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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Reason</th>
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</thead>
<tbody>
<tr>
<td>50%</td>
<td>Lack of Engagement with the Organization</td>
</tr>
<tr>
<td>39%</td>
<td>Lack of Value</td>
</tr>
<tr>
<td>33%</td>
<td>Employer Won’t Pay (or Stopped Paying) Dues</td>
</tr>
<tr>
<td>31%</td>
<td>Left the Profession</td>
</tr>
<tr>
<td>29%</td>
<td>Forgot to Renew</td>
</tr>
<tr>
<td>28%</td>
<td>Unable to Justify Membership Cost with any Significant ROI</td>
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Excerpted from a September 2021 Survey by HigherLogic
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?**

<table>
<thead>
<tr>
<th>Lack of Engagement</th>
<th>No / Limited Value</th>
<th>No ROI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide Opportunities for Members to Engage with <strong>ONE ANOTHER</strong></td>
<td>Seek Feedback Communicate When and How Members Access Benefits in Multiple Channels</td>
<td>Change Thinking to Value of Investment, Not Return on Investment</td>
</tr>
<tr>
<td>Provide Opportunity to Serve in Limited to Fully-Integrated Ways</td>
<td>Make Benefits Easily Accessible Meet Networking &amp; Educational Needs and Preferences</td>
<td>Brag about the Council’s Success &amp; Fulfillment of Mission by Communicating Regularly Outside of Events &amp; Dues</td>
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<tr>
<td>Personalize Communication</td>
<td>Provide Something that is Absent Elsewhere</td>
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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