Attracting and Retaining Members: What’s the Silver Bullet?

Presented by Cathi Hight
Cathi Hight

• President of Hight Performance Group

• Developer of *The Member Retention Kit* and *A New Approach to Tiered Membership*

• National instructor for the U.S. Chamber *Institute for Organization Management* since 2004

• Career Highlights:
  ▪ SVP of Growth Strategy & Investor Relations for the Austin Chamber
  ▪ VP of Operations for the Chamber of Commerce of Hawaii
  ▪ Regional Manager of Dole Foods and for Dean Foods
  ▪ National Manager, FastTrac Entrepreneurship Program for the Kauffman Foundation

• Is a member of the:
  ▪ Association of Chamber of Commerce Executives (ACCE)
  ▪ American Society of Association Executives (ASAE)
  ▪ Society for Human Resource Management (SHRM)
Is Our Retention Rate Normal?

What Considered “Normal”?
Normal is Based on Your Peers

Compare your performance metrics with others who share common factors with your organization
2019 Association Metrics

- 2019 Membership Marketing Benchmarking Report—conducted by Marketing General Inc. (824 associations participated)
  https://go.marketinggeneral.com/2019mmbr
Membership Metrics – Sample #1

Membership - Revenue Per Chamber Member
(Total Chamber Revenue / Total Number of Member Accounts)

- My Chamber: $423
- 25th Percentile: $423
- 50th Percentile: $613
- 75th Percentile: $962

Membership - Member Dues Investment
(Dollar Value of Member Accounts divided by Number of Member Accounts)

- My Chamber: $189
- 25th Percentile: $189
- 50th Percentile: $209
- 75th Percentile: $324

Membership - Member Retention - Dollars
($ amt of Prior FY memberships minus $ amt of canc in FYR) / by $ amt of PFY membership

- 25th Percentile: 81.74%
- Median: 83.46%
- 75th Percentile: 86.87%
- My Chamber (13th Percentile): 93.17%

Membership - First Year Member Retention - Accounts
(New Member Accounts in Prior Fiscal Year that Renewed in Current Fiscal Year / New Member Accounts - Prior Fiscal Year)

- 25th Percentile: 42.37%
- Median: 51.21%
- 75th Percentile: 69.55%
- My Chamber (13th Percentile): 91.63%
**Membership Metrics – Sample #2**

- 1-3 employees: 35.2%
- 4-9 employees: 17.9%
- 10-25 employees: 19.1%
- 25-49 employees: 8.5%
- 50-99 employees: 7.3%
- 100+ employees: 12%

**Membership - Revenue Per Chamber Member**

- NaN: $3,051
- 25th Percentile: $3,404
- 50th Percentile: $3,931
- 75th Percentile: $5,094

**Membership - Member Dues Investment**

- NaN: $967
- 25th Percentile: $843
- 50th Percentile: $1,120
- 75th Percentile: $1,754
Membership Metrics – Sample #2

Membership - Member Retention - Dollars
($) Value of Member Accounts PFY - Cancelled Member Account Value PFY) / $ Value of Member Accounts PFY)

Membership - Member Retention - Accounts
(Prior FY MemAccts minus FY Cancellations) / Prior FY MemAccts

Membership - First Year Member Retention - Accounts
(New Member Accounts in Prior Fiscal Year that Renewed in Current Fiscal Year / New Member Accounts - Prior Fiscal Year)
Recommended Peer Comparisons

- Number of Member Accounts
- Average Dues per Member
- Average Revenue per Member
- Retention of Member Accounts (# and $)
- Retention of Dues Revenue
- 1st Year Member Retention
Key Factors that Influence Retention Outcomes

Lessons learned from the field
Key Factors that Influence Retention

- Drop Analysis: FTE, Dues & Tenure
- Recruitment Analysis: FTE, Dues & Tenure
- Value Proposition & Expectation: Motivation to Belong
- Engagement Level: Early, Frequency, Type

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1st and 2nd Year Members Have the Worst Retention

Drop Rate by Membership Tenure

Member Retention: What's the Silver Bullet?
### Drop Analysis by Tenure

#### Who drops and who sticks?

<table>
<thead>
<tr>
<th>1st Years Billed</th>
<th>#</th>
<th>Renewed</th>
<th>#</th>
<th>Dropped</th>
<th>#</th>
<th>$1st</th>
<th>#</th>
<th>$R</th>
<th>$D</th>
<th>$Outst</th>
<th>#</th>
<th>%</th>
<th>$Drop</th>
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<th>$Outst</th>
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<th>$D</th>
<th>$Outst</th>
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<td>13.60%</td>
<td>0.76%</td>
<td>1.77%</td>
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<th>2016 All Billed</th>
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<th>Renewed</th>
<th>#</th>
<th>Dropped</th>
<th>#</th>
<th>$2016</th>
<th>#</th>
<th>$R</th>
<th>$D</th>
<th>$Outst</th>
<th>#</th>
<th>%</th>
<th>$Drop</th>
<th>%</th>
<th>$Outst</th>
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<td><strong>76.47%</strong></td>
<td>67.03%</td>
<td>22.46%</td>
<td>31.33%</td>
<td>1.08%</td>
<td>1.63%</td>
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</tr>
</tbody>
</table>

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Member Retention: What’s the Silver Bullet?
Not All 1st Year Members are a Challenge (Retention by FTE: Full-Time Employees)

Some organizations distinguish member size even more under 10 FTE to learn more.
You Don’t Have a Retention Problem with All Members

Drop Analysis Case Study:

- 150 investors dropped their membership during 2016 and 2017
  - 129 members (86%) paid less than $1,000 in dues; 96 members (64% of total drops) were Basic Investors that paid $395 or less (tiered model)
  - 79 members (52.6%) had been members for 3 years or less
  - 95 members (63.3%) had 5 or fewer employees
    - 17 members (11.3%) had between 6 - 10 employees
    - 39 members (26%) had more than 11 employees
Recruitment Analysis

Recruitment Analysis Case Study:
• 117 new investors recruited during 2016 and 2017
  o 95 members (81.2%) paid less than $1,000 in dues:
    ▪ 68 members (58.2% of total new members) joined at the Basic Investor level at $395
    ▪ 27 members joined at the 3-Star Investor level and paid between $620 - $695
  o 22 new members (19% of 117 recruited) invested at $1,000 or higher
  o 88 members (75.2%) had 5 or fewer employees (52 members have 0 employees)
    ▪ 9 members (7.7%) had between 6 - 10 employees
    ▪ 19 members (162) had more than 11 employees
Value Propositions and Expectations

ONE SIZE DOES NOT FIT ALL

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## The 4 Types of Members

### Member A
- Funders of our mission and support our purpose, strategic plan and priorities
- Desires a business-friendly environment and opportunities that benefit all
- Believes in “doing the right thing” and being a responsible corporate citizen
- **Focus:** Advocacy, Talent, Economy

### Member B
- Desires a thriving economy and business-friendly environment to grow in this market
- Seeks branding opportunities to gain market share & tell their story
- Needs alignment for corporate
- **Focus:** Positioning, Talent & Leadership

### Member C
- Seeks visibility while running operations
- Deals with rising biz costs & regulations
- Desires cost-effective opportunities to drive sales and learn w/out ‘showing up’
- **Focus:** Visibility, Peers, Growth

### Member D
- Low-cost lead generation
- Free/low-cost opportunities for exposure & connections with others
- Introductions to the community
- **Focus:** Visibility, Connections, Leads

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**Get Something Done Through Us**

**Get Something for Their Business**

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Engagement Level

Value Proposition/Expectation + Meaningful Engagement = Retention

Engagement includes: programs/events, reports, committees, email open-rates and click-throughs, surveys/polls, education, social media
4 Strategies to Improve Your Retention Outcomes
Key Factors that Influence Retention

- **Drop Analysis**: FTE, Dues & Tenure
- **Recruitment Analysis**: FTE, Dues & Tenure
- **Value Proposition & Expectation**: Motivation to Belong
- **Engagement Level**: Early, Frequency, Type

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#1: Recruit for Retention

Target Prospects that Are More Likely to See Value and Stay
How Do You Recruit for Retention

Ideal Member Profile #1

• 10 – 30 FTE
• Been in biz 3+ years
• Multiple locations
• Involved and invested in the community
• Sees the value in belonging/supporting member-based organizations

• Create Ideal Member Profiles that describe the characteristics of members that stay
• Develop more than one profile
• Offer incentives to recruit to profiles

• Based on your drop and recruitment analyses, learn from your behavioral patterns
• Decide what changes need to be made
One Marketing Piece Can Appeal to Different Motivations

- Allows prospects and members to self-identify with what matters—“I Care About. . .” and focuses on a different motivation per quadrant
- Uses messaging points that matter to the intended audience
- Some people may resonate with more than one quadrant
- Members may first engage for one motivator and then change as their interests and engagement changes
#2: Onboard New Members Effectively

1st Year Member Journey Map

The 1st 90 Days

Early Engagement

Member Retention: What’s the Silver Bullet?
Develop Member Empathy

• What’s it like to be a new member?
• What questions do they have after they join?
• How do they engage meaningfully?
• Where do they go to get started?
• How do they find the information they need?
• Who can help them?
## 1st Year Member Onboarding Journey Map

<table>
<thead>
<tr>
<th>Welcoming</th>
<th>Connecting</th>
<th>Engaging</th>
<th>Reviewing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Members’ anticipations:</strong></td>
<td><strong>Meeting members’ needs:</strong></td>
<td><strong>Members’ anticipations:</strong></td>
<td><strong>Members’ anticipations:</strong></td>
</tr>
<tr>
<td>Tell me what happens after I join</td>
<td>Email Engagement Guide with short survey to identify engagement opportunities</td>
<td>Early connections are developing into peer relationships</td>
<td>My initial year was just what I imagined or better</td>
</tr>
<tr>
<td>Tell me more about the organization</td>
<td>Phone call from staff liaison or volunteer to check-in and answer questions</td>
<td>I receive value even if I can’t show up often</td>
<td>I’ve enjoyed interactions with peers and the information I gained</td>
</tr>
<tr>
<td>Let me tell you more about me or us</td>
<td>Follow up from key staff based on interests or needs</td>
<td>I feel that I belong to this community, know what’s going on and how I can contribute</td>
<td>Staff recognizes me and makes me feel my contributions are appreciated</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Meeting members’ needs:</strong></th>
<th><strong>Engaging</strong></th>
<th><strong>Reviewing</strong></th>
<th><strong>Meeting members’ needs:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome letter with brief overview and links to new member web portal and contact info (may have responses to FAQs, videos, survey)</td>
<td>Send survey or polls to get feedback on issues, programs and needs</td>
<td>Send a customized pre-renewal letter with a summary of their activities and a recap of our achievements</td>
<td>Send invoice with options to renew</td>
</tr>
<tr>
<td>Phone call from staff liaison to learn more about the new member</td>
<td>Receive survey results or information on issues</td>
<td>Ask members to review their account info and how to make changes</td>
<td>Follow up from key staff based on interests or needs</td>
</tr>
<tr>
<td>Follow up emails</td>
<td>Staff or volunteers send personalized emails and targeted opportunities</td>
<td></td>
<td>Phone call from staff liaison or volunteer to check-in and answer questions</td>
</tr>
</tbody>
</table>

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Make the 1st 90 Days Count

• Make Them Feel Welcome
  – Send a Welcome Letter from the team
  – Post a new member announcement on social media
  – List of new members on the website, newsletter, lobby screen, board handouts

• Reach Out to New Members
  o Plan for 2 - 3 “touches” from team members and volunteers
  o Determine their interests
  o Help them navigate resources and engage earlier in the process
Influence Early Engagement

• Make a list of onboarding resources
  – New Member Orientation
  – Ambassadors (Diplomats, Navigators)
  – Engagement Guide
  – New Member Packet

• Find ways for technology to play a role
  o Automated email campaigns
    (welcome, Did You Know?, surveys)
  o Video series (info, how-to’s)
  o New member web pages, portals

"You’ve got to start with the customer experience and work back toward the technology – not the other way around”

Steve Jobs
Sample New Member Videos
https://www.nar.realtor/orientation/2016-new-member-orientation-video

2016 New Member Orientation Video

FEBRUARY 1, 2016

This 23-minute video covers valuable information to help new members realize their full benefits of membership from the National Association of REALTORS®.
Welcome to the Columbus Chamber

This online member kit provides a quick list of some of the Chamber’s key solutions and services. Our president and CEO, Michael Dalby, also has recorded a welcome message for you. We invite you to peruse the kit at your convenience, and contact us anytime to put your Chamber membership to work.

Jump to:
- Member Benefits
- Service and Program Overviews
- Savings Programs
- Member Perks
- Events
- On-Demand Learning
- Member Directory

Business Resources
- Employer Internship Resources
- News
- Connections
- Membership Tools
- Contacts

A Message From Michael Dalby

How can we serve you? In this brief video message, Chamber President and CEO Michael Dalby welcomes you to the Columbus Chamber and explains how we can help accelerate your business.
#3 Provide Meaningful Engagement
Different Engagement for Interests

CHAMBER COUNCILS

AIR SERVICES TASK FORCE
Members work with local businesses to quantify demand for out of country non-stop destinations and works with Austin Bergstrom International Airport to improve the service, frequency, and competitive prices for non-stop service.
Meeting Frequency: 10x
Who Can Serve: Members
Staff Liaison: Drew Scheberle
dscheberle@austinchamber.com

AMBASSADOR COMMITTEE
Ambassadors help the Chamber engage new members by extending the hand of friendship via goodwill calls, ribbon cuttings, and representing the Chamber at many civic and social functions.
Meeting Frequency: Monthly
Who Can Serve: Members
Staff Liaison: Melanie Ferrer
mferrer@austinchamber.com
Chair: Courtney Bianchi, Batch Austin

AUSTIN COMMUNITY COLLEGE TASK FORCE
Members work with the ACC President on recommendations to complete the college's Progress Toward Excellence.
Meeting Frequency: 4x
Who Can Serve: Private sector members approved by Task Force Chair
Staff Liaison: Drew Scheberle
dscheberle@austinchamber.com

CAPITAL AND INNOVATION COUNCIL
Help drive strategy and execution for the Innovate Austin initiative. This includes the development of frameworks for entrepreneurs, new companies, accelerators, incubators, co-working spaces, angel investors, venture capital, and private equity.
Meeting Frequency: Quarterly
Who Can Serve: Reps from angel, seed, venture, & private equity investors
• Reps from Austin-based startups who have not had a liquidity event
• Reps from accelerators, incubators, and co-working spaces
Staff Liaison: Jonathan Packer
jpacker@austinchamber.com
Vice Chair: Akshay Sakhikhi, Cognitive Scale

CLEANTECH COUNCIL
Business professionals affiliated with CleanTech industry in the Austin Region share information on new CleanTech advancements in technology, develop strategies to address “gaps” within the CleanTech ecosystem, and provide input on how to grow the sector.
Meeting Frequency: Quarterly
Staff Liaison: Callie Turley
turley@austinchamber.com

MEMBER DEVELOPMENT COUNCIL
Provides support for the Chamber's Membership Sales efforts. This council works with staff to build their contacts in the community to encourage membership investment in Chamber.
Meeting Frequency: 6x a year
Who Can Serve: Members approved by Vice Chair
Staff Liaison: Robert Watts
rwatts@austinchamber.com
Vice Chair: Stephen Coulston, Perkins+Will

MEMBER RELATIONS COUNCIL
Assist Chamber staff with retaining members. Council members help do that by recognizing member anniversaries, focusing on higher level investing members (PABs/CABs), and conducting outreach with members who are new or not engaged.
Meeting Frequency: 6x a year
Who Can Serve: Members approved by Vice Chair
Staff Liaison: Robert Watts
rwatts@austinchamber.com
Vice Chair: Paul Trylko, Amplify Credit Union

HEALTH INNOVATION COUNCIL
Assist in the development of strategy and help set direction specific to Austin's medical school and Innovation Zone Vision, including the UT Dell Medical School, collaboration with Dell Seton Teaching Hospital, Central Health and related ecosystem partners, and activities for recruitment, retention and establishment of digital and/or healthcare innovation companies.
Meeting Frequency: Quarterly
Who Can Serve: Reps from companies
• Reps from investors in healthcare
• Reps from accelerators and incubators
Staff Liaison: Jonathan Packer
jpacker@austinchamber.com
Vice Chair: Mini Kahlon, University of Texas Medical School

TECH COUNCIL
Support initiatives that affect the tech industry, developing and fostering relationships among key regional and out of region technology leaders and investors, and help to execute strategic activities which drive the Innovate Austin program.
Meeting Frequency: Quarterly
Who Can Serve: Members
Staff Liaison: Jonathan Packer
jpacker@austinchamber.com
Vice Chair: Max Hoberman, Certain Affinity

TALENT COUNCIL
The council is composed of HR executives of primary employers focused on deepening the Austin talent pool through attraction and retraining.
Meeting Frequency: 8x a year
Who Can Serve: Private sector members approved by Council
Staff Liaison: Drew Scheberle
dscheberle@austinchamber.com
Vice Chair: Will Coomes, VISA

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Member Retention: What’s the Silver Bullet?

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Create Circles of Engagement

- Create circles of engagement (in-person, virtual communities, social media)
- Connect members to one another via mutual interests and initiatives
  - Task forces, councils
  - Special Interest Groups (SIGS)
  - Peer-to-peer (Women’s, YP’s groups)
  - Calls to Action
  - Social media platforms
- Allow members to share best practices, solve common problems
  - Forums, panels, experts
  - Blogs, online resources
- Collect feedback from members
  - Surveys, polls, interviews, list serves

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#4: Resources for Retention

A. Dedicated Staff

B. Senior Level Support

C. Army of Ambassadors

D. Member Relations Council
Dedicated Staff to Serve as Member Relations Manager

• Manage/coordinate volunteer retention resources
  ▪ Ambassadors
  ▪ Member Relations Council/Membership Committee

• Coordinate outreach contact to members
  ▪ Outreach/Touch Plans
  ▪ Past-due renewals

• Manage member recognition program

• Run Membership Reports to Monitor Retention
  ▪ Retention audits (annually, semi-annually)
    • Review retention/drop rates by FTE, industry, year joined, year business established, sales rep
  ▪ New members—join date less than 90 days (monthly)
  ▪ Members who are 6 months from renewal (monthly)
  ▪ Engagement reports using the participation fields (monthly)
Get Your Board Involved

Outreach for Our Top Investors

Purpose: Conduct targeted outreach to the Chamber’s top partners as part of a long-term engagement and retention initiative. Senior team members will be assigned 10 partners each year. Each partner will receive three outreach visits per year, including one on-site visit.

Instructions for On-Site Visit:

- Review the list of targeted partners and staff assignments on file at S:\MEMBERSHIP\Targeted Outreach Program.
- If the partner is also a Chamber member, you can review their account profile in Weblink, including the phone number, email of the primary contact and physical address.
- Contact the President, or appropriate C-Level representative, to set up an on-site visit prior to 8/15/16. If you have limited time to meet with your assigned partners, select those whose membership renewal dates are earlier.
- If you add austinchamber@weblinkconnect.com to the bcc line of your emails, the messages will automatically be added partners’ account profile in Weblink.
- After the scheduled visit, use the Outreach Notes template provided to record the responses to the questions and other information requested, and email it to me. We will review comments in an upcoming meeting and discuss how we could better serve our members.

Talking Points During the Visit

Although the following are common points we want to gather insights around from these visits, feel free to discuss other things that may be important to specific partners.

Key Message about the Greater Austin Chamber:

Our work through Opportunity Austin has helped to develop Austin as a prosperous region with a diversified economy that is competitive and resilient. Our success presents ongoing challenges of mobility/ connectivity, affordability and talent, both short and long-term.

We want to thank you for supporting our mission and our strategic plan. We couldn’t do this without your commitment!

I’m happy to talk with you about specific initiatives during our time together. We also want to learn more about your challenges and initiatives, and how we can better serve you.

Specific common questions to ask:

- How would you describe the business outlook for your organization over the next 12 months? (positive, neutral, negative) What factors influence the outlook?
- What are some of your key corporate initiatives over the next 12 months? How could the Chamber help to support these initiatives?
- What is the top benefit for your organization for doing business in Austin?
- What is the top challenge facing your organization?
An Army of Ambassadors

- Outreach contact to members (calls, visits, notes, e-mails)
- Meet & Greet at events
- Postings on virtual venues (start interactions, respond to interactions)
- Onboarding “buddies”
- Connecting members to other members
- Providing testimonials on the “value of membership”
- Collecting testimonials (calls, visits, capturing during events)
- Recruiting new members
Member Relations Council

- Support for membership staff
- Analyze engagement reports and identify actions to take
- Conducts 6-month membership check-ins
- Onboarding activities
- Outreach to dropped members
- Recognize members – Anniversary Blitzes
- Recruit new members
- Report at Board meetings
Create a Resource Plan

Retention Group 1: Membership Staff
- Included Staff: Melanie, Ron, Robert, Estar, Cathi
- Target Member Level: Mixed Levels
- Tools: Engagement Form, Engagement Guide

Retention Group 2: Ambassadors
- 5 Volunteer Ambassador Retention Rockstars
- Each volunteer will contact 5 organizations a month and conduct a call or in-person visit between the 1st of the month and the last day of the month
- Target Member Level: Engage & Build
- Tools: Engagement Form, Engagement Guide

Retention 3: Member Relations Council
- 5 Volunteer Member Relations Council Members
- Each volunteer will contact 5 organizations a month and conduct a call or in-person visit between the 1st of the month and the last day of the month
- Target Member Level: $2,500+
- Tools: Engagement Form, Engagement Guide

Retention Group 4: Retention Rockstars (Mix of Staff & Volunteers)
- Identify 5 additional staff and volunteers who want to help with retention
- Each staff/volunteer will contact 5 organizations a month and conduct a call or in-person visit between the 1st of the month and the last day of the month
- Target Member Level: Mixed Levels
- Tools: Engagement Form, Engagement Guide
So, Now You Know What Influences Retention

The silver bullet is a series of strategies and actions to be employed and it doesn’t magically happen without you!
You don’t have a retention problem with all members—identify who sticks and who drops

Recruit for Retention—create a targeted recruiting plan based on who you want and use the value proposition for the right audience

Onboard new members and help them be successful

Create engagement that is meaningful to different interests

Provide resources for retention—staff, volunteers and smarter technology
Now What?

What did you learn that was most helpful?

Who should you share this information with next?

How do you see this benefiting your members or organization?
Cathi Hight—At Your Service

- Staff training and Board retreats
- Strategic planning
- Benchmarking and operational evaluations
- Membership surveys & focus groups
- Membership development workbooks
- Webinars and articles
- Conference presentations
- Check out our web site: www.hightperformance.com
- Contact us at (512) 354-7219 or at cathi@hightperformance.com

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