

Member Joins Cycle (Day 1)

1. *Email to All: Manual Confirmation of Joining (Day 1)*
 - a. Confirmation
 - b. Directions on How to Get a Receipt

 2. *Email to All: Membership Monday & Thursday- Welcome to NAIFA Nation (By Day 4)*
 - a. Member Orientation links (Both Live and On-Demand)
 - b. Update Your Profile links to Find a Pro
 - 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 (1st of Month Following Join)*
 - a. Letter from the CEO
 - b. Membership Card
 - c. Code of Ethics
 - d. Membership Pin
 - e. Top 5 Benefits of Belonging to NAIFA

 8. *Webinar for All: Member Orientation (By Day 30)*
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9. *Mail to Managed Chapters*: State Welcome Letter from Executive Director (Day 30)
10. *Orientation Follow-Up*: Follow up with all new members that have not yet watched or attended New Member Orientation after 30 days (Day 30)
11. *In Development...Email to All*: Resource Highlight Email (Day 30)-Automated from Hubspot
12. *In Development...Email to All*: Personal Support Email (Day 90)-Automated from Hubspot
13. *Mid Year Review*: Send email to members after 6 months of membership to invite a discussion about member benefits. Offer time of Director of Member Engagement to meet one on one with interested members. (Day 180)

Member Renewal Cycle (Day 275)

14. *Email to All Annual Members*: Notice to Renew (Day 275) (90 days out) *
15. *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-Suggest Monthly Power Hour Calls)
16. *Email to All Annual Members (that didn't renew after first email)*: Notice to Renew (Day 305) (60 days out) *
17. *Email to Members with Cards to Expire in the Next 60 Days*
18. *Paper Renewal to All Annual Members (that haven't renewed since emails)*: First Notice to Renew (Day 320) (45 days out)
19. *Email to All Annual Members (that haven't been renewed yet)*: Notice to Renew (Day 335) (30 days out) *
20. *Text to All Annual members (that didn't renew yet)*: Notice to renew via text with link to pay via quick renew form (Day 345) (20 days out) (10th of the month for all expired and up to renew in next calendar month)
21. *Paper Renewal to All Annual Members (that haven't renewed since emails)*: "Expires Soon" Notice to Renew (Day 345) (20 days out)
22. (Day 365 – Member Does Not Renew, becomes Expired)

Member Reactivation Cycle (Day 366)

23. *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.)
24. *Autogenerated Email to all **Monthly** Members with payment failure: Notice of Payment Failure*
25. *Manual Email to **Monthly** Members with payment failure: Email from HubSpot, which Includes payment link directly to update invoice.*
26. *Monthly Chapter Membership Report Emailed to Chapter President, Chapter Executive, and Chapter Membership Chair: Includes all Expired, Lapsed, Cancelled, and Deceased Members, as well as Members Up for Renewal in the next 90 Days (Beginning of each Month)*
27. *Email to All Annual Members (that didn't renew yet): Notice to Renew (Day 366)**
28. *Phone calls to all **Monthly** Members with Payment failure: Request for Updated Information (Within 7 days of payment failure)*
29. *Text to All Annual members (that didn't renew yet): Notice to renew via text with link to pay via quick renew form (Day 375) (10th of the month for all expired and up to renew in next calendar month)*
30. *Paper Renewal to All Annual Members (that haven't renewed since emails): "Expired" Notice to Renew (Day 375)*
31. *Phone call to Managed Chapters: "We've Noticed You're Lapsed" (Day 380)*
32. *Email to All Annual Members (that didn't renew yet): Notice to Renew (Day 395) (30 days past)*
33. *Text to All Annual members (that didn't renew yet): Notice to renew via text with link to pay via quick renew form (Day 405) (10th of the month for all expired and up to renew in next calendar month)*
34. *Paper Renewal to All Annual Members (that haven't renewed since emails): "Past Due" Notice to Renew (Day 405)*

35. *Email to All Annual Members (that didn't renew yet):* Notice to Renew (Day 425) (60 days past)
36. *Text to All Annual members (that didn't renew yet):* Notice to renew via text with link to pay via quick renew form (Day 435) (10th of the month for all expired and up to renew in next calendar month)
37. *Paper Renewal to All Annual Members (that haven't renewed):* Final Notice to Renew (Day 440)
38. *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) (90 days past)
39. (Day 455 – Member Does Not Renew, becomes Lapsed)

Member Retirement Cycle (As Needed)

40. *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.

** Explore automation through YourMembership or HubSpot.*