



# Membership Lifecycle Procedures

## **Member Joins Cycle (Day 1)**

1. *Email to All: Auto-Email Confirmation of Joining (Day 1)*
  - a. Confirmation
  - b. Directions on How to Get a Receipt
2. *Email to All: Membership Monday – Welcome to NAIFA Nation (By Day 7)*
  - a. Member Orientation links (Both Live and On-Demand)
  - b. Update Your Profile links to NAIFACONnect
  - c. Tell Us Your Interests link to member interest survey
  - d. Get Profiled link to *Advisor Today* with details to be profiled
  - e. Explore the Member Portal with benefits details and Kelsey National offer
  - f. Show Everyone You Belong to NAIFA prompt with member logo and social media hashtags
  - g. IFAPAC and Advocacy in Action Center links
3. *Phone Call to All: Welcome to NAIFA by MET (By Day 7)*
  - a. Thank You for Joining
  - b. Request Referrals
  - c. Steer to New Member Orientation
  - d. Upcoming Events
  - e. Answer Questions
4. *Email to Chapter Executives, Presidents, Membership Chairs, IFAPAC Chairs, and Grassroots Chairs: You Have New Members (By Day 7)*
5. *Email to Referrer (if applicable):* If member was noted as their "Referred by" the referrer gets an email letting them know that the person they referred joined.
6. *Email to Brand Ambassador (if applicable):* If the new member is from a company with a Brand Ambassador, the Brand Ambassador is notified that they have a new member and takes action to reach out to that person.
7. *Mail to All: National New Member Packet (1<sup>st</sup> of Month Following Join)*
  - a. Letter from the CEO
  - b. Membership Card
  - c. Code of Ethics



# Membership Lifecycle Procedures

- d. Membership Pin
- e. Top 5 Benefits of Belonging to NAIFA

- 8. *Webinar for All: Member Orientation (By Day 30)*
- 9. *Mail to Managed Chapters: State Welcome Letter from President (Day 30)*
- 10. *Phone Call to All: New Member Check-In to NAIFA by MET (Day 90)*

## **Member Renewal Cycle**

- 11. *Email to All Annual Members: Notice to Renew (Day 276)*
- 12. *Phone (Care) Calls by Chapter Membership Committee to Members Up for Renewal in the Next 90 Days (Following Monthly Chapter Membership Report at the Beginning of each Month)*
- 13. *Email to All Annual Members (that didn't renew after first email): Notice to Renew (Day 306)*
- 14. *Mail Renewal to All Annual Members (that haven't renewed since emails): First Notice to Renew (Day 320)*
- 15. *Email to All Annual Members (that didn't renew yet): Notice to Renew (Day 336)*
- 16. *(Day 365 – Member Does Not Renew, becomes Expired)*

## **Member Reactivation Cycle**

- 17. *Automated Update: Expired **Monthly** Payers Credit Card Number and Expiration Dates Updated by National Database.  
(Note: Not all cards are able to be updated via this method.)*
- 18. *Autogenerated Email to all **Monthly** Members with payment failure: Notice of Payment Failure*
- 19. *Monthly Chapter Membership Report Emailed to Chapter President, Chapter Executive, and Chapter Membership Chair: Includes all Expired, Lapsed,*



# Membership Lifecycle Procedures

Cancelled, and Deceased Members, as well as Members Up for Renewal in the next 90 Days (Beginning of each Month)

20. *Email to All Annual Members (that didn't renew yet): Notice to Renew (Day 366)*
21. *Phone calls to all **Monthly** Members with Payment failure: Request for Updated Information (Within 7 days of payment failure)*
22. *Phone call to Managed Chapters: "We've Noticed You're Lapsed" (Day 380)*
23. *Email to All Annual Members (that didn't renew yet): Notice to Renew (Day 396)*
24. *Email to All Annual Members (that didn't renew yet): Notice to Renew (Day 426)*
25. *Paper Renewal to All Annual Members (that haven't renewed): Final Notice to Renew (Day 440)*
26. *Email to All Annual Members that still haven't renewed: We're Sad You've Not Renewed...tell us why. (Survey link included) (Day 455)*
27. *(Day 365 – Member Does Not Renew, becomes Lapsed)*

## **Member Retirement Cycle**

28. *Inbound Email or Phone Call: Member indicates they want to cancel because they are retiring.*
  - a. MET Representative encourages them to take advantage of the retirement rate.