\mathbf{\$40,000 \div 120 = \$333}$$

$$\mathbf{\text{Member Recruitment Cost} = \$333}$$

How do you get members to WANT to volunteer?

Create a positive first impression.

Personally invite them to volunteer.

ASK them to volunteer.

Assign a great volunteer to reach out to them.

Make your volunteers feel special and appreciated.

Create meaningful experiences and have fun.

Say Thank You!



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You made the ask and got a YES to Volunteer

Not what?

Be clear about Expectations up front – How much time are you asking for? What are you asking them to do? What's in it for them? Ask them their expectations.

Show them how their volunteering helps your mission and vision.

Let them know what skill sets and strengths you saw in them and why that's needed for the area, program, event, etc. in which you asked them to volunteer.

Questions for Volunteers & Staff?

- **Volunteer:** What does it feel like to volunteer here and how could we make that experience better for you? What benefits have you/your company received from volunteering? What are you passionate about that fits the chamber's mission?
- **Staff:** What volunteer opportunities do we offer? Could we change it up or design a wider variety of volunteer opportunities? Who's currently in our volunteer pool? Who do we need in our volunteer pool?

Membership Surveys

- Annual? Quarterly? Monthly?
- What do you ask them on the survey?
- What percent of your members answers the survey?
- Do you offer an incentive/contest/drawing for them to complete it?
- Is the survey electronic? If so, it is “check the box”, “ranking” and open comments?

Why do members leave your chamber or association?

- Not engaged & don't have time to attend anything
- Perception of us not having a clear vision
- Bad meetings and events
- Not open to innovation and change
- No sense of community
- “Pay your dues” mentality
- Don't feel needed
- What other reasons?

Questions?

Comments?



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