



2025 Membership Action Plan Executive Summary

Introduction

The 2025 NAIFA Membership Action Plan is a strategic blueprint to strengthening the association’s membership base by acquiring, onboarding, engaging, retaining, and reactivating members. With a target of at least **5% net membership growth**, this plan leverages a **flywheel model** to create sustainable momentum and ensure long-term success.



The NAIFA Membership Flywheel

Key Strategies

1. Acquisition

- Implement inbound marketing techniques to attract financial professionals.
- Develop a **national database of prospective members**, categorized into qualified and unqualified leads for targeted outreach.
- Enhance NAIFA’s **value proposition** by clearly defining membership benefits, reinforcing the core pillars of **Advocate, Educate, and Differentiate**.
- Launch three **membership marketing campaigns**—**Advocate Campaign (Jan-May)**, **Differentiate Campaign (June-Aug)**, and **Educate Campaign (Sept-Dec)**—to drive awareness and engagement.
- Strengthen **individual, agency, and group membership programs** with streamlined processes and clear benefits.
- Leverage **influencer networks** to extend reach and credibility.

2. Onboarding

- Ensure **at least 50%** of new members engage with onboarding efforts.
- Personalize welcome experiences with emails, **Brand Ambassador Team (BAT) outreach**, chapter engagement, and new member packets.
- Emphasize advocacy education to strengthen members’ connection to NAIFA’s mission.

3. Engagement

- Increase participation in key engagement programs by **10%** over the previous year.

- Enhance **Advisor Today Podcast** and **Young Advisor Team (YAT)** initiatives to connect with younger professionals.
- Recognize and motivate members through the **Triangle Team Program, Member Spotlights, and National Quality Awards**.
- Improve **digital communication** by tailoring content and optimizing the **Member Benefits website**.

4. Retention

- Achieve a **90% member retention rate** by reinforcing the value of NAIFA membership.
- Streamline **renewal processes** and encourage proactive **chapter outreach** to members approaching renewal.
- Expand awareness of the **Find a Financial Professional tool** to increase member visibility and business opportunities.

5. Reactivation

- Target a **20% reactivation rate** of lapsed members.
- Implement a structured **reactivation process** with improved tracking and outreach.
- Utilize **Membership Power Hours** and **Win-Back Campaigns** to re-engage past members effectively.

Conclusion

This comprehensive membership strategy aims to drive sustainable growth through data-driven decision-making, targeted campaigns, and enhanced engagement efforts. By aligning NAIFA's collective efforts, the association will strengthen its advocacy, education, and industry impact while reinforcing its value to members.

Together, We Can Take on Anything!