

**BILLINGS AREA CHAMBER OF COMMERCE RETENTION PLAN (APRIL 2015)**

This plan develops a framework to communicate the value of Chamber membership, connect individuals to our services, fully engage our members and ultimately retain their membership. We must identify and acknowledge each of member’s individual needs. Annually a membership survey is conducted to better identify member needs and evaluate their satisfaction with our services. This plan addresses activities throughout the initial year of membership as well as ongoing action steps with detailed activities specific to All Members, Long-Standing Members, and Top Investors to communicate the value of membership throughout the year.

We believe the retention process begins immediately upon receipt of membership dues. The use of a team approach and establishing a detailed system of specific steps to attend to individual needs is fundamental to our success in retaining new and long-standing members.

<b>MEMBER STATUS</b>	<b>PLAN OF ACTION</b>	
<b>NEW MEMBERS</b>	NEW MEMBER	<p>Thank you email from Business Engagement Specialist within five business days of receiving payment and completed application. Includes information on committees, networking opportunities, and upcoming events along with an invitation to contact the Membership Team.</p> <p>Welcome packet sent within ten business days of receiving initial payment &amp; application – includes welcome letter from President/CEO and Chairman of the Board of Directors, verification form (to ensure that we represent them correctly), members only log-in information, window cling, mailing label request form, upcoming event information and LiNK Magazine.</p> <p>Business Engagement Specialist assigns an Ambassador at the end of each month and provides new member contact information to each Ambassador.</p>
	MONTH 1	Ambassadors make initial contact (email/call/visit) with newly assigned member.
	MONTH 6-9	Business Engagement Specialist calls New Members to assure satisfaction, remind of member benefits, or to invite to an event (not a call to discuss invoicing);

<p><b>SECOND YEAR MEMBERS</b></p>	<p>MONTH 18-21</p>	<p>Business Engagement Specialist contacts provide opportunities for further engagement through targeted invitations for participation in special networking events, focus groups, and business discussions. Ambassador contact lists for existing members focuses on these members renewing for the second time.</p>
<p><b>ALL MEMBERS</b></p>	<p>ANNUALLY</p>	<p>Annual member satisfaction survey</p>
	<p>6-9 MONTHS PRIOR TO RENEWAL</p>	<p>Business Engagement Specialist and Ambassadors make personal contact with targeted “at-risk” Members.</p>
	<p>30 DAYS PRIOR TO RENEWAL</p>	<p>1<sup>st</sup> Invoice received by Member – includes a reminder of membership benefits and a verification form to keep our records accurate and up-to-date.</p>
	<p>30 DAYS PAST RENEWAL DUE DATE</p>	<p>2<sup>nd</sup> Invoice received by Member</p>
	<p>60 DAYS PAST RENEWAL DUE DATE</p>	<p>Business Engagement Specialist makes personal contact with Member (may email invoice, or send non-responsive member letter). List may be forwarded to Board of Directors or other staff to potentially make contact.</p>
	<p>90 DAYS PAST RENEWAL DATE</p>	<p>Final invoice received by Member – include non-responsive member letter as applicable</p>
	<p>120 DAYS PAST RENEWAL DATE</p>	<p>Member presented to Board of Directors as Dropped Member</p>
	<p>QUARTERLY MEMBER BENEFIT REVIEW</p>	<p>Members that have joined in the past six months are personally invited along with selected existing members/long-standing members. The purpose is to educate new and existing members and show appreciation to long standing members. Ambassadors are included to encourage personal connections with existing members and Chamber promoters.</p>
<p><b>LONG STANDING</b></p>	<p>10+ YEAR MEMBERS</p>	<p>Recognition at special events such as</p>

<b>MEMBERS</b>		Annual Meeting; Member Spotlight on website.  Invited to participate in Member Orientation to show appreciation and allow them to share their Chamber/CVB experiences
<b>TOP INVESTORS (BIG SKY LEVEL)</b>	CEO CONCIERGE SERVICE	Personal ongoing contact from President/CEO and Chairman of the Board of Directors  <ul style="list-style-type: none"> <li>• Access to invitation-only and standing committees</li> <li>• Aspirational City Visit &amp; Leadership Exchange invitation</li> <li>• Exclusive briefings with city and county leaders</li> <li>• Participation in Future's Council Advisory Board (CEO only)</li> </ul>

### **BUSINESS ENGAGEMENT SPECIALIST**

A primary function of the Business Engagement Specialist is to engage members by enhancing their membership experience through connecting them to appropriate programs and services.

The Member Relations Manager will:

- Connect with members at all levels of membership to understand their business, provide individualized customer service, and connect them to services and programs based on their individual needs to maximize their investment.
- Contact members regularly via phone and/or personal visits to assess needs and maintain maximum membership renewal.
- The majority of the contacts will be made within 6-9 months and 18-21 months of their renewal date. Targeted members will be those categorized as “at risk” due to lack of attendance at events, contact with Chamber staff, business transaction or referrals during a designated period of time.
- Focus additional effort on members between their first and second year renewal. Review their initial reason for joining and their individual engagement profiles for continued relevance and seek opportunities for further engagement through special networking events, focus groups and discussions related to their reason for joining.
- Familiarize new members with overall Chamber operations and services through benefit reviews at quarterly meetings or one-on-one sessions.
- Oversee distribution of new member packets, window clings and other related membership items.
- Review member status changes; recommend increases, decreases and cancellations as appropriate.
- Develop methods to acknowledge member accomplishments including rewards for busy times of the year, personally delivering events tickets, handwritten cards congratulating members for milestone anniversaries or when they receive recognition in the community.

- Manage the Chamber's corporate retention plan.
- Lead and manage dues collection efforts through phone calls, mail, and personal visits.

## **NEW MEMBERS**

As part of our retention plan, we recognize the need to target our efforts to members that have been with us for 1-2 years. This specific membership base will be called within 6-9 months of their renewal period. This call is to assure that they are receiving the full benefits of their membership and that we are meeting their needs. The Business Engagement Specialist will target these members by generating reports to review those members that have had no contact (i.e. event or meeting participation, referrals, etc.) within a designated time period and provide a personal contact.

## **AMBASSADORS**

In addition, the Ambassadors Committee will assist in Member-related activities. This Committee consists of 12-18 members.

Their focus is to support the mission of the Chamber by connecting new and existing members to opportunities to grow their business and to advocate for the members to the Chamber staff.

This will be accomplished by:

- extending a welcome to new Chamber members
- connecting new and existing members to networking opportunities
- contacting identified "at risk" members to remind them of their Chamber benefits
- providing feedback and communicating member needs to staff and the Board liaison

The Committees goals include contacting new members within 1-2 months of joining and contacting 15-20 existing members/Ambassador each month. This Committee meets monthly with Membership staff and the Chamber Board Membership Liaison. Each quarter Ambassadors have a discussion about one of the Chamber's Priority Issues. This allows the group to better understand strategic priorities, and allows them to share information and request feedback from their contacts about the current quarter's priority.

## **BOARD OF DIRECTORS**

The Board of Directors will be provided with a monthly membership report and asked to identify any business with open membership dues invoices greater than 60 days past due that they would choose to personally contact. In addition, Board members may be recruited to assist the membership team with activities such as personally contacting major event sponsors or long-term members to show appreciation for their investment.

## **TOOLS**

Our membership database is used as a contact management tool. We utilize this tool to assure consistent communication. This tool allows us to set up reminders, track communication and generate reports on all contact information. Reports will be generated to identify those members who are at risk – those that have not attended events or activities, had contact with Chamber staff, or received referrals during a designated period of time.

## **GOALS**

- Contact a minimum of 50 members each month.
- Annually retain 90% of our members