



Membership



A Paradigm Shift

Why?

If we started over today, is that how we'd do it?

Does it make sense?



Paradigm Shift...continued

- Inbound vs. Outbound Marketing
- Prospecting/Lead Generation
- Referral & Testimonial Development from Members/Chapters
- Organized & Focused Membership Campaigns
- Clearly Stated/Demonstrated ROI...with NUMBERS
- Development of Member Personas and Messaging
- Comprehensive Chapter Engagement Focus



NAIFA Membership Committee

Committee Co-Chairs

- Member Acquisition - Adam Sachs | asachs@centinelfg.com | 617-797-4536
- Member Retention - Roger Sims | rdsims@ft.newyorklife.com | 336-254-1153

Member Acquisition Vice Chairs

- Brad Kadelski | brad@brookfieldpartners.com | 508-868-6765
Vice Chair of Membership Sales
 - Company Sales/Ledger Deduct/Agency Presentations
 - Group Sales (100% Agency/Financial Security Champion)
 - Individual Sales
 - Influencer Network
 - Lead Generation, Referrals, and Testimonials



NAIFA Membership Committee

Member Acquisition Vice Chairs

- Chris Bor | cbor23@yahoo.com | 925-348-4241
Vice Chair of Chapters Sales & Distribution
- **TBD**, Associate Vice Chair of Chapter Sales for Peter Browne Cohort
Arizona, California, Florida, Georgia, Illinois, Massachusetts, Michigan, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Tennessee, Texas, Virginia, and Washington
- **TBD**, Associate Vice Chair of Chapter Sales for Juli McNeely Cohort
Alabama, Arkansas, Colorado, Connecticut, Indiana, Iowa, Kentucky, Louisiana, Maryland, Minnesota, Missouri, Nevada, Oklahoma, Oregon, Puerto Rico, South Carolina, Utah, and Wisconsin
- **TBD**, Associate Vice Chair of Chapter Sales for Jeff Taggart Cohort
Alaska, Delaware, District of Columbia, Hawaii, Idaho, Kansas, Maine, Mississippi, Montana, Nebraska, New Hampshire, New Mexico, North Dakota, Rhode Island, South Dakota, Vermont, West Virginia, and Wyoming
- **TBD**, Associate Vice Chair of Chapter Sales for John Newton Russell Cohort
Austin, Central Florida, Central Iowa, Chicagoland, Cincinnati, Cleveland, Columbus, Dallas, Eastern Iowa, Fort Worth, Greater Foothills, Heartland, Houston, Louisville, Los Angeles, Memphis, Northeast Florida, Northern Virginia, Pineywoods of East Texas, Richmond, San Francisco Peninsula, Silicon Valley, Tampa Bay, Tidewater, Upstate South Carolina, and Wichita



NAIFA Membership Committee

Member Retention Vice Chairs

- Paul Szkotak | pmszkotak@ft.newyorklife.com | 609-332-7007
Vice Chair of Onboarding, Retention, and Reactivation
 - Onboarding Strategies
 - Brand Ambassador Team (BAT)
 - Group Membership Retention
 - Individual Membership Retention
 - Referral Recognition
 - Reactivation & Win-Back Strategies
- **TBD**
Vice Chair of Engagement
 - Young Advisor Team (YAT)
 - Future Leaders
 - Triangle Team
 - Member-to-Member Programs
 - National Quality Award (NQA)



NAIFA Membership Committee

Professional Staff

- Corey G. Mathews | cmathews@naifa.org | 850-294-3776
Vice President of Membership and Chapter Services. Staff Lead
- Michele Borsuk | mborsuk@naifa.org | 610-526-2555
Senior Director of Membership
- Zack Huels | zhuels@naifa.org | 703-770-8223
Director of Member Engagement
- **TBD**
Membership Sales Manager
- Kevin Rara | krara@naifa.org
Membership Specialist



Quarterly Membership Calls

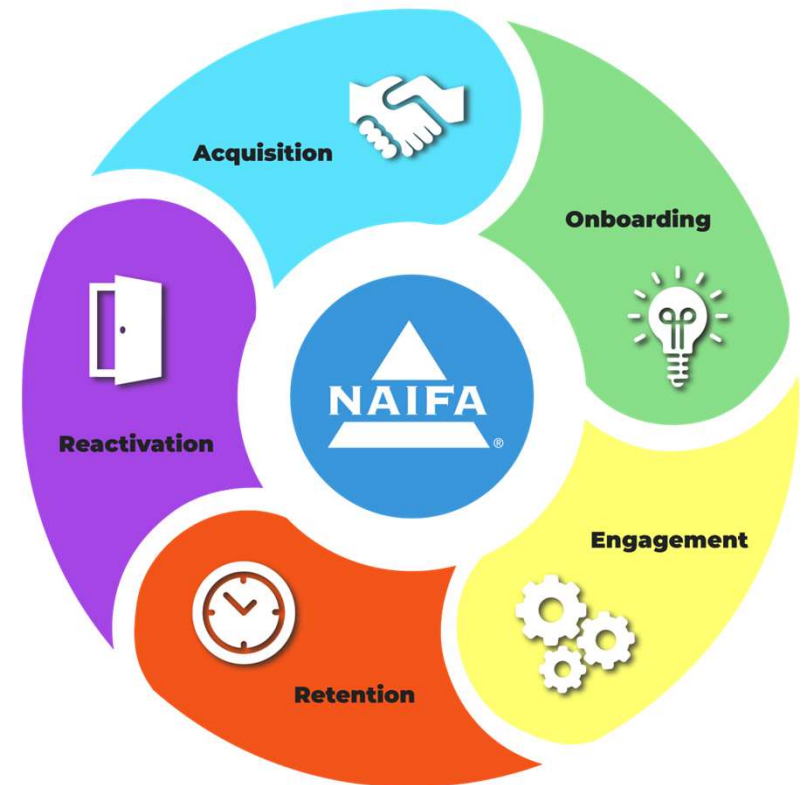
Chapter Presidents, Executives, and Membership Chairs

- Review of Quarterly Membership Results vs. Goal
 - Presentation of Initiatives & Messaging for Next Quarter
 - Discussion of Ideas, Lessons Learned, and Questions to Answer
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- **February 12th – 3:00 PM Eastern**
 - **April 9th – 3:00 PM Eastern**
 - **July 9th – 3:00 PM Eastern**
 - **October 8th – 3:00 PM Eastern**



A Comprehensive Membership Action Plan

- Approaches membership as a continuous process to attract, engage, and delight prospective members, converting them into and retaining them as members throughout their career.
- Specific targets in each domain as part of a comprehensive effort to **achieve 5% net growth in each chapter and nationally.**
- Will require staff, chapters, partners, volunteers, and members working together.





What We Need From You!

- To make membership growth your Chapter's #1 priority this year.
- To read, understand, and ask questions, if needed, about the NAIFA Membership Action Plan.
- To set your Chapter Goals for membership consistent with those in the plan and hold us all accountable to meeting them.
- To make every possible effort to have at least your President, Executive, and Membership Chair on each quarterly call.
- To work with and be responsive to your Associate Vice Chair of Chapter Sales.