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Membership Chair Best Practices

Chapter Membership Chairs help guide NAIFA by connecting new, current, and prospective members with the people, programs, and resources they need to succeed. The structure of work is outlined in the job description. Below are some ideas to help you be effective and efficient with your time.

Build a Membership Team

Build a team based on the size of your chapter. Team size would be based on the number of members within your state. Suggest one capable and committed team member to 100 members. No “volun-tolds.”

Identify Brand Ambassadors Who Love to Speak About NAIFA

- Recruit a micro-volunteer in each regional office of a carrier, IMO, BGA, etc. Ask them to meet with non-members.
 - Use the membership sell sheet and the AED pitch speech. (see pitch below)
 - Bring bagels, buy coffee, don't beg, but confidently state that it is a goodwill mission on behalf of the agents/advisors in the profession that they hear NAIFA's message. Leave no advisor unprotected or neglected!
- Adam Sachs is building a volunteer team to deliver the NAIFA Membership Promise Presentation, Group Membership Pitches, and more. If you have someone, or want to nominate yourself, to be part of the NAIFA Nation Membership Team, reach out to Adam Sachs.

New Member Recruitment

The vast majority of NAIFA members are here today because someone asked them to join. Most people do not organically find NAIFA and decide to join. We know that the best results happen when they are asked by someone they like, know, and trust. Here are some best practices on recruitment.

- **Learn the NAIFA Advocate, Educate, Differentiate Pitch.**
Determine if the prospect is new to the industry or an experienced advisor.

New to the Industry Pitch

I seriously doubt if you would have started in this career if it wasn't for NAIFA. I'm excited to tell you about my professional association, NAIFA, the National Association of Insurance and Financial Advisors. I'm sure you have heard of the American Medical Association for doctors or the American Dental Association for dentists. NAIFA is the professional association for insurance and financial advisors.

NAIFA does it all. NAIFA advocates for its members and their clients in 50 state capitals



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and Washington, D.C. It was NAIFA that lobbied for the deferred taxation of inside build-up over 100 years ago. It was NAIFA that prevented the ill-advised fiduciary regulation a few years ago. And, it's NAIFA who is fighting for your clients today. The proposed tax changes could hurt the middle class as well as the rich.

Have you heard of the Society of Financial Service Professionals, or SFP? Everyone knows they have world-class education and now they've joined NAIFA as our professional development arm. NAIFA educates its members so they may better serve their clients. Our members' only monthly program, NAIFA Live is second to none in helping you become a more productive and better educated advisor. NAIFA Live gives you a top producer providing sales & marketing tips and techniques to up your game. NAIFA members are differentiated from non-members as outside studies have shown they make more money and adhere to a Code of Ethics that includes they must act in their clients' best interest. Best of all, you can choose whether to go to a local in-person watch party, or just watch from your desk (or on-demand when your schedule allows).

The other real power of NAIFA is our National Network. Our NAIFA Network does business with one another because we all are cut from the same cloth and our word is our bond. If you want to be the best then you know that you have to surround yourself with the best from which to learn and grow—and that's just what we do. I joined NAIFA and it was the best business investment I ever made. I invite you to join and by going to naifa.org/join

If they are a seasoned professional

I think you would agree that you would not be in this room today if it wasn't for NAIFA. NAIFA, the National Association of Insurance and Financial Advisors does it all. But maybe you're not aware that NAIFA completely restructured in 2018 to become a dynamic new association after 128 years. That's right, NAIFA took all of its strengths—such as state advocacy whereby there is a professional lobbyist in every state capital—and streamlined its operations so that it is a modern association ready to serve a diverse and youthful population of advisors. And what's better yet is the Society of Financial Service Professionals and Life Happens have now joined NAIFA!

Have you heard about any of our new programs such as NAIFA Live? Are you aware that now you can receive all the benefits of NAIFA *and* FSP *and* Life Happens? We have new programs for Young Advisors including a brand new LUTCF program. If you haven't looked at NAIFA in a long time, it's time to look again. I guarantee there's something that you will find priceless for your personal and professional life.

NOTE: Should the non-member be a wholesaler, carrier rep, or fund rep, you may want to add: NAIFA membership can open doors for you as you could gain access to more



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advisors. Personally, I have decided to only work with wholesalers who are NAIFA members.

- **Give Out a Business Card.** After presenting your elevator pitch, it's key that your audience has the information it needs to remain in touch. Have business cards on hand that list your contact information and the QR code to the NAIFA join page. That way, if a potential member wants to know more they can easily connect. Order your personal NAIFA business cards here: <https://naifa.formstack.com/forms/businesscards>
- **Keep an Eye Out for Group Membership Opportunities.** Ideally, a qualified agency is one that can add ten or more new members. Smaller numbers work, too. NAIFA's closure rate increases when the lead is set in as a referral (a.k.a warm lead). This program can have a huge impact on your chapter's numbers and provide positive year-end growth. Submit your leads to recruitment@naifa.org.
- **Engage your fellow chapter board members.** Consider setting a goal that each board member strives to become part of the Triangle Team and can attribute 3 new members to their profile. Plus, they'll receive all of the perks of being part of the Triangle Team!
- **Invite prospects to chapter events.** Seeing the chapter in action is crucial for prospects. Be sure to invite non-members to every event (most importantly your state legislative day) and then be prepared to assist them through the join process. Use your member kit to set up a recruitment table and have sell sheets and QR codes on hand. NAIFA can even customize your sell sheet with state leadership. Request a customized sell sheet here: https://naifa.formstack.com/forms/customized_membership_collateral
If they leave without joining, make sure to contact them, get their feedback on the event, and offer them the additional opportunity to join.
- **Did You Hold an Event and Develop New Non-Member Leads?** If you did and haven't closed them, you can send them to NAIFA. We will put them into our lead funnels to further nurture. We will encourage them to subscribe to our blogs and look for a better time for them to convert to membership.

Welcoming New Members

Here's What NAIFA is Doing:

- NAIFA will send a welcome email every Monday to the members who joined the week prior. This email invites them to attend our weekly new member onboarding webinar and outlines some of the basics of NAIFA membership including how to access benefits and update their consumer-facing profiles. The email also includes a survey for getting involved in volunteerism and areas of interest.



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- Starting in 2024, on Tuesday, we will send an automated voicemail and text from the National President
- Every Tuesday, leaders (Chapter President, President-Elect, Membership, Grassroots, IFAPAC Chairs at the State level) will be notified of new members in your chapter.
- Every Tuesday, the Brand Ambassadors will be notified of new members in their shared company and alerted to reach out to welcome the new member.
- Every Wednesday, leaders, (Chapter President, President-Elect, Membership, Grassroots, IFAPAC Chairs at the local and affiliate levels) will be notified of new members in your chapter
- Starting in 2024, every Wednesday an automated voicemail and text message will be sent by the State Chapter Membership Chair
- Each month, NAIFA will send a new member packet which contains a welcome letter, NAIFA's Code of Ethics, their membership card, and a NAIFA pin.

Every week, you will receive the list of new NAIFA members from your chapter. We encourage you to reach out and welcome them to your chapter, start connecting them with your members, and integrate them into your chapter to help create a great first impression.

The following are ideas for what your team might decide to also undertake:

- **Send a welcome email.** NAIFA can provide you with an email template that you can customize to your state to welcome new members. This is a simple, time-efficient way to let them know about the state chapter, send along important chapter information and contacts, or even set up a time to meet a new member for coffee or lunch.
- **Make new member phone calls.** What's better than an email, a phone call. These conversations can lead to deeper connections, more membership referrals, increased volunteer engagement, or even business opportunities!
- **Coordinate introductions to other NAIFA members.** After you've gotten to know your new members, start to make the introductions to others across NAIFA Nation. This is especially beneficial if they have indicated an interest in a particular topic i.e. grassroots, LUTCF, etc. Ensuring each member connects with the best possible people will ensure that they get the most out of their membership.
- **Recognize them publicly.**
 - During each in-person event, ensure that you invite new members and hold a pinning ceremony. Order your pins online here: https://naifa.formstack.com/forms/naifa_pin_order_form. Access the pinning ceremony script here: <https://members.naifa.org/pinning-ceremony>. Use the standard NAIFA deck and update it to recognize your new members. Download the deck here: <https://leaders.naifa.org/slidedeck>
 - Welcome members on your social media platform. State-specific new member graphics are available here: <https://leaders.naifa.org/chapter-new-member-graphics>



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- Publish a press release announcing your new members. Download the press release template here: <https://leaders.naifa.org/press-release-templates>

Member Engagement

Here's What NAIFA is Doing:

We love our new members and we love our loyal members! There's no such thing as too much love at NAIFA! Here are some best practices to recognize and engage your current members. NAIFA National will undertake the following member engagement activities automatically:

- Congratulate and recognize milestone anniversaries
- Send automated communications for care calls throughout the year
- Sending out Triangle Team kits to qualifying members
- Update Financial Security Advocate badge holders and Hard Hat Winners and publicize
- Send an annual membership feedback survey to improve
- Hold quarterly Member Benefits webinars & check-ins
- Offer new Member-to-Member and Sponsor Marketplace options
- Offer new Membership Coaches Circle Programs
- Offer new MentorLoop Membership Mentoring Program
- Start new Networking with NAIFA study groups through the Centers of Excellence/special interest groups (YAT, Diversified/Future Workforce, Future Leaders)
- Call for Awards and Publicity for Award Winners
- Encourage and remind members to participate and volunteer in the myriad of opportunities that NAIFA offers to build your personal and professional brand
- Highlight and promote any NAIFA member who publishes their own books, offers their podcast, appears on TV or radio
- Maintain the Member Portal and weekly Member Newsletter to ensure members are in the know

Here's Ideas for Your Chapter:

- **Ensure that membership is on the agenda at every meeting.** Membership is one of NAIFA's core principles (Membership, Grassroots & IFAPAC). Use the chapter meeting slide deck to ensure that you are talking about the latest information available for members. Download the deck here: <https://leaders.naifa.org/slidedeck>
- **Recognize their anniversaries on your social media platforms.** Download your state-specific anniversary graphics here: <https://leaders.naifa.org/chapter-anniversary-graphics>
- **Celebrate their birthdays.** Send your members a quick email or text on their birthday.
- **Help us spot members at work.** Let us know about your members who are doing good work in your community and making an impact. We can feature them in an upcoming "NAIFA Members Spotted" social media post or even a member profile. Let us know at membership@naifa.org.



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- **Encourage and recognize members to become Triangle Team, FSA, LILI, LUTCF,** The Triangle Team is NAIFA's newest member recognition program that is inclusive to everyone, no matter the number of years in the business or practice specialty. Qualifications hit the 3 NAIFA pillars of Membership, Grassroots & IFAPAC. Learn more about the Triangle team and see the members in your state.
<https://members.naifa.org/triangle-team>
- **Make Membership Care Calls.** Periodically checking in with members, especially those in their first year of membership, is of the utmost importance when integrating members with NAIFA. The more engaged, the more active, the longer they will be active members. Reaching out to make sure newer members are taking advantage of everything NAIFA has to offer will help retain members and help cut back on lapses.
- **Participate in NAIFA's awards programs.** Encourage your members (or nominate them yourself!) for NAIFA's national award programs such as NAIFA Quality Awards and *Advisor Today's* 4 Under 40 as well as for your own chapter's award programs. If you do not have a chapter award program, consider starting one! NAIFA's Awards can all be found in the Talent Development Center: <https://tdc.naifa.org>.
- **Highlight your dedicated members during meetings.** The standard chapter deck can should be edited to recognize your top member recruiters, LILI graduates, Triangle Team Members, FSA badge holders, and more. Download the deck here:
<https://leaders.naifa.org/slidedeck>
- **Begin with the End in Mind.** When your chapter is planning an event, you should be thinking, "Is this event for Membership Retention and we're going to make an IFAPAC ask, or is it for Membership Acquisition and we're trying to attract non-members?" The membership chair is the critical voice to help steer the event. Ask critical questions such as "Why are we promoting this to non-members? Why would they come?" Review your programs—do you have a healthy balance that includes education as well as networking? Ask yourself, if I was of X population, would I want to attend? Is the program all insurance, and nothing appealing to investment? As the Membership Chair try to balance acquisition and retention. Should ask, what are the optics and what do people think of our chapter brand? More importantly, is this what we want them to think about our chapter brand?



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Member Retention

Here's what NAIFA Nation is doing:

- The Member Experience Team under the Member and Chapter Services division will automatically follow-up on any member with a credit card failure or expired card
- Send renewal notices via mail, voicemail, email, and text combination to those members who are expiring and are annual payers
- The Member Experience Team will send exit survey and follow-up to members that call to cancel to understand why cancellations are occurring with data fed back to the National Membership Team for consideration as to how to improve

Every month you will receive a list of members whose membership has lapsed. Reaching out to these members via phone and email to find out why their membership has lapsed is crucial. If the member is not renewing, finding out why is critical to improving the member experience. Here are some ideas to engage members whose membership has lapsed.

- **Make it a group effort.** Once a quarter, divide the list and have each board member make a few calls during your board meeting. This ensures that the calls are made, and any feedback or concerns can be discussed at the board level.

Familiarize yourself with NAIFA's Member Benefits:

Explore NAIFA's Member Portal: <https://members.naifa.org>

Discover all of our affinity partners in the NAIFA Marketplace: <https://naifa.chalicenetwork.com/>

Watch the February 2023 member benefits webinar on demand:
<https://www.youtube.com/watch?v=DNNITF1YDL8>

Stay current on the latest member benefits when you attend NAIFA's quarterly webinars. Each session will be at 2 pm eastern. Register here for the December session:
<https://belong.naifa.org/benefits-2024>

- December 13, 2023:
- March 6, 2024
- June 5, 2024
- September 4, 2024
- December 4, 2024

Subscribe to the Centers of Excellence blogs to get involved in special interest groups! Visit members.naifa.org/centers to get involved with the members-only Legislative Working Groups, Networking with NAIFA member-to-member study groups, writing and speaking opportunities within the specialty areas.



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Layering the Membership Ask Creates Exponential Growth

One-on-One Ask (Individual Sales)	Home Office attempts to close through automation; Chapters	Chapter Events, Leads Generated by Home Office & Provided to Chapters
Primary: Chapters to Identify Secondary: Home Office	Home Office	100% Agency Sales
Leader Generated by Chapters & Home Office	Home Office	Financial Security Champion/100% Agency Program (Group Sales)
Source of Leads	Responsibility to Close	
Win-Back	Former & Lapsed Lists	Chapters
Lapsed & Renewal Lists	Renewals	Chapters

The NAIFA Advocate, Educate, Differentiate Membership Promise Pitch

Determine if the non-member has heard of NAIFA. “Are you familiar with NAIFA?”

If no, “I’m excited to introduce you then because I belong to NAIFA!”

“NAIFA is the National Association of Insurance and Financial Advisors. I’m sure you have heard of the American Medical Association for doctors or the American Dental Association for dentists. NAIFA is the professional association for insurance and financial advisors.

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