



AFWA Chapter Membership Challenge RESOURCE PACKET

IN THIS PACKET

- Recruitment basics
- Converting guests
- Retention
- Comeback campaign
- Corporate membership
- Recruitment hotline

FIND ADDITIONAL RESOURCES AT

AFWA.ORG/MEMBER-HOME/CHALLENGE18

- Membership flyer
- Corporate membership flyer
- Employer benefits flyer
- Student flyer
- Referral program information



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


RECRUITMENT BASICS

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, "Why AFWA?"

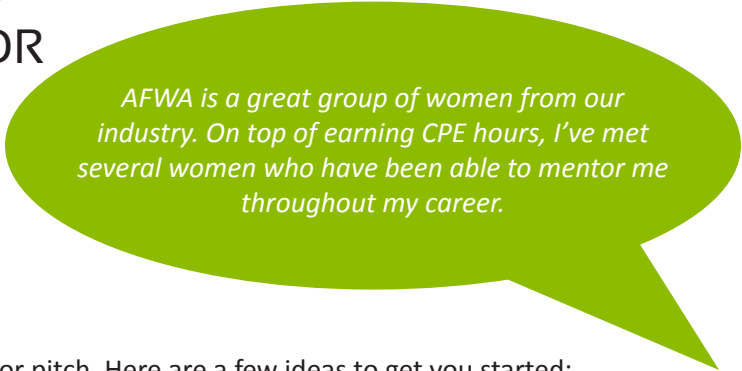
Our mission statement is great, but a personal spin will be much more inviting.

Which statement makes you want to join AFWA?



The mission of the Accounting & Financial Women's Alliance is to enable women in all accounting and finance fields to achieve their full potential and to contribute to 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've made some lifelong friends through AFWA

FINANCE AND AFFILIATE MEMBERS

Remember there are many members of AFWA who are not CPA's! It's easy to default to CPE as a key benefit to membership in AFWA, however not all professionals require CPE. Currently, AFWA is not registered to provide the required CPE for finance professionals - yet, many finance professionals find benefit in membership.

These professional women find value in networking with and being inspired by other successful business women. They enjoy learning about topics they can apply to their own business. And they grow through professional development topics and leadership opportunities.

RECRUITMENT BASICS

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. **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.
2. Using the same advanced search tool, you can filter results to those who are members of the AFWA LinkedIn Group. AFWA's LinkedIn Group has thousands of members, many of whom are not active AFWA members. Through this group you may see connections 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.

EVENTS:

Many Chapters 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:

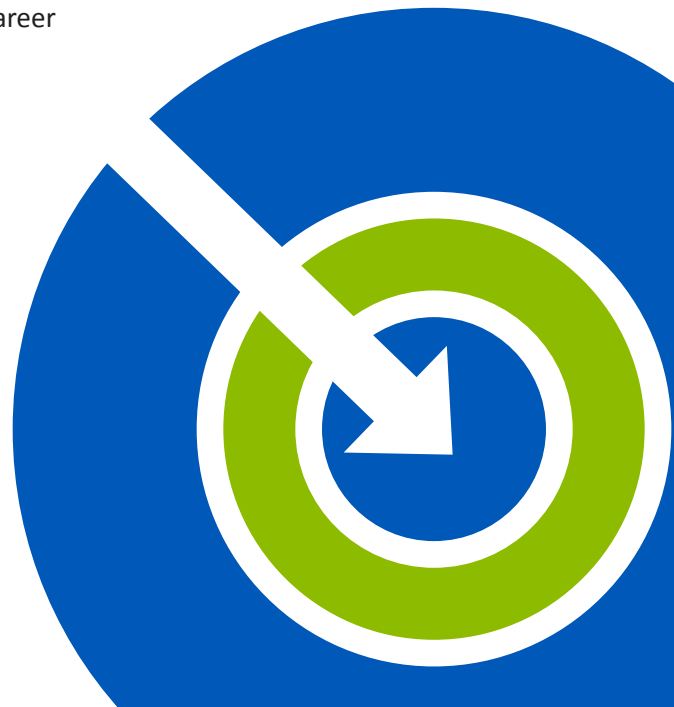
1. **Panel discussion:** Panel discussions are typically well attended because panelists will invite their friends or colleagues for support. Host a panel discussion with panelists from some of your targeted companies. You may get some new faces in the door.
2. **Joint meeting:** What are the other associations 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. Business Professors may also be interested in joining AFWA for their own personal development and can be a link to students and campus career centers.



RECRUITMENT BASICS

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.

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.

Be sure to add all guests to your Chapter email list. This is a great way for potential members to keep up with your Chapter and all your upcoming events.

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 Leadership Toolkits 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 for assistance to download and customize these resources.

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.

AFWA.ORG/REFERRALS

Submit the names of your guests at [AFWA.org/Referrals](https://afwa.org/Referrals) and a National Volunteer will reach out with a personal greeting!

CONVERTING GUESTS

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.

Touch 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.

CONVERTING GUESTS

Touch 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.

BONUS TIP

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.

Your spreadsheet might include columns for the guest name, contact information, each event attended and follow up notes.

Touch 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

RETENTION

The month's of May, June, and July are some of the biggest months for AFWA membership renewals. During this membership campaign, retention should be a key priority for your chapter.

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.

1. Download the Active Members report from your Chapter Dashboard (Please contact afwa@afwa.org for assistance accessing or reading this report.)
2. Once you open the report in Excel, sort your membership by expiration date
3. Start with outreach to those members within their grace period (expired but not yet terminated). Nearly 25% of membership renewals occur within this grace period!
4. Next, review your list for members who have expiration dates coming up in the next few months. Be proactive and make a personal touch with these members now!

The Comback Campaign plan outlined in the following pages can be easily modified to suit a retention plan as well.

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
- > Within their grace period, members may also receive a call from headquarters and a second printed invoice

As you continue to make retention a priority for your chapter, 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.

COMEBACK CAMPAIGN

AFWA has a large pool of members who are no longer active in the organization. Some of these past members may have retired, some may have moved cities or changed careers, others simply lost touch with the organization and would likely appreciate a callback.

AFWA has recently launched a new online application that makes it easier for past members to renew their membership. A membership is terminated 90 days after expiration. In the past, if a membership was terminated, that member would be required to contact headquarters and pay a \$25 processing fee to rejoin the organization. This new application allows them to renew membership online and waive the \$25 processing fee.

Returning members should visit [AFWA.org/comeback](https://afwa.org/comeback)

Here's how your Chapter can approach past members for AFWA membership renewal.

GETTING STARTED

Step 1: Establish your team

Whether the entire Board participates, a sub-committee of the Board, or a group of volunteers led by the Membership Chair, this is not a campaign that should be tackled by a single individual.

Step 2: Create a target list of expired members

1. Access your Chapter Reports from your Chapter Dashboard and refer to the Terminated Members report. This report will provide information on all terminated memberships from your Chapter. Select 'download report' for a complete list of terminated members, including contact information.
2. Next, sort the terminated members by 'Mbr type' and remove any who ended their membership as a retired member. You may choose to reach out to these members, but they are less likely to renew their membership.
3. Have Chapter Leadership review the remaining list for past-members who may have moved away, changed careers, or are still active members (*if a member has changed her membership type, i.e. associate to regular or regular to retired, they may appear on the terminated member list – cross reference these members with your active member list*)
4. The remaining terminated members make up your Chapter's target list. Chapter Leadership should review the final target list and make comments on members who are likely to comeback, offer insight on why a particular member may have left, or comment on any other information that may be relevant to the ask back.

Step 3: Prepare Your Message

In the last three years, we've made a number of improvements to the AFWA National Membership. However, the number one reason members join AFWA is for networking – this is the value provided best within the local Chapter. Members who have left AFWA will want to hear about the new things happening in the Chapter and the goals you have for the year ahead.

Take a moment now to list the positive things happening within your Chapter (new leadership, upcoming events, new sponsors, goals and vision for the coming year...)

1. _____
2. _____
3. _____
4. _____
5. _____

Use these points to craft a message to your past members. Here are some starting points...

- We miss you!
- Great things are happening with AFWA, don't miss out!
- If you know the person, make it personal. 'I haven't seen you in awhile' 'I think you would be pleased with the updates in AFWA' 'I could use your expertise'

COMEBACK CAMPAIGN

Step 4: Delivery

Now that you have your message, you'll want to communicate with your target list of past members. The above message may vary depending on delivery, but always keep your Chapter points in mind.

Start with an email to all targeted past members.

- Use the above message as the body of your email.
- If using a mailing system, such as Constant Contact, include the 'come back' image
- If sending a mass email to all targeted past members at one time, be sure to use a blind copy so their names are not distributed to others.

Divide follow up among committee members. This further delivers the 'we miss you' message in a more personal way. Past Members will really appreciate being noticed.

- A personal handwritten card with a simple 'we miss you message'
- A phone call, be prepared with what you'll say and/or ask whether you get a voicemail or an live person on the line
- Make sure they know about the new reinstate application
- Personally invite them to an upcoming event. A top reason we hear for new members joining or attending events is 'because someone asked'

BONUS IDEA

Provide an offer to members who come back to AFWA. For example:

- Anyone who returns to AFWA in the next (timeline) will be entered to win ... (ex. tablet, gift card to a department store or office supply store)
- Renew your membership today, and the next chapter event is on us!

REMEMBER

Returning members should visit [AFWA.org/comeback](https://afwa.org/comeback) to renew online and waive the \$25 processing fee.

To use this application, the member will be required to use the email and password they previously used for their AFWA membership.

- If the member no longer uses the same email address (maybe a job change), she may change her contact information within the renewal application
- If she does not remember her password, and has changed email addresses, she will need to contact 800.326.2163 for a password reset.



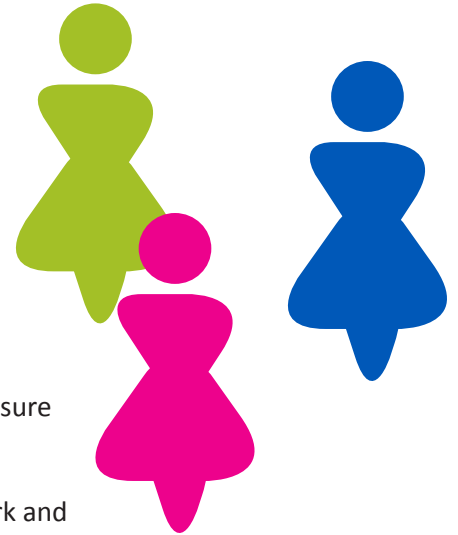
CORPORATE MEMBERSHIP

More bang for your buck, more value for your time, more return for your work - however you view it, Corporate Membership can provide a great opportunity to grow your Chapter's membership.

AFWA's corporate membership program works by offering a discount on individual National Membership when 5 or more employees from the same company join AFWA. Refer to the enclosed Corporate Membership flyer for specific details on the discounts and benefits included with corporate membership.

Here are a few ideas and tips for promoting corporate membership:

- Look for the major employers in your community. These may be accounting firms or corporate business offices.
- Review your current membership. Are there any members who may be able to recruit their own firm or office as a corporate member?
- Introduce potential corporate members to AFWA by inviting them to speak at one of your meetings.
- Employees don't have to be members of the same chapter. So if the company has national offices, employees can join the chapter nearest them.
- Corporate membership is processed through National Headquarters. Individual members will receive separate invoices for Chapter membership - be sure your following up with these members to ensure they pay your Chapter dues in addition to national dues.
- Major employers are often looking for new hires. AFWA is great place to network and meet potential candidates. Your Chapter may have a job board, and AFWA.org offers a national job board where AFWA members receive a discount on open position posts.
- AFWA provides an environment for young employees to build leadership, management, and public speaking skills.
- Corporate Members may receive additional benefits such as conference registration or national advertising.
- Corporate members can become great sponsors for your Chapter!



RECRUITMENT HOTLINE



We've presented your Chapter with a goal. We've offered many ideas to help you reach that goal. Now we want to offer you personal assistance. Do you want to customize your membership flyer? Need help drafting a membership message? Need help formatting a logo for a new promotional item? Do you want to brainstorm ideas unique to your market or to discuss an idea more in depth?

Call 859.219.3578

Office hours 8am - 5pm Eastern

Email marketing@afwa.org