**Member Retention Checklist**

When is the best time to start your member retention efforts? From day one! The best time to start building relationships with your members is the day they join – make your members feel welcome and wanted. Research has shown that repetition builds familiarity, familiarity builds trust, and trust builds relationships. With timely and consistent messages, you can help to foster the familiarity, trust, and relationships that will build a strong core of committed members and volunteers for your chapter.

This checklist encompasses a full year of membership but are suggested action items only – if you have a process in place that is working for your chapter, stick with that process! This checklist will help you become familiar with a few basic member touch points but remember – one size doesn’t fit all. Note that membership activation notices and renewal notices are sent by HIMSS but don’t let that stop you from doing your own outreach – HIMSS cannot guarantee that our messages will get through to the member’s inbox. Additional “local” touch points will reinforce the renewal message and help to build familiarity with your chapter which will lead your chapter to its membership goals.

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| **Touch Points** | **Action** | **Media** | **By Who** | **Completion date** |
| Immediately on joining or renewing | Membership activation email to include; notice of activation, general reference and contact information, and link to individual membership orientation guide. | Email | HIMSS | Upon member dues payment. |
| Within 30 days | Welcome “kit”:  Welcome letter/email, chapter directory, benefits guide, event calendar, and contact information. | Email / Mail | Chapter |  |
| Within 60 days | Thanks for joining/renewing discount offer (X% off of event registration or online pub purchase, etc.) | Email | Chapter / HIMSS |  |
| Within 90 days | Welcome Phone Call  (Information and explain benefits) | Phone | Chapter leaders and volunteers (excellent ad-hoc volunteer opportunity) |  |
| 9 months | Year in Review and/or Member Survey | Email | Chapter |  |
| 10 months (renewal notices begin mailing from HIMSS) | Invitation to join a  committee/volunteer | Email / Mail | Chapter |  |
| 11 months | “How you doing?” Phone call  (Serves as renewal touch point and gauge activity of member. No need to call all of your members, just do what you can.) | Phone | Chapter leaders and volunteers |  |
| 12 months | Thank you for being a member letter – highlight accomplishments for the year. | Mail | Chapter |  |

**Additional tips for success:**

* ***Highlight value:*** All communications should highlight the value to the member. This doesn’t necessarily mean pointing out a discount or other personalized benefit, community and society level benefits are also important to highlight.
* ***Engagement:*** Membership research has shown that organizations whose members participate in the following have renewal rates at or over 80%!
  + Conference attendance
  + Attendance on a webinar or other professional development meeting
  + Volunteering
  + Participation in a social network or young professionals program
  + Purchase of book, publication or other non-dues product or service