



Accounting & Financial Women's Alliance
CONNECT • ADVANCE • LEAD

Engagement

Activities & Opportunities to Keep Your Chapter Strong

August 2018

TODAY'S PROGRAM

- The importance of New Member On Boarding
- Ongoing Member Engagement
- Engaging Volunteers
- Delegation



Cindy Stanley
AFWA Executive Director



Debi Williams
AFWA Director of Operations

Early Bird Through August 16!!!

Here the stories of success from Chapter Leaders who have done it!

Join us for AFWA Day at the



Women Who Count

2018 NATIONAL CONFERENCE

Presented by The Accounting & Financial Women's Alliance

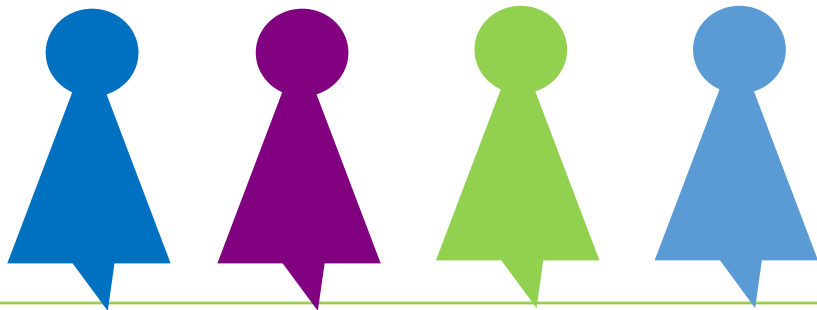
Celebrating 80 Years of Women Who Count
October 28-30, 2018 | Kansas City, MO— Westin Crown Center

WomenWhoCount.com

The Importance of On-Boarding

40% of non-renewing members have been a member for 3 or fewer years.

First impressions make a difference! The first few months... and years... of membership are the most important for developing the member experience to ensure membership retention.



What Does AFWA HQ Do for New Members?



Notice to Chapter	Email	Within 30 days
Message from the Executive Director	Email	Within 30 days
Message from National Board Member	Email, call, or letter	30-60 days
Today's AFWA	Webinar	Quarterly
New Member Packet	Mailed Letter	Under review



Your Engagement Plan: ID Your Team

MEMBERSHIP

- Assign three different volunteers to each focus on three areas of your membership plan. Recruitment. Engagement. Retention.
- A clearly defined responsibility might be appealing to a volunteer and a great way to get some one new involved.

ENGAGEMENT/HOSPITALITY

- New Member On-Boarding: communicate with your chapter's newest members
- Overall Member Engagement: Review membership list, check in with members throughout the year, connect members with volunteer roles, watch for members who stop participating



Your Engagement Plan: ID New Members

The screenshot displays a user dashboard with several sections. Red circles and arrows highlight a specific navigation path:

- My Profile** (circled in red)
- Manage My Chapter** (circled in red, located in the 'My Account Links' list)
- Chapter Documents** (button circled in red)
- Chapter Reports** (button circled in red)

Arrows indicate the flow from 'My Profile' to 'Manage My Chapter', and then from 'Manage My Chapter' to both 'Chapter Documents' and 'Chapter Reports'.

My Membership

My Profile
Update your contact and professional information. Chapter leaders, access the 'My Chapter' Dashboard.

Renew Member
View and pay your current membership renewal invoice

Webinars
Register for upcoming webinars and view past recordings

My Account Links

- My Profile
- My Membership
- My Committees
- My Social Communities Links
- My Donations
- My Events
- My Invoices
- Change My Password
- Manage My Chapter

Chapter Documents **Chapter Reports**

Start	End	Email
07/01/2017	06/30/2018	Email
07/01/2017	06/30/2018	Email
07/01/2017	06/30/2018	Email
07/01/2017	06/30/2018	Email

Edit Primary Info **Edit Demographics**



Your Engagement Plan: ID New Members

The screenshot displays the AFWA New Chapter Members Report Parameters page. It features a main interface with sections for 'Terminated Members', 'August New Members', and 'August Chapter Dues'. Each section has a 'Download Report / Previous Data' button. A red circle labeled '2' highlights the text 'This report shows your Chapter's newest members. Download a report to extend your date range' and the 'Download Report / Previous Data' button under the 'August New Members' section. A red circle labeled '1' highlights the right arrow icon in the 'Terminated Members' section. A red circle labeled '3' highlights the 'Start Date' field, which is set to '6/1/2018'. A red circle labeled '4' highlights the 'Go' button. An inset window titled 'Report Parameters - Google Chrome' shows the same form, with a red circle labeled '3' highlighting the 'Start Date' field and a red circle labeled '4' highlighting the 'Go' button. The URL in the browser is 'https://apps.afwa.org/eweb/reports/ReportPa...'. The 'End Date' field is set to '8/10/2018'.

Terminated Members

August New Members

This report shows your Chapter's newest members. Download a report to extend your date range

Download Report / Previous Data

Name Company

August Chapter Dues

Download Report / Previous Data

Report Parameters - Google Chrome

Secure | https://apps.afwa.org/eweb/reports/ReportPa...

AFWA New Chapter Members Report Parameters

Start Date: 6/1/2018

End Date: 8/10/2018

Go



Your Engagement Plan: New Member On Boarding

BASIC

100

- **Personal email introduction** to welcome the new member – be sure to include information on the next chapter event
- Be sure the new member is aware of all the ways to **find information**, ex. Social Media, chapter website, the name of the volunteer who sends communication emails.
- **Get to know your new member** – ask her what she is most interested in, and what her career goals are. This will help match her with others in the Chapter, or get her involved on a committee.
- **Pay close attention to Corporate Members.** Don't assume one key contact is passing along all information.
- Occasionally kick-off chapter meetings with round-the-room **introductions**. Or small group introductions of high attendance at the meeting.
- Make a **personal phone call or send an invitation to connect** on LinkedIn
- Provide a **list of names and contact information** for all Chapter leaders, include headshots if available
- Connect each new member with a **Member Mentor** – a volunteer who may meet the new member for coffee, or check in on a regular basis throughout the first year.
- Host a quarterly small group **meeting** for new and potential members (Today's AFWA). Discuss the benefits of AFWA and how to make the most of membership.
- Invite new members to **get involved**. Start small, such as working the check-in table at the next event

Reminder: Add all new members to your chapter mailing list!



Your Engagement Plan: Ongoing

Communicate Frequently

Make it easy for members to find out about upcoming events. Send emails, update social media and your chapter website. You should have up to three notices for each event, save the date, register today, last call to register.

Membership is a VIP Experience

Give your members special treatment! Nicer or different color name tags, a drink ticket, BIG discounts on event registration, pre or post networking time with meeting speakers, check in fast lane, anniversary recognition

Lift Your Board Members

Board members give a lot of time to make your chapter great. Treat them special! A ribbon for their namebadge, formal installation, end of year gift, name them on the website, recognize a volunteer of the month



Your Engagement Plan: Ongoing

Survey Your Members

Find out what your members are REALLY looking for. Ask about meeting time and location. What CPE do they need? Ideas for fun events? What do they value about membership? And what can you do better?

Customize Experiences

Organize small group programming for membership segments: c-level, young professional, students, partner-track, tax, non-profit ... meetings can be casual to encourage discussion and deeper connection

Go Local!

Is your chapter in a large market? Considering rotating your events to new locations, or planning networking events around town. Make it easy for members to come to you and get to know others closest to them.



Your Engagement Plan: Ongoing

Align with a Cause

Today's members are looking for purpose - align with a cause to engage members in a new deeper way – go for hands on. Tour a non-profit. Raise money for Heart Walk. Tax preparation. Habitat for Humanity. Dress for Success.

Break Away from the Same Old Same Old

Keep your members interested by trying new programs, initiatives, or benefits. Set a goal to try 1 or 2 new things this year – over time you can add more.



Engaging Volunteers



CUSTOMIZE RESPONSIBILITY

Ask a member to organize an event specific to her career stage, her neighborhood, or her interests.



CO-CHAIR

Divide responsibility among two members – based on volunteer experience, alternating schedules, or general responsibility



SHORTER TERMS

Ask members how much time she does have to give. Match her with committees that operate just a portion of the year, or divvy out small tasks.



START SOMETHING NEW

Encourage a member to take the lead on a new project she is passionate about.



A Few More Notes...



On Leadership

Remember, many employers who support the cost of dues are looking for on-the-job leadership training for their employees.



On Delegation

As a Chapter Leader, you're setting an example for the responsibilities of a volunteer in your role. Delegating work and providing specific tasks will help engage members.

Consider the team you can build around you.

In Summary



Place value on
face-to-face
interactions



Create a warm
welcome for new
members and treat
your current
members like VIPs



Create
opportunities for
members to get
involved



Try something
new – have fun!





Questions?

Contact Cindy.Stanley@AFWA.org or Deborah.Williams@AFWA.org





Connect with AFWA
anytime at AFWA.org on these social sites

@AFWAnational

