



Understanding the Dramatic Affect of Member Retention

[#wlsummit](#)

Welcome

Part 1 - How Do the
Economics of Member
Retention Impact You?

Part 2 - What Can I Do
About It?



WebLink by the Numbers

In the last 12 months, WebLink...

- **Managed 695,000 members and 9.7 million profiles**
- **Added 112,000 new members**
- **Delivered 1.04 billion directory impressions and 368 million leads**
- **Held 115,000 events with 1.5 million attendees**
- **Sent 29.2 million emails**



My Story



Chris Landis

Vice President, Finance and Administration

WebLink International

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Who is this Guy?

Majored in Economics at DePauw University

Public Accounting with Arthur Andersen and Ernst and Young

Led Customer Service Operations for BMG/Columbia House

Led Customer Service Turnaround for Indiana BMV

Launched and Grew the Online Division for a Publicly Traded For-Profit College

Joined WebLink Team!!!

1999

No arrests on my permanent record

2003

Convinced my wife, Heather, to marry me

2007

Convinced my wife that I was suitable to be a Dad

Convinced my wife that I was suitable to be a Dad (again)

2011

Convinced my wife that I was suitable to be a Dad (again)

Retention Rate
Welcome

**Part 1 - How Do the
Economics of Member
Retention Impact You?**

Part 2 - What Can I Do
About It?



Retention Rate

In Pursuit of Greatness



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Retention Rate What If?

Association for Member Acquisition

- 1,000 members in year 0
- Adds new 250 members per year
- 75% member retention rate



1,000 members

Association for Member Retention

- 1,000 members in year 0
- Adds new 250 members per year
- 90% member retention rate



1,977 members

97% more!

Membership Growth Curve



Retention Rate What If?

Association for Member Acquisition

- 1,000 members in year 0
- 75% member retention rate
- Adds new 250 members per year
- \$300 annual dues
- \$300,000 annual budget year 0



\$300,000 budget

Association for Member Retention

- 1,000 members in year 0
- 90% member retention rate
- Adds new 250 members per year
- \$300 annual dues
- \$300,000 annual budget year 0

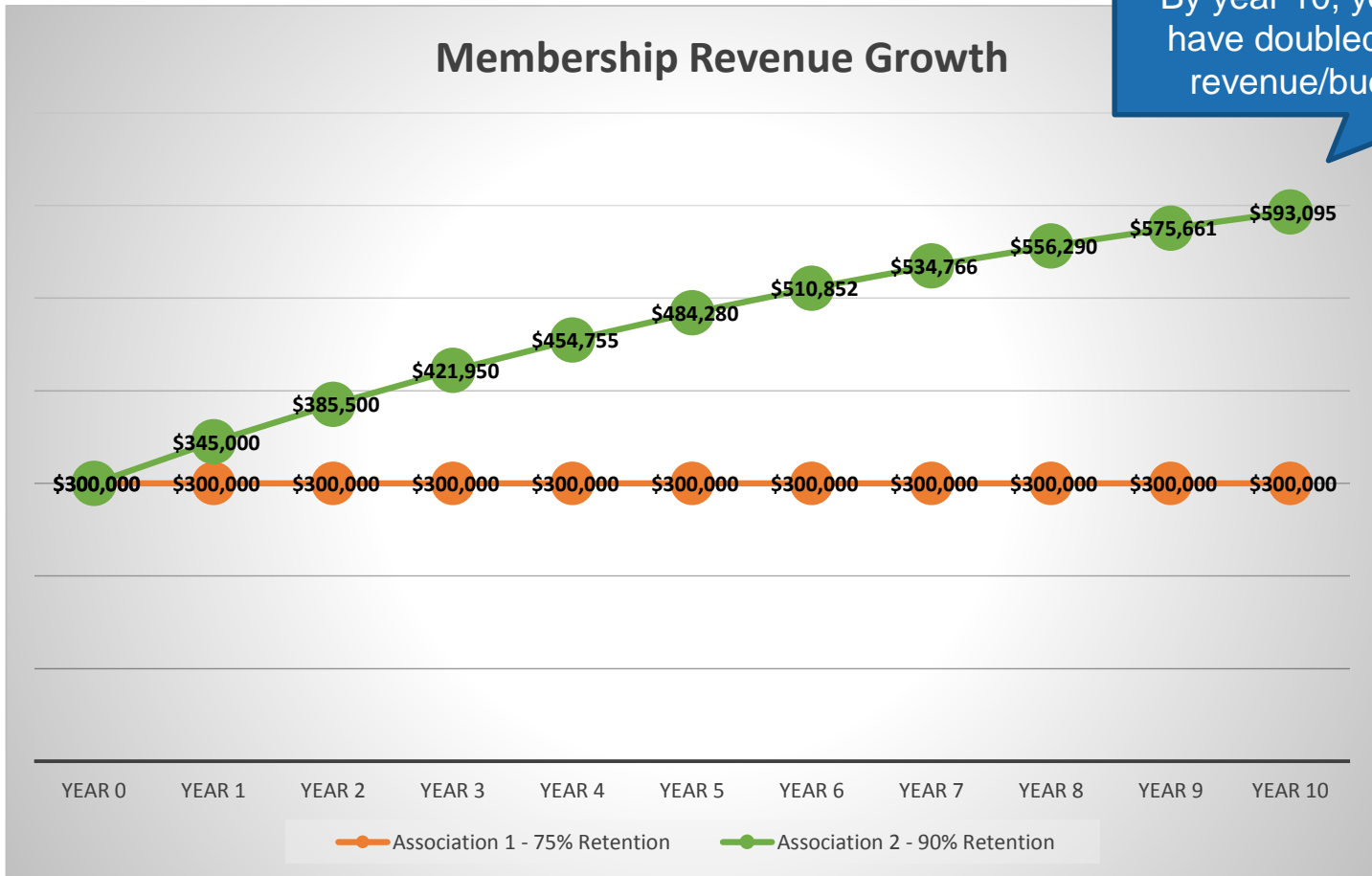


\$593,095 budget
\$293,095 more!

Revenue Growth Curve

Membership Revenue Growth

By year 10, you will have doubled your revenue/budget



Revenue What If?

Association for Member Acquisition

- 1,000 members in year 0
- 75% member retention rate
- Adds new 250 members per year
- \$300 annual dues
- \$300,000 annual budget year 0
- \$100 per member in non-dues



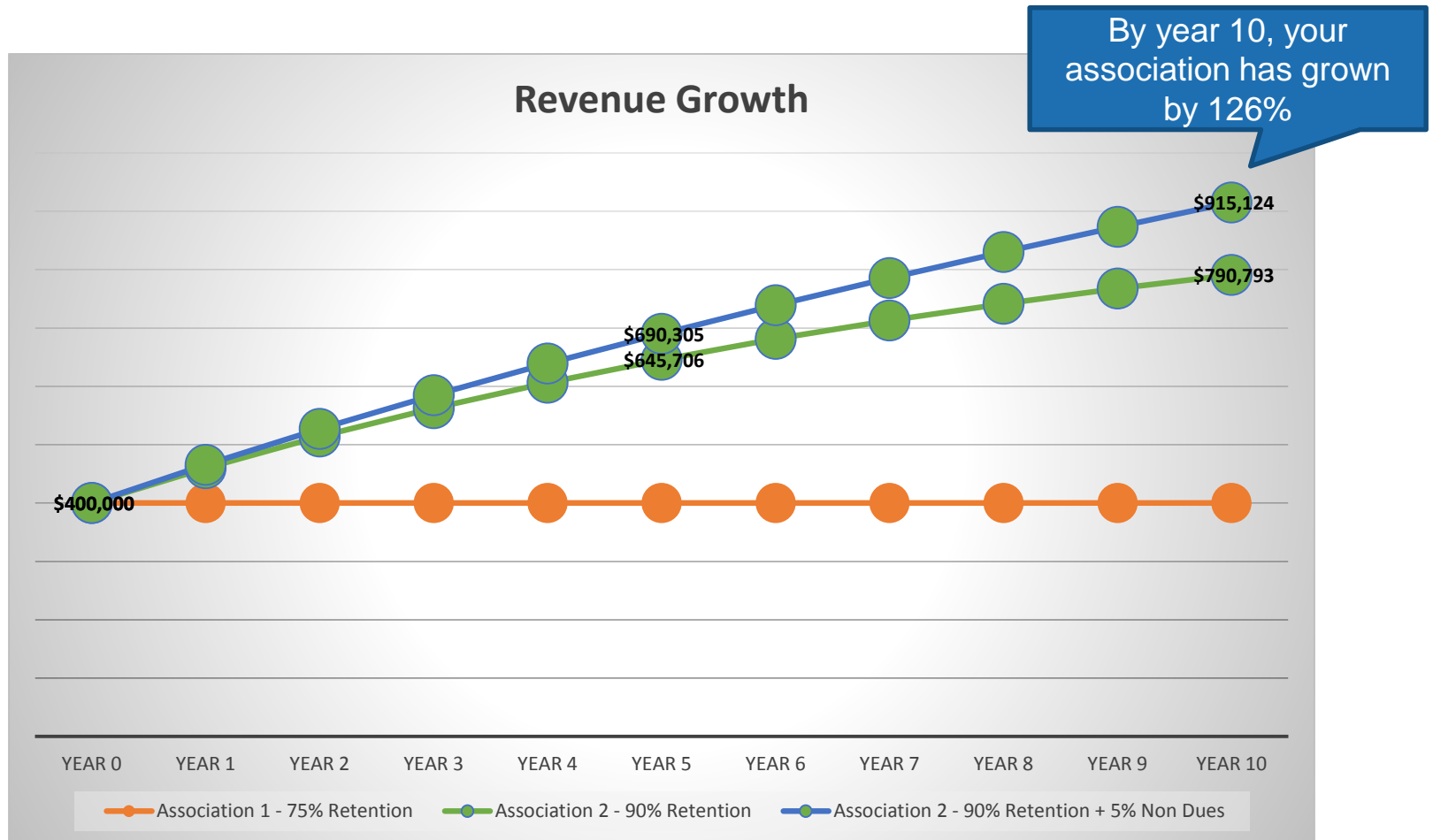
\$400,000 budget

Association for Member Retention

- 1,000 members in year 0
- 90% member retention rate
- Adds new 250 members per year
- \$300 annual dues
- \$300,000 annual budget year 0
- **Also able to get 5% annual increase in non-dues revenue per member**



Revenue What If?



Retention Rate

What is Great?

Doubling Membership



**Increasing Your
Revenue/Budget by 126%**

Retention Rate Welcome

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Economics of Member
Retention Impact You?

**Part 2 - What Can I Do
About It?**



WebLink by the Numbers

In the last 10 years, WebLink...

- **Increased directory impressions by 6,478% (65x)**
- **Increase number of events managed by 366% (4x)**
- **Increase the number of event attendees by 317% (3x)**
- **Increased the volume of emails sent by 96,825% (968x)**
- **Increased our Revenue by 460% (5x)**



MEMBERSHIP RETENTION Plan & Strategy

TIP 1 << Find Happy Members

TIP 2 << Work Your Short-Term Plan

TIP 3 << Work Your Long-Term Plan

TIP 4 << Use All Your Tools

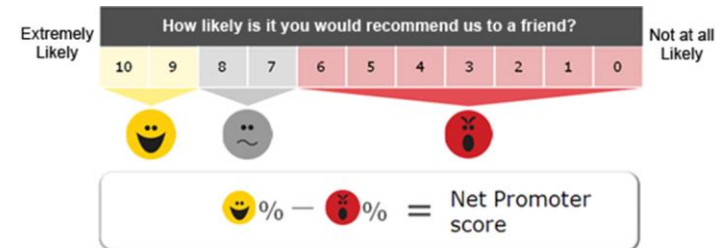


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TIP 1 << Find Happy Members

Find Happy Members

- ❑ Identify your promoters using a Net Promoter Survey
- ❑ Identify personas that are representative of your member base
- ❑ Analyze personas to understand what motivates them and how they find value
- ❑ Determine what personas are your promoters
- ❑ Ask your promoters for referrals
- ❑ Build your plans around recruiting developing more promoters



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REMEMBER:

A goal without a plan is a wish

Choose the Person for the Job

WHO?

Choose a staff person who...

- has the time to contact your members
- has the demeanor to work with your members
- can follow a process



TIP 2 << Work Your Short Term Plan Within 24 hours of...

- “Welcome Email”- sent encouraging member to visit website members-only area via email with login credentials
- Member added to new member section of website for 60 days
- Member added to weekly email/communication lists (WebLink Connect utilizes Affiliations)
- Schedule subsequent tasks via Project Template
- Member listed in new member section of monthly newsletter



Within 2-3 days of...

- Check to see if member has accessed Members Only Area yet
- If not accessed – member contacted to encourage use and extend invitation to next event
- If accessed – contact member to answer any questions about Members Only section or other benefits
- Survey sent through communications tool asking for join reason and track involvement to make sure they are receiving and utilizing the benefits important to them
- Graph these for reporting/marketing staff
- Make the communication specific to what they said they wanted when they joined

TIP 2 << Work Your Short Term Plan

Within 2-3 weeks of...

- ❑ Administrative staff – calls member to schedule ribbon cutting
- ❑ Staff inputs ribbon cutting date and time onto social media sites (Facebook, Twitter, Ambassador site, SMS text message system)
- ❑ Member mailed an invitation to an upcoming Ambassador Committee lunch meeting



TIP 2 << Work Your Short Term Plan Within 30 days of...

- Member receives handwritten note from salesperson with invitation to next Member Orientation
- Ambassador or salesperson delivers new member packet/membership plaque
- Member receives welcome letter from President/CEO



TIP 2 << Work Your Short Term Plan

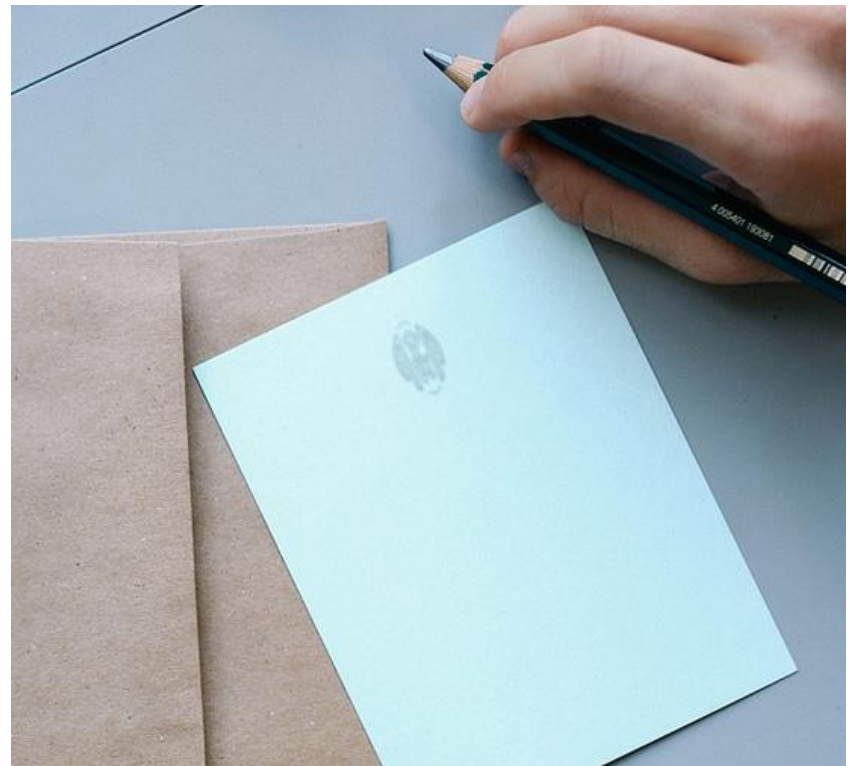
Within 30-60 days of...

- ❑ Member receives personalized welcome letter from Chairman of the Board on company letterhead
- ❑ Ribbon cutting photo delivered by Ambassador
- ❑ Ribbon cutting photo published in monthly newsletter and on organizations/associations website and social media



TIP 2 << Work Your Short Term Plan Within 3 months of...

- ❑ Administrative staff mails another post card to check in with member and encourage event attendance
- ❑ Postcard includes listing of calendar of events



TIP 2 << Work Your Short Term Plan Within 4 months of...

- ❑ Account executive (sales person) calls to discuss upcoming events, referral reports and encourages attendance at Member Orientation (if has not already attended)
- ❑ Member Orientation – used to showcase benefits of membership, website and staff introductions

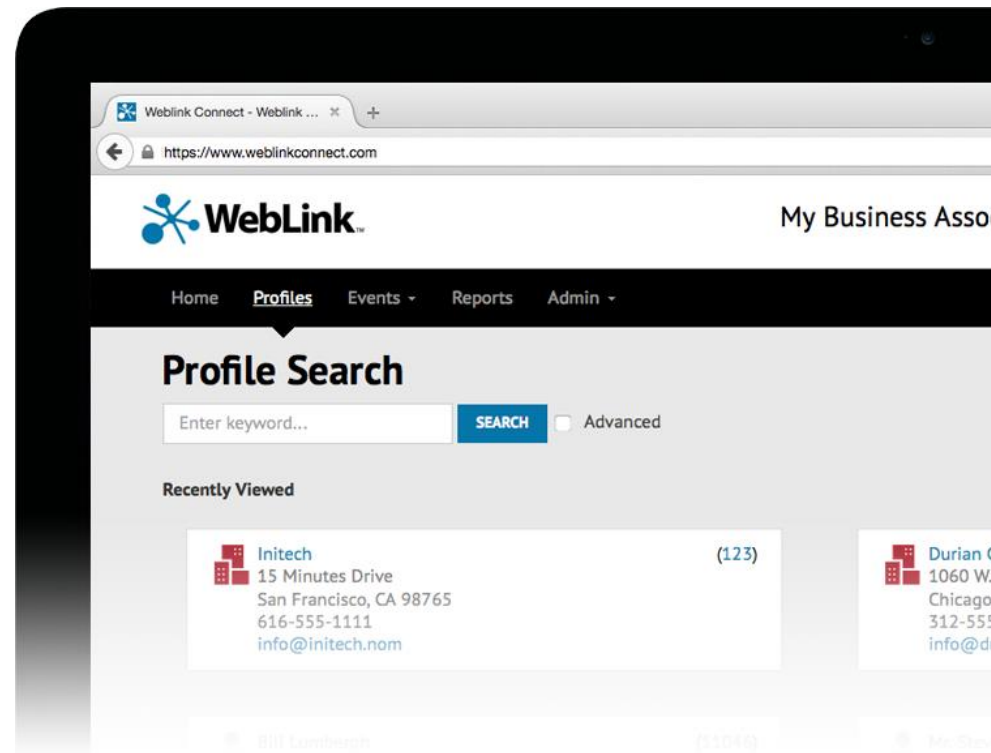


TIP 2 << Work Your Short Term Plan

Work Your Short Term Plan

HOW?

- Use the tools in **WebLink Connect**® to keep your retention tasks at your fingertips!



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MEMBERSHIP RETENTION Plan & Strategy

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TIP 3 << Work Your Long Term Plan Within 6 months of...

- ❑ Staff sends a reminder email or places a call to encourage member to log into Members-Only section on website to verify profile information and review referral report
- ❑ **Important to keep member information up to date!**



The screenshot shows the website's navigation menu with links for "Visit Rogers & Lowell", "News & Events", "Live & Work", and "Business D". Below the menu is a banner for "P-I-N-N-A-C Country Club" with the tagline "A Family Friendly" and contact information for "ni Luetjen, Director Marketin" including an email "Membership@pin" and phone number "479-418-7415 | Pin". The main heading is "Members Only" with a red underline. Below this is a login form with fields for "Username" and "Password", a "Login" button, and a link "Click here for personal login information". At the bottom, there is a "ACCREDITED" badge from the "UNITED STATES CHAMBER OF COMMERCE" and copyright information: "Copyright © 2015 Rogers-Lowell Area Chamber of Com reserved. 317 W. Walnut | Rogers AR 72756".

TIP 3 << Work Your Long Term Plan Within 8 months of...

- ❑ Staff places a retention call to new and renewing (one year) members to thank them for membership



TIP 3 << Work Your Long Term Plan

Within 10 months of...

- Member receives renewal letter and membership dues invoice (sent out during 10th month of membership)
- Letter outlines all the organization has done
- Includes information organization will continue to do for them!
- Bullet points of information

TIP 3 << Work Your Long Term Plan After 1 year...

- After renewal for first year received, a thank you post card is mailed
- Encourages continued support
- Offer a special for 2nd year of membership
- Downloadable marketing booklet
- Complementary expo ticket
- Early-bird pricing on major event/item

TIP 3 << Work Your Long Term Plan After 2 years...

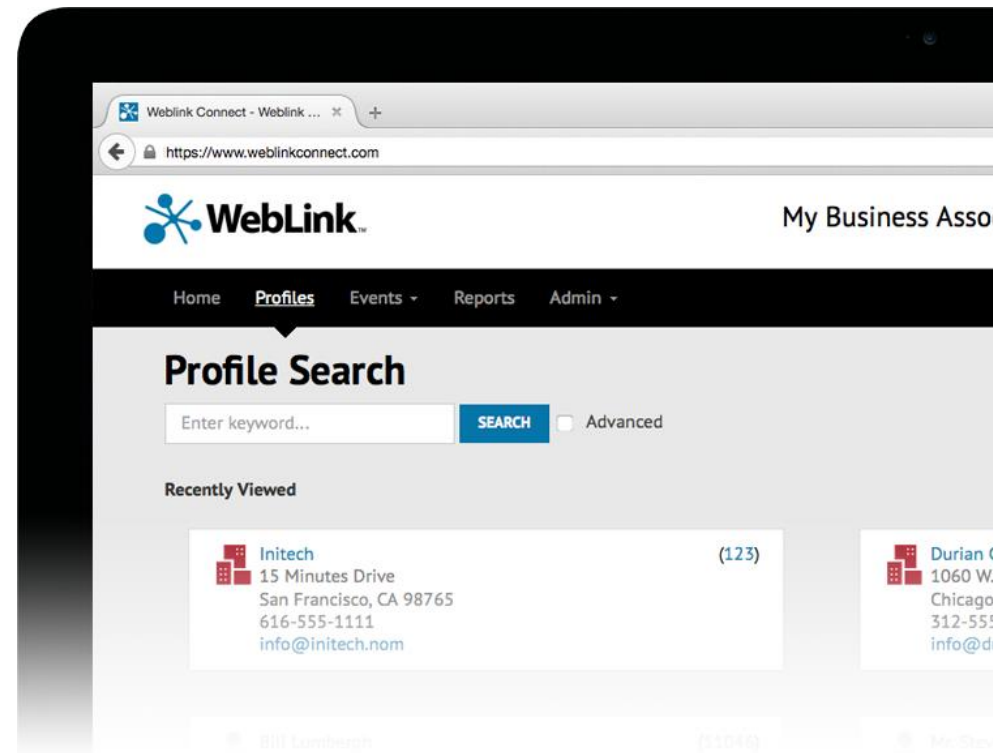
- Continue to encourage support via weekly emails
- Personal phone call or member visit for ALL year 2 members made by staff
- Encourage engaged members to create testimonials for video and print and locate on organization website
- Promote additional engagement via social media and blogs
- Encourage “sharing” of information to others (members or not)

TIP 3 << Work Your Long Term Plan

Work Your Long Term Plan

HOW?

- Use the tools in **WebLink Connect®** to keep your retention tasks at your fingertips!



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Tools for Success

A FEW ITEMS YOU'LL NEED FOR THE JOURNEY

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It Was Born to Do This!

- HTML templates for letters set up
- Project Templates can be created to automatically set up tasks
- Contacts can be automatically added to member profile from project/task area
- Contact Types set up for reporting
- Referrals automatically added to member profile
- Referral reports can be generated and emailed
- Add affiliations to sort members for communication

Lifetime Value Report

This report shows:

- Join date
- Longevity
- Dues revenue
- Non-dues revenue
- Yearly averages

| | Join Date | Drop Date | Years as Member | Dues Revenue | Other Revenue | Total Revenue | Avg. Dues Inc./Year | Avg. Other Inc./Year |
|-------|--|------------|-----------------|--------------|---------------|---------------|---------------------|----------------------|
| 1807 | A-1 Equine Health Center | 10/01/1960 | 53.3 | 4,183 | 340 | 4,523 | 78 | 244 |
| 1823 | AAA Wisconsin | 02/14/1990 | 23.9 | 8,000 | 1,194 | 9,194 | 167 | 50 |
| 17408 | ABMA Auto Body & Glass | 06/01/2009 | 4.6 | 0 | 60 | 60 | 0 | 13 |
| 16206 | Abnasky, Taylor-Nick | 04/17/2008 | 5.7 | 1,598 | 471 | 2,069 | 278 | 02 |
| 17486 | Accent Point Sports LLC/Accent Fishing | 05/18/2009 | 4.7 | 1,144 | 322 | 1,466 | 245 | 69 |
| 17794 | Access Security, Inc | 11/23/2009 | 4.1 | 1,096 | 1,781 | 2,877 | 265 | 430 |
| 14985 | Acti-Ultra | 03/14/2002 | 6.8 | 3,337 | 7,620 | 10,957 | 342 | 1,165 |
| 2609 | Activis Care | 11/02/1994 | 29.2 | 3,792 | 745 | 4,447 | 192 | 39 |
| 3463 | Acquisition Health & Development, LLC | 01/18/2000 | 24.0 | 3,550 | 77 | 3,627 | 254 | 5 |
| 14504 | Adams Automation Center | 03/02/2007 | 6.9 | 2,182 | 424 | 2,606 | 306 | 62 |
| 3636 | Adessa | 09/21/2000 | 13.8 | 3,312 | 5,290 | 8,602 | 240 | 363 |
| 4217 | Administrative Billing Solutions | 01/23/2007 | 7.8 | 1,793 | 650 | 2,343 | 244 | 87 |
| 2178 | Adult Day Services | 12/08/2005 | 8.1 | 0 | 0 | 0 | 0 | 0 |
| 5618 | Advanced Auto Parts - Hastings | 06/28/2013 | 0.3 | 0 | 244 | 244 | 0 | 244 |
| 21582 | Advanced Auto Parts - Vine | 06/28/2013 | 0.5 | 421 | 25 | 446 | 421 | 25 |
| 1381 | Advanced Optical | 10/15/1990 | 21.3 | 14,487 | 3,968 | 18,455 | 623 | 175 |
| 16726 | Advanced Diagnostic Services, LLC | 09/24/2008 | 5.3 | 1,248 | 758 | 1,607 | 254 | 60 |
| 1603 | Advanced Mail, Inc | 12/04/1999 | 24.1 | 4,258 | 1,264 | 5,523 | 302 | 97 |
| 15951 | Advanced Massage Therapies | 07/27/2009 | 4.5 | 0 | 235 | 235 | 0 | 62 |
| 18794 | Advent Management Group, Inc. | 08/16/2010 | 3.4 | 838 | 3,247 | 4,085 | 245 | 950 |
| 3357 | Awea Golfbox Center | 06/16/1990 | 25.6 | 4,048 | 138 | 4,186 | 259 | 9 |
| 20348 | Affinity Insurance Group LLC | 03/08/2012 | 1.6 | 380 | 511 | 791 | 154 | 294 |
| 17833 | Affordable Dentures | 09/18/2012 | 1.3 | 288 | 795 | 1,083 | 218 | 600 |
| 1888 | AFL Auto Express, Inc. | 04/01/1992 | 21.6 | 3,274 | 1,563 | 4,837 | 158 | 223 |
| 19696 | AIGM Group, Inc. | 11/18/2010 | 3.2 | 638 | 2,528 | 3,206 | 264 | 901 |
| 14480 | AIRC Asset Management | 08/24/2007 | 6.4 | 2,759 | 1,149 | 3,908 | 432 | 180 |
| 1656 | AIRREC Eau Claire | 12/01/1998 | 15.1 | 0 | 160 | 160 | 0 | 11 |
| 16425 | AJP Motors Arts Academy of Eau Claire | 01/14/2009 | 5.0 | 1,349 | 1,892 | 3,151 | 270 | 361 |
| 1609 | All Season Tire Company | 11/01/1992 | 21.2 | 4,743 | 481 | 5,224 | 224 | 23 |
| 3847 | All the Dirt Racing News, Inc. | 10/23/2008 | 5.2 | 1,337 | 487 | 1,824 | 254 | 93 |
| 19677 | All Time Services, Inc. | 10/19/2010 | 3.2 | 951 | 2,994 | 3,945 | 294 | 925 |
| 21892 | The Alliance | 12/02/2012 | 0.1 | 0 | 338 | 338 | 0 | 338 |
| 1429 | Allstate Bank - Pleasant Bay | 01/01/1972 | 42.1 | 18,197 | 841,990 | 100,187 | 433 | 3,376 |

WebLink Connect™ can help you identify your best members in the Lifetime Value Report.

HTML Templates

- ❑ Tool to quickly set up recurring communication with membership
- ❑ Easily created
- ❑ Can be as “fancy” as you can create
- ❑ Contact records tracked (WLC)



Project Template

New Save Search Delete **Year 1 Retention - Berlin Bike City Tours**

Project Name

Year 1 Retention - Berlin Bike City Tours

Assigned To

wladmin

Project Type

Retention

Budget

0.00

Actual

0.00

Profile ID

2396 ... None

BERLIN BIKE CITY TOURS

[Event ID](#)

0

Main Contact

None

Project Status

Initial

Started

Date Started

4/15/2015

Date Due

4/15/2015

Completed

Date Completed

1/ 1/1900

Sold By

wladmin

Quick Actions

Tasks Notes C Notes B Notes A Custom Fields Project Description Notify Details Task Legend

New Task

Delete Task

View Selected Tasks

Extend Due Dates

Drag a column header here to group by that column

| Date Due | Task Description | Profile Name | Assigned To | Assigned By |
|-----------|---|------------------------|-------------|-------------|
| 4/18/2015 | Review Member website access | Berlin Bike City Tours | jspringer | jspringer |
| 4/16/2015 | Welcome Email | Berlin Bike City Tours | jspringer | jspringer |
| 4/29/2015 | Administrative Assistant schedule Ribbon cut... | Berlin Bike City Tours | jspringer | jspringer |

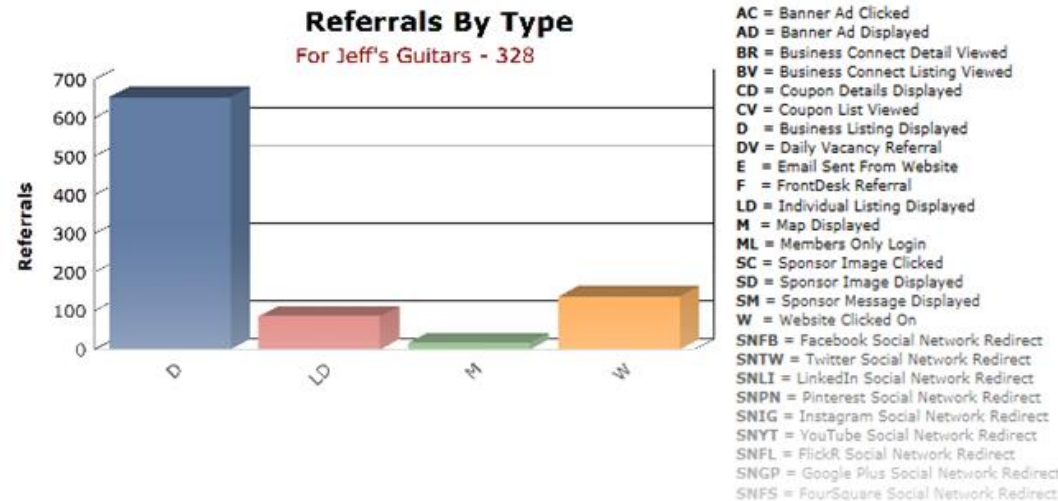
Referral Reports

Your AMS referral report is a valuable tool to show membership ROI and retain members.

WebLink Business Association

Referral Report 1/1/2014 to 4/22/2014

| | | | |
|----------------|-----------------------------------|--------------|---|
| Name | Jeff's Guitars | Phone | (620) 325-0000 |
| ID# | 328 | Fax | (620) 325-0000 |
| Address | 123 Main St Neodesha, KS 66757 | Web | http://www.jeffsguitars.com |



Referral Type

Referrals

Last Ref

Affiliations

- Allows you to parse/filter your profiles by using affiliations
- Can be added in mass
- Easy to add in “To” field in communication tool
- Unlimited number can be setup

TIP 1 << Find Happy Members

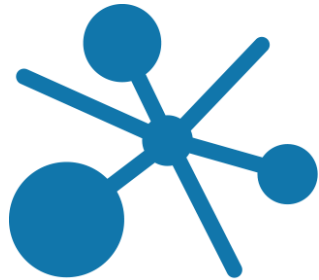
TIP 2 << Work Your Short-Term Plan

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WebLink

Grow Faster

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