



## State Leaders Institute

### Membership Benefits: The Keys to Recruitment, Engagement, and Retention

#### Sample Annual Member Recruitment, Engagement, Retention Plan

Activity	Task	Timeframe	Notes
Recruitment	Membership Invitation	Ongoing	Utilize prospect information you collect via your website
Recruitment	“We Want You Back” Membership Invitation	Varies	Choose date that coincides with slow time of year for members
Engagement	Welcome Email	30 Days Post Join Date	Include full list of benefits, upcoming dates to remember, dues receipt, login information, etc.
Engagement	Check-In	6 Month Post Join Date	Quick check-in call/email
Engagement	Important Dates Reminder	30-60 Days Prior to Event	Reminder to register for conference, webinar, etc.
Retention	1 <sup>st</sup> Renewal Notice	90 Days Prior to Expiration	Include invoice and renewal note
Retention	2 <sup>nd</sup> Renewal Notice	60 Days Prior to Expiration	Include invoice, renewal note, highlight new membership benefits
Retention	3 <sup>rd</sup> Renewal Notice	30 Days Prior to Expiration	Include invoice, renewal note, resources member has utilized
Retention	FINAL Renewal Notice	1 Day Post Expiration	“Your membership is now terminated”