



OUTREACH GUIDELINES

# RETENTION

**KEEPING MEMBERS ENGAGED THROUGH OUTREACH**

Every Chamber Member joins the South Padre Island Chamber for a specific reason(s). As a member of the business community, they have goals and objectives to meet and view our organization as a potential conduit to achieving those goals.

Some Members join to network with business leaders, others may join for the advertising/marketing opportunities, and some may join as a way of giving back to the community with no intention of ever engaging with their membership benefits.

As their Chamber of Commerce, we must learn why they joined and what they expect to gain from being a part of our organization. At the end of the day, their membership renewal is contingent on their return on investment (ROI). If we fall short of their expectations and they do not see the value in their membership or receive an ROI, they will not renew.

# OUTREACH GOALS

To keep in regular contact and engage members throughout the year in a more personal way.

Each outreach call/email/visit is a personal connection with a Member that should emphasize our respect and gratitude for their support and trust in us. Our role is to provide engagement opportunities that may be valuable for their business. We achieve this by recommending event opportunities or prompting them with questions to pinpoint what engagement opportunities matter most to their business, and then providing those opportunities.

# ACTION ITEMS

1. Complete outreach call /email/visit list each month. Reserve 45-60 min each day for outreach or space calls throughout the day.

For example, call a Member at the top of every hour. Best times to call: 9:00 am – 12:00 pm/1:00 – 5:00 pm 2.) At the end of each business day, please send a list of Members you have contacted via email to Alita.

3.) Get their employees involved! We always want to reiterate that the membership is company-wide if they say they are too busy or cannot make it to a particular event involve another employee, set them up as a representative in ChamberMaster, send a login account, and add them to Constant Contact

4.) Please share success stories with the Chamber team. It is always great to hear about Members finding renewed value in their membership, engaging with us after a lapse in time or for the first time, etc. Post all communication in Chamber

**MEMBER OUTREACH IDEAS**

## Lead Statistics Emails

The Lead stats email is a great way to show Members that we are working for them 24/7.

Creating and sending Lead Lists

Open “Info Requests”

Click on ‘General Lead List Report’

Highlight “Lodging” under Interest Category

Leave Lead Delivery Status line ‘blank’

Enter date range (day after last report sent/current day)

Click on “Continue”

Click on view leads and check for relevancy

Click on ‘Continue’

Set Communication Method as “Email Only”

Click “continue”

Remove any list without email

Remove duplicates

Click “Send Now” Note: Do by each category for a specific time period, last quarter, last 6 months

## Member Survey

Send them an email with a quick survey (see survey questions)

## Member Spotlight

Members are always looking for more visibility. To assist in this the Chamber will spotlight each New Member on Social Media.

When a member renews they will be spotlighted on social media.

## Benefit Review

Create a benefit review checklist. Email the checklist to remind them of value they can take advantage of.

## Thank You for Your Support Call

This outreach is meant to be kept brief and to thank the Member for their support and their trust in us. Letting the Member know that we are always available to support them and letting the Member lead any dialog.

## Thank You for Your Renewal Call

This is another touchpoint to let the Member know that we noticed their renewal and appreciate their continued support and trust in us. Make this a very short call, “just wanted to let you know how much we appreciate your continued membership”

# MEMBER OUTREACH TIMELINE

## Day 1 Year 1- New Member Onboarding

### Membership

* + Send new member welcome email
  + Member rep login
  + Deliver Plaque & New Mbr packet

## Day 3-7

### Membership

* + Welcome phone call to new member
  + Schedule a one-on-one meeting if necessary
  + Deliver Plaque

## Month 2

### Membership

* + Assign New Member to an Islander

### President/CEO

* + Welcome Call

## Month 3

### President/CEO

* + Welcome Email

## Month 4

### Membership Call

* + Encourage Member to update Member profile
  + Remind of any upcoming events

## Month 5

### Membership Email

* + Invite to an upcoming event
  + Send Listing Benefit Review checklist

## Month 7

**Month 8**

### President/CEO

* + Mail handwritten thank you note

## Month 10

### Membership

* + Upcoming renewal, look for email
  + Verify billing contact
  + Email Mbr Survey

## Month 11

### Membership

* + Full Benefit Review checklist
  + Lead stats Email (with discretion)

### Membership

* + First billing email

## Month 12

### Membership

* + Check In Phone call and email
  + Renewal thank you letter
  + Billing statement (if needed)

### President/CEO

* + Renewal thank you call

## Month 14

### Membership (if needed)

* + Sorry to see you go

### President/CEO

* + Sorry to see you go email

### Membership

* + Drop Member

### Member Call

* + How is it going, are you getting emails

## Year 2 Month 1 (Due Date)

### Membership

* + Renewal thank you letter

### President/CEO

* + Renewal thank you call

## Year 2 Month 3

### Membership

* + Invite to sit on Committee

## Year 2 Month 4

### Membership

* + General check in

## Year 2 Month 6

### Membership

* + Send listing benefits checklist

## Year 2 Month 8

### Membership

* + Send full Benefit listing
  + Send lead stats email with discretion

## Year 2 Month 9

### President/CEO

* + Mail handwritten thank you note

## Year 2 Month 10

### Membership

* + Upcoming renewal, look for email
  + Verify billing contact
  + Thank Member for their support

## Year 2 Month 11

### Membership

* + First billing email

## Year 2 Month 12

### Membership

* + Check In Phone call and email
  + Renewal thank you letter

### Membership (if needed)

* + Billing statement (if needed)

### Membership

* + Renewal thank you call

## Year 2 Month 14

### Membership (if needed)

* + Sorry to see you go

### President/CEO

* + Sorry to see you go email

### Membership (if needed)

* + Drop Member