

**SHRM**<sup>®</sup>

SOCIETY FOR HUMAN  
RESOURCE MANAGEMENT

Tips, tools and techniques  
for growing and retaining  
your membership

SHRM Membership Recruitment & Retention Toolkit



# TABLE OF CONTENTS

<b>USING THIS TOOLKIT .....</b>	<b>3</b>
<b>DESCRIPTION OF THE TOOLKIT .....</b>	<b>3</b>
<b>PART I—RECRUITMENT .....</b>	<b>4</b>
<b>Why HR Professionals Don't Join Chapters (Survey Results).....</b>	<b>4</b>
<b>Determining Key Prospects.....</b>	<b>9</b>
<b>Setting Your Strategy .....</b>	<b>9</b>
<b>Marketing Materials, Tools, Templates and Resources Available     from SHRM .....</b>	<b>9</b>
<b>PART II—RETENTION .....</b>	<b>19</b>
<b>Defining Retention.....</b>	<b>19</b>
<b>The Cost of Retention.....</b>	<b>19</b>
<b>Continuous Marketing .....</b>	<b>20</b>
<b>The Renewal Process Is Important.....</b>	<b>26</b>
<b>Determining Why Members Don't Renew.....</b>	<b>31</b>
<b>Conclusion.....</b>	<b>32</b>
<b>Other Resources .....</b>	<b>33</b>

## SHRM Organization

The Society for Human Resource Management (SHRM) is the world's largest association devoted to human resource management. Representing more than 250,000 members in over 140 countries, the Society serves the needs of HR professionals and advances the interests of the HR profession. Founded in 1948, SHRM has more than 575 affiliated chapters within the United States and subsidiary offices in China and India. Visit SHRM Online at [www.shrm.org](http://www.shrm.org).

## USING THIS TOOLKIT

The SHRM Membership Recruitment & Retention Toolkit provides you with many ways to expand membership in both your chapter and in the Society for Human Resource Management (SHRM). It contains models and samples that you can adapt to your needs. These tools may suggest methods of recruiting that are different from those you have traditionally used. *You* must decide on the strategy that will work best.

A critical element to the success of any membership program is a strong membership committee. Coordinating and conducting a multi-faceted recruiting and retention campaign is not a task one person should undertake alone. Important factors to consider include:

- Organizing and planning before starting any promotional campaign.
- Being aware of all the prospective members in your area. Prospects may include SHRM at-large members. At-large members are SHRM members who are not affiliated with any chapter.
- Knowing in detail what you have to sell.
- Knowing your market—why haven't the prospective members joined already?
- Keeping your current members informed of your chapter's and SHRM's accomplishments and their value to members.
- Being aware of all possible ways to contact prospective members.
- Remembering that personal contact is the key to increasing membership and keeping it active.

## DESCRIPTION OF THE TOOLKIT

Included here are a number of ideas that you can adapt for your specific needs.

This toolkit contains a suggested outline for a chapter recruiting brochure, along with suggested text. A chapter brochure can be used as a direct mail piece when accompanied by a letter from the chapter president encouraging the recipient to join. Or it can be included in a packet with information on SHRM, copies of your chapter newsletter, details about special programs, etc., which prove particularly useful in following up with someone who has expressed interest in learning more about membership.

If you choose telemarketing as a method of recruitment, this toolkit contains a sample script that provides the outline for your campaign. It includes specific instructions for use and guidelines on what kind of chapter information should be featured. To make this approach most effective, modify the script to your specific needs and distribute the revised script to all participants in the telemarketing effort. That way, everyone is involved in providing the same information and there is less potential for misinformation.

Sample recruiting letters are included to give you an idea of the type of information that should be incorporated. Do not use these letters verbatim. Instead, adapt your own letters by following these formats. Sample letters to new members and their bosses are also included.

A list of support services available from SHRM tells you about the types of materials we can provide to reinforce your campaign efforts.

## PART I—RECRUITMENT

### WHY HR PROFESSIONALS DON'T JOIN CHAPTERS (SURVEY RESULTS)

SHRM recently surveyed its at-large members and asked them why they do not participate in any local chapter(s). The reasons may surprise you. Here is a list of the most common responses:

1. I didn't know there *was* a local chapter.
2. No one *invited* me to join.
3. The chapter's bylaws prohibit me from becoming a member, even though I am a SHRM member.
4. I attended a chapter meeting and did not feel welcomed.
5. No one responded to my e-mails/phone calls for membership information.
6. The chapter does not meet my needs.
7. I don't have time to attend—too busy.
8. The chapter's meetings are on days/times that are not convenient for me.
9. I would participate if the chapter offered more online resources (mail list services, website, chat rooms, etc.).
10. The program topics were not beneficial to my job.
11. My company will not pay for SHRM *and* chapter dues.
12. Dues are too expensive for what the chapter offers.
13. Chapter programs do not have very good speakers.
14. Board members seem to be “cliquish.”
15. Too much selling by “vendors” at meetings.
16. The chapter is too large to get to know members personally.
17. Chapter doesn't do a good job in communicating the benefits of joining.

Now that you have seen the reasons members are not joining your chapter, let's address each issue.

### CHAPTER COMMUNICATION WITH POTENTIAL MEMBERS

- I didn't know there *was* a local chapter.
- No one *invited* me to join.
- I attended a chapter meeting and did not feel welcomed.
- No one responded to my e-mails/phone calls for membership information.

- Board members seem to be “cliquish.”
- The chapter is too large to get to know members personally.
- Chapter doesn't do a good job in communicating the benefits of joining.

If local HR professionals are not aware of your chapter's existence, that is a sure sign that your chapter is not reaching out to the community as well as it could. SHRM can provide your chapter with a list of local SHRM members who are not affiliated with any chapter. This can give you a starting point to invite potential new members into your organization.

Try to be creative when marketing your chapter to potential members. For example, here is a list of groups your chapter could consider contacting to offer an invitation to join or to attend a meeting.

- Members of the local and state chambers of commerce (there may be a fee associated).
- Members of other HR-related organizations (your chapter can contact these organizations and request a list of members in your area. There may be a fee associated).
  - American Association for Affirmative Action
  - American Industrial Hygiene Association
  - American Management Association
  - American Payroll Association
  - American Society for Healthcare HR Association
  - American Society for Payroll Management
  - American Society for Training & Development
  - College and University Professional Association for HR
  - Human Factors Ergonomics Society
  - Human Resources Planning Society
  - International Association for Human Resource Information Management
  - International Ergonomics Association
  - International Federation of Training and Development Organisations
  - International Personnel Management Association
  - International Society for Performance Improvement

- o National Association of African-Americans in Human Resources
- o National Association of Colleges and Employers
- o National Career Development Association
- o National Employment Counseling Association
- o Society for Industrial-Organizational Psychology
- o University Continuing Education Association
- o World at Work (formerly American Compensation Association)
- Try advertising your chapter meetings/events in the local newspaper or business paper.
- Offer potential members a FREE meeting, and make sure the invitation is to one of your chapter's best programs of the year. Remember how important a first impression can be!

Many SHRM members say that no one ever invited them to join a local chapter. So invite them! They may know of your existence, but they want to be *invited*. They also say they'd like a personal invitation—not a form letter, but a phone call or something more personal. Everyone likes to feel important. It only takes a few minutes to call someone to invite them to become a member and explain to them what great benefits your chapter offers. *There are scripts available in a later section of this toolkit.*

Did you know that many members mistakenly think that being a SHRM member makes them an automatic member of a local chapter? That is why a phone call or direct contact would be helpful. By the same token, many chapter members mistakenly believe that local chapter membership makes them an automatic SHRM member.

If prospective members attend a chapter meeting, but leave feeling that they were ignored or unwelcomed, do you think they will return? Unfortunately, this is one of the most common responses SHRM members gave for not joining a chapter—they felt unwelcomed. They made the effort to attend, but the chapter did not make the effort to welcome or acknowledge them. Welcoming them does not simply mean having them stand and introduce themselves. It means other members and even board members starting up a conversation with them, finding out more about them and thanking them for coming. Visitors and potential new members should be treated as well as your company would treat a new or potential customer.

Here are some ideas for making *prospective* members feel welcomed:

- Have special ribbons or badges for prospective members; make sure the chapter board members watch for these ribbons/badges and make time to visit with and welcome each person.
- Make sure that board members show the potential member how much they appreciate their time.
- Tell the prospective member about the chapter and what to expect if he or she joins.
- Describe to the prospective member what you have gained from chapter involvement.

Here are some ideas for making *new* members feel welcomed:

- After they have been members for three months, have a committee member call them to ask them if they have questions, or if the chapter can serve them better.
- Have a minimum of 3-4 additional contacts with first-year members.
- Introduce new members to the board.
- Recognize new members by presenting them with a certificate at a meeting.

If you contacted your chapter to find out about membership, would someone return your phone call or e-mail? Many of our at-large members tell us that they repeatedly attempt to contact a chapter but got no response. It is understandable that your board members are volunteers who are very busy, but members are the lifeblood of your organization. If your chapter makes potential members feel unwelcomed in this way, you will lose them. No one wants to be ignored. Even if a potential member contacts the wrong board member to inquire about membership, someone still needs to follow up. Make sure all of your board members are aware of the importance of returning calls and e-mails from potential members (and current members, too, of course!) This will be many members' first impression of your organization—make it a good one! With the wide-spread acceptance of e-mail as primary communication tool, people also expect an almost immediate response—not one in a few weeks. It only takes a few minutes to return a call or an e-mail and make a prospective member feel important and valued.

Cut down the “lag time”! Lag time is the time that it takes from the moment a prospective member fills out an application form to the time the member has been officially welcomed into the organization. Lag time is a real killer of retention. The member wants to feel a sense of urgency!

SHRM also frequently hears members say that chapter board members seem to be “cliquish.” Your chapter can avoid appearing cliquish by simply sitting at different tables. It is best not to have a “board table” or “head table.” Board members can use meeting times as an opportunity to sit with the members and to find out what members want from the chapter.

If your chapter is large, your prospective members (or even your current members) may find it intimidating to network successfully. To make networking easier, try holding a meeting every other year where you have a speaker whose topic is tips on networking. Many members are unsettled by the prospect of networking with strangers, even though they may have joined the chapter for that very reason. After the speaker finishes, allow the members to network for 30-45 minutes. Consider giving prizes at the end for the following:

- The person who made a connection for a potential job.
- The person who introduced someone with a problem to someone with a solution.
- The person who made a new contact with an HR resource partner (some chapters call them “vendors”).
- The person who met the most new people.
- The person who made an appointment to meet someone for a follow-up lunch.

Your chapter might also consider holding networking events during which you separate members by topic or best practice. Most members say that the main reason they join a chapter is to network and share practices or challenges. Give them the opportunity to learn about each other’s successes! You could also divide the group into smaller clusters based on industry such as banking/financial, government, manufacturing, etc. These smaller groups will make your members feel more at ease when networking.

Do you think your local HR professionals feel that your chapter does a good job communicating the benefits

of joining? How do potential members find out about your chapter? What efforts do you make? Consider using the tool in this kit to create a brochure that outlines the benefits of joining your chapter. Do your board members use networking time to mention to potential members and guests what benefits the chapter has brought to them? Here are some more ideas for marketing your chapter:

- Create business cards with chapter meeting dates and the president’s contact information (business card kits are available at any office supply store).
- Announce your chapter meetings in the newspaper, chamber of commerce newsletter, on the radio, etc.
- Target new businesses for membership.
- Use the chamber’s mailing list.
- Keep a “prospective member” list—invite them to every meeting.
- Create a chapter brochure and/or website.
- Advertise with other associations (see list in other section)

Are your chapter bylaws inclusive or exclusive? Some potential members who are already SHRM members cannot join local chapters due to restrictions in chapter bylaws. Every HR professional needs an HR resource partner (consultants, lawyers, staffing professionals, etc.) at one time or another. Not including them in the chapter will keep your members from making those contacts. Wonder why you are not recruiting and retaining senior HR professionals? Many of them become consultants or start small businesses such as staffing agencies!

If “solicitation” has been an issue, consider adopting and enforcing a non-solicitation policy. State the policy in the newsletter a few times per year, and include it on renewal forms and new member applications. When members sign the membership application or renewal, they are also signing an agreement NOT to solicit. SHRM has several sample policies available on the Volunteer Leaders’ Resource Center (VLRC) website at [www.shrm.org/vlrc](http://www.shrm.org/vlrc). Chapters that have gone this route are usually very pleased with the results, and no one is excluded from participating in a chapter.

Would potential members of your chapter say that your organization meets their needs? Why or why not? Have you ever asked them? Surveying your current members

will not tell you why others are not joining. Use SHRM's at-large list and survey those who have not joined your chapter. Ask them why. Then, use that information to develop new programs and services to meet the needs of this group of potential members. Contact them again later to advise them about your chapter's new benefits—let them know they were heard!

Are your chapter meetings held at times/places that are convenient to your members or prospective members? Many chapters only hold lunch meetings. Your members may not find that convenient. Try moving your meeting times around to hold a few breakfast or dinner meetings. Many chapters say that they get a whole new group of people at different times of day. Some chapters say that their most successful meeting time is from 3:30 p.m. to 5:00 p.m. They save money on paying for meals, and their members can leave work for the day and still get to pick up their children before daycare closes or after-school activities end.

Many chapters also hold their meetings at one central location. Try holding a few meetings during the year at different locations to get closer to some of your membership "pockets." Have you ever looked at your members' addresses to determine the best location for a chapter meeting? Do you consider those members who live or work on the outskirts of town or even in a nearby city or town?

Make sure that program topics and speakers meet the needs of your members—ask them what they want. Also, ask those who DON'T attend meetings what they want. Consider conducting annual member surveys for program topics. (There are sample surveys in the VLRC.) Don't be afraid to ask expert members to present. They'll be flattered! Be sure your presenters are actually good speakers. If you are having difficulty finding speakers, remember that chapters do not have to meet monthly. Every other month or even quarterly is OK. Your best option is to focus on quality, not quantity.

Make sure that your chapter programs are addressing ALL levels of HR. Some programs should be for entry-level HR professionals, some for mid-level, and some for senior-level. Consider not holding "business" meetings as part of programs. The board's business could be dealt with at a board meeting. Some chapters are offering handouts of

announcements and other news at the start of the meeting so that the time can be focused on the speaker. Member meetings should focus on professional development. The general membership is not usually concerned about board matters, minutes, the treasurer's report, etc. They are there to learn something and get back to work.

Did you know that your chapter could have meetings pre-approved for HR Certification Institute recertification credits? If any of your members are certified, being able to say that they will receive one credit hour toward recertification for each meeting they attend goes a long way. Chapters can get meetings pre-approved by the HR Certification Institute by completing an online form at [www.hrci.org](http://www.hrci.org).

Guidelines for pre-approval:

- The presentation must not be held in conjunction with the meal and the speaker must present for a minimum of one hour (15 minutes of which may be dedicated to questions and answers).
- Discussions of chapter business, registration and meals must not be calculated into the event's total length.
- Events must be HR-related.
- The HR Certification Institute will only pre-approve *upcoming* events. Requests must be submitted no later than four weeks in advance of the event.

Are your chapter programs worth your members' time and money? Are you able to locate excellent speakers on timely topics? Here is a list of potential speakers for your chapter programs:

- Members of your state council, including district directors
- Local attorneys
- OSHA and DOL staff
- Senior HR professionals/consultants
- Local business leaders
- CEOs
- Members of the National Speakers Association at [www.nsaspeakers.org](http://www.nsaspeakers.org) (you can search by state or topic)
- SHRM staff ([www.shrm.org/speakers](http://www.shrm.org/speakers))

Here are some ideas for programs that chapters have found to be successful:

- Hold a trade fair, an HR resource partner fair or a job fair.
- Have a best practices panel.
- Have a chapter Workplace Excellence Award, Diversity Award or some other award that recognizes a company or a professional.
- Meet with local or state legislators.
- Discuss local wage survey results.
- Hold a program on “A Day in the Life of HR.”
- Have a mock trial.
- Hold a panel discussion with CEOs.
- Have a panel made up of senior HR members.
- Have a discussion between CEOs and HR on how HR can add value.
- Have table topics.
- Hold programs based on HR competencies.
- Consider also holding meetings on specialty HR areas such as non-profits, government, small business, etc.

Your chapter may also encounter those potential members who say they don’t have time to attend, or that their company won’t pay for chapter dues, or even that the chapter dues are too expensive for what the chapter offers.

If someone says, “I’m too busy,” it may actually mean the chapter meetings are at times or on days that are not convenient for the member. If the person simply cannot get away for lunch and all your meetings are at lunch, you’ve lost the member. Usually, this statement means something else, such as “The programs are not good enough to make me leave the office.” Try the “carrot and stick” approach. You have to entice them with something that will really get their attention.

Make your chapter meetings FUN! Offer door prizes, or have a fun networking event where a game is played. Hold at least one event per year that is networking-focused, held at a ball game, a picnic area, an amusement park, a cocktail party, a golf outing, the theatre, ballet, orchestra, etc.

If members think your dues are too high, consider giving a discount to certain members: those who have been members for a certain number of years, those who are

SHRM members, student members, those who are on the board, etc. Consider making dues for past presidents free for life (most chapters do). SHRM offers one year of free dues to members who are in transition. Consider free or reduced dues for members in transition. They will reward you with loyalty.

How much are your dues? Typical chapter dues are \$30-\$60 per year. If yours are much more, you may lose some members. If the benefits of being in the chapter are “worth it,” some members might pay the dues out of their own pockets.

Your chapter could send a letter to the CEOs of member companies explaining why it is important for their HR staff members to be involved in the chapter.

Having members pay up front for all meals for the year may work well for some chapters, but for others, they could lose members who say, “I’m not paying for 12 meals when I can only attend three meetings this year.”

Your chapter might consider conducting exit or non-renewal interviews or surveys. ASK past members why they did not renew. Answers may surprise you! Divide up the list and have each board member call five people.

### Did They Just Forget?

- Often, the meeting notice comes several weeks prior to the event. The member reads it and thinks, “I’ll respond later. I am not sure what will be going on that day.”
- Send e-mail reminders four weeks before, two weeks before, and on the day before the registration deadline. You’ll be surprised at how many register on the last day!
- Consider requiring that members attend X number of meetings per year to maintain their membership.
- Make sure your members understand what it takes to be an affiliated chapter—brag when you receive an award/recognition and make sure they know what that entails.
- Give them an “annual report” of all the successes the chapter had during the year. They need to see where their money is going and how it benefits them.
- Send a letter to each member a few weeks prior to sending the renewal notice. In this letter, list the chapter’s accomplishments. Many members have no idea what the chapter does. Be specific about how the accomplishments benefited the members.



- This reminder of accomplishments and benefits of the past year will prompt them to renew quickly so they won't miss out on these benefits in the future.

Now that we have reviewed the reasons HR professionals don't join chapters and how your chapter can overcome those issues, let's review how you can determine your prospects.

### **DETERMINING KEY PROSPECTS**

Before you begin your member campaign, take an extra step to reduce your work in the long run. Submit your list of prospective members to SHRM for a cross-check against our files; many may already belong to another chapter or SHRM as members-at-large. Your approach to recruiting these individuals will be far different than your strategy for reaching professionals who have had no prior experience with SHRM on any level. With the exception of peak work periods at SHRM, lists can usually be cross-checked and returned to you within two weeks.

There are a number of sources for potential members. Among them are the following:

- Professionals known to chapter members through business contacts.
- HRM professionals who have recently moved into your city or have been promoted into HRM positions. Check the business section of your local newspaper regularly.
- Individuals who are "at-large members". These are individuals who are not affiliated with chapters but who are SHRM members. Mailing labels or lists containing these names are available from SHRM. Is your chapter using the lists? (Due to privacy issues, SHRM does not make e-mail addresses of members available.)
- Recent graduates from schools offering HR or related programs.
- Individuals who are frequently quoted or have written articles for professional journals who live in your area.
- Individuals who have received certification.
- Members of other HR-related associations (see list on page 4).

- Professors from business, communication or psychology departments of local universities or colleges.
- Lists of local businesses and the HR contact from the Chamber of Commerce and your local employment commission.
- Rosters from HR educational programs, meetings or graduate classes in HR. Persons attending these are usually interested in "keeping up to date" and will appreciate the advantages of SHRM chapter membership.

As you can see, the potential list is limited only by your imagination. A brain-storming session by your Membership Committee will probably yield a number of other viable suggestions.

### **SETTING YOUR STRATEGY**

Once you've determined who your prospective members will be, it's time to decide how to approach them. It can be done through direct contact, telemarketing, direct mail, or a combination of techniques. Only your Membership Committee can know which method is best for your organization. In almost all cases, you'll want to plan on an initial method of contact and then some type of follow-up. Be sure to include in your plans both objectives and follow-up evaluation of the success of your campaign.

### **MARKETING MATERIALS, TOOLS, TEMPLATES AND RESOURCES AVAILABLE FROM SHRM**

- Letter templates (customizable)
- Brochure templates (customizable)
- Printable benefits list
- Telephone scripts (customizable)
- Talking points (customizable)
- Press release templates (customizable)
- "SHRM Member" ribbons
- Newsletter articles (membership)

## Membership Promotions

The following membership promotional tools are available from SHRM at no charge.

### *Member Benefits Guide*

This brochure outlines the history, services, and programs SHRM provides. This online guide, available at <http://www.shrm.org/about/membership/Documents/FlipBookFinal.pdf>, provides your prospective members the ability to “flip” the pages.

### *Membership Core Leadership Area*

The Membership Core Leadership Area (CLA) in the VLRC includes tools, templates, the member benefits flier (in PDF, can be downloaded for print locally), the SHRM membership application (pre-coded with the chapter first-year membership discount), and links to marketing tools, best practices and other useful information. Visit: <http://www.shrm.org/Communities/VolunteerResources/Pages/clas.aspx#member>.

### *What's in it for ME?: SHRM & Chapters in Partnership*

This tri-fold brochure outlines the benefits of belonging to both SHRM and a local chapter. It fits easily inside a #10 envelope and is suitable for use on a resource table or in a mail campaign to prospective members. It can be downloaded from the VLRC or ordered in quantities from SHRM at no charge.

### *SHRM Membership Promotions*

To assist chapters in their membership growth, periodic membership promotions are sponsored by SHRM's Membership Marketing Department. Materials are developed describing each program and the prizes to be awarded. For information regarding current membership promotions, contact a member of your Regional Team.

### *SHRM “AFFILIATE OF” Logo*

Logos are also available online for download from: <http://www.shrm.org/Communities/VolunteerResources/graphicsguide/use/Pages/default.aspx>.

### *Chapter Rosters and At-Large Mailing Information*

SHRM rosters list SHRM members coded to a local chapter. SHRM at-large members (those members not currently affiliated with a local chapter) are a potential source for new local members. The at-large member mailing list information is available in an Excel spreadsheet throughout the year for special requests, such as

publicizing conferences, membership drives, etc.

### *SHRM Member Ribbons*

Your chapter can obtain SHRM Member ribbons at no cost. Ask SHRM members to wear these attached to their chapter name badges. That way, potential members can ask questions about the benefits of membership of those who really know!

## Letter Templates (customizable)

### **Sample Letter to Non-SHRM Member Who Has Attended a Local Chapter Meeting**

Dear \_\_\_\_\_:

Thank you for attending a recent chapter program. We are pleased to serve your needs for ongoing professional development. Now we would like to do more to expand your professional skills and help you achieve your career goals.

I am writing to tell you about our chapter, as well as the organization with which we are affiliated, the Society for Human Resource Management (SHRM). Locally, we provide regular meetings, publications and services unavailable from any other source. Membership in both the local chapter and SHRM assures you of opportunities to stay ahead of our rapidly changing field. Our local chapter has more than [insert number] members and SHRM has more than 250,000. Locally, we have members from such companies as [list several of the best known or those related to the prospect's business].

The services of both the chapter and SHRM are outlined in the enclosed brochures. Once you review them, I believe you'll agree that involvement is a strong investment in your professional future. I'll call you in a few days to answer any specific questions you may have.

**Sample Letter to Non-SHRM Member Who Has Received Recent Promotion**

Dear \_\_\_\_\_:

Congratulations on your new responsibilities as [insert title] of [insert company name]. The local chapter of the Society for Human Resource Management (SHRM) is pleased to recognize your advancement in our field.

I would personally like to invite you to join more than [insert number] local chapter members and more than 250,000 SHRM members who have found the organization to be a tremendous aid in maintaining and enhancing their professional competence.

SHRM can help your successful performance through local meetings, networking, publications and services that keep you up-to-date on the profession, legislation, trends and research. We can be one of the best investments you'll ever make in your career.

Enclosed is information about both the local chapter and SHRM—who we are and how we can help you. I will call you in a few days to answer any questions you may have about the value of SHRM and local chapter membership. Once again, congratulations on your new position.

**Sample Letter Welcoming a New Member Who Is Also Joining SHRM**

Dear \_\_\_\_\_:

This is to confirm that your application for membership in the [insert chapter name] chapter of the Society for Human Resource Management (SHRM) has been processed and forwarded to SHRM. You will receive your membership card and other information from them shortly.

Benefits of your SHRM membership include *HR Magazine*<sup>®</sup>, the leading monthly magazine of our profession; SHRM Online, a news and information site updated daily; and many other services.

The success of our local chapter of SHRM depends on its membership. Through your support, we are able to

provide regular meetings, outstanding speakers, seminars and other programs aimed at the needs of today's busy HR professionals.

Your name is already on our chapter mailing list, and you will receive our monthly newsletter beginning with the [insert date/month] issue.

I hope to see you at the next meeting so we can become personally acquainted. Please contact me if you have any questions, and again, welcome. You have made a sound investment in your professional future.

**Sample Letter to Boss of New Member**

Dear \_\_\_\_\_:

I am pleased to announce that [insert new member's name] has been accepted as a member of the local chapter of the Society for Human Resource Management (SHRM).

[Member's name] is joining more than [insert number] other [insert city/metropolitan area/community name] area HR professionals who are taking a positive approach to their continued professional development. Through their support, we are able to offer our monthly meetings, seminars and other programs aimed at the needs of today's busy HR executives.

More than 250,000 members benefit from the services offered by SHRM. Other member services include *HR Magazine*<sup>®</sup>, conferences, workshops, SHRM Online, a reference library, and legislative representation. All of these are aimed at fulfilling the mission of SHRM.

We welcome [insert member's first name] to our chapter and know this reflects on the desire of [insert company's name] to have its HR professionals continue their development. Your support of our chapter is greatly appreciated.

### Sample Letter Welcoming a Local-Only Member (chapter member who is NOT a SHRM member)

Dear \_\_\_\_\_:

This is to confirm that your application for membership in the [insert chapter name] chapter of the Society for Human Resource Management (SHRM) has been received and approved. We welcome you to our professional organization and hope your membership will be a long and profitable one.

The success of the chapter depends on its membership. Through your support, we are able to provide regular meetings featuring outstanding speakers, seminars and other programs aimed at the needs of today's busy HR professionals. Another benefit of your membership is the opportunity to network with area professionals.

Your name is already on our chapter mailing list, and you will receive our monthly newsletter beginning with the [insert date/month] issue.

I hope to see you at the next meeting so we can become personally acquainted. Please contact me if you have any questions, and once again, welcome! You have made a sound investment in your professional future.

### Chapter Brochure Template

You may use the outline and information below to create your own chapter brochure.

#### Chapter Name

The text should profile the local chapter, giving some history of the organization along with its size and structure, services, dues and how often it meets.

Special and regular activities could be described under separate headings as noted in the content outline.

#### Membership Criteria

This section would outline the qualifications for membership in the local chapter and would identify different categories of membership, perhaps under subheads.

### Benefits of Membership in the Local Chapter (customize for your chapter)

As a member of a SHRM-affiliated local chapter you will develop a network that will help you in many ways:

- Exposure to other HR professionals and companies revealing how other organizations handle various HR situations, procedures, policies, etc.
- Access to a network of professionals and specialists providing HR information that might otherwise be difficult and/or expensive to obtain.
- Opportunity to develop relationships and contacts in other companies to share information on HR issues.
- Availability of local professional development opportunities to improve your HR competencies.
- Access to current best practices to make your organization more efficient, increase employee commitment and help line managers carry out business strategy.
- Availability to develop leadership skills by taking on a volunteer leadership role in a local chapter.
- Opportunity to develop leadership skills by taking on a volunteer leadership role in a local chapter.
- Development of a reputation and credentials in the HR field through your involvement in a local chapter.

### SHRM Profile

Include information about SHRM such as:

- More than 250,000 members
- Headquartered in the Washington, D.C., area
- World's largest association devoted to human resource management
- First-time member dues for chapter members; a \$15 discount off the regular price

### Benefits of Membership in SHRM

- Professional development
- Networking
- Legislative updates and representation
- Resources
- Publications
- Research

### **Membership Application**

If space allows, add a chapter membership application which includes a check box for more information about SHRM. Be sure to include a return address on the application.

### **Membership Criteria**

This section would spell out the qualifications for membership in the local chapter and would identify different categories of membership, perhaps under subheads.

### **Printable Benefits List**

Use the printable member benefits list (available in the VLRC Membership CLA area) for your chapter members who might be interested in joining SHRM.

### **SUGGESTED GUIDELINES FOR TELEMARKETING CAMPAIGN**

The primary objective of the campaign is to enroll individuals who have never belonged to the local SHRM chapter into the organization. The secondary goal is to enlist those individuals into SHRM affiliation, either at the time of the telemarketing campaign, or at a later date, once they have joined the local chapter.

Potential prospects include:

- Individuals in the profession who chapter members know or have met casually through business.
- HR professionals who have recently moved into the city (the business page of the newspaper is a good source for names).
- Individuals who have been promoted into HR positions (again, the business page is an excellent source for such information).
- Individuals who belong to SHRM, but do not maintain local affiliation (known as members-at-large). SHRM encourages local chapters to ask for assistance in identifying prospects. You may want to submit names to SHRM to determine whether the person is already a member of SHRM.

Ideally, the telemarketing campaign should be conducted at least two months prior to the annual local chapter

membership renewal date. For example, if the chapter is on a calendar year (January through December), then the campaign for new members would take place in November.

As many chapter members as possible should participate in the telemarketing recruitment effort.

Each member should be assigned a specific number of people to contact. Priority in assignment should be (a) individuals chapter members know and (b) individuals they don't know.

The telemarketing campaign should be conducted within a specific timeframe. Ideally, activities should be concentrated within a four-week period as follows:

- First week: Initial phone calls made (sample script included here) and chapter recruitment package mailed to interested prospects.
- Second week: Follow-up phone calls to answer questions, determine level of interest, and schedule meeting/lunch with those most interested.
- Third and fourth week: Meeting(s) with prospects.

Participating chapter members should be thoroughly familiar with the local chapter and with SHRM, services offered, etc., so they can quickly and accurately answer prospects' questions.

Phone calls should be made during business hours to prospects' offices. If possible, phone calls should be made in the mornings of mid-week days (Tuesday through Thursday).

Chapter recruitment package for mailing to prospects identified through the telemarketing might contain:

- Information on chapter
- Chapter application form
- List of chapter activities for preceding 12 months
- Copy of latest chapter newsletter, if one is published
- SHRM benefits information and application
- *HR Magazine*<sup>®</sup>

After campaign is completed, participating chapter members should have a meeting to assess recruitment effort.

- Success rate of conversions
- Reasons given for not joining
- Review of techniques/tactics used by chapter members who were successful in recruiting new members
- Alterations/changes required in telemarketing effort
- Success/failure rate or input received from prospects suggesting other recruitment methods to use

Local chapter may wish to provide some type of incentive to motivate members in recruiting effort. For example, local chapter member with highest new member conversions during campaign might be given the opportunity to select a book of his/her choice from the SHRMStore that would be paid for by the local chapter.

#### **SUGGESTED SCRIPT—INITIAL PHONE CALL**

##### **Introduction**

Version 1: Prospect is known well.

For lead-in, cite recent occasion where you were able to help the prospect, or you had a recent discussion with the prospect on some HR topic. Then say, “You know, [prospect’s name], I’ve found being a member of the local chapter of the Society for Human Resource Management has helped me in that area.” (Continue with basic script.)

Version 2: Prospect is an acquaintance.

Refresh the prospect’s mind as to who you are and when you last talked to him or her. Then say, “[Prospect’s name], you’re a professional in the HR field, and I’d like to take a few minutes of your time to tell you about an organization of HR professionals called the Society for Human Resource Management.” (Continue with basic script.)

Version 3: Prospect new to the city.

“Good morning, [prospect’s name]. I’m [name, title, organization], and I’d like to welcome you to our city.” Engage the prospect in conversation about where he or she came from, how he or she likes your city, etc. Then say, “[Prospect’s name], meeting other HR professionals in a new locale is not often easy, which is why I’d like to briefly tell you about a professional organization here in town that you may want to join.” (Continue with basic script.)

Version 4: Prospect not known, recently promoted  
 “Good morning, [prospect’s name]. I’m [name, title, organization], and I’d like to congratulate you on your recent promotion.” Engage the prospect in the conversation about how long individual has been with current organization, what he or she will be doing in new position, etc. Then say, “I’d like to quickly tell you about an organization of HR professionals that could prove to be invaluable to you in your new position.” (Continue with basic script.)

#### **SUGGESTED SCRIPT—BASIC INFORMATION/ FIRST TELEPHONE CALL**

“SHRM is an association of more than 250,000 HR professionals worldwide. It is the world’s largest professional association devoted exclusively to HR management. SHRM is headquartered in the Washington, D.C., area.

In our local chapter, we have more than [insert number] members from a range of organizations in this community. [Insert member names/titles, organizations hat prospect may know, or key local HR leaders who belong.] I’ve been a member for [insert number] years, and I’ve found that SHRM has helped me considerably in my job. [Cite specific instances wherein local and SHRM affiliation has helped you.]

I’ve also benefited from the monthly meetings that have given me and the other members the opportunity to share ideas and obtain perspective as well as input from peers. In addition, [quickly list other key activities/services of the local chapter].

An individual can belong to the local chapter only (this would not apply if your chapter is a 100% chapter) or can belong to both the local chapter and to SHRM. SHRM affiliation expands the networking potential tremendously and provides an HR professional with extensive services and resources. Membership in the local chapter and SHRM are separate.

I think you would find membership extremely worthwhile, and I would like to send you some information on both the local chapter and SHRM. (Obtain mailing address if prospect agrees.)

It's been a pleasure talking with you, and I'm going to get this SHRM material in the mail tonight. I'll give you a call next week, in case you have any questions."

---

*Note: In initial call, don't mention dues unless asked. First phone call is meant to whet the interest of the prospect by emphasizing the value and benefits of membership.*

#### **SUGGESTED SCRIPT—SECOND TELEPHONE CALL**

"Good morning, [prospect's name]. This is [your name], and I'm calling to make sure you received the material I sent you about SHRM. If you're interested, I'd like to fill you in on SHRM in more detail, and answer any questions that you may have. But, if you're busy now, we could meet for lunch, on the chapter—or perhaps you'd prefer to come to our next chapter meeting as my guest.

(If individual declines both invitations, then continue with:) If you have any questions, I'd be most willing to answer them now, or call back at a time that's more convenient for you.

(If individual is not interested at all, then close conversation with:) Thank you for your time. If in the future you wish any information on our organization, or wish to attend one of our meetings as my guest, please give me a call.

---

*Note: An entertainment budget should be considered by chapters in advance of the telemarketing campaign.*

#### **SUGGESTED GUIDELINES FOR HANDLING NEGATIVE COMMENTS**

Those chapter members participating in the telemarketing campaign should hold a pre-launch brainstorming session to consider proper responses to negative comments. Some examples and suggested responses:

##### **I DON'T SEE THE VALUE OF JOINING BOTH THE LOCAL CHAPTER AND SHRM.**

Affiliation in both the chapter and in SHRM gives you an added dimension in services. For example, there are increased professional development opportunities such as educational programs and conferences available through affiliation on both levels. SHRM Online is a tremendous resource. (Cite specific resources that you use frequently.) SHRM has a call center named the HR Knowledge Center where certified HR professionals will research and answer

any question you have—up to 25 of your questions per year. SHRM affiliation gives you access to quality publications, a broad network of resources and individual expertise, while local chapter membership intensifies the opportunities for sharing ideas and problems with your peers.

##### **SHRM DUES ARE TOO HIGH.**

Actually, they are comparable to dues in other professional organizations for the services they provide. For example, [cite dues for other associations]. For your \$180 (\$165 for a first-time member) you get monthly and quarterly publications, access to the SHRM HR Knowledge Center and library, access to the SHRM Online website, frequent research reports, networking among peers, and many other services.

##### **I BELONG TO ANOTHER ORGANIZATION OF HR PEOPLE. WHY SHOULD I JOIN SHRM?**

You're a professional and you ought to belong to the leading professional organization in the field. SHRM's perspective and scope are much larger than any organization devoted to one or two areas in the field. SHRM's program covers all functional areas, and the services are designed to expand your knowledge and make you promotable.

##### **I'M ONLY INTERESTED IN GETTING *HR Magazine*<sup>®</sup>.**

Well, that is certainly a valuable publication. Why deprive yourself of all of the other services as well as the opportunity to share ideas and problems with your peers? Plus, as a member, you receive discounted prices on all books available through the SHRMStore—and the savings here might just make up the difference between the cost of membership and just subscribing to *HR Magazine*<sup>®</sup>.

##### **MY COMPANY WON'T PAY FOR MY MEMBERSHIP.**

Maybe if your boss was aware of all the resources available from SHRM and how much time it would save you researching answers to HR questions, he or she might reconsider. If your company had to hire an attorney or consultant, 30 minutes of his or her time would cost more than SHRM's annual dues. Membership dues you pay in a professional organization are also tax deductible as an ordinary business expense.

### Other Tips

- Be prepared. Have on hand current and accurate information about member benefits and local events. The online SHRM Member Benefits Guide is available at <http://www2.shrm.org/Members%20Guide%20Flipbook/index.html>.
- Reflect on the primary reason you first joined, and why you continue your membership. A personal anecdote, relating how SHRM and the chapter have helped you, is often most compelling. You know the value of membership—the challenge is to communicate it to your fellow HR professionals.
- Listen to colleagues; uncover the need. Once you've determined your fellow HR professionals' needs, tailor your message to address those needs, showing specifically how SHRM can help.
- Be enthusiastic, and don't let objections throw you. Objections—particularly “I don't have the time” or “I don't have the money”—are a natural part of the sale. Objections are often a request for more information, or may give the prospective member a pause, a chance to think through the idea of joining.
- One of the best ways to deal with objections is the “feel, felt, found” method. For example, if someone tells you that membership is too expensive, you can reply, “I know how you feel and know how hard we have to work these days to make every dollar count. Others felt that way, until they found that membership paid for itself—from discounts on conferences and courses to the invaluable networking opportunities.” Give it your own personal touch.
- Follow up with your prospect. Generally you have to reinforce and reiterate the reasons for joining SHRM at least once.
- Practice these steps and don't get discouraged. You are helping your colleagues, SHRM and the HR profession by getting the word out there, just as your work as a SHRM member helps the Society and your profession.

### TALKING POINTS ON SHRM BENEFITS

#### SHRM Online

Visit SHRM Online ([www.shrm.org](http://www.shrm.org)) to read daily news updates on HR-related regulations, legislation, court decisions and more; ask questions and receive answers from the SHRM HR Knowledge Center (up to 25 questions per year); receive personal answers to HR-related questions and access in-depth information on a variety of HR topics; obtain updates on legislative issues through the bi-weekly e-Newsletter HR Issues Update, take advantage of our research on HR topics; network with your colleagues online via HR Talk and SHRM Connect; and keep up-to-date on SHRM activities, services and products.

#### HR Knowledge Center

All professionals encounter situations when quick answers to questions are needed. The staff in the SHRM HR Knowledge Center is available to personally research and answer up to 25 HR-related questions each year via telephone. The HR Knowledge Center also offers unlimited 24/7 access to Express Request, a self-service, online benefit that allows SHRM members to request and receive via e-mail information on a wide variety of HR topics.

#### Publications

*HR Magazine*<sup>®</sup> is an award-winning monthly publication you will receive. SHRM regularly provides its members with additional publications, including SHRM *Legal Report* (legal issues), *Workplace Visions* (emerging HR trends) and HR discipline-specific e-newsletters.

#### Professional Development

SHRM offers professional development opportunities through a variety of certificate programs, conferences and seminars. The Society hosts the largest annual conference and exposition devoted to the human resource profession as well as conferences focusing on employment law and legislative issues, international HR, recruitment and retention, and diversity. Professional development is



more than attending seminars and conferences. It includes certification as well. Certification indicates that an individual has mastered the body of knowledge he or she needs to do the job. Certification is handled through the HR Certification Institute at SHRM headquarters.

### Government Affairs

SHRM is your voice in Washington, D.C. The SHRM Government Affairs staff monitors legislative and regulatory actions on the federal and state levels that affect HR professionals. Working with volunteer leadership, SHRM determines positions on pending legislation and regulatory issues and then communicates them to

Congress and governmental agencies on your behalf. Members help shape public policy and ensure that the needs and concerns of the HR professionals are represented in the political decision-making process through the HRVoice program, an online letter-writing service.

### Newsletter Articles

To increase your SHRM membership, you may wish to include articles in your chapter's newsletter about member benefits. This will also increase your SHRM member retention as members may not be aware of all the benefits available to them.

## Press Release Template



Press Contact:

For Immediate Release:

Chapter contact name  
and phone number

### TITLE OF ARTICLE

City, State— Month, Day, Year— The (CHAPTER NAME) serves HR professionals in the (NAME OF CITY OR AREA). The organization is an affiliated chapter of the Society for Human Resource Management (SHRM), the world's largest human resource management association. SHRM has more than 250,000 members and 575 chapters throughout the United States.

Chapters are a critical link in the Society's structure, providing a local forum for members' personal and professional development, a networking arena, and a focus for legislative attention to local, state, and national human resource management issues.

[Here, add any information about your specific chapter program or event.]

The (CHAPTER NAME) currently has (NUMBER OF MEMBERS) who are from organizations of various sizes and industries. (INCLUDE ANY OTHER PERTINENT CHAPTER INFO YOU'D LIKE).

According to (CHAPTER) President (NAME OF PRESIDENT), "The (CHAPTER) serves as an important local voice, providing leadership on key business and workplace issues and helping to improve the practice of human resource management within our membership and within the community."

###

(CHAPTER BOILERPLATE AND WEBSITE  
ADDRESS IF APPLICABLE.)

### **Student Member Conversions**

Although you might not think of students when you set your recruiting strategy, you should! There are more than 400 local student chapters—one may be in your area. There are also more than 15,000 student members of SHRM. As they prepare to graduate and move into the field of HR, your chapter should reach out to them. You can find a list of student chapters at [www.shrm.org/students](http://www.shrm.org/students). Contact the student chapter advisor and ask to speak to the students about your local professional chapter. Invite them to meetings and encourage them to join the professional chapter upon graduation.

If there is no student chapter in your area (or even if there is), you might also consider visiting an HR class to discuss the local SHRM chapter. Some students are non-traditional and may already have a job in HR. You might also visit graduate classes of an MBA or other HR-related program.

### **Tracking Prospective Members**

Does your chapter track potential members? If not, you may be missing out on a large segment of the local HR population. Track these prospective members just as you would your paid members. Do you think that only your current members would like to receive invitations to your monthly chapter meetings, seminars, legal updates or special programs? Of course not! Many others in the HR community, even if they have decided not to join at this time, may want to attend a meeting periodically as a non-member. If you do not keep these potential members on your invitation list, you may never acquire them as a member.

So, what type of data should you store on prospective members? Keep a spreadsheet of data such as:

- Basic contact information, such as name, address, phone, fax, e-mail address, etc.
- The source of the name (referral from a member, guest of a member, other organization's mailing list, attendee at a special event, etc.)
- Contacts with the prospect, such as information sent, calls made, etc.
- Status of the potential member, such as "new," "follow up in 30 days," etc.
- Other facts about the prospect, such as HR specialty, length of time in field, title, etc.
- For organizations with more than one HR professional, facts such as main contact, size of company, number of HR staff, etc.

- Any other information that seems appropriate.

### **Best Practices in Chapter Membership Recruitment**

Attending your state council meetings is a great way to find out what other chapters are doing in this area. Another is to share best practices through the Membership Core Leadership Area (CLA) conference calls, webinars and SHRM Connect group for "Membership."

### **Chapter Membership Rally—Sample Chapter Best Practice**

This event was titled "CNHRMA Membership Rally." It was held from 5:00 p.m. to 6:30 p.m. on a Tuesday evening at a hotel with easy access for everyone. The chapter was at a point where it was simply maintaining and not gaining many new members. The chapter leadership knew there were a lot of professionals who would benefit from being a member of the chapter. The evening was set up with registration from 5:00 p.m. to 5:10 p.m., social time from 5:00 p.m. to 5:30 p.m., speakers from 5:30 p.m. to 6:20 p.m., and closing/giveaways from 6:20 p.m. to 6:30 p.m. The chapter had the room until 7:30 p.m., and people were encouraged to stay and mingle.

The chapter provided hors d'oeuvres and had a cash bar available; there was no cost to anyone to attend the event. The theme of the evening was "Lessons from the Geese": "Geese flying in formation honk to encourage those up front to keep up their speed. CNHRMA is soaring to new heights! Let's honk for each other to keep up our efforts to serve the professional and advance the profession!"

The chapter ordered some inexpensive horns that were very bright in color, and used them to decorate the tables. The president explained the theme during the opening remarks, and it was fun to see everyone open up and use the horns the rest of the evening to applaud, etc. Now, most everyone in the chapter knows what it means when they say "Honk! Honk!" to each other.

The district director spoke briefly about the benefits of being a part of a local chapter, and how it ties in with the state council, etc. Door prizes from the SHRMStore were given away. Each city's local chamber mailing lists were used to contact potential members. The total cost for the event was approximately \$800 for food/room/door prizes and "thank you" gifts.

**Now that we have reviewed recruitment strategies, let's move on to retention.**

## PART II—RETENTION

The easiest way to begin Part II is to respond to the question “What is retention and why is it important?” For our purposes, “retention” means keeping the members you’ve already recruited and cultivated.

### DEFINING RETENTION

Retention is important for several reasons.

- It is a key indicator of how well your chapter is meeting its mission and providing for members.
- Your current members add value to the chapter.
- There is less volunteer time and effort required to keep a current member than recruit new members.
- Financially, it is easier on the bottom line to renew a member than to recruit a new one.

Retention should be built into the membership segment of your chapter’s strategic plan. The cost of keeping your members should also be built into your chapter’s budget.

Your recruiting efforts actually begin the minute you gain a new member—and they continue throughout that member’s tenure with the chapter. Members joined your chapter with specific expectations. How you respond to and deliver those expectations will impact the future relationship of that member and the chapter. In one respect you could say that membership marketing is ongoing to “prospective,” “new” and “tenured” members.

### THE COST OF RETENTION

Retention rate is a measurement tool. And, as with any measurement tool, it involves math.

# of members renewed divided by # of members eligible to renew	x 100	= Retention %
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For example:

298 members renewed divided by 350 members invoiced for renewal	x 100	= 85%
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Financially, you take a big hit! What that means to your chapter is that for every member you lose at renewal time, you have to replace every one of those members just to stay even. You can’t even begin to grow your ranks until

you replace those members. From a revenue standpoint, that is costly. If your chapter’s annual dues are \$50 per member (as in the example above) what is your lost revenue on dues alone?

350 members less 298 members renewed = 53 members lost	53 x \$50 per year in dues	= \$2,600 in direct dues revenue
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Unless you’re totally non-dues dependent or have a tremendous reserve, you have to replace that lost revenue to continue the same scope of programming, benefits and services to your membership. And the spiral continues downward. If you don’t provide at least a bare minimum of the programming, benefits and services your members have come to expect, more will not renew.

What if only 50% of those 53 members also attended your annual workshop?

53 members x 50% = 27 members attended	x \$100 workshop registration fees	= \$2,700 in lost workshop revenue
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Because 53 members that you worked hard to recruit and cultivate didn’t renew their membership last year, your potential loss on these two income line items alone was \$5,300. That is a big hit to your operating plan and your potential scope of work. The spiral *can* get worse! If your members see a lessening in the scope of programming, benefits and services offered, it could impact how they see the value of their own membership in the chapter. That will impact the renewal rate in subsequent years.

You can see why keeping those members through a strong retention program of continuous marketing and assessment must be an essential part of your chapter’s operating plan. (That means your strategic plan as well since the operating plan is conceived through the strategic plan.)

What is your marketing cost to recruit a new member? It has been proven that the cost of recruiting a new member is higher than keeping an existing member. In the example above, you would have to replace \$5,300 in revenue and recruit 53 members just to stay even! So, you have the marketing cost on top of the lost revenue. Retention is an investment in the chapter.

When you look strictly at the numbers, it is easy to see why retaining your members is “a good thing.”

### CONTINUOUS MARKETING

So much of the information contained in Part I of this toolkit is applicable to Part II. The tips on marketing to prospective members can be carried through to your current members. The process is really ongoing. Likewise you must continually deliver on your promises. Every member has a perceived value of his or her membership. If you don't meet each member's expectation of that membership, you run the risk of losing that member.

Use the tools at hand to market to your existing membership base.

- Newsletters
- Website
- E-mails

- Invoices
- From the podium
- One-on-one interactions

Remember that retention is a key indicator of how well your chapter is meeting its mission and providing for members. It is essential that you know how you are accomplishing that. Conducting a member survey will help you in your planning and assessment process. Determining what your membership wants will be a strong beginning to delivery. If members don't get what they need, how long do you think they'll stay (and how likely are they to renew)?

Member surveys can be the size of a post card or multiple pages; but that depends on what you want to measure and the depth of that measurement. They can also be very detailed and specific. Take this survey for example:

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### SIouxLAND SHRM MEMBER SURVEY SEPTEMBER

1. How many Siouxlnd SHRM monthly meetings did you attend in the past 12 months?

	9-12 meetings
	6-8 meetings
	3-5 meetings
	1-2 meetings
	Never attended

2. When you don't attend meetings, what is (are) the reason(s) why?

If more than one reason applies, please rank beginning with No. 1 as the reason that applies most often.

	Inconvenient place
	Inconvenient time
	I forget
	Something comes up at work
	Something conflicts at home
	Not interested in program

	Other (explain):
	Other (explain):

3. As a member, what do you expect from Siouxland SHRM? Are your expectations being met?

Please read your expectations of Siouxland SHRM in Column B. If you have an expectation that does not appear in Column B, please add it next to Other.

In Column A, rank the expectations in order of importance using No.1 for the most important. Write N/A if the expectation does not apply to you.

Then, in Column C, let us know if your expectation is being met at Siouxland SHRM by circling the answer that best fits.

Column A	Column B	Column C
Rank here	Expectation	Is Siouxland SHRM meeting your expectations?
	Networking with other HR professionals	Yes Sometimes No
	Refreshers and updates on topics familiar to you	Yes Sometimes No
	Cutting-edge topics—mostly new information	Yes Sometimes No
	Other:	Yes Sometimes No
	Other:	Yes Sometimes No

4. What can Siouxland SHRM do to better meet your needs?

--

5. During which times are you able to attend meetings? What are your preferences?

Refer to the meeting time in Column A

In Column B, circle the answer that best describes your availability to meet during that time.

In Column C, please rank meeting times in order of your preference, with No. 1 being the time you most prefer. If you have no preference for any meeting times, please indicate so by circling N/P in the column heading.

Column A	Column B	Column C
Meeting Time	Can you meet during this time?	Rank Preference N/P
Before 8:00 a.m.	Always Most times Sometimes Never	

Between 8:00 a.m.-10:00 a.m.	Always Most times Sometimes Never	
Between 11:00 a.m.-2:00 p.m.	Always Most times Sometimes Never	
Between 4:00 p.m.-6:00 p.m.	Always Most times Sometimes Never	
Between 5:00 p.m.-7:00 p.m.	Always Most times Sometimes Never	
Anytime after 4:00 p.m.	Always Most times Sometimes Never	
Anytime after 5:00 p.m.	Always Most times Sometimes Never	
Time other than above: _____	Always Most times Sometimes Never	

6. What do you think about the programs you have heard this year? Check one.

<input type="checkbox"/>	Mostly Excellent
<input type="checkbox"/>	Mostly Good
<input type="checkbox"/>	Mostly Fair
<input type="checkbox"/>	Mostly Poor

7. How useful have you found this year's programs to be?

<input type="checkbox"/>	Extremely Useful
<input type="checkbox"/>	Somewhat Useful
<input type="checkbox"/>	Somewhat Not Useful
<input type="checkbox"/>	Not At All Useful

8. What topics would you most like to see covered in upcoming programs? Please feel free to add your own topics at the bottom of the list. Assign a value to the topic according to your interest level as follows:

- 1 = Extremely interested
- 2 = Somewhat interested
- 3 = Neutral
- 4 = Not interested

Interest	Topic
	Newest developments in federal compliance
	Newest developments in state compliance
	Specific legislation—what specifically?
	Benefits—what specifically?
	Newest in retention techniques
	ROI on HR functions
	Balanced scorecard
	Emotional intelligence
	Training and development—what specifically?
	Certification (PHR, SPHR, GPHR)
	Performance/productivity—what specifically?
	Performance appraisal systems
	Leadership—what specifically?
	Strategic HR—what specifically?
	Health, safety and security—what specifically?
	Conflict management
	Power/politics
	Influence and negotiation
	Labor relations—what specifically?
	Self awareness and working with individual differences
	Effective coaching techniques
	Session around a best-selling book—Ideas on books?
	Downsizing/right-sizing—what specifically?
	Compensation—what specifically?
	School-to-work—what specifically?
	Employee relations—what specifically?
	Employee selection tools—what specifically?
	Project management
	Culture—what specifically?
	Other:
	Other:

9. As you know, Siouxland SHRM dues have been \$50 for several years. While dues will likely increase at some point, in determining how much, we must consider that a portion of your dues is spent on food for meetings. As we evaluate the dues structure, it is important to know what you think. Please check the box next to the statement that best describes your thoughts. If no statement applies, please add your own.

	I like having food at meetings, and I think dues should be raised to cover the cost.
	I like having food at meetings, but only if doing so raises dues by no more than \$_____.
	I like having food at meetings, but I prefer that you charge the appropriate extra amount for each meeting.
	If having food at meetings means that dues will increase, then I prefer not to have food.
	I don't have a strong feeling one way or another.
	Other:

10. To what extent will dues influence your decision to renew your Siouxland SHRM membership?

	As long as dues remain under \$_____, my decision will not be influenced.
	As long as dues remain under \$_____ and my meals are covered, my decision will not be influenced.
	I will not renew my Siouxland SHRM membership if dues increase at all.

11. How long have you been a Siouxland SHRM member?\_\_\_\_\_

12. Do you visit the Siouxland SHRM website regularly? YES or NO  
If NO, why?

13. What can Siouxland SHRM do to improve its website?

14. When considering rejoining Siouxland SHRM for 2005, what concerns, if any, do you have?

15. What do you see as Siouxland SHRM's greatest strength?

16. What one change do you think would make Siouxland SHRM more effective?

17. Does your employer pay for your Siouxland SHRM membership? YES or NO



18. What is your position title? \_\_\_\_\_

19. At what level in the organization do you perform the majority of your work and make the majority of your decisions?

	Strategic
	Operational
	Task

## THANK YOU!

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More sample surveys may be found online in the VLRC. You may also ask your Regional Team members for additional samples. You may wish to automate the survey process. That will make the analysis of the survey data much easier. It will make the survey process itself a quick and easy activity for your membership. Explore such vehicles as [www.surveymonkey.com](http://www.surveymonkey.com) or [www.surveyananywhere.com](http://www.surveyananywhere.com). Nominal fees may be charged. Do a cost/benefit analysis; you may find that the nominal fees are justified when weighed against the time and efforts of your volunteers involved in the process.

Another way to look at this picture is to survey “why?” What was it that prompted your members to renew? Ask them to list the top one or two membership benefits they value most. Providing a list and having them rank the benefits is another way to accomplish this. This will give you a good start in the development of your marketing

plan by knowing what your members value most not what you perceive them to value most.

Revisit Part I of this toolkit. Court your existing membership the same way you court new members. Thank them for being members, thank them for participating, touch base with them often.

Brainstorm to create a list of all the retention steps/initiatives/activities you could initiate. Then, evaluate each in terms of length of time it would take for you to see a return on the investment of your resources. Determine if they are “quick win,” short term or long term. Then, look at the list, again assessing the cost involved with each one: inexpensive, mid-range or expensive. Determine who would be accountable for each of the items listed: volunteers, paid staff, outsourced. For example:

What?	Length for ROI?	Who?	How much?
Find out if there are different retention rates for different levels of membership	Short-term	Volunteers	Inexpensive
Make joining and renewing available at all chapter meetings and events	Short term	Volunteers	Inexpensive
Hold a new member orientation	Short term	Volunteers	Inexpensive
Continue to contact non-renewing members for two years to market programs and services	Long term	CMP	Expensive
Give every member a chapter pin	Quick Win	CMP	Mid-range
Offer early-bird renewal rate	Short term	CMP	Mid-range
Offer free memberships to any chapter member who recruit 10 members	Short Term	Volunteers	Mid-range
Re-brand the chapter	Long term	Outsource	Expensive

Develop your action plan based on what your anticipated ROI would be for each of the items listed. Then, look at all of your resources: volunteer time, volunteer talent, budget and reserves targeted for such a plan.

What are some other ideas?

- If you charge a non-member rate for meetings/events, remind members how much money they saved by attending at the member rate.
- Rather than giving members discounts or credits during the first year, collect the full dues amount and apply discounts on the first renewal.
- Give members an “I renewed” or “Renewing Member” ribbon to wear at meetings.
- Recognize your members as often as possible. Be sure to thank them for their participation at each and every level.
- Send members note pads imprinted with your chapter’s logo and the dates of the meetings or the annual workshop or conference.
- Recognize members who achieve specific milestones in their membership.
- Recognize past presidents or chapter members who contribute at a high level.
- Have a benefits of membership corner/column in the newsletter or on the website.

Looking for more ideas? Check out the successful practices in the Volunteer Leaders’ Resource Center at [www.shrm.org/vlrc](http://www.shrm.org/vlrc) or the Other Resources section at the end of this toolkit.

## THE RENEWAL PROCESS IS IMPORTANT

Do you have a planned process in place for issuing your renewals? When does that process start? Can members expect their invoices to arrive when they are supposed to (e.g., by October 15 for a January 1 membership year)? Or do the renewal invoices go in the mail “whenever.” If your members know when the invoices go out, they are more likely to have a corresponding item in their budget for that month.

Do you send renewal invoices? Or, do you rely on your members to remember to pay their dues? If they don’t see an invoice, they may not remember to pay their dues.

Use the invoice to remind members *why* they joined. Give them an “annual report” of sorts to remind them what the chapter did in the previous year, highlights of programming, workshops, etc. Don’t discount the impact of other facets such as joining a network of professional colleagues, etc. Sometimes you can’t put a dollar figure on the impact of knowing other members and cultivating those professional relationships. Members need to be reminded of those as well.

Use collateral “marketing” when invoices go out. Place an article in the newsletter or on your website to let members know that invoices have gone out. That will serve as an alert. Use the newsletter and the website to re-market the value of membership. Don’t drone on; bullet points will suffice.

An increasing number of chapters are relying on e-mail for their renewal processes.

- E-mail greatly reduces the cost of renewals. Stationery, envelopes and postage are an added expense.
- E-mail makes it easy to get to the membership. The distribution list is already in place.

In the 2004 Chapter Operations Survey, 100% of chapters responding indicated they communicated with their membership through e-mail. While e-mail is economical and perceived as effective, are you sure your messages are reaching their intended audience? Are they being opened? Are they being deleted before being opened? Are they simply going into the proverbial “black hole”?

When you receive bouncebacks labeled as “undeliverable,” take note. Contact that member by phone to verify an address or secure a new one. If your member isn’t receiving his or her chapter communications, your chapter will appear as non-responsive. If members don’t hear from you, they won’t see value in belonging and likely won’t renew.

Investigate if your e-mail product provides options to track your outbound e-mail. If yes, periodically, throughout your membership year, check the effectiveness and/or validity of your e-mail distribution lists. Flag the outbound e-mail to monitor if e-mails are received and opened. Follow up with those members whose e-mails are never received and update your database. Create a strategy to “touch” the members who do not open their e-mail.

Some large Internet Service Providers (ISPs) (and even some of your members’ employers) have their servers set up to automatically delete or block any e-mail messages sent to multiple addresses, sent to an address other than that of their customer, or that contain any text with certain words. If you send messages with text such as “free,” chicken “breast” (for dinner), or “sexual” orientation (as a topic of a meeting), your message could be marked as spam and deleted before it reaches the member. Also, once you send a message like any of these mentioned here, your e-mail address could be put on a “black list,” meaning that messages from you will never be accepted again.

If your members use ISPs such as AOL, Yahoo, Gmail, Hotmail or Juno, your e-mail messages may never be seen unless recipients add your e-mail address to their list of acceptable senders. The same thing can be said about your members’ companies. Their IT staff will need to add your e-mail address to the list of acceptable senders in order for your messages to be delivered.

You may wish to explore using software features like a mail merge that provides the convenience of writing a single e-mail but sending it to multiple addressees individually. This could increase the chances of delivery.

Consider using the text below to create a bookmark, letter or flyer that you include with your member renewal invoice.

#### **Eight Reasons to Renew Your Chapter Membership**

It’s tough in today’s fast-paced work environment to maintain top performance as a human resource management professional. You need all the help you can get! RENEW YOUR MEMBERSHIP TODAY! Here are some of the benefits you receive through your chapter.

- **Exposure to other HR professionals and companies** revealing how other organizations handle various human resource situations, procedures, policies, etc.
- **Access to a network of professionals and specialists** providing HR information that might otherwise be difficult and/or expensive to obtain.
- **Opportunity to develop relationships and contacts** in other companies to share information on HR concerns.
- **Availability of local professional development opportunities** to improve your competence.
- **Access to current best practices** to make your organization more efficient, increase employee commitment and help line managers carry out business strategy.
- **Availability of up-to-date information** on pending legislation that may impact your company’s operations.
- **Opportunity to develop leadership skills** by taking on a volunteer leadership role in a local chapter.
- **Development of a reputation and credentials** in the HR field.

Here is an example of an e-mail renewal announcement with a member incentive for payment on time.

**Dear HRACI Member:**

**YOUR HRACI MEMBERSHIP EXPIRES DECEMBER 31!**

**RENEW ON TIME FOR A CHANCE TO WIN!**

It is that time of year again! It is time to renew your membership for the Indiana SHRM Chapter of the Year. We hope that you will join us for another outstanding year of great programs and professional development.

**GOOD NEWS**

Once again renewal is only \$60. Even though our various costs (meals, etc.) continue to increase, the Board continues to manage our expenses to achieve our goals and keep the overall budget in balance. This has permitted us to keep this year's dues unchanged.

**MORE GOOD NEWS**

This year we have an extra incentive for you to renew your membership and do it by December 31! If your renewal form and payment are received by December 31, you will be entered into a drawing for one (1) of five (5) Indiana State Conference registrations for next year's conference.

HRACI values you and helps you meet your professional goals in several ways including:

- An opportunity to network on a monthly basis with colleagues facing similar problems and challenges.
- Monthly topics that are pertinent and of concern to HR professionals.
- An annual half-day workshop on diversity in the workplace.
- An annual half-day workshop on compensation and benefits - always a "hot" topic for companies of all sizes.
- PHR/SPHR certification classes.
- Full access to all areas of our website.
- The opportunity to post jobs at no cost—or look for a new job.
- The chance for recertification credits at many of our 2004 programs.
- A chance to be a part of one of the best local SHRM chapters in the nation.

Renewal is very easy. We have several options available to you.

1. Click on this link, <http://www.hraci.com/renew>, enter a few quick pieces of information and you are set for another year.
2. We will have a table set up at the October, November and December meetings to accept your renewal payment.
3. Or, you can use the attached form and mail it in with your payment.

Please do not let your membership lapse! You do not want to start paying the additional \$10 to attend the monthly meetings as a guest (Guest rate is \$30). Even worse, you do not want to rejoin at the new member rate of \$100.

So, get your name in the drawing and renew your membership today!

Please let us know if you have questions or concerns.

*Vice President of Membership*

*Phone/E-mail*

*Director of Membership*

*Phone/E-mail*

Have a process in place that includes a second invoice or an e-mail reminder if the membership invoice/dues have not been returned. For example, if the first invoice goes in the mail on October 15, the follow-up invoice or reminder would go out December 1. The cost of a second mailing won't be as high because you are only sending to those that did not renew. Perhaps use a different color paper or the words "Reminder" printed on the invoice in a noticeable font.

Don't assume that everyone received the invoice! Whether you use paper or e-mail, you still need to touch base with

those members who didn't renew as a result of the first mailing/contact.

Here is an example of an e-mail follow up to a non-renewing member as step 2 in this chapter's process. The first contact was a paper invoice with a letter on the importance of renewing with the chapter. The invoice was included in the mailing. This e-mail went out in early November to non-renewing members.

Dear George,

Another successful year of TAHRA is underway, and we miss not having you as a dedicated member of our organization. Being a member offers many benefits to you and your organization, including:

- Exposure to other HR professionals and companies.
- Opportunities to develop relationships and contacts in other companies.
- Availability of up-to-date information on pending legislation.
- Opportunities to develop leadership skills by taking on volunteer roles within the TAHRA group.
- Development of a reputation and credentials in the HR field through your involvement in TAHRA.

If this is something you or anyone in your organization is interested in please e-mail a request for a membership packet to [insert name] at [membership@tahra.org](mailto:membership@tahra.org) and remember to include the address to which you would like the membership packet sent to. If the intended recipient of this e-mail is no longer with the company, please respond back so we can update our records as well as know if you are interested in joining TAHRA.

Thanks for your time and I look forward to hearing from you soon!

Membership Chair

If you are using a telephone campaign to follow up, here is a sample telephone script. “Reach out and touch someone” brings a personal touch to a non-renewal. It says “your membership is important and we personally want to remind you of how important your membership is to us.”

\_\_\_\_\_, this is \_\_\_\_\_ of the HRA. I’m a member of the membership committee of the chapter. (If you personally know this person, add where you met him or her or when you last sat next to him or her at a meeting or workshop, for example.)

Our records show that your membership with HRA is up for renewal and I wanted to take a moment to tell you that we do value your membership in our chapter of SHRM. We hope that you will be rejoining us.

Did you receive your membership renewal invoice? (If no, say “may we send you another?”)

Will you be renewing your membership? (If yes, encourage quick payment. If no, say “may we keep your name on the mailing list for our workshops and special events?”)

(If no, you’ll need to launch into the Exit Survey questions.)

Thank you for your time today and your consideration in renewing this investment in your professional development.

Staying in touch throughout the process is important to keeping that member and not having to rekindle the relationship at a later date if he or she doesn’t renew.

As soon as your chapter processes that renewal, your marketing campaign for retention starts anew. Send the member an acknowledgement of his or her renewal in the form of a thank you. Maybe it is just a quick e-mail. Maybe it is something more formal such as a membership card in the mail. Be sure to personalize your communication with them. For example:

Dear Pete:

Thank you for renewing your membership in the Human Resource Management Association of the Outback. We hope to see you at our membership meeting next month. Here are the details:

**The Strategic Approach to Decreasing Your Workers’ Compensation Costs**

**Jeff Smith**  
**Better Approach Companies**

**Wednesday, June 10**  
**The Meeting Place**  
**17 South Street**  
**Our Town**

In addition to the public areas of our chapter’s website, you will find more resources including our membership directory in a password-protected area. Here is your password: XYZ123. Visit the website often to take advantage of all facets of your membership investment.

If you should have any questions, please call any of your board members. We want to meet or exceed your expectations for membership in HRMA of the Outback.

Sincerely,

Julie Jones  
President

## DETERMINING WHY MEMBERS DON'T RENEW

After determining who didn't renew their membership with the chapter, the next step is the process of discovering *why* they didn't renew.

The discovery process begins with creating a strategy and then implementing it. The objective, of course, is to raise the retention rate with the ultimate goal of creating and implementing action steps that bring about the desired outcome.

Conducting exit interviews will give you the most comprehensive data to determine why members don't renew. Exit interviews can be conducted in a variety of ways.

- **E-mail.** A quick multiple-question survey using simple survey software.
- **"Pick up the phone."** The human touch can never be discounted. The same quick survey can be done over the phone—but it may also result in a renewal because you took the time to touch base with the former member.
- **Hard copy in the mail with a self-addressed, stamped envelope.** Research shows that self-addressed, stamped envelopes provide a greater rate of return for surveys.

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Pre-determine the reasons you think members might not renew and make that your list of options. It will result in a quicker survey than if you ask open-ended questions. The following is a sample list.

Reason for not renewing:

- \_\_\_\_ Unable to actively participate
- \_\_\_\_ No longer in HR
- \_\_\_\_ Retirement
- \_\_\_\_ Active in another professional association
- \_\_\_\_ Budgetary constraints
- \_\_\_\_ Programs too general (explain)
- \_\_\_\_ Programs too specific (explain)

Overall, I felt the association's services were:

- \_\_\_\_ Excellent \_\_\_\_ Good \_\_\_\_ Fair \_\_\_\_ Poor

The monthly newsletters are:

- \_\_\_\_ Highly informative \_\_\_\_ Of some value \_\_\_\_ Of little value

Why? (explain)

The website is:

- \_\_\_\_ Highly information \_\_\_\_ Of some value \_\_\_\_ Of little value

Did you ever request information from the association?

- \_\_\_\_ Yes \_\_\_\_ No

If yes, did you receive a prompt answer?

\_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, did you receive the information you needed?

\_\_\_\_\_ Yes \_\_\_\_\_ No

Do you think the association is working for the profession?

\_\_\_\_\_ Yes \_\_\_\_\_ No

How do you think we could do a better job? (explain)

Will you consider rejoining the association at a later date?

\_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, when may we contact you? Date \_\_\_\_\_

After you've completed the survey process and you know the reasons, look for trends. Those trends will assist you in developing an action plan to reduce or stop the member erosion and begin the uphill march to increase your retention rate.

For example:

- Trend: Your programming consistently falls into the 101 or entry level of topics. We need more advanced learning or opportunities to explore new avenues/topics.
- Action: Look at the current level of programming. Is there merit to this claim? What have your meeting evaluations reflected? If you are meeting a consistent need for those that attend, look at offering two levels of programming. The latter will address the needs of those not attending.

Or this:

- Trend: I don't find any value in belonging.
- Action: Look at your marketing. Are you creating a value proposition for members? Are you selling them on just one benefit? Or are there other reasons to belong that could enhance their perception of value? You may need to change your marketing strategies and/or materials.

Or even this:

- Trend: The dues are too high, and I have to pay them myself.
- Action: Again, creating a value proposition in your marketing will mean members see more value in why they belong. So they may have a higher tendency to renew, even if they have to pay for it themselves.

Non-renewals can be telling and can create the foundation for retention strategy. Find out why members don't renew and use that information to your chapter's advantage.

## CONCLUSION

In this toolkit, we provided you and your chapter with many ideas for expanding and keeping your membership. We hope that the contents have helped you to create a recruitment and retention plan that will work for you. If you have any questions about recruitment or retention that are not covered here, please contact your SHRM Regional Team.



## **OTHER RESOURCES**

*Millennium Membership: How to Attract and Keep Members in the New Marketplace*, Levin, Mark, CAE, 2000, ASAE

*Retention Wars: The New Rules of Engagement*, Levin, Mark, CAE, CSP, 2004, B.A.I., Inc.

*Membership Essentials: Recruitment, Retention, Roles, Responsibilities, and Resources*, Jacobs, Sheri, CAE, and Assante, Carylann, 2008

*199 Ideas: Membership Recruitment and Retention*, ASAE & The Center's Membership Section Council, 2009, ASAE

