Converting Guests to Membership  
IDEAS AND GUIDES FOR CHAPTERS

It’s great to have guests attend Chapter events, but it’s even better to have new members joining the network and committing to AFWA and your Chapter. Here are a few ideas to get you started converting your guests to members:

**Make information available:** What are the most common questions you hear from potential members? Are the answers to those questions available on your Chapter website? List your Chapter dues, upcoming events, featured benefits, and leadership contact information on your website. Be sure the link to AFWA.org/join is prominent on your membership or homepage. Also consider having a membership brochure or flyer printed and available at all Chapter events.

**Show the value of membership:** How much more does it cost to attend an event as guest over a member? The average Chapter only charges $5 more for non-members. Consider increasing this difference to $8-$10 at least, to demonstrate greater value in membership. This cost difference could be even greater on your most popular events, or highest quality topics.

**Recognize and Appreciate current members:** Host a members-only event, an event free for members, offer a special such as a drink ticket to members, or include a member spotlight in your monthly newsletter. Anytime you can give a little something extra to your members you’re letting others know they’re missing out by not joining *(and you’ll make your current members very happy!)*.

**Plan ahead:** An individual (or a company) is more likely to join AFWA, if they know what is coming in the months ahead. Is your chapter planning and promoting upcoming events? If you have holes in your calendar, fill them in with AFWA National webinars.

**A personal invitation:** Keep track of the guests coming to your events. Once you’ve seen someone attend several events, send her a personal invitation to join AFWA. Share your story about what AFWA means to you and provide a link to the AFWA.org/join

**Invite her to volunteer:** This method may only work for specific guests, but a little flattery can go a long way. If you have an opening on a committee, consider inviting your guest to join AFWA and get directly involved.

**Access to Membership List:** For some guests, such as recruiters or local businesses, access to membership contacts offers high value. Hopefully this goes without saying, but never distribute your Chapter Member list to a non-member. AFWA Members have exclusive access to a nationwide contact list of women in the accounting and finance industry. Don’t give this information away to non-members, but remind them this information comes with membership.

GUIDE TO MEMBER CONVERSION

Okay, so those are nice ideas, but you want a plan! Here are some tactical steps that your Chapter leadership can take to following up with and converting potential members.

**Step 1: Following a Potential Member’s first event**

A volunteer should make a personal follow up thanking the guest for attending and inviting her to the next event. If you met this attendee, include something personal you remember about her (ex. I hope your meeting the next day went well, here is a link to the book I was telling you about)

**How to make the connection** – be sure to exchange business cards at the event, or collect contact information from guests on the event sign-in

* **Send a LinkedIn invitation to connect**: be sure to include a message in the invitation. Avoid Facebook or other social connections, as these may be too personal for someone you just met.
* **Send an Email**: Not all emails get lost, especially when they are sent from one individual to another. Email provides a nice method for personalizing your message.
* **Send a handwritten note**: This small gesture can have a great impact, with a personal touch. AFWA notecards require just a small investment from your Chapter and can be distributed among your leadership.
* **Pick up the phone**: AFWA members appreciate when we pick up the phone to collect personal feedback, potential members will feel the same way. Be prepared with your message and plan ahead what you will say in a voicemail, or the questions you will ask with the potential member on the line.

**Step 2: Following a Potential Member’s second event**

The goal of the first step is to simply introduce yourself and thank the potential member for attending your event. In this step 2, you’ll want to learn more about your potential member. Whether you get the opportunity to speak to your guest in person, or you follow up after the event, find out what brought her back to your event and provide more information on that topic.

For example, if your guest:

* Needs CPE or liked the session topic: Share a list of upcoming CPE events
* Is looking for a job or a new hire: Share that AFWA is a great place to make connections, and members have access to an online directory of all members
* Looking to grow her professional network, or find a mentor: Find out the potential member’s line of work and introduce her to someone similar in the Chapter. This may be someone with more experience in the same field, or someone with similar experience.
* Is a student or working toward her credential: Share scholarship opportunities offered by your Chapter and the Foundation of AFWA.
* Looking to get involved or gain leadership experience: (You would love to hear this response, right!) Share information about volunteer opportunities on committees and the Board.

This is also a great time to ask your guest if she has any questions about AFWA or AFWA membership.

**Step 3: Following a Potential Member’s third event**

You’ve introduced yourself and gotten to know your potential member, now is the time to ask her to join AFWA! Plan to speak with your guest at your Chapter’s event, but also plan to follow up with an email.

What to include in the email:

* **A direct invitation to join AFWA**
  + **Make your ask personal** by sharing your own AFWA story. For example, “I’m so happy you’ve begun to find a network in AFWA. I would love to see you become a member of our organization. I joined AFWA \_\_\_ years ago and \_\_\_\_ (share what you value out of membership)...”
  + **Ask her to volunteer** (only if appropriate based on your previous conversations): “We have an opening on our \_\_\_ committee. Your name was mentioned by our Board as someone we would like to get more involved. Our volunteers get much more out of AFWA membership, I hope you’ll consider joining us.”
* **A link to AFWA.org/join**
* **Chapter Membership Dues:** National dues will be listed on the website, but Chapter dues aren’t available until further into the application. Share the total amount of membership up front.
* Attach a **membership flyer or brochure**
* **Information about Corporate Membership:** Consider the company or firm your guest works for. Corporate Membership discounts start with just 5 employees.
* The **phone number for AFWA HQ**, in case she has questions about payment 800-326-2163
* The details of your next Chapter event

TRACKING

Keeping track of who you have talked to and how many events they’ve attended can be difficult, especially if you have a committee sharing the work. Start a spreadsheet to track your progress.

Sample Spreadsheet: Share this spreadsheet at your monthly Board Meeting

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Guest Name | Contact info | 1st event | Followed up by/date | 2nd event | Followed up by/date | 3rd event | Followed up by/date | Join date |
|  |  |  |  |  |  |  |  |  |

WHAT NOT TO DO

Don’t…

* Have multiple members reaching out at the same time. Too much follow up or being bombarded with communication could be a turn off to potential members.
* Push someone who has already said no. If she says no, give her some time. Follow up in 6 months or a year, or when you have a big event you think she would enjoy.
* Feel like you have to stick to this model. Every guest is different, some may be sold after the first event, others may take longer.
* Rely on one person to close on membership. Many members join AFWA to make connections. Introduce your guest to multiple members. If someone else makes a stronger connection, consider handing off your communications.
* Forget to be positive. To you, membership may be small. But to your guest your membership may have room to grow, or appear as a close network. Always focus on the positive!