

# **Retention Program 2009**

**\*Updated\***



### **Retention Program Schedule**

- Application Submitted:*      *Initial letter is sent explaining membership approval process*
- 2 weeks after submitted:*      *E-mail or phone call from Membership Director to explain letter and the references checked process. If there is any problem with the references, the authorization form is sent at this time to the member in order to speed up the process of approval.*
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- 1) **Application Accepted:**      *Send member “Welcome!” letter from Membership Director along with orientation invitation and month event calendar. Phone call from membership committee to welcome new member; and based on approval score and ranking invite to attend orientation with new member.*
- 2) **2 weeks:**      *Follow-up letter with NAHB certificate, HBAGK static sticker, “Member to Member” discounts, Advertisers Manual, and master calendar.*
- 3) **4 weeks (1 month):**      *Phone call from Membership Director to verify receipt of materials and explain packet, verbal invite to orientation and try to set up face-to-face meeting to discuss both the NAHB, MAHB and the HBA of Greater Kalamazoo benefits. Also, deliver Master Calendar again and “Making Your Membership Work for You” piece.*
- 4) **8 weeks (2 months):**      *Call from Membership committee to ask new member why they joined and list 2 or 3 benefits the new member expects to get from their membership.*
- 5) **16 weeks (4 months):**      *Letter from Membership Director encouraging recruitment and involvement with Green Built Kalamazoo. Send Green Built application, HBAGK application for a friend, SPIKE prospect roster, and encourage website use.*
- 6) **24 weeks (6 months):**      *Call from membership committee for member involvement survey and invite to attend an event with member.*
- 7) **32 weeks (8 months):**      *E-Mail “Did You Know?” flyer*
- 8) **40 weeks (10 months):**      *Renewal sent out with 10 reasons to renew. Mail letter to original or assigned sponsor alerting sponsor of members upcoming renewal*
- 9) **44 weeks (11 months):**      *Renewal reminder e-mail is sent along with “Membership Pays” and “Earn a Return on Your Investment” information*
- 10) **50 weeks (12 ½ months):**      *Reminder invoice (statement)*

**Procedure for Non-Renewal by Anniversary**

- 11) 54 weeks: *(15 days past due)* Final reminder on non-renewal and call from Membership Director
- 12) 56 weeks: *(30 – 60 days past due) (Cancelled Status)* Called by Membership Committee to encourage renewal
- 13) 60 weeks: *(60-90 days past due)* Members name is on “Cancelled” list, initiating sporadic calls from the Membership Committee
- 14) 64 weeks: *(91+ days past due)* “Cancelled” account becomes dropped/inactive file and is sent letter and “Membership Pays” brochure – they have 30 days to reinstate without having to submit a new application
- 15) 6 months past “Drop”: Dropped member is sent “We Miss You” letter with application for re-instating and the “Why Don’t You Belong” piece

### **Procedure for Prompt Renewal**

- 11) Within 12-14 months: Send “Thank You for Renewing”, membership card, static stickers, and master calendar
- 12) 16 months: E-Mail notice on orientation meetings
- 13) 18 months (1yr, 6mo): *Membership committee calls with member involvement survey and invites member to attend function with them*
- 14) 20 months (1yr, 8mo): Send membership application for friend or business associate along with SPIKE prospect roster, and “Why Don’t You Belong?” piece
- 15) 22 months (1yr, 10mo): E-mail original or assigned sponsor alerting him of member renewal. Membership Director calls member to remind him of upcoming renewal and to be on the lookout for an invoice. Renewal notice is mailed.

### **Procedure for Prompt Renewal**

#### **Year 2+**

- 16) Within 0-2 m. of renewal: Send “Thank You for Renewing”, membership card, static stickers, and master calendar
- 17) 2+ years, 6 months: *If they haven’t attended a GMM in the last year, Membership committee calls with member involvement survey and invites member to attend function with them*
- 18) 2+ years, 8 months: Send membership application for friend or business associate and “Why Don’t You Belong?” piece to encourage recruitment