



# Understanding the Dramatic Affect of Member Retention

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# 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**

# 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



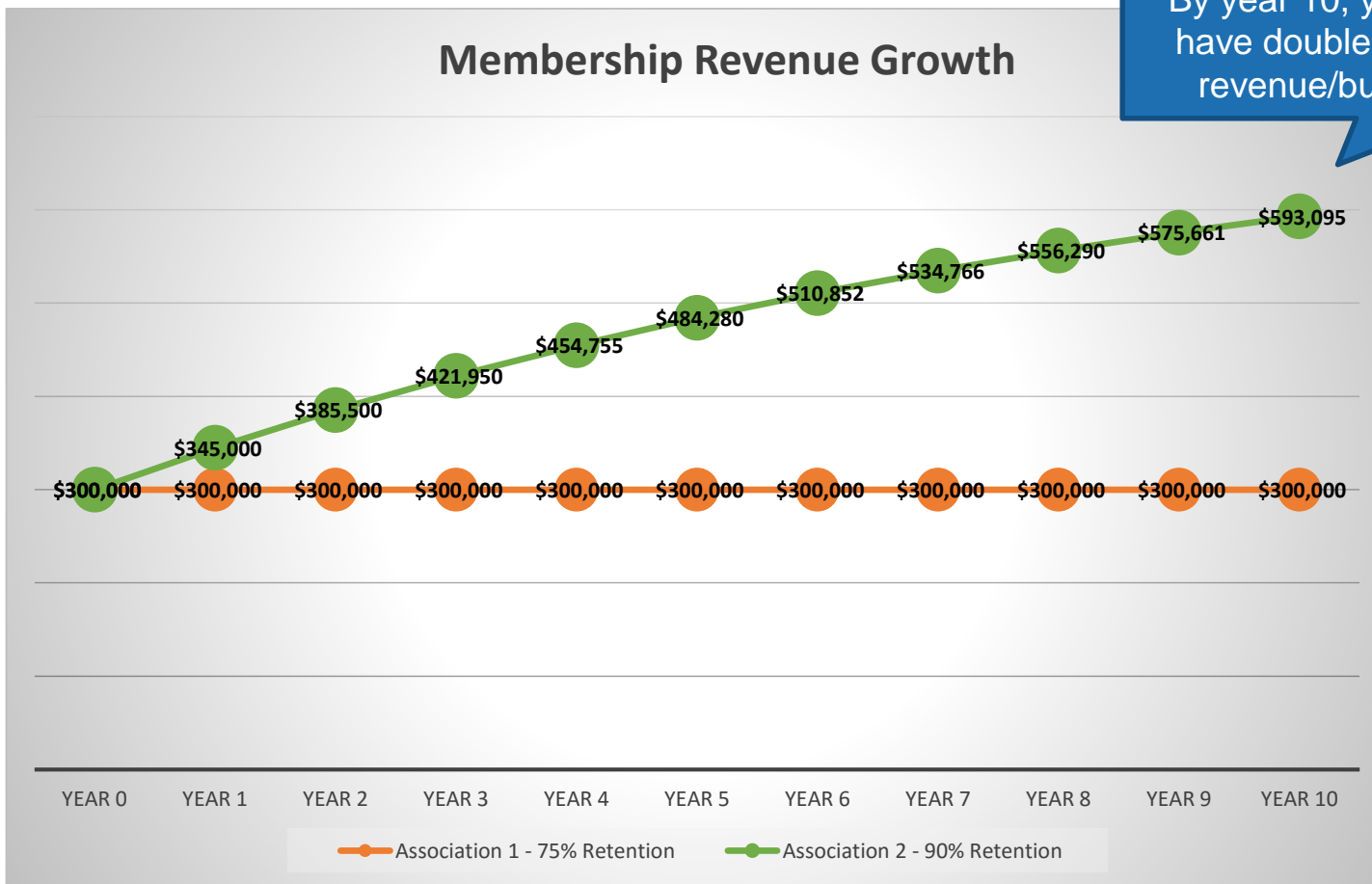
\$593,095 budget  
**\$293,095 more!**



# Revenue Growth Curve

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

## Membership Revenue Growth



# 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



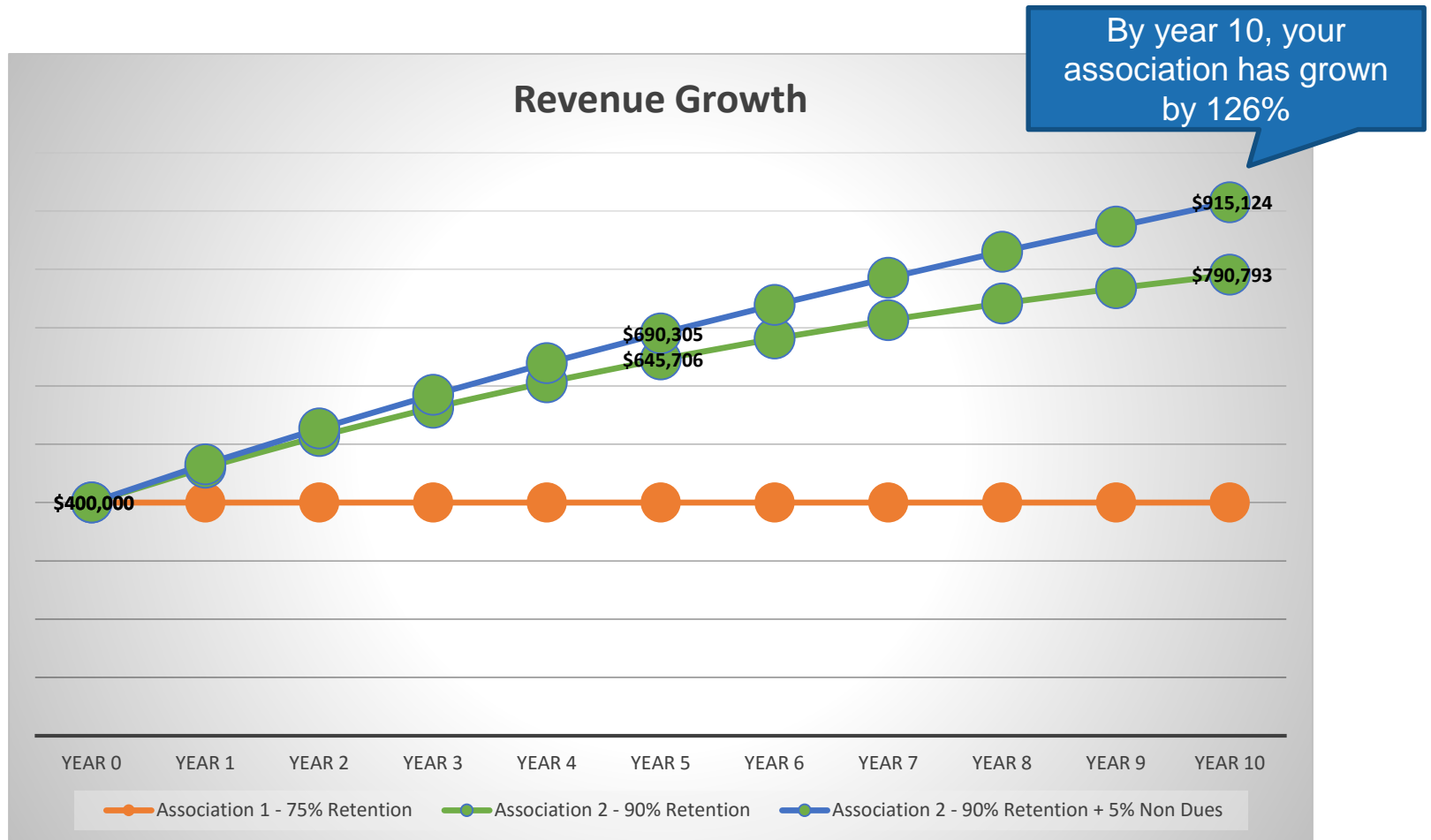
\$400,000 budget

## 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

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 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





# 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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***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



## TIP 2 << Work Your Short Term Plan

# 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...

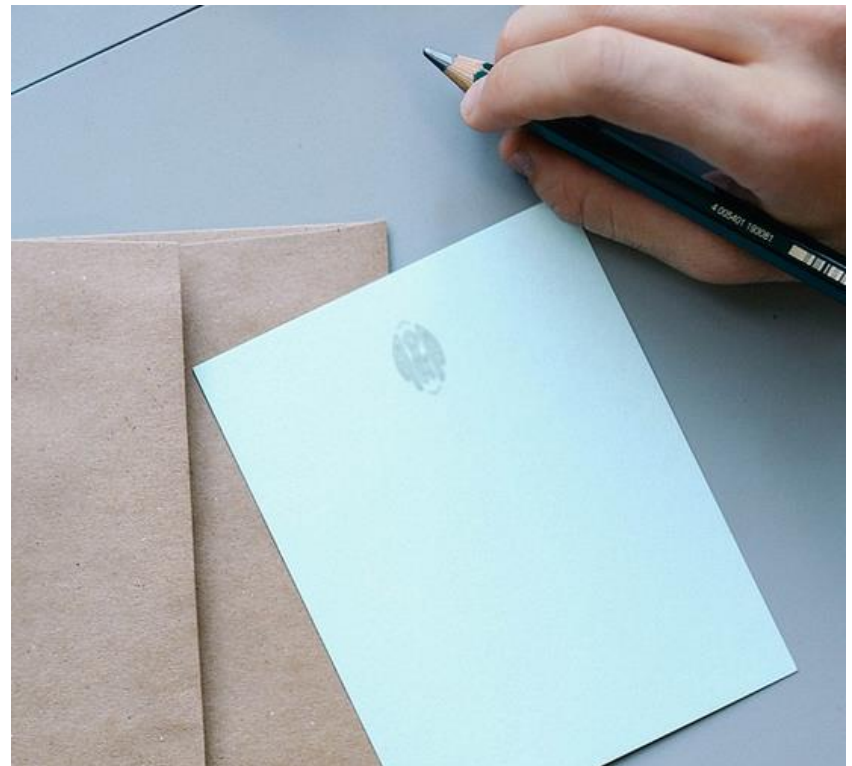
- ❑ Member receives personalized welcome letter from Chairman of the Board on company letterhead
- ❑ Ribbon cutting photo delivered by Ambassador
- ❑ Ribbon cutting photo published in monthly newsletter and on organizations/associations website and social media





# 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

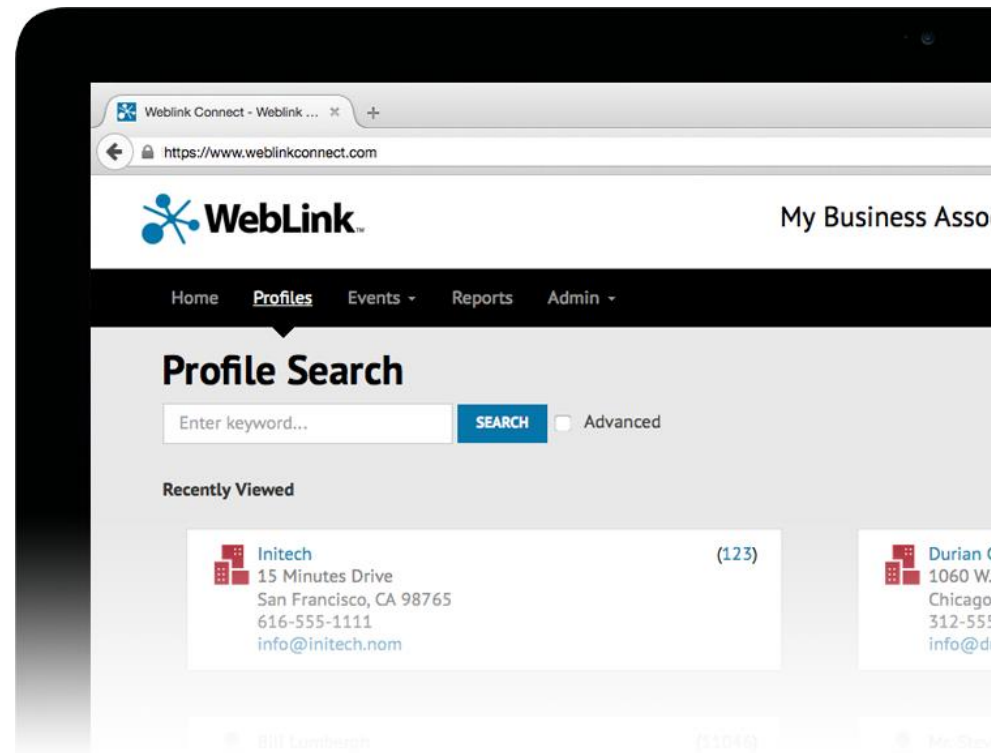


TIP 2 << Work Your Short Term Plan

# 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

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 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!**



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**Members Only**

Username

Password

Login [Click here for personal login information](#)

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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...

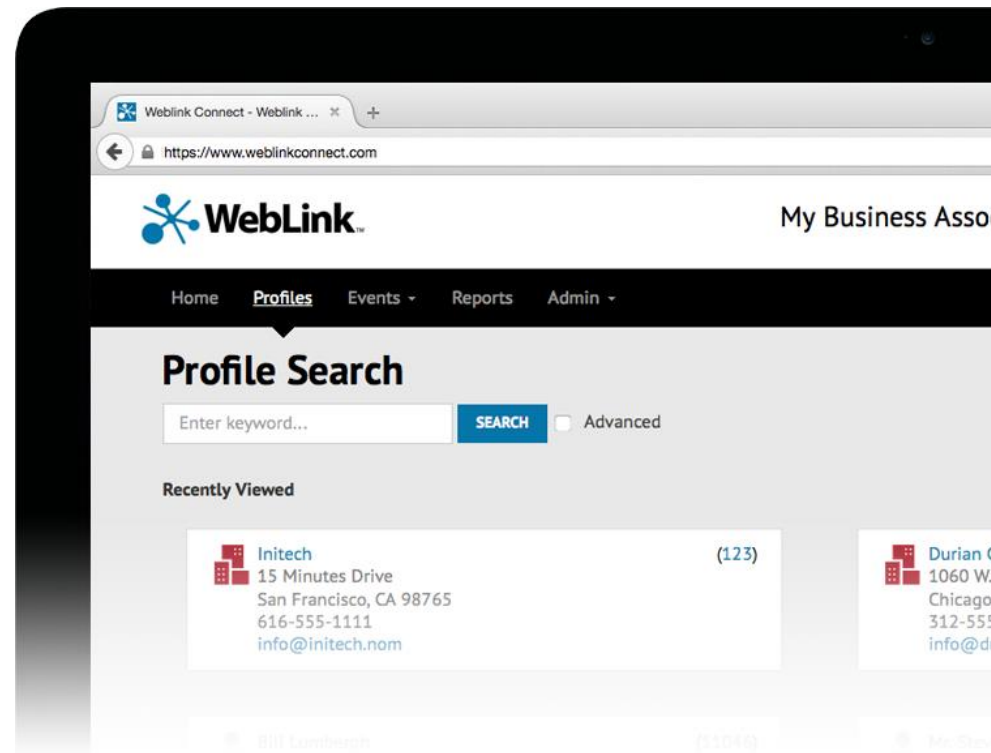
- Continue to encourage support via weekly emails
- Personal phone call or member visit for ALL year 2 members made by staff
- Encourage engaged members to create testimonials for video and print and locate on organization website
- Promote additional engagement via social media and blogs
- Encourage “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!



# MEMBERSHIP RETENTION Plan & Strategy

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**TIP 4 << Use All Your Tools**



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# Tools for Success

**A FEW ITEMS YOU'LL NEED FOR THE JOURNEY**

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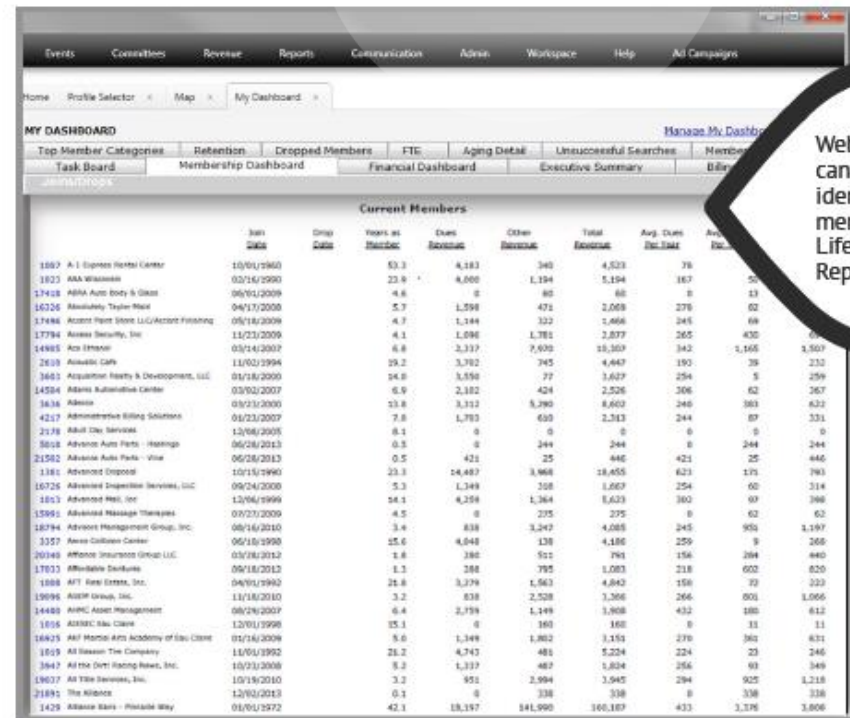
# It Was Born to Do This!

- ❑ 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



The screenshot displays a software interface with a navigation menu at the top (Events, Connections, Revenue, Reports, Communication, Admin, Workspace, Help, Ad Campaigns) and a 'MY DASHBOARD' section. Below the dashboard, there are tabs for 'Task Board', 'Membership Dashboard', 'Financial Dashboard', and 'Executive Summary'. The main content area is titled 'Current Members' and contains a table with the following columns: Join Date, Drop Date, Years as Member, Dues Revenue, Other Revenue, Total Revenue, Avg. Dues Per Year, and Avg. Other Revenue. The table lists various members with their respective dates and revenue figures.

	Join Date	Drop Date	Years as Member	Dues Revenue	Other Revenue	Total Revenue	Avg. Dues Per Year	Avg. Other Revenue
1807	A-1 Equine Health Center	10/01/1960	53.3	4,183	340	4,523	78	50
1822	AAA Wisconsin	02/10/1990	23.9	8,000	1,194	9,194	167	50
17428	ABA Auto Body & Glass	06/01/2009	4.6	0	60	60	0	13
16226	Abnasky Trailer West	04/17/2008	5.7	1,598	471	2,069	278	02
17486	Accent Point Store LLC/Accent Finishing	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
2610	Activis Care	11/02/1994	29.2	3,782	745	4,447	192	39
3463	Acquisition Health & Development, LLC	01/18/2000	24.0	3,550	77	3,627	254	5
14504	Adena Substation 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	1,783	650	2,433	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	23.3	14,487	3,968	18,455	623	175
16726	Advanced Diagnostic Services, LLC	09/24/2008	5.3	1,248	1,607	2,855	60	314
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	Aerie Golfwear 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	891	154	294
17833	Affordable Dentures	09/18/2012	1.3	288	795	1,083	218	600
1888	AFT Van Express, Inc.	04/01/1992	21.8	3,274	1,563	4,837	158	223
19696	AIGM Group, Inc.	11/18/2010	3.2	638	2,528	3,166	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	1,882	3,231	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
19637	All Time Services, Inc.	10/19/2010	3.2	951	2,994	3,945	294	925
21892	All Things	12/02/2013	0.1	0	338	338	0	338
1429	Allstate Bank - Pleasant Bay	01/01/1972	42.1	18,187	841,990	860,177	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 [Event ID](#) **BERLIN BIKE CITY TOURS** 0

Main Contact: None Project Status: Initial

Started Date Started: 4/15/2015  Completed Date Completed: 1/ 1/1900 Sold By: wladmin

Quick Actions

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



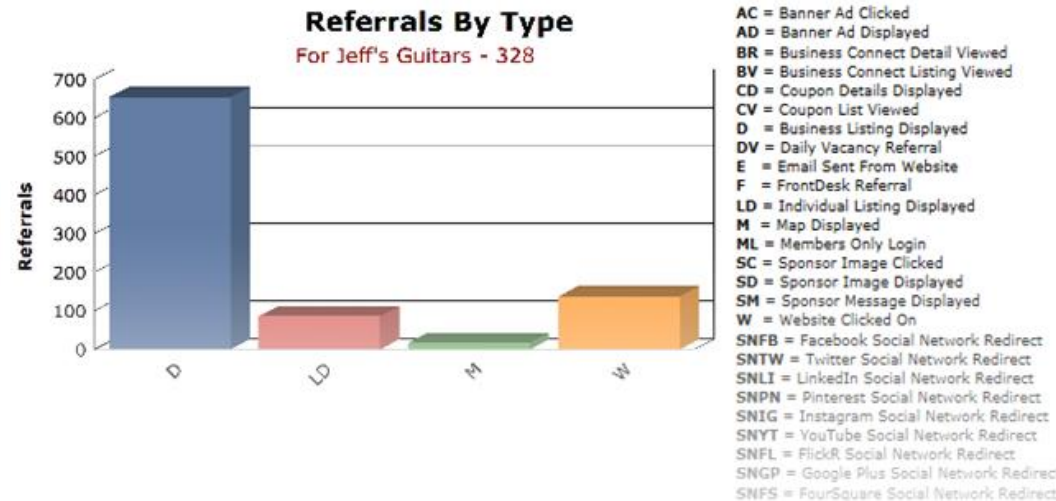
# Referral Reports

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

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



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

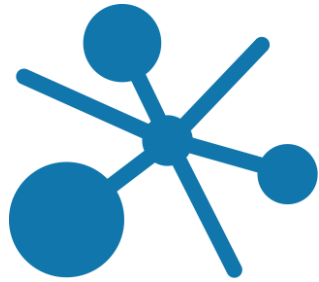
TIP 2 << Work Your Short-Term Plan

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# WebLink

*Grow Faster*

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