

Using Those Annoying Tele-marketers to Retain Members

**Recruitment and Retention of Members
NABE 2004 Midyear Meeting Program Materials
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**Presenter: Christopher G. Blake, CAE
Director of Communications, Connecticut Bar Association**

CBA Membership Retention Program

Schedule of Activities

Selection of vendor (you can do this stuff in-house, but it is very labor-intensive and requires knowledge of tele-marketing techniques)

Written proposal should include all services to be rendered and fees.

- Insist on references
- Check references
- Review contract
- Revise as necessary
- Sign contract

Phase I: recently lapsed members (one year or less)

Draft and send personalized letter to de-activated members with membership application

Develop a script for tele-marketers; let tele-marketers develop first draft; they know the best techniques to engage members.

- Internal review process
- Revisions
- Final approval

Stress to tele-marketers that they should get a credit card number, if the member wants to join.

Send database to vendor including:

- Full name
- ID number
- Firm

- Address
- City/state/ZIP
- Phone number (of course!)
- Bar admission date
- Section memberships
- Dues amount

Create a database to track de-activated members who express interest in joining.

Set up a time with the vendor to listen to actual calls and offer critique.

Receive regular reports from vendor identifying former members who wish to re-activate their membership. Vendor should clearly identify those who have paid by credit card and those requiring follow-up.

Send invoice and letter to members requiring follow-up. Track results.

Prepare periodic progress reports for management and Executive Director.

Monitor and analyze results.

Prepare final report.

Phase II: Members terminated within past three years for nonpayment of dues.

Develop a database with the same member information as was used for Phase I; send database to vendor.

Prepare script similar to the first one; you may want to alter this script somewhat by mentioning the new member benefits you have developed in recent years; they may not be aware of these benefits.

Create database to track results; track results using same procedure as Phase 1.

Send invoice and letter to members requiring follow-up. Track results.

Prepare periodic progress reports for management and Executive Director.

Monitor and analyze results.

Prepare final report.

Results of CBA 2002-2003 Membership Retention Program

Phase I:

319 recently lapsed (within the past year) former members were called, excluding those on the “do not call” list.

53 reinstated their memberships.

Total revenue:

Membership dues: \$10,980

Section dues: \$915

Grand Total: \$11,895

Total expenses: \$1,485.

Phase II:

831 former members whose membership lapsed 2-3 years ago were called., excluding recently lapsed members and those on the “do not call” list.

55 reinstated their memberships.

Total revenue:

Membership dues: \$11,493

Section dues: \$1,195

Grand total: \$12,688

Total expenses: \$2,122

Summary:

Total revenue: \$24,503

Total expense: \$3,607

NET income: \$20,976

Final thought: We gave monthly updates to the CBA officers and the Board of Governors. They appreciated the efforts we made and the positive results.

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