



Accounting & Financial Women's Alliance

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# Recruit Engage Retain

- July 2015 | rev. 9/15 -

A guide for the AFWA Chapter Membership Chair. It won't happen on its own, but with a little teamwork and inspiration you can grow, engage, and retain the membership of your AFWA Chapter.

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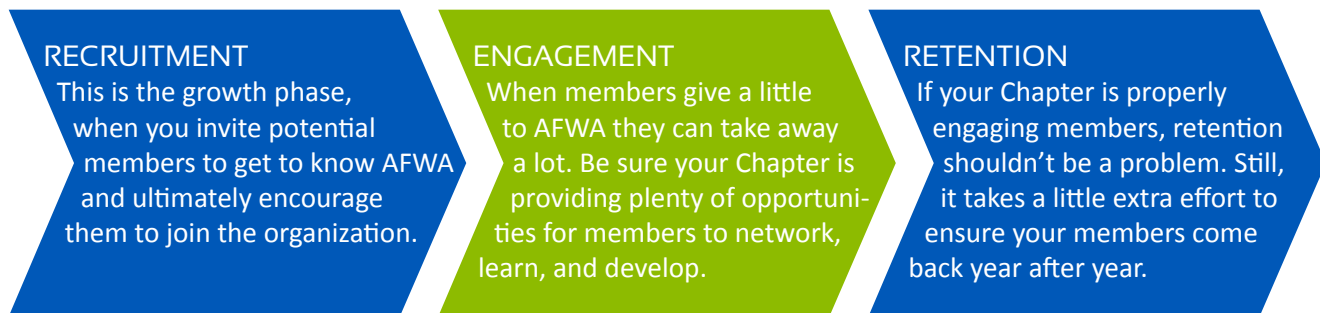


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Let's begin by viewing your membership growth plan in three phases:



### START YOUR PLAN

Begin by setting a goal for your Chapter. Be specific with your goal,

Instead of > “We want to grow membership.”

Try > “We’d like recruit 10 new members by the end of the fiscal year.”

In the second goal you’ve targeted a membership phase (recruitment), provided a measurement (10 members), and given yourself a timeline (by the end of the fiscal year). Instead of focusing on all three membership phases at once, you can better target your efforts by focusing on one.

Other goal examples might be:

- We’d like 90% of our members to be involved in a volunteer role this year.
- We’d like to achieve 80% retention of the memberships expiring this quarter.

### DON'T DO IT ALONE

Growing your Chapter should be a team effort. Be sure the entire Board is aware of your goal, and use your goal as an opportunity to involve other members. Throughout this guide, we’ll refer to various committees and volunteer roles.

#### Membership Committee:

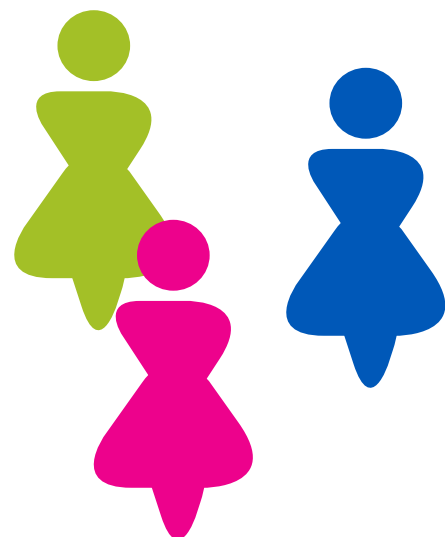
Led by the Chapter’s Membership Chair, the Membership Committee will be in charge of developing and executing a plan to grow, engage, or retain membership in your Chapter. Consider a sub-committee meeting to be held at a different time than the regular board meeting – you’ll be amazed at the ideas that can grow over a cup of coffee.

#### Hospitality Committee:

The Hospitality Committee is your follow-up team. Members on the committee may be assigned as greeters at your next Chapter event, they may follow up with potential members via email or phone, call on new members to welcome them to AFWA, or reach out to members who have let their membership lapse.

#### Co-Chair Model

Consider a Co-Chair model for the Membership Committee. Divide the work by responsibility or timeline (i.e. alternating months). This take the pressure off one responsible party and prepares another leader to take over the role the next year.



# RECRUITMENT

## PITCH

Before you approach that first individual to invite her to an AFWA event, be sure you've mastered your elevator pitch – your answer to the question, "What is AFWA?"

Our mission statement is great, but a personal spin will be much more inviting.

Which statement makes you want to join AFWA?

*The mission of AFWA is to enable women in all accounting and related fields to achieve their full personal, professional and economic potential and to contribute to the future development of their profession.*

OR

*AFWA is a great group of women from our industry. On top of earning CPE hours, I've met several women who have been able to mentor me throughout my career.*

So take a moment to think about and write out your elevator pitch. Here are a few ideas to get you started:

- Women who mentor me in my career
- Networking through AFWA got me my current job
- I've really developed my public speaking skills
- I got a scholarship through AFWA for earning my CPA
- AFWA supports up and coming professionals in the industry
- I earn a lot of CPE from AFWA events
- I'm made some lifelong friends through AFWA

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## HOME BASE

Many people are visual learners, so even after you've told someone about your great experience with AFWA, she may want to research for herself. This is where your Chapter's website or social media comes into play.

Note that managing the Chapter website or social account should not be the responsibility of the Membership Chair. However, you may want to work with this volunteer to ensure your site is up to date before you start a membership campaign. Download our guidebooks on Chapter websites and social media for more tips on developing these platforms for your Chapter.

## TARGETS

Now that you're armed with your AFWA pitch, it's time to reach out to your community. Again, choose a defined target and focus on that group. Here are a few places to start:

### INACTIVE MEMBERS:

Chapter leaders can access a list of members who have not renewed their membership via the online Chapter Dashboard. Reach out to these members to invite them back to AFWA and find out why they didn't renew. Sometimes people just want to know they're missed!

### MAJOR BUSINESSES IN YOUR COMMUNITY:

Think beyond the local accounting firms. Look into banks, brokerage houses, companies employing financial analysts and accounting departments. Who are the major employers in your community? Research these local businesses, ask around your network, and extend an invitation.

### LOCAL PAPER:

Refer to your local newspaper or business journal for recent promotions or new hires in the accounting and finance industry. Reach out with a congratulatory message and an invitation.

### CURRENT MEMBERSHIP:

Encourage the members of your Chapter to recruit from their own networks. Host a "Bring your Boss" luncheon, or "Two for One" event where the member's guest gets in free, hold a drawing or offer an award to the member who introduces the most guests to AFWA.

### LINKEDIN:

LinkedIn is the largest social network specifically for professionals. Here are two tips for using LinkedIn to grow your membership:

- 1. AFWA Group:** Within the AFWA LinkedIn Group you can perform a search of all members. Search for your city, there may be faces here you haven't seen in a long time or perhaps have never met. Since you're both members of the AFWA Group, you can direct message an invitation to the user.
- 2. Search function:** You can use LinkedIn's advanced search feature to find accounting and finance professionals in your area. Search based on title or keyword (ex. CPA, CFP, accounting...), you might find people or businesses you wouldn't have otherwise thought of.

### EVENTS:

Many Chapter's hold annual Membership Socials to promote networking and growth among the membership. But there are at least two other types of events that are great for getting new faces in the door:

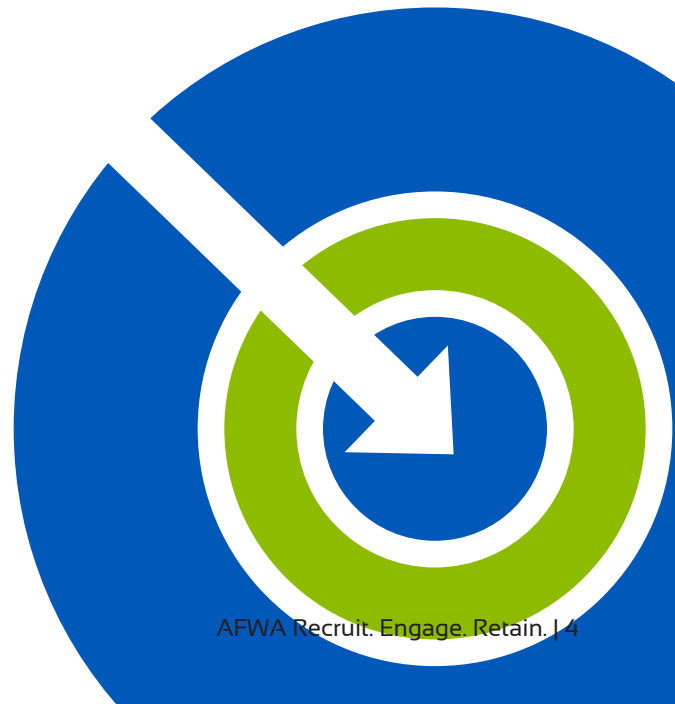
- 1. Panel discussion:** Panel discussions are typically well attended because panelists will invite their friends or colleagues for support. Host a panel discussion with panelists from some of your targeted companies. You may get some new faces in the door.
- 2. Joint meeting:** What are the other associations in your community with similar interests? Host a joint meeting to network with new faces.

### CORPORATE MEMBERSHIPS:

AFWA offers a great package for Corporate Memberships. Be sure to have the Corporate Membership Brochure available when you reach out to larger businesses who may have five or more potential members.

### LOCAL UNIVERSITY OR COLLEGE:

Maybe your Chapter would like to focus on building your student membership. Students enjoy all the same benefits at a discounted membership rate. Remember, not all students are traditional twenty-somethings. There are many adult students who are working toward a new career.



## MEDIUM

Now you know who you want to reach out to, so how do you do it?

### EVENTS:

Your Chapter's event calendar is your number one promotional tool. When a potential member attends your event, she's much more likely to join if she knows what other events to look forward to. So try to keep a few months ahead in your planning so you always have an upcoming event to promote.

### DIRECT MAIL:

Direct mail doesn't have to involve a major campaign – although with a good list, one could be successful. Pre-order a supply of postcards or notecards that leave room for a personal message. Distribute these among you committee members. As you discover a new potential member, or as a follow up to someone you've previously met, send a personal note inviting them to an upcoming event.

### PHONE CALLS:

As with Direct Mail, a personal touch can go a long way. Utilize your membership committee to split up calls to members – current and potential – to invite members to renew or join AFWA.

### SOCIAL MEDIA:

If your Chapter doesn't use social media, now is the time to start. An active Facebook page can even be a substitute for a Chapter website. Check out AFWA's Social Media: Getting Started guide for tips and ideas.

### BUSINESS CARDS:

Print generic business cards for your Chapter. Cards can include your Chapter name, website, email, and social media. Distribute these to Board Members to pass out when given the opportunity.

### EMAIL SIGNATURE:

As a member, you are one of the most important assets to your Chapter. Promote your AFWA membership to all your contacts via your email signature. Templates are available in the Marketing Toolkit in the Member Portal.

## TOOLS

Visit the AFWA Marketing Toolkit on the Members Portal for a variety of tools and resources to help your Chapter. Here you'll find the AFWA Membership brochure, templates for stationary and promotional pieces, helpful webinars and more. As always, contact [marketing@afwa.org](mailto:marketing@afwa.org) for assistance to download and customize these resources.

## WELCOME AND FOLLOW UP

Congratulations, you've reached out to your potential members and many are coming to your next event. But, your work is not over. Now is when your hospitality committee can step in to make potential members feel welcome and coming back for more.

Be sure your Hospitality Committee is aware of any potential members who may be coming to the next event so they greet and welcome the guest.

Hold a networking ice breaker at your meetings. Depending on how many attendees you have, this could be as simple as stand-up introductions around the room.

Have a guest registration form at each meeting to capture contact information of anyone new. These may be at check in or at each table. Keep a running list of your potential members to follow up and reach out with an invitation for future events.

Follow up: A simple email or LinkedIn message saying "nice to meet you," can go a long way. Think of something specific from your conversation and reference it in your message. Send a link to a book, blog, or website you talked about. This will make a huge impact and show that you really cared about your meeting.

Finally, don't give up. Just because a guest didn't immediately join or return to the next month's event doesn't mean she's not interested in AFWA. Make notes in your running list of potential members, follow up one week after the event, two months later, even six months later. Just be sure you always have something new to offer.

# ENGAGEMENT

Surveys from National Headquarters show that most members drop their membership after just one to three years of membership. Perhaps these members never felt connected, or didn't know how to get involved more deeply. The best way to retain your members is to engage them.

## WARM WELCOME

### PERSONAL TOUCH:

For starters, your Hospitality Committee should welcome every new member with either a phone call or personal email. Be sure to share any upcoming events or volunteer opportunities. Make it a two-way conversation and give the new member plenty of opportunity to ask questions.

### FISHBOWL SEATING:

Walking into a meeting as a new member can be intimidating, especially if everyone gravitates to their own friends. Ask everyone at your next meeting to draw a number assigning them to a seat or table. This takes the pressure off finding a seat and encourages mixing among members. Be sure to give plenty of time for conversation to happen at the tables.

### MEETING INTRODUCTIONS:

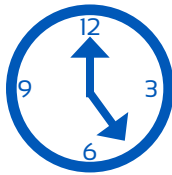
Give new members an opportunity to introduce themselves at your Chapter meetings.

### DISCUSSION QUESTION:

We've all been to a presentation where the presenter gets to Q&A and crickets suddenly enter the room. Instead of traditional Q&A, ask the presenter to provide a discussion question at the end of their presentation. Each table of attendees can then take a few minutes to discuss the question and the presentation as whole. This provides a wrap-up for attendees to connect on the presentation they've just heard.

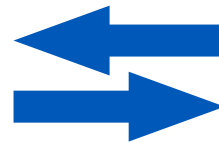
## EVENTS

Members value the opportunity to network, so their attendance at Chapter events is crucial to whether or not they renew their membership. Work with the Programming Committee to develop an events calendar with a variety of events to appeal to more members.



### TIME:

AFWA is a multi-generational organization with women in all different stages of life and career. One individual may only be able to get out of the office for lunch, while another may not be able to get away until happy hour. Maybe even try a breakfast event.



### LOCATION:

For Chapters in larger cities, distance can sometimes hinder attendance at events. Rotate the location of your events to create convenience for your members.



### COST:

The same goes for cost. While many companies have a budget to pay for CPE events there may not always be the funds to attend everything. Try a happy hour or brown bag lunch.



### INVITATIONS:

Keep track of your attendance lists from each event. Who are the members you haven't seen in awhile? Reach out with a call or email to find what they've been up to and invite them to an upcoming event. People will appreciate being missed!

## VOLUNTEERS

Engage members by getting them involved in a volunteer role. Talk to each new member to determine her areas of interest and connect those talents to a project, committee, or board services. Feel each new member out and remember, not everyone is ready to immediately jump into a volunteer role. She may need to get to know the organization better before she feels comfortable enough to volunteer.

Here are some ideas to create more volunteer opportunities within your Chapter:

### SPLIT THE WORK

Spread tasks out over the year with different volunteers. i.e. instead of one person being in charge of every monthly event, two people may be in charge of alternating monthly events. This spreads out the work load and gets more people involved.

### CONSIDER A CO-CHAIR

If one person heads up the same event year after year, what happens if this person suddenly leaves AFWA? Assign co-chairs to help with major events – one experienced chair and one new chair. The new chair can learn.

### START SOMETHING NEW

You may find out a member is interested in starting something new for your Chapter, such as a Facebook account, mentor program, or fundraising event. Encourage the member to take the lead on the project and give them plenty of support from the Board level.

### SHORTER TERMS

Not all volunteers have to be year-long commitments. Invite members to head up a single monthly luncheon, or participate on a committee for an annual event. This can get members involved without the commitment to an entire year's worth of work.

**!** Sometimes a seemingly small task can be just enough to motivate a member to want to get involved more. We all have to start somewhere.

## COMMUNITY

Get your Chapter involved in community events, such as a 5k, bowl-a-thon, food drive, habitat for humanity, or other community fund raiser. This offers a great alternative for members to network outside of Chapter meetings, and appeals to members' desire to support a cause.

## SOCIAL MEDIA

Again, start a social media account for your chapter, such as Facebook or Twitter. This gives members an opportunity to engage and connect outside of your Chapter meetings.



**REMEMBER:** These ideas shouldn't all fall on the shoulders of the Membership Chair. As said before, it takes a team to grow a Chapter. Work with the other Chapter Leaders to fit everyone's responsibilities into the overall membership plan.

# RETENTION

If you successfully engage your members, retention should happen on its own. But, it never hurts to be proactive and reach out to members who are about to renew. Your Chapter's membership report is your best tool for managing retention. This report, available on the Chapter Leaders Dashboard will provide the current status of all your members. Please contact [afwa@afwa.org](mailto:afwa@afwa.org) for assistance accessing or reading this report.

Here is AFWA National's schedule for reaching out to members for renewal:

- > Invoice is generated and emailed 60 days in advance of expiration
- > A hard copy of the invoice is mailed 6 weeks prior to expiration
- > Email reminder sent 7 days prior to expiration
- > Final email reminder sent 30 days after expiration

Remember, AFWA memberships expire year round. Gather a small committee at least once a quarter to review the membership report and reach out, via phone or email, to members who are about to expire, or have recently expired. Confirm the member has received her invoice from headquarters and ask about her intentions to renew.

Be sure each committee member is prepared with her "elevator pitch" - what to say if the member says she is not going to renew. This may include the committee member's own personal story of how AFWA has impacted her, or may come from some of the responses found in AFWA's Retention Talking Points document.

If the member definitely plans to not renew, be sure to capture her reason. Keep a list of the reasons why members choose not to renew so the Board can learn from the feedback and improve the Chapter.

## BONUS IDEA

Just as everyone enjoys a personal touch, everyone likes to be recognized. Consider recognizing members on their 5, 10, 15... year anniversaries. A certificate, mention in a newsletter, or call out at a meeting can make a big impact - warm fuzzies for the member being recognized, motivation for the member one year away from an award, and realization by new members of the long term value AFWA has given other members.

## PARTING THOUGHTS

### TEAM:

It can't be said enough - Membership recruitment, engagement, and retention is not a one person job. It takes the commitment of a team. Ask for help, and to improve your chances of a yes, be specific. Who are you going to say yes to:

*Will you join my membership committee?*

OR

*You have such pretty hand writing, will you help me write notes to potential members?*

### EXCHANGE IDEAS:

The AFWA Member Exchange on LinkedIn is a great resource for collecting ideas from other Chapters. Check out the latest discussions, and add a question or idea of your own.

### KEEP NOTES:

In the next year or two, you are likely to exit the Membership Chair position. Take notes of your goals, what you did to achieve them, and your results. Any future Membership Chair will greatly appreciate the records.

### QUESTIONS:

Contact AFWA Headquarters for ideas and support at 800.326.2163 or [afwa@afwa.org](mailto:afwa@afwa.org)