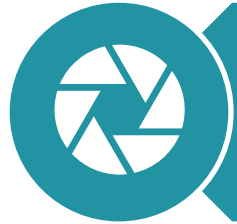


Chapter Membership Chair Training

Presented by: Ty Hendrickson



Agenda



Membership Committee Updates



Guide to Prospecting New Members Review



Breakout Discussions



Karletta Jones

Corporate Partnerships

- Updates



Bridget Donoghue

Early Career Initiative

- ECI Website Link
- LinkedIn
- Discount

Engage student/early career members in service



Membership Events Educa

Early Career Members

About the Early Career Initiative

The Early Career Initiative is a volunteer group created to ensure the voice of emerging leaders is heard and utilized within the national organization. Members of the ECI are working to grow young professional membership within AFWA by developing programs and initiatives specifically designed to meet the needs of the modern accounting and finance professional.

Early Career Members are classified as:

- *Members with less than 10 years of professional experience,*
- *Members under 35 years of age, or*
- *Members who are currently part-time or full-time students*

- Organize national programming for student/early career members
- Network with others transitioning into the industries

<https://www.afwa.org/early-career-members/>

Follow us on LinkedIn



ACCOUNTING & FINANCIAL WOMEN'S ALLIANCE

EARLY CAREER PROFESSIONALS

AFWA Early Career Professionals

AFWA is proud to support young professionals by offering resources and connections to help kick-start your career.

Accounting · Lexington · Kentucky · 69 followers

See all 3 employees on LinkedIn

Following

Home About Posts Jobs People Videos

About

<https://www.linkedin.com/company/afwa-professionals/>

AFWA is proud to support students by offering resources and connections to help kick-start your professional career. Whether you're a full-time student taking in everything campus-life has to offer, or a part-time student working a full-time job and raising a family – we support you and your ambition to succeed in the accounting and finance industries.

Graduate Membership Discount!



Existing student members

Attention AFWA graduates!

Graduation season is upon us and AFWA wants to congratulate you on your amazing academic achievement of finishing your degree. We know you will accomplish great feats in the next stage of your career.

As a graduation gift, we'd like to help you connect, advance, and lead by offering you a graduate discount on your next year of AFWA membership. At your next AFWA membership renewal, you will be redesignated as an Associate Member (\$99/annual) and we'd like to offer you a \$50 discount in your first year. Simply use the code "**GRAD50**" at your next renewal.

Looking for leadership experience and to grow your network? Consider volunteering to serve on our **Early Career Initiative** committee, which helps create programming unique to the needs of those members starting their careers in accounting and finance. Sign up [here!](#)

If you have any questions regarding renewal, please contact Cindy Stanley at cindy.stanley@afwa.org.

Non-members

Attention graduating students!

Are you interested in connecting, advancing, and leading in the next stage of your career? Consider joining the Accounting and Financial Women's Alliance (AFWA) as an associate member (\$99/annual).

As a graduation gift, we'd like to offer you a graduate discount on your AFWA membership. Simply use the code "**GRAD50**" when you register [here](#).

Looking for leadership experience and to grow your network? Consider volunteering to serve on our **Early Career Initiative** committee, which helps create programming unique to the needs of those members starting their careers in accounting and finance. Sign up [here!](#)

If you have any questions regarding renewal, please contact Cindy Stanley at cindy.stanley@afwa.org.



Sheryl Wagner

Retention & Awards

- Member Appreciation Month
- Member Care Call Scripts
- Membership renewal reminder e-mails

Member Appreciation Month

We want members to know YOU COUNT!

- Gear up with AFWA You Count Shirts – order form included on the 4/12 e-mail
- You Count logos will be available to download for social media.
- Refer a new member in May and receive a \$10 Starbucks gift cards – details on 4/19 e-mail.
 - Top referrer will be recognized on social media and at the Women Who Count conference in October
- Member spotlights: nominate yourself or another member to be featured on AFWA's social media – details on 4/26 e-mail.
- Trivia Tuesdays: 5/3 AFWA History; 5/10 AFWA Chapters; 5/17 AFWA Foundation; 5/24 Member Benefits.
 - Weekly awards – drawing on Fridays for members who answered correctly

Member Care Calls

- These steps can be used as a tool to guide outreach phone calls directed to members who have missed meetings or who have not renewed their membership.
- Chapters should personalize to best fit the needs of each individual call.
- The member care call scripts each have sections for Concern, Purpose, Talking Points & Action.

Membership Renewal E-mails

- Committee members obtain a list from National each month for members whose membership will expire the following month.
- A personalized e-mail is sent to each member on the list reminding them of their upcoming renewal and listing benefits received with their AFWA membership.



Grace Staten

Membership Chair

- New Member On-boarding Deck
- Journey Mapping

Journey Mapping

- Sample Map

- Prospect attends a chapter event as a guest and picks up membership information
- Prospect Joins Chapter and National
- Optimistic about the value of membership
 - Will membership help her do her job better?
 - Will the membership help her grow as a leader?
 - Wondering about the ROI for her investment.
- Member is welcomed by the President and other members of the organization
- Member attends a chapter event as a member
- Chapter board leader invites the new member to join the membership committee
- Through involvement the members network grows and finds a mentor
- New member attends the annual conference
 - Makes some new connections and new friends network expands
 - Knowledge expands
- Assists programming committee with upcoming events
- Co-chairs the membership committee Increases leadership skills
- Elected to the Chapter Board
- Meets her new employer while serving on the chapter board
- Gets involved on a national committee



Guide to Prospecting New Members

Guide to Prospecting New Members



- Prospecting Corporate Memberships
- Prospecting Individuals
- Strategies Working for Local Chapters
- Strategies Not Working for Local Chapters



Corporate Memberships vs. Individual Memberships

Prospecting Corporate Memberships

1. Create a list of prospective businesses that are headquartered or have a location in your chapter's area. This includes the name of the business, 2-3 potential contacts for outreach and email/phone numbers for each.
2. Create an outreach strategy for businesses that allows you to get a meeting and present the value of AFWA.
3. Gather all valuable information for the business and present the value of an AFWA corporate membership.
4. Create a nurture strategy for any business that is not ready to commit.

Where to Find Prospects?

1. Accounting Firms:

a. Inside Public Accounting Top 400 firms:

<https://insidepublicaccounting.com/top-firms/ipa-400/>

b. State Society Websites -> search for accounting firms.

2. Top Places to Work for Women:

a. Forbes's Best Employers for Women: <https://www.forbes.com/best-employers-women/#2e72e3167de9>

b. Great Place to Work's Best Workplaces for Women:

<https://www.greatplacetowork.com/best-workplaces/women/2020>

Outreach Strategy

You should never assume that you will be able to reach your prospect or get their attention on their first try. Typically, an outreach strategy includes different touch points over the course of a year. For example:

- Connect on LinkedIn
- Email drip
- Invitations

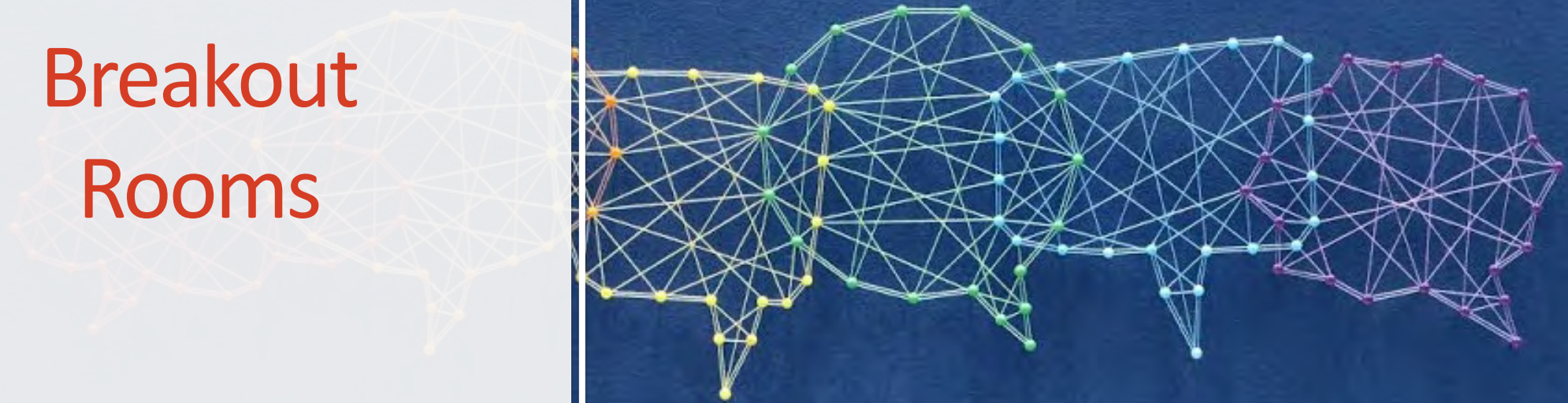
AFWA Value

1. Information about corporate memberships
2. What does AFWA do for their people?
3. How is the investment going to provide an ROI for them?
(Monetary, training, DEI initiatives, leadership development, etc) It's important to find out what they value and want to position AFWA to those needs.

Nurturing

This nurture schedule is different from the one where you are trying to get in front of the organization. This is for anyone who you have met with and they weren't ready to pull the trigger yet.

Breakout Rooms



Prospecting Individual Memberships

1. Create and maintain a list of prospects that work in accounting and finance in your area.
2. Create an outreach strategy for individuals that is centered around upcoming events and opportunities for development.
3. Create a nurture strategy for any individual who does not sign up after attending an event.

Where to Find Prospects?

1. Ask each person in the chapter to give the names of 3-5 women in accounting that they think would benefit from AFWA (ideally, they should be able to do so anonymously).
2. Search the websites of local accounting firms and make a list of all of the women listed on the website.
3. Review local publications for award recipients.
4. Search LinkedIn for women in the accounting industry in your area. You could also search based on college degree.
5. Home office to provide lists of individuals who previously attended conferences.

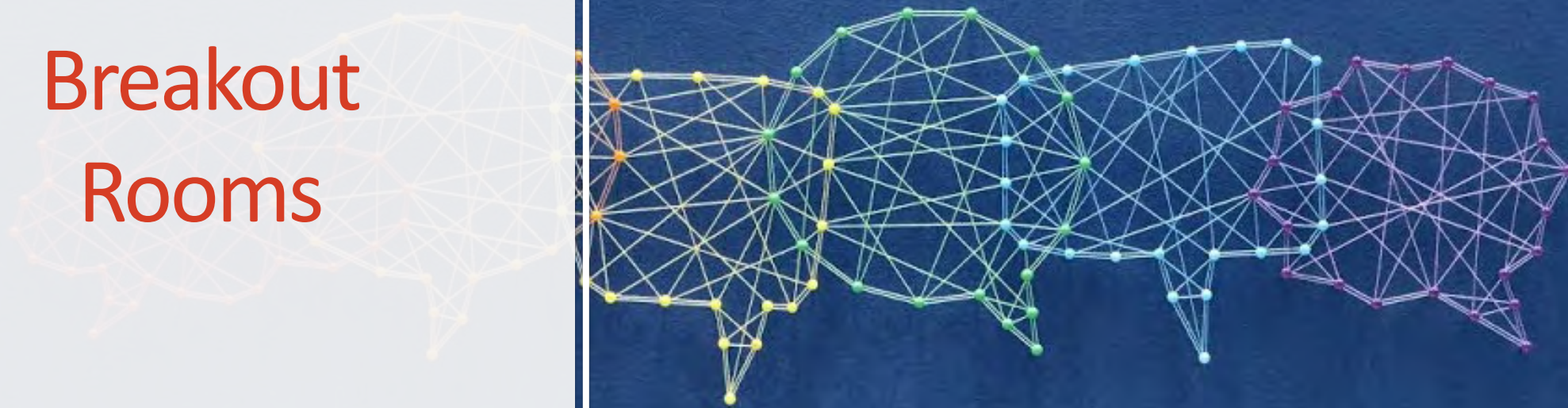
Outreach Strategy

- LinkedIn
- Email Drip
- Personal Invitations
- Mutual Connections

Nurture

This nurture schedule is different from the one where you are trying to get the individual to join an event. This is for anyone who attended, but they weren't ready to pull the trigger yet.

Breakout Rooms



Interested in
National
Involvement?

inovautus
consulting





Announcements & Polls

Contact Us



Ty Hendrickson

Consultant



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thendrickson@inovautus.com



(720) 680-0585



[linkedin.com/in/tyhendrickson](https://www.linkedin.com/in/tyhendrickson)

About Inovautus Consulting:

Inovautus Consulting is an **accounting marketing growth advisor**. We help accounting firms identify and implement strategies to help them grow their firms and distinguish themselves in the marketplace.

Connect with us to learn more at 888-491-9330.