



THE POWER OF **YOU**

2017 CHAPTER BUSINESS SUMMIT
MARCH 30 - APRIL 1 • DALLAS RENAISSANCE

Membership Action Plan

Overview



Overview of Session

- Understand the purpose of the plan
- Discuss how you will manage the committee
- Discuss ways to implement the plan back home
- Tips to keep the plan rolling all year
- Review the column headers and each task

Tip: CLRP → Membership → Documents → document title:
Membership Action Plan 2017/2018

Membership Action Plan

- Simple, easy to follow
- Scalable to fit your chapter's priorities and size of your membership committee
- Helps prioritize, delegate, or manage tasks
- Transferable to the next team

Tip: CLRP → Membership → Documents → document title:
Membership Action Plan 2017/2018

Membership Action Plan

Special Thanks to the Pilot Program Team!



Management Tool

Multiple ways to make this effective

- VP/Director uses to delegate and manage tasks
- Entire department has access to view

Who Will Update Your Plan?

- VP/Director or Committee Members

Management Tool

What Can We Get Done with Our Committee Size?

- Do be aware of your committee size
- DON'T delete/remove what you can't get done
- Work on adding more committee members

Implementation

Rollout at Chapter

- Fulfills a Compliance Document Requirement
- High level overview with your Board/Presidents
- Review in detail with Chapter Administrator
- Review in detail with Membership Committee
- Determine which tab to use (full year or month)

Implementation

Start of Year

- Assign tasks for 6 months or full year
- Identify what you currently do
- Discuss what you want to do
- Share what you can't get done
- Complete “Title Responsible” and “Person Responsible”
- Add chapter (C) specific tasks

Plan In Action

During the Year

- Allow for flexibility in assigned tasks
- Discuss completed and upcoming assignments
- Add new tasks (*DON'T Delete tasks*)
- Complete the “outcome/feedback”, “total on list” and “link to template” column

Plan In Action

During the Year

- Discuss at all Membership Committee Meetings. Make updates, discuss outcomes, reassign tasks, etc.
- Add more links to templates
- Work with Director of Leadership Development
- Manage your “Super Star” and those limited with time.



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Understand Your Plan Details

Review of the Column Headers



Membership Action Plan

Sortable by:

- Date to complete
- Recruitment or Retention action items
- Specific Task
- Title or Person Responsible
- Date Completed

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Understand Your Plan

Column Headers

Suggested Date to complete

Guides you on what day/week a task should be done

Frequency

How often is this task done. Focus on Ad-hoc or annual

Chapter or
Global task

Global tasks are the recommended tasks to complete each year (G). Chapter tasks (C) are those which you perform above and beyond what is listed by Global (G). Add as many as needed.

Purpose

Defines if effort will help recruit or retain. Helps prioritize tasks for chapters who need to focus on one area.

Understand Your Plan

Column Headers

Task

What needs to get done

Title Responsible

The title can vary by chapter. Update for your chapter.

Person Responsible

This can vary over the course of the year.

Report/Resource to use

Where is the data coming from?

Understand Your Plan

Column Headers

**Report Criteria
(start/end date)**

When applicable, add the start/dates. Do not adjust any CLRP dates to avoid overlapping with Global's efforts.

Total # on list

Record the total # on original list when it was pulled. Once the task is finished, the same Report and report criteria can be run to show how effective the effort was.

Outcome/ Feedback

What did you learn from the task? What needs improvement?
What was the general response from those who received the communication?

Link to template

Add link to template used to assist with task (google drive, Dropbox, Basecamp, etc).



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Understand Your Plan Details

Review of Tasks



Membership Action Plan

Review of Tasks by Frequency:

- Ad hoc
- Annually
- Monthly
- Quarterly

Membership Action Plan

Ad hoc Tasks

- Recruitment materials: Applications, brochures, Refer A Friend vouchers, Affiliate Member applications
- Attend Recruitment fairs (table cloth, sign, literature...)
- Conduct New Member Orientation

Membership Action Plan

Annual Tasks

- Anniversary Year Special Recognition

Membership Action Plan

Monthly Tasks

- Cancelled one year ago
- Event attendee follow up (non-members/Essential Level)
- Event Registered (non-member/Essential Level) 1st time attendee
- Event Registered (non-member/Essential Level) 2nd time attendee
- Call to members who haven't attended chapter event in 6 months
- Welcome call to new members
- Publicize list of new members from prior month

Membership Action Plan

Monthly Tasks

- Thank you for renewing last month
- Welcome call to transferred membership
- Welcome call to transferred from another chapter
- Renewal calls – up for renewal in 2 months
- Send delinquent member list to board
- Thank you for renewing last month calls

Membership Action Plan

Quarterly Tasks

- Promote Refer A Friend in newsletter, chapter event, social media
- Send recruitment campaign email to non-members on chapter distribution or prospect list.



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**What additional tasks does your
chapter perform?**

