



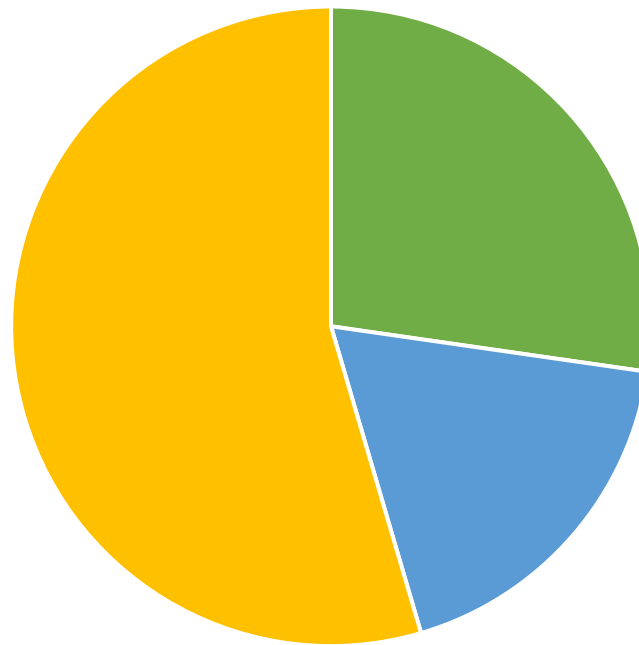
# Council Leader Education Series

## *Growing Membership and Recapturing Lost Members*

March 7, 2023

# Your Feedback

Current Membership Trend Among Attendees



■ Growing ■ Shrinking ■ Stagnant

## A Definition of Recruitment

Recruitment is the process of actively seeking out and inviting members to join your Estate Planning Council, including the entire process from inception to integration into the association.

# General Recruitment Practices

Charge the Board

Get in Front of Prospects

Share a Compelling “Why”

Membership Requirements

Get Hands-On

Don't Stop Marketing

# Recruitment Practices for Younger Professionals

Self-Assessment

Create a Warm & Welcoming Environment, Including at Events

Offer Content & Events that Meet the Needs of this Group

Mentorship Programs

Provide Leadership Opportunities

Career Opportunities

Ask Existing Younger Professionals to Recruit Others

Speak their Language

Scholarships

Ask for Feedback

# Attrition Statistics

50%	Lack of Engagement with the Organization
39%	Lack of Value
33%	Employer Won't Pay (or Stopped Paying) Dues
31%	Left the Profession
29%	Forgot to Renew
28%	Unable to Justify Membership Cost with any Significant ROI

# Before the Lapse

Communicate, Communicate, Communicate

Correspond in Multiple Avenues

# Solutions for Attrition

## *“I Forgot”*

Personal “Nudge”

Coffee Chat

Be Flexible

Ask Questions & Welcome the Response

Offer a Discount

Make it EASY!



# Solutions for Attrition

## *Not the Anticipated Experience*

### WHAT WAS THE EXPECTATION OF THE MEMBER WHEN THEY JOINED?

#### Lack of Engagement



Provide Opportunities for Members to Engage with **ONE ANOTHER**

Provide Opportunity to Serve in Limited to Fully-Integrated Ways

Personalize Communication

#### No / Limited Value



Seek Feedback

Communicate When and How Members Access Benefits in Multiple Channels

Make Benefits Easily Accessible

Meet Networking & Educational Needs and Preferences

Provide Something that is Absent Elsewhere

#### No ROI

Change Thinking to Value of Investment, Not Return on Investment



Brag about the Council's Success & Fulfillment of Mission by Communicating Regularly Outside of Events & Dues

# Solutions for Attrition

## *Retirement*

Special Membership Category

Public Acknowledgment of Retirement

Reduced Dues

Serve as Mentor

Advisory Capacity

Create an  
Environment  
that Members  
want to be Part  
of AFTER  
Retirement



# Solutions for Attrition

## *Financial Considerations & Moving Out of the Profession*

Most Challenging

Be Flexible for Financial Considerations when Possible

Seek Feedback

Use Council's Resources Wisely

# Don't Give Up

Keep Communicating

Continue Invoicing