

**Access to Microfinance & Improved Implementation of Policy Reform  
(AMIR Program)**

**Funded By U.S. Agency for International Development**

***Membership Recruitment/Retention***

Final Report

**Deliverable for Business Associations Component, Task No. 2.7.7  
Contract No. 278-C-00-98-00029-00**

***July, 2000***

*This report was prepared by H. Wayne Meyer, in collaboration with Chemonics International Inc., prime contractor to the U.S. Agency for International Development for the AMIR Program in Jordan.*

## Abbreviations Used in the Report

ACC	Amman Chamber of Commerce
AMIR	Access to Microfinance & Improved Implementation of Policy Reform
AWTC	World Trade Center
BA	Business Associations
BPWA	Business and Profession Women—Amman
CEO	Chief Executive Officer
CIPE	Center for International Private Enterprise
ED	Executive Director
EU	European Union
GM	General Manager
INTAJ	Information Technology Association—Jordan
IT	Information Technology
JABA	Jordan American Business Association
JD	Jordanian Dinar
JEDCO	Jordan Economic Development Company
JPMA	Jordanian Association of Manufacturers of Pharmaceuticals & Medical Appliances
JSTTA	Jordan Society of Tourist and Travel Agents
JTA	Jordan Trade Association
MC	Membership Committee
MD	Managing Director
MDO	Membership Development Officer
MM	Membership Manager
MSM	Marketing and Sales Manager
PRCM	Public Relations and Communications Manager
R&R	recruitment and retention
YEA	Young Entrepreneurs Association

## Table of Contents

Executive Summary .....	5
Objective of Consultancy .....	6
Findings and Recommendations	
Amman World Trade Center.....	7
Business and Professional Women—Amman.....	9
Information Technology Association—Jordan.....	11
Jordan Trade Association.....	13
Young Entrepreneurs Association.....	15
Amman Chamber of Commerce .....	17
Jordan American Business Association.....	19
Summary of Business Associations Interviewed .....	20
Recruitment and Retention Program Workshop .....	21
Appendices:	
Recruitment and Retention Program Proposals	
Appendix A Amman World Trade Center.....	22
Appendix B Business and Professional Women—Amman.....	30
Appendix C Information Technology Association—Jordan.....	39
Appendix D Jordan Trade Association.....	48
Appendix E Young Entrepreneurs Association.....	57
Appendix F Documents Read During the Consultancy.....	67
Appendix G Persons Interviewed .....	68
Appendix H AMIR Recruitment and Retention Workshop Report .....	69

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## Executive Summary

The objective of the consultancy was to increase the capacity of five business associations in membership recruitment and retention (R&R) best practices, and assist up to 20 other associations in developing strategies related to these practices.

All of the associations—except the Amman Chamber of Commerce (ACC) which is based on government-required membership-- need to develop written R&R programs based on proposals given to them by AMIR and conduct annual membership campaigns. All of them, including ACC, need to review their service offerings based on surveys, assessment of needs of core members, and other considerations. AMIR needs to monitor these programs.

The Amman World Trade Center (AWTC) is already engaged in many of the “right” R&R best practices, much of this is due to the sound business skills of its General Manager. AWTC needs to add a few more steps to complete its R&R programs.

Business and Profession Women—Amman (BPWA) has partial R&R programs and is offering a broad range of services. The association has several major problems related to R&R. Many members are past due, perhaps because they feel they are not receiving benefits, but BPWA does not know whether this is the case. BPWA needs to sharpen its focus; and the Board has a problem with letting the executive director take charge of operations.

Information Technology Association—Jordan (INTAJ) is quite new but is making a fast start, especially financially. The association does not know what its members really expect from their membership. Finding answers to this and filling their expectation will be critical to the success of the organization because of the high membership fees paid by the “working” members. They will be expecting substantial benefits. INTAJ could learn lessons from other organizations with high fee structures. Its retention program needs special consideration

The Jordan Trade Association (JTA) is using a number of R&R best practices, but needs to develop complete programs. The membership manager has good marketing skills and is making a good start in organizing the R&R programs. JTA has a potential problem in that its target market may be almost saturated; this may require re-consideration.

The Young Entrepreneurs Association (YEA) is doing many of the “right” R&R activities; in fact, it was the only one of the associations interviewed which had written R&R programs (although incomplete). Several issues affect R&R; the most serious is sustainability--whether the “break even” goal of 600 member is attainable.

The Amman Chamber of Commerce, despite its image, is actually supplying some member services and is interested in improving its service delivery. ACC has the potential through its syndicates to better serve its members.

The Jordan American Business Association (JABA) is engaged in many of the correct R&R practices; it has a potential problem with satisfaction of member expectations.

Participants in the R&R Program Workshop were quite interested in learning how to develop R&R programs. AMIR should follow up in encouraging them to complete these plans.

## **Objective of Consultancy**

The objective of this consultancy was to provide Technical Assistance to five Business Associations (BA)--AWTC, BPWA, INTAJ, JTA, and YEA-- that will increase their capacity in following international best practices of BA membership recruitment and retention. Additionally, the same practices need to be generally conveyed to more than 20 other BAs in a workshop setting. At the end of the consultancy every participating BA should have in hand a R&R strategy and be committed to undertaking the activities contained therein on a predetermined fast-track schedule.

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## **Findings and Recommendations**

### **Amman World Trade Center (AWTC)**

The first association assisted by the consultant in formulating a unique membership recruitment and retention program was AWTC. The proposal for this program is contained in Appendix A. This proposal is based on two meetings with one staff member, and on a review of other AWTC information. Unfortunately, no AWTC representatives attended the AMIR Recruitment and Retention Program Workshop on June 28.

#### Findings:

AWTC is doing many of the “right” things regarding membership recruitment and retention that portend well for membership growth. A number of these are due to the business skills of the new General Manager (GM) who, though lacking a business association background, has many years of experience in marketing and managing a business. The “right” things include: a membership person on staff—in fact, a new one is being hired; development of new services which will provide benefits for members—employment testing, health insurance, monthly luncheons, trade expos, etc.; a membership in the international World Trade Centers Association which gives AWTC members access to an enormous bank of trade-related information and over 300 other Centers; sponsorship of a September WTCA Convention in Jordan; an increase this year in non-dues income (which relieves the financial pressure on dues); workshops; discounts for members from outside suppliers; productive alliances with other associations; a realistic target market; a newsletter; a large prospect list, 700 names (which may enable achievement of a goal of 300 members by the end of the year, 219 presently); a follow up system for prospects; tracking attendance and contacts with members on the computer; computer information regarding revenue production by each member; specific retention activities; a prospective member kit; a new member packet; and conduct of exit interviews by the GM.

The GM also has a good grasp of the need to identify and satisfy the core members, a realistic view that the present competition among business association is actually expanding the market by elevating the status of associations (with the help of the AMIR project), and a good sense of why members have joined.

On the other hand, AWTC lacks a few parts of a good recruitment and retention structure: no Membership Committee (it is supposed to be formed soon); no recruiting of members by members; no membership development budget; no written recruitment and retention plans; no member surveys this year (although some were done last year); no directory; and a partially maintained website.

#### Recommendations:

1. AWTC should develop written recruitment and retention programs, including assignment of responsibility and due dates, based on the programs proposed by AMIR, including developing a Membership Committee and a membership development budget.
2. AMIR should monitor progress on the AWTC recruitment and retention plans on a monthly basis
3. AWTC should review, and then perfect, its list of service offerings based on: a satisfaction survey, an assessment of core member needs and expectations, the ability to adequately deliver all the services, coherence to its focus on trade facilitation, and any other appropriate information

4. AWTC should seriously consider conducting a one month membership campaign during 2000—organized by a re-activated Membership Committee--if it can get assurance that members will participate in the actual recruitment efforts

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## **Findings and Recommendations**

### **Business and Professional Women—Amman (BPWA)**

The second association assisted by the consultant in formulating a unique membership recruitment and retention program was BPWA. The proposal for this program is contained in Appendix B. This proposal is based on two meetings attended by one staff member and one Board member, and on a review of other BPWA information. One BPWA staff member, and two Board members, did attend the AMIR Recruitment and Retention Program Workshop on June 28 and received further instructions on developing a detailed recruitment and retention program.

#### Findings:

The BPWA has a longer history than many of the other associations and apparently a loyal group of well-connected women. It was originally a club and now wants to be considered an association. It is offering a range of services that, from a recruitment and retention point-of-view, would seem to provide good benefits to members. BPWA is also offering important services to women through the AMIR program—research on women’s issues, legal counseling, entrepreneurial support.

Despite this background and service offering, however, a substantial number of members are not paying their dues, which are quite low, only JD15 per year. Over one-half of dues so far this year remain unpaid. No doubt part of the reason is that BPWA has not had proper billing procedures. But the more important reason appears to be that members do not feel they are receiving benefits. Yet, the association really does not know the whether this is the case because they have not done any surveys of the membership.

Another issue which affects recruitment and retention is that of the focus of the organization; this affects the quality of delivery of services and thus satisfaction with benefits. The consultant perceived a “fuzziness” about the distinction between just business women or women in general. The Board may consider BPWA an organization of business women who are trying to help all women. The membership may be expecting more direct benefits for themselves.

A third issue is leadership. Membership development depends on a strong executive director who can take charge, assisted, if possible, by membership staff. BPWA is in the process of losing a strong executive director who tried for two months but was unable to persuade the Board to let her take charge.

BPWA does not have a separate membership staff person nor a membership development budget and the Membership Committee is not very active. Numerous other aspects are also missing in its recruitment and retention efforts.

#### Recommendations:

1. BPWA should develop written recruitment and retention programs, including assignment of responsibility and due dates, based on the programs proposed by AMIR—this will address some of the issues listed above.
2. AMIR should monitor progress on the BPWA recruitment and retention plans on a monthly basis
3. BPWA should re-consider its focus.
4. AMIR should discuss the issue of leadership with the BPWA Board.

5. BPWA should review, and then perfect, its list of service offerings based on: a satisfaction survey, an assessment of core member needs and expectations, the ability to adequately deliver all the services, coherence to its focus on women-owned businesses, and any other appropriate information
6. BPWA should seriously consider conducting a one month membership campaign during 2000—organized by the new Membership Committee--if it can get assurance that members will participate in the actual recruitment efforts

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## **Findings and Recommendations**

### **Information Technology Association—Jordan (INTAJ)**

The third association assisted by the consultant in formulating a unique membership recruitment and retention program was INTAJ. The proposal for this program is contained in Appendix C. This proposal is based on one meeting attended by one staff member and one Board member, and on a review of other INTAJ information. One INTAJ staff member did attend the AMIR Recruitment and Retention Program Workshop on June 28 and received further instructions on developing a detailed recruitment and retention program.

#### Findings:

INTAJ is making a very fast start. It does not yet have an office or even a bank account because of delays in filing official papers, but it has already exceeded its financial goal for member dues for the first year. Preparation of a program is thus based on a small amount of preliminary information regarding the association's early formative period.

One important finding is that INTAJ does not know the specific needs of its members related to membership, and particularly what they are expecting from INTAJ, other than that in general INTAJ should be furthering the interests of the Information Technology (IT) industry. The consultant posed this question to the Board member who was interviewed; he had to stop for a few moments to consider his answer. It does appear that development of quality standards, improvement of human resources, software development methodology, member profitability, matchmaking, outsourcing, etc. are possible candidates for priority services. But, at this point, INTAJ does not have the answer, and it cannot offer all these services. Considering the high fees, JD5,000 per year, "working" members are going to be expecting substantial benefits.

INTAJ's sustainability is highly leveraged on satisfaction of the "working" members. Building a group of members at a fee level between working and affiliate would diversify the risk.

Since the loss of even one "working" member would influence the financial situation, the retention program must be emphasized and must operate in a near-perfect manner. In fact, the Chief Executive Officer may have to spend a disproportionate amount of time "handholding" disgruntled members. They are making a sizeable investment and deserve good service. Lessons could be learned from the Jordanian Association of Manufacturers of Pharmaceuticals & Medical Appliances (JPMA) which has only 15 members who pay higher fees than the INTAJ working members.

#### Recommendations:

1. INTAJ should develop written recruitment and retention programs, including assignment of responsibility and due dates, based on the programs proposed by AMIR, including consideration of other membership levels. The retention program should reflect the need to take extra special care of the "working" members. JPMA should be consulted in developing the retention program.
2. AMIR should monitor progress on the INTAJ recruitment and retention plans on a monthly basis
3. INTAJ should review, and then perfect, its list of service offerings based on: a satisfaction survey, an assessment of "working" member needs and expectations, the ability to

adequately deliver all the services, coherence to its focus on the IT industry, and any other appropriate information

4. INTAJ should seriously consider conducting a one month membership campaign during 2000 or early 2001—organized by a Membership Committee--if it can get assurance that members will participate in the actual recruitment efforts

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## **Findings and Recommendations**

### **Jordan Trade Association (JTA)**

The fourth association assisted by the consultant in formulating a unique membership recruitment and retention program was JTA. The proposal for this program is contained in Appendix D. This proposal is based on two meetings with one staff member and a third with another staff member, and on a review of other JTA information. One JTA staff member did attend the AMIR Recruitment and Retention Program Workshop on June 28 and received further instructions on developing a detailed recruitment and retention program.

#### Findings:

The JTA Membership Manager, who has a marketing background and has worked for JTA for only 6 months, has made a good start in approaching membership development from a marketing perspective. He has assembled a range of appropriate materials—lists of benefits, addition and loss statistics, work plan, member lists, a Potential Member Packet, a New Member Packet, and a prospective member database. He also has initiated, though not yet written down, a well-considered recruitment and retention program, including a series of contacts, follow ups, exit interviews, and maintenance of contact and attendance files. He has some ideas for a marketing campaign, and is implementing some important new services. He is conducting a well-constructed member satisfaction survey.

On the negative side, the Membership Manager has not been achieving the membership growth goals during 2000, i.e. 14 rather than 20 new members through the end of May.

JTA has a broad offering of member services, including the new ones just mentioned. Preliminary results of the survey indicate members' satisfaction with the services, although not total satisfaction. JTA is respected for its trade missions, representation at trade shows, training courses, and export promotion. The Membership Manager estimates that the average JTA member receives annual financial benefits equal to several times their annual membership fees.

However, JTA has not conducted a membership campaign. It has a Membership Committee, but the Committee has not been very active. The association is possibly approaching the limits of growth in its present target market—the existing potential member database is not large enough to meet its membership goals. JTA has had a high rate of non-renewals during 2 of the past 5 years. A members recognition program has been limited. Communications with members have been limited.

#### Recommendations:

1. JTA should develop written recruitment and retention programs, including assignment of responsibility and due dates, based on the programs proposed by AMIR.
2. AMIR should monitor progress on the JTA recruitment and retention plans on a monthly basis.
3. JTA should enlarge its potential member database to at least 100 to increase the chances of reaching its 2000 membership goals.
4. JTA should review, and then perfect, its list of service offerings based on: the recent satisfaction survey, an assessment of core member needs and expectations, the ability to adequately deliver all the services, coherence to its focus on trade facilitation, and any other appropriate information.

5. JTA should seriously consider conducting a one month membership campaign during 2000—organized by a re-activated Membership Committee, and in conjunction with the newspaper advertising program financed by AMIR--if it can get assurance that members will participate in the actual recruitment efforts.
6. If, at the end of the year, membership growth has been weak, and/or the revised potential member database is inadequate to meet 2001 membership goals, JTA should re-consider its target market, membership categories, and membership fees.

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## **Findings and Recommendations**

### **Young Entrepreneurs Association (YEA)**

The fifth association assisted by the consultant in formulating a unique membership recruitment and retention program was YEA. The proposal for this program is contained in Appendix E. This proposal is based on two meetings attended by two staff members, and on a review of other YEA information. One YEA staff member did attend the AMIR Recruitment and Retention Program Workshop on June 28 and received further instructions on developing a detailed recruitment and retention program.

#### Findings:

The membership development section of YEA is doing some of the “right” things—conduct of a membership survey; written recruitment and retention plans (the only association among the 7 interviewed which had written plans—although incomplete); kits assembled for prospective members and proposed for new members; files set up for each member; a series of renewal letters; a prospective member database; interesting ideas about promoting the association and conducting member visits. Membership development efforts are assisted by the fact that, in general, YEA appears to be benefiting from good management techniques—annual work plans, delegation of responsibilities to departments, weekly staff meetings to review progress on priority issues, adjustment of activities to meet the needs of members, and an atmosphere of enthusiasm.

On the other hand: the Membership Committee, although active, is not providing sufficient support for membership development efforts; only 130 members have paid as of 6/20/00, compared to a goal of 185 by this time--it appears doubtful that the goal of 250 paid members by the end of 2000 will be reached; the future “break even” goal of 600 members, which would supposedly ensure sustainability, will be very difficult to achieve. The database of potential members may be too small and thus limiting the ability of YEA to reach its goal of 250 paid members by the end of the year. Several membership issues may be limiting growth and efficiency--an insistence on only one class of membership, membership fee levels set by the By-Laws, requiring 2 recommendations from existing members, and membership renewal for all members at the end of the year. YEA seems to be a bit weak on “closing” sales. It has no real plans yet for recognition of members. The membership retention program has not been fully considered nor really begun. Communications are weak—there are no newsletters, directories, or website.

Recruitment and retention efforts could be adversely affected by several activities in which YEA is participating or about to participate—Vision 2020, development of regional groups, and the EMPRETEC small business development program. These are quite worthwhile projects but they do not all provide direct benefits to members and thus can detract from the core activities of meeting the needs of members.

#### Recommendations:

1. YEA should complete its written recruitment and retention programs, including assignment of responsibility and due dates, based on the programs proposed by AMIR.
2. AMIR should monitor progress on the YEA recruitment and retention plans on a monthly basis.
3. AMIR should hold discussions with YEA on its future sustainability related to the membership levels it needs to break-even, membership categories, fees, target market, expenses, etc., considering the progress of membership growth this year, and also the

future effects of YEA's side projects such as Vision 2020 and development of regional groups.

4. YEA should review, and then perfect, its list of service offerings based on: a satisfaction survey, an assessment of core member needs and expectations, the ability to adequately deliver all the services, coherence to its focus on entrepreneurs, and any other appropriate information
5. YEA should seriously consider conducting a one month membership campaign during 2000—organized by a re-activated Membership Committee--if it can get assurance that members will participate in the actual recruitment efforts. A successful campaign could provide the boost YEA needs to help it reach its membership goals.

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**Findings and Recommendations**  
**Amman Chamber of Commerce (ACC)**

The consultant was asked by the AMIR Project to do a brief assessment of ACC's member services program. Development of membership recruitment and retention programs for ACC is not relevant since membership is mandatory for commercial and service businesses operating in the formal sector. This assessment is based on meetings with four ACC staff members and a review of ACC materials. Two members of the ACC staff did attend the AMIR Recruitment and Retention Program Workshop on June 28 and received instruction on development of member services.

Findings:

ACC has a negative image of providing no services to its members because it has had no reason to provide them. Businesses are required to be members in order to get a license for their business. However, it does appear that ACC is assisting some members and is giving serious consideration to broadening its services, partially because it senses that it may lose its required membership status in the future.

ACC does not have easily accessible records, and cross-filing information, regarding members' use of its services. But, the Chamber is providing a number of services that do benefit some members annually —about 900 members get certificates of origin; perhaps 2000 to 3000 (but probably fewer) get letters for travel or signature approval; possibly a few thousand (but most likely fewer) get guarantees for visitors; about 100 get lists of members on computer diskettes; perhaps 60 use the arbitration service; a few hundred benefit from trade missions; and a few hundred from personal advocacy . Thus, on the high side--out of a membership of 31,000--possibly 7000 to 8000 (but more likely 3000 to 4000) actually get some benefits. Statistics were not available for other services which include: legalization, research, notarization, etc. All members are getting identification cards; a substantial number may benefit from this. ACC's 25 syndicates are a source of information and feedback.

The potential exists for substantial non-dues income; many of these services are provided for nominal fees or for free. Also, non-members often pay the same fee.

ACC seems to operate fairly efficiently; most company registrations and certificates of origin are completed in an hour or less, or at least the same day, if there are huge queues.

The staff members who were interviewed appeared to be quite interested in improving ACC member service. One indication of this is that ACC's staff recently completed customer relations training. In addition, the staff is working on a questionnaire to query members about services. Also, ACC is developing or considering providing some new services—life insurance, health insurance, building a club for members, marketing assistance for small businesses, training, internet access, help with WTO, bank facilities for members.

Recommendations:

1. ACC should revise its survey by shortening it, asking more direct questions about existing and proposed services, and then distribute the survey and assess the results.
2. ACC should then adjust its offering of services based on the survey, its ability to deliver the services, and any other appropriate information.
3. As the financial need increases, ACC should increase its fees for services, with non-members paying higher rates.

4. ACC should keep track of member use of services, particularly multiple use of the same service or a variety of services by the same members.
5. ACC should follow up the customer service training at 6 month intervals with refresher courses.
6. ACC should activate the syndicates and use them as a conduit for providing services and getting feedback. ACC should also consider a Board composed of syndicate representatives which might be more broadly representative of the membership.

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**Findings and Recommendations**  
**Jordan American Business Association, (JABA)**

The consultant was asked by JABA to do a brief assessment of its membership recruitment and retention programs, though not to propose detailed programs. This assessment is based on meetings with two JABA staff members and a review of JABA materials. Two members of the JABA staff did attend the AMIR Recruitment and Retention Program Workshop on June 28 and received instruction on how to develop their own detailed recruitment and retention program.

Findings:

JABA is taking many of the steps which lead to successful recruitment and retention efforts. These include: a membership development staff person; a seemingly attainable membership goal for 2000; a membership development budget; surveys taken on training needs and public policy priorities; two membership levels to accommodate both firms and individuals; alliances and co-sponsorships with other associations; a well-defined target market which includes US business representatives and Jordanian businesses with links to US businesses; a large database of potential members; members bringing in friends to be members; a broad range of promotional activities; a system of making personal calls on members; kits for new members and a membership renewal kit; and a membership retention evaluation form.

JABA also has many of the necessary tools: colorful, attractive, and informative informational materials, annual reports, and quarterly newsletters; a well-functioning website; an impressive range of services—well-attended meetings, training sessions, seminars, hosting and sponsoring trade missions, sponsoring a trade week; and a member discount card.

JABA, however, is lacking in a few areas. Their recruitment and retention programs, expressed to the consultant verbally, have not yet been reduced to written form. A satisfaction survey has not been taken. The membership dues are substantial and members appear to be looking for more direct benefits, especially more direct contacts with US businesses. This expectation provides potential for dissatisfaction which could lead to future membership losses. The Membership Committee, although organized has not been very active in recruiting. A membership campaign has not been conducted. A directory has not been published, although lists have been distributed in the newsletters. Information on member contacts is not yet kept on the computer, thus exception reports on member participation cannot be produced. A recognition program has not been developed. Annual visits to members are not being made.

Recommendations:

1. JABA should develop written recruitment and retention programs, including responsibility and due dates, based on instructions given at the June 28 workshop. These programs should include systematizing member contacts, a recognition program, directory, and annual visits.
2. JABA should conduct a member satisfaction survey and then review its services based on results from the survey, an assessment of its core members' needs and expectations, the ability to adequately deliver the required services, adherence to its focus on connections to US businesses, and any other appropriate information.
3. The Membership Committee should be re-organized and develop plans for a membership campaign.

## **Findings and Recommendations**

### **Summary of Business Associations Interviewed**

#### Findings:

The consultant found a great variance among the associations which were interviewed regarding recruitment and retention programs. Some had membership committees, but most were not functioning well. Membership goals ranged from achievable to extremely challenging. A few have membership development budgets but most do not. A few have done or are doing member surveys, but others are not. All are aware of benefits but most have yet to relate these fully to member needs and expectations. Changes in membership categories may be helpful to some of the associations. Most have well-defined target markets. Several have a database of potential members, a few do not. Most are doing some aspects of retention, but none have a complete program. The sustainability of some of the associations will depend on their ability to operate highly effective recruitment and/or retention programs. None have members who are actively recruiting; none have held campaigns, and none have fully developed promotional programs. The common thread is lack of written, thorough recruitment and retention programs.

#### Recommendations:

1. All of the associations, except ACC, should develop written recruitment and retention programs.
2. AMIR should monitor these programs on a monthly basis.
3. All of the associations, including ACC, should match their services to the needs and expectations of their members.
4. All of the associations should experiment with membership campaigns.
5. AMIR should closely monitor, and offer assistance to, BPWA as it goes through a leadership crisis, and, perhaps, a reconsideration of focus.
6. AMIR should work closely with YEA on its sustainability.
7. AMIR should closely monitor INTAJ's retention program

## **Findings and Recommendations**

### **Recruitment and Retention Program Workshop, held June 28**

The workshop was attended by 18 people, representing 9 business associations. A copy of the presentation and handouts is included in Appendix H.

#### Findings:

The attendees seemed to be quite interested in the subject of recruitment and retention; most took copious notes. Some of the older associations—ACC, Institute of Management Consultants, Association of Certified Public Accountants, and Society of Tourist & Travel Agents—had more problems dealing with some of the concepts and tools of recruitment and retention, also with considering revisions to established procedures. The sample one page sample survey garnered quite a bit of interest—several participants had had problems with poor responses. It appeared that many of the associations are already conducting segments of recruitment and retention programs. Several were surprised to learn that prospective members should usually expect to submit payment with their application. Not many are keeping member information in computer files. Several wondered about maintaining both paper and computer membership files. Few have recognition programs. Most are reluctant to cut off non-paying members, even if many months past due

#### Recommendations:

1. AMIR should send out reminder communications to encourage the attending associations to develop written recruitment and retention plans.
2. AMIR should then reconvene a half day workshop to discuss their written plans, perhaps getting some members to share their experiences on particular parts of the programs.
3. AMIR should monitor the plans on a monthly basis, or less often, if that is more feasible.

**Appendix A**  
**Amman World Trade Center (AWTC)**  
**Recruitment and Retention Program Proposal**

**Amman World Trade Center (AWTC)  
Recruitment and Retention Program Proposal**

5/13/01

**Draft**

**Recruitment Program**

GM=General Manager    MC=Membership Committee    MSM=Marketing and Sales Manager  
PRCM=Public Relations and Communications Manager

	Responsible	Due Date
<b>A. Preparation</b>		
1. Membership staff <ul style="list-style-type: none"> <li>• <i>Increase the staff.</i> The plan to increase the staff by adding two representatives is a good one. Part or most of their compensation should be based on performance, both for recruitment and retention.</li> </ul>	GM	8/31/00
2. Membership Committee <ul style="list-style-type: none"> <li>• <i>Organize a Membership Committee.</i> This committee, chaired by a Board member and composed of regular members, is necessary to assist with membership development efforts.</li> <li>• <i>Committee members need to participate in recruitment.</i> Besides attending meetings, their participation is necessary for meeting AWTC goals.</li> </ul>	Board	8/31/00
	MC	9/30/00
3. Membership goal <ul style="list-style-type: none"> <li>• <i>300 paid members by end of 2000.</i> This goal seems achievable but will take some strong efforts by the membership staff and committee.</li> </ul>	MC	12/31/00
4. Membership development budget and financing <ul style="list-style-type: none"> <li>• <i>Include a separate amount in the overall budget.</i> This should be based on details of the annual recruitment and retention plans, and can be the basis of a profit center for the department.</li> <li>• <i>Continue keeping track of revenues generated by individual members.</i> Using QuickBooksPro software to record these revenues is an excellent way of determining the value of individual members to AWTC and should be taken into account in specific retention efforts.</li> </ul>	MC	10/31/00
	GM	12/31/00
5. Membership survey <ul style="list-style-type: none"> <li>• <i>Conduct a satisfaction survey within a few months.</i> Try a one page faxed version, with boxes to check (tick) answers, and can be faxed back. Test the survey before sending it out to the membership.</li> <li>• <i>Call a few non-responders to check validity.</i> Find out why they did not respond; get their opinions.</li> <li>• <i>Try different size and types.</i> This will help determine which will yield the best results.</li> </ul>	MSM	8/31/00
	MSM	8/31/00
	MSM	12/31/00

<p>6. Review benefits</p> <ul style="list-style-type: none"> <li>• <i>Emphasize the availability of trade-related information.</i> The ability to obtain this information from WTCA is a special competitive advantage for the association. It should be exploited and continually promoted so that when a Jordanian business wants international trade leads, they will automatically think of contacting AWTC. This service should also produce increasing income.</li> <li>• <i>Develop the employment testing center concept.</i> This is not only an excellent service for members, with non-members paying a higher price, but can also produce good income for AWTC.</li> <li>• <i>Develop the expertise of AWTC to hold trade expositions.</i> The trade expo to be held in September in conjunction with the Convention will be a good opportunity to develop these skills. This service, too, should be a good income generator.</li> <li>• <i>Continue luncheons and training events on a regular basis.</i> It is important to stick to a definite schedule—this re-assures members of the professionalism of the organization. These services should be priced to produce income.</li> <li>• <i>Develop other member benefits such as health insurance.</i> Health insurance can not only be an excellent benefit for members but can produce good income, too, in the form of commissions.</li> <li>• <i>Provide benefits that are deliverable.</i> Make sure the association has the capacity.</li> </ul>	GM	12/31/00
<p>7. Review membership categories</p> <ul style="list-style-type: none"> <li>• <i>Consider such a review if there are many complaints about fees and/or membership levels have leveled off.</i> This does not appear to be a problem this year.</li> </ul>	GM	12/31/00
<p>8. Membership fees</p> <ul style="list-style-type: none"> <li>• <i>Consider a review of these if there are many complaints.</i> This does not appear to be a problem this year.</li> </ul>	GM	12/31/00
<p>9. Review effects of competition and alliances</p> <ul style="list-style-type: none"> <li>• <i>Be ready to adjust to the effects of competition.</i> Although competition now seems to benefit associations in general, circumstances can change.</li> <li>• <i>Take advantage of existing alliances.</i> Alliances with JTA, YEA, and JABA should be used as much as possible to build up AWTC, contact new prospective members, and become better known.</li> </ul>	GM	12/31/00
<p>10. Target market</p> <ul style="list-style-type: none"> <li>• <i>Continue to focus on the present target market.</i> Focusing on dynamic Jordanian companies--which are interested in growth, international opportunities, and trade shows, and want an association to help provide solutions-- is an appropriate segment to pursue.</li> </ul>	MSM	12/31/00

<p>11. Database of potential members</p> <ul style="list-style-type: none"> <li>• <i>Include those from AWTC events and Ministry lists.</i> Continue getting names from trade exhibits, training events, and seminars, as well as from the Ministry of Industry and Trade.</li> <li>• <i>Request suggestions from present members.</i> Existing members know who would benefit from membership. Consider giving them an incentive or gift if suggested company becomes a member.</li> <li>• <i>Develop new sources of potential members.</i> These could include: visitors to website, directories from other associations, etc.</li> <li>• <i>Open a computer file for each potential member.</i> This is an excellent practice which AWTC should continue.</li> </ul>	MSM	12/31/00
	MSM	12/31/00
	MSM	12/31/00
	MSM	12/31/00

<b>B. Recruitment activities</b>		
<p>1. Promoting the association</p> <ul style="list-style-type: none"> <li>• <i>Develop a program.</i> This could include trade fairs inside and outside the country, mailing promotional materials, hand deliveries, faxes, e-mails, seminars, co-sponsoring events, newspaper advertisements, etc.</li> <li>• <i>Determine how people are discovering AWTC.</i> The office should keep track of how new (and prospective) members found about AWTC. This information will help in judging the effectiveness of various promotional vehicles.</li> <li>• <i>Experiment with different forms of promotion.</i> The effectiveness of each should be tested and more use made of those which bring better results.</li> </ul>	MSM	8/31/00
	MSM	12/31/00
	MSM	12/31/00
<p>2. Deliver information to prospects</p> <ul style="list-style-type: none"> <li>• <i>Develop a kit for prospective members.</i> This could include a simple low-cost basic informational brochure, an applications form, and an invitation from the Chairman. These should be sent out to all additions to the prospect list even before they are personally contacted.</li> </ul>	MSM	8/31/00
<p>3. Telephone calls</p> <ul style="list-style-type: none"> <li>• <i>Call new additions to the database as soon as possible.</i> This is a good way of making an initial determination of which new prospects to target.</li> </ul>	MSM	12/31/00
<p>4. Personal meetings</p> <ul style="list-style-type: none"> <li>• <i>Hold as many personal meetings as possible.</i> AWTC should continue to do this.</li> </ul>	MSM	12/31/00
<p>5. Follow up</p> <ul style="list-style-type: none"> <li>• <i>Follow up all prospects in a systematic way with telephone calls, faxes, e-mails, etc.</i> AWTC should continue its process of tailoring each follow up to the needs of the prospect.</li> </ul>	MSM	12/31/00

6. Close the sale <ul style="list-style-type: none"> <li>• <i>Train membership committee on closing techniques.</i> Everyone involved in solicitations needs to know how to do this.</li> <li>• <i>Ask for payment with the completed application.</i> Sales are not really “closed” until payment is received.</li> <li>• <i>Sell benefits.</i> Stress those benefit which are important to the prospect.</li> </ul>	GM	10/31/00
	MC	12/31/00
	MC	12/31/00
7. Recruitment progress <ul style="list-style-type: none"> <li>• <i>Monitor monthly progress and make adjustments.</i> Monitoring should be done systematically to better assure that the annual goal will be met.</li> </ul>	GM	12/31/00

<b>C. Annual Campaign</b>		
1. Organizing <ul style="list-style-type: none"> <li>• <i>Seriously consider organizing a special campaign.</i> The campaign would be an intense effort over a limited length of time, often 1 month, when resources and efforts are targeted to gaining a number of new members in a limited time. This should be done by the membership committee. Responsibilities and separate lists of prospects should be divided up among the staff and committee. A special budget should be developed. The time of year should be carefully chosen.</li> </ul>	MC	10/31/00
2. Special incentives <ul style="list-style-type: none"> <li>• <i>Offer something free or heavily discounted.</i> This gives the prospect an extra reason to join during the campaign period--perhaps a discounted or even free membership service.</li> </ul>	MC	10/31/00
3. Promotional media <ul style="list-style-type: none"> <li>• <i>Use a combination of media.</i> Depending on the budget—newspaper, radio, TV, faxes, emails, special deliveries, etc. could be used. This will, hopefully, “saturate” prospective members with messages about AWTC.</li> </ul>	PRCM	10/31/00
4. Telephone calls <ul style="list-style-type: none"> <li>• <i>Make calls to all prospects.</i> The membership committee should participate.</li> </ul>	MC	10/31/00
5. Personal meetings <ul style="list-style-type: none"> <li>• <i>Conduct as many personal meetings as possible.</i> Membership committee should participate.</li> </ul>	MC	10/31/00
6. Special activities <ul style="list-style-type: none"> <li>• <i>Schedule at least one special activity each week.</i> These could include seminars, training, social activities, etc. and will help get prospective members into an AWTC setting where they can be solicited and approached individually. These events should also attract new prospects. The membership committee should participate.</li> </ul>	GM	10/31/00

7. Follow ups <ul style="list-style-type: none"> <li>• <i>Make follow ups on all prospects.</i> These should include telephone calls, faxes, personal calls, emails, etc. The membership committee should participate.</li> </ul>	MC	10/31/00
8. Close the sale <ul style="list-style-type: none"> <li>• <i>Attempt to close the sale on all contacts with prospects.</i> The membership sale is not closed until the fees have been paid.</li> </ul>	MC	10/31/00
9. Review campaign <ul style="list-style-type: none"> <li>• <i>Assess goals, results, organization, promotional effectiveness, activities, etc.</i> This review will help in planning for the next campaign.</li> </ul>	MC	10/31/00

<b>D. Completion of recruitment</b>		
1. Approve applications <ul style="list-style-type: none"> <li>• <i>Conduct an informal check of the applicant, if not well known.</i> This will ensure applicant is legitimate.</li> </ul>	MSM	12/31/00
2. New member packet <ul style="list-style-type: none"> <li>• <i>Add a few new items to the packet.</i> The packet should include welcoming letter from the Chairman, membership card, membership certificate, annual report, directory of members, information on AWTC, information on WTCA, committee preference card, and other activities/ event information.</li> </ul>	MSM	8/31/00

<b>Retention program</b>		
<b>A. Integration of members</b>		
1. Member files <ul style="list-style-type: none"> <li>• <i>Continue practice of setting up a hard copy file for each new member.</i> These should be closely monitored, and coordinated with the member database on the computer.</li> </ul>	MSM	12/31/00
2. Initial meeting <ul style="list-style-type: none"> <li>• <i>Hold personal meeting with new members within first month.</i> This is an excellent practice which AWTC should continue. This will help AWTC better understand the <u>expectations</u> of the new member regarding membership. Meeting expectations is a critical part of effective retention.</li> </ul>	MSM	12/31/00
3. Follow up on participation of new members <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> This is an excellent practice which AWTC should continue.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> </ul>	MSM MSM	12/31/00 12/31/00

<p>4. Follow up on participation of old members; recognize efforts</p> <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> This is an excellent practice which AWTC should continue.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> <li>• <i>Recognition should be given at an annual special meeting and continued in the newsletters.</i> Give out certificates for length of membership—5, 10, etc. years, and also for attendance at AWTC events. Recognize “Member of the Year,” “Exporter of the Year,” and others who have made significant contributions. Pass out WTCA pins. The member recognition in the newsletters is an excellent practice.</li> </ul>	MSM	12/31/00
	MSM	12/31/00
	GM	12/31/00
<p>5. Personal meeting with all members at least once per year</p> <ul style="list-style-type: none"> <li>• <i>Meet with each member, preferably at his/her business.</i> Although most of these meetings should be conducted by the Membership Dept and Committee, the Executive Director should conduct one per week as a way of keeping in touch with the membership.</li> </ul>	MSM	12/31/00
<p>6. Communications</p> <ul style="list-style-type: none"> <li>• <i>Make maximum use of the website, with frequent updates.</i> The presentation, time requirements, and fees for services on the website is well done. However, as mentioned in the interviews, the existing lack of events on the website calendar gives the impression of an inactive organization. This needs some improvement.</li> <li>• <i>Start a regular newsletter.</i> If this is sent quarterly, than a brief one-page bulletin should be sent out monthly to maintain a regular contact with the members.</li> <li>• <i>Develop an annual directory.</i> The directory should include advertisements and be sold to non-member. This will yield additional income. It should be provided to members for no charge.</li> <li>• <i>Issue regular press releases.</i> Press releases to newspapers, TV, and radio should be employed as a low cost way of getting noticed.</li> </ul>	PRCM	12/31/00
	PRCM	8/31/00
	PRCM	12/31/00
	PRCM	12/31/00

<b>B. Situational analysis</b>		
<p>1. Satisfaction survey</p> <ul style="list-style-type: none"> <li>• <i>Take a satisfaction survey at least once each year.</i> This will enable AWTC to re-evaluate its program and make adjustments.</li> </ul>	PRCM	11/30/00

<p>2. Review of benefits—delivering <u>value</u>?</p> <ul style="list-style-type: none"> <li>• <i>Base this review on the satisfaction survey and other available information.</i> The Membership Committee should make recommendations to the Board on changes in benefits which will help build the membership of AWTC.</li> <li>• <i>Provide for the needs of the core membership.</i> Make sure that the needs and expectations of those members which are providing the most revenue and are most active are being met.</li> </ul>	MC	12/31/00
	GM	12/31/00

<b>C. Renewal process</b>		
<p>1. Timing and methods</p> <ul style="list-style-type: none"> <li>• <i>Develop a series of renewal communications.</i> These could include telephones, letters, emails, faxes, etc.</li> </ul>	PRCM	8/31/00
<p>2. Follow up on unpaid renewals</p> <ul style="list-style-type: none"> <li>• <i>Use reminder communications.</i> These could include telephones, letters, emails, faxes, etc.</li> </ul>	MSM	12/31/00
<p>3. Termination of membership for unpaid members</p> <ul style="list-style-type: none"> <li>• <i>Make a Board decision on grounds for termination.</i> It is less expensive to salvage an existing member than recruit a new one. Therefore, care should be taken in terminating unpaid members. Extenuating circumstances may exist for delayed payment. On the other hand, a policy should be set by the Board so that termination decisions are consistent. The AWTC custom of a “soft separation” with a reminder that “we will still serve you” is excellent.</li> <li>• <i>Consider an inactive status category as an alternative.</i> Inactive status could be considered for members who are having, for example, serious financial problems. They should receive minimum benefits</li> </ul>	Board	9/30/00
	Board	9/30/00

<p>D. Exit interviews of former members</p> <ul style="list-style-type: none"> <li>• <i>All non-renewing members should be interviewed.</i> The follow up calls from the General Manager is an excellent practice and should be continued.</li> <li>• <i>Leave former members on a list so that they can be solicited again in the future.</i> Send them mailings at times.</li> </ul>	GM	12/31/00
	MSM	12/31/00

**Appendix B**

**Business and Professional Women--Amman (BPWA)  
Recruitment and Retention Program Proposal**

**Business and Professional Women--Amman (BPWA)  
Recruitment and Retention Program Proposal**

5/13/01

**Draft**

**Recruitment Program**

ED=Executive Director MC=Membership Committee

	Responsible	Due Date
<b>A. Preparation</b>		
1. Membership staff <ul style="list-style-type: none"> <li>• <i>Consider hiring a membership development staff person. Part of this person's compensation should be based on performance, both for recruitment and retention.</i></li> </ul>	ED	9/30/00
2. Membership Committee <ul style="list-style-type: none"> <li>• <i>Re-organize the Membership Committee. This committee needs to meet oftener, at least monthly.</i></li> <li>• <i>Committee members need to participate in recruitment. Besides attending meetings, their participation is necessary for meeting BPWA goals.</i></li> </ul>	Board MC	8/31/00 9/30/00
3. Membership goal <ul style="list-style-type: none"> <li>• <i>100 new members by end of 2000. This goal will take some strong efforts by the staff and committee.</i></li> </ul>	MC	12/31/00
4. Membership development budget and financing <ul style="list-style-type: none"> <li>• <i>Include a separate amount in the overall budget. This should be based on details of the annual recruitment and retention plans.</i></li> <li>• <i>Keep track of revenues generated by individual members. Use QuickBooksPro software to record these revenues. It is an excellent way of determining the value of individual members to BPWA and can help determine the core members.</i></li> </ul>	MC ED	10/31/00 12/31/00
5. Membership survey <ul style="list-style-type: none"> <li>• <i>Conduct a satisfaction survey soon. Try a one page faxed version similar to the one handed out at the June 28 workshop.</i></li> <li>• <i>Call a few non-responders to check validity. Find out why they did not respond; get their opinions.</i></li> </ul>	ED ED	7/31/00 7/31/00

<p>6. Review benefits</p> <ul style="list-style-type: none"> <li>• <i>Base a review on results of the satisfaction survey and other information.</i> Members' poor payment record of fees which are quite low indicates a serious problem, probably that they do not feel they are getting any benefits. What are they expecting from BPWA? There are a number of benefits which should be considered: Member training Networking contacts—social and business, should schedule once per month; also, schedule events with other associations to broaden range of contacts Public affairs events—seminars, lectures Trip—schedule 2 per year, networking and touring; study tours Special fees and discounts—for members only—hotels, shops, Fastlink, etc. Promote AMIR-supported projects--legal services and counseling; research; entrepreneurial center; incubator Annual exhibition of members products/services Sponsored walks. BPWA needs to make sure however that it can properly <u>deliver</u> on whatever services it chooses.</li> <li>• <i>Re-consider the association focus--on all women, women in business, or what?</i> This focus is a special competitive advantage for the association. The focus may need to be sharpened. Should it be generally on all women? Or, mainly be on women in business? Or, what? Whatever the decision, the focus should be exploited and continually promoted.</li> <li>• <i>Provide benefits on a consistent basis.</i> Consistency is a key to maintaining a professional image.</li> </ul>	MC	8/31/00
<p>7. Review membership categories</p> <ul style="list-style-type: none"> <li>• <i>Consider a new membership category.</i> A new "associate" category could be for micro businesses and recent graduates; it would have fewer benefits.</li> </ul>	ED	12/31/00
<p>8. Membership fees</p> <ul style="list-style-type: none"> <li>• <i>Raise the fees for regular members; have lower fees for associates.</i> Regular members would pay more for more benefits.</li> </ul>	ED	12/31/00
<p>9. Review effects of competition and alliances</p> <ul style="list-style-type: none"> <li>• <i>Be ready to adjust to the effects of competition.</i> Although competition now seems to benefit associations in general, circumstances can change.</li> <li>• <i>Take advantage of existing alliances and build new ones.</i> Alliances with local associations should be used as much as possible to build up BPWA, contact new prospective members, and become better known.</li> </ul>	ED	12/31/00
	ED	12/31/00

10. Target market <ul style="list-style-type: none"> <li>• <i>Continue to focus on the present target market.</i> These are woman-owned businesses in Amman—any size and any type of business.</li> </ul>	ED	12/31/00
11. Database of potential members <ul style="list-style-type: none"> <li>• <i>Expand the existing database to several hundred potential members.</i> This number is needed to better assure chances of meeting the membership goal of 100 new members.</li> <li>• <i>Include those from BPWA events and people making enquiries.</i> Lists need to be kept of these people.</li> <li>• <i>Request five suggestions from present members.</i> Existing members know who would benefit from membership. Consider giving them an incentive or gift if the suggested company becomes a member.</li> <li>• <i>Develop new sources of potential members.</i> These could include directories from other associations—such as ACC and ACI.</li> <li>• <i>Open a computer file for each potential member.</i> This will help keep track of recruiting efforts.</li> </ul>	ED ED ED ED	7/31/00 12/31/00 8/31/00 12/31/00 12/31/00

<b>B. Recruitment activities</b>		
1. Promoting the association <ul style="list-style-type: none"> <li>• <i>Develop a program.</i> This could include radio and newspaper advertisements, completing and printing new brochures, and updating the website more often.</li> <li>• <i>Determine how people are discovering BPWA.</i> The office should keep track of how new (and prospective) members found about BPWA. This information will help in judging the effectiveness of various promotional vehicles.</li> <li>• <i>Experiment with different forms of promotion.</i> The effectiveness of each should be tested and more use made of those which bring better results.</li> </ul>	ED ED ED	8/31/00 12/31/00 12/31/00
2. Deliver information to prospects <ul style="list-style-type: none"> <li>• <i>Provide a kit for prospective members.</i> The kit should include an informational brochure, an application, a schedule of activities, and an invitation from the Chairman. These should be sent out to all additions to the prospect list even before they are personally contacted.</li> </ul>	ED	7/31/00
3. Telephone calls and faxes <ul style="list-style-type: none"> <li>• <i>Call and fax new additions to the database as soon as possible.</i> The telephone calls are a good way of making an initial determination of which new prospects to target. The faxes will get their attention.</li> </ul>	ED	12/31/00

4. Personal meetings <ul style="list-style-type: none"> <li>• <i>Hold as many personal meetings as possible.</i> Or invite them to meetings or other events at the office.</li> </ul>	ED	12/31/00
5. Follow up <ul style="list-style-type: none"> <li>• <i>Follow up all prospects in a systematic way with telephone calls, faxes, e-mails, etc.</i> Try to tailor each follow up to the needs of the prospect.</li> </ul>	ED	12/31/00
6. Close the sale <ul style="list-style-type: none"> <li>• <i>Train membership committee on closing techniques.</i> Everyone involved in solicitations needs to know how to do this.</li> <li>• <i>Ask for payment with the completed application.</i> Sales are not really “closed” until payment is received</li> <li>• <i>Sell benefits.</i> Emphasize those benefits which are important to the prospect.</li> </ul>	ED MC MC	9/30/00 12/31/00 12/31/00
7. Recruitment progress <ul style="list-style-type: none"> <li>• <i>Monitor monthly progress and make adjustments.</i> Monitoring should be done systematically to better assure that the annual goal will be met.</li> </ul>	ED	12/31/00

<b>C. Annual Campaign</b>		
1. Organizing <ul style="list-style-type: none"> <li>• <i>Seriously consider organizing a special campaign.</i> The campaign would be an intense effort over a limited length of time, often 1 month, when resources and efforts are targeted to gaining a number of new members in a limited time. This should be done by the membership committee. Responsibilities and separate lists of prospects should be divided up among the staff and committee. A special budget should be developed. The time of year should be carefully chosen.</li> </ul>	MC	10/31/00
2. Special incentives <ul style="list-style-type: none"> <li>• <i>Offer something free or heavily discounted.</i> This gives the prospect an extra reason to join during the campaign period.</li> </ul>	MC	10/31/00
3. Promotional media <ul style="list-style-type: none"> <li>• <i>Use a combination of media.</i> Newspaper, radio, TV, faxes, emails, special deliveries, etc. could also be used. This will, hopefully, “saturate” prospective members with messages about BPWA.</li> </ul>	ED	10/31/00
4. Telephone calls <ul style="list-style-type: none"> <li>• <i>Make calls to all prospects.</i> The membership committee should participate.</li> </ul>	MC	10/31/00
5. Personal meetings <ul style="list-style-type: none"> <li>• <i>Conduct as many personal meetings as possible.</i> Membership committee should participate.</li> </ul>	MC	10/31/00

6. Special activities <ul style="list-style-type: none"> <li><i>Schedule at least one special activity each week.</i> These could include seminars, training, social activities, etc. and will help get prospective members into a BPWA setting where they can be solicited and approached individually. These events should also attract new prospects. The membership committee should participate.</li> </ul>	ED	10/31/00
7. Follow ups <ul style="list-style-type: none"> <li><i>Make follow ups on all prospects.</i> These should include telephone calls, faxes, personal calls, emails, etc. The membership committee should participate.</li> </ul>	MC	10/31/00
8. Close the sale <ul style="list-style-type: none"> <li><i>Attempt to close the sale on all contacts with prospects.</i> The membership sale is not closed until the fees have been paid.</li> </ul>	MC	10/31/00
9. Review campaign <ul style="list-style-type: none"> <li><i>Assess goals, results, organization, promotional effectiveness, activities, etc..</i> This will help in plans for next campaign.</li> </ul>	MC	11/30/00

<b>D. Completion of recruitment</b>		
1. Approve applications <ul style="list-style-type: none"> <li><i>Conduct an informal check of the applicant, if not well known.</i> This will ensure applicant is legitimate.</li> </ul>	ED	12/31/00
2. New member packet <ul style="list-style-type: none"> <li><i>Consider including several things.</i> The packet could include: a welcoming letter from the Chairman, a membership card, a membership certificate, membership directory, an annual report, committee preference card, and other activities/ events information.</li> </ul>	ED	8/31/00

<b>Retention program</b>		
<b>A. Integration of members</b>		
1. Member files <ul style="list-style-type: none"> <li><i>Set up a hard copy and computer file for each new member.</i> These should be closely monitored. The new AMIR database should be used when it becomes available in August or September.</li> </ul>	ED	12/31/00
2. Initial meeting <ul style="list-style-type: none"> <li><i>Hold personal meeting with new members within first month.</i> This will help BPWA understand the <u>expectations</u> of the new member regarding membership. Meeting expectations is critical to effective retention.</li> <li><i>Or hold new member orientation meetings as an alternative.</i> If this is the choice, they should be held frequently.</li> <li><i>Try to involve the new member on a committee or project.</i> Active members are more easily retained.</li> </ul>	ED	12/31/00
	ED	12/31/00
	ED	12/31/00

<p>3. Follow up on participation of new members</p> <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> The information should then be transferred to member files.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> </ul>	ED	12/31/00
<p>4. Follow up on participation of old members; recognize efforts</p> <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> The information should then be transferred to member files.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> <li>• <i>Recognition should be given at an annual special meeting and also in the newsletters.</i> Give out certificates for length of membership—5, 10, etc. years, and also for attendance at BPWA events. Recognize “Member of the Year,” “Professional Woman of the Year,” and others who have made significant contributions—be creative. Member recognition in the newsletter is also a good idea.</li> </ul>	ED	12/31/00
<p>5. Personal meeting with all members at least once per year</p> <ul style="list-style-type: none"> <li>• <i>Meet with each member, preferably at their business.</i> Most of these meetings should be conducted by the membership staff and Committee; however, the ED should conduct one per week as a way of keeping in touch with the membership.</li> </ul>	ED	12/31/00
<p>6. Communications</p> <ul style="list-style-type: none"> <li>• <i>Use a variety of media.</i> Issue annual reports. Sending faxes to members on their birthdays is a great idea. Consider an agreement with a publisher or contractor to print a BPWA magazine where they do all the work and pay BPWA a % of the advertising revenue. The magazine would be given free to BPWA members and the revenue from public sales would go to the publisher or contractor.</li> <li>• <i>Communicate with members on a monthly basis.</i> A quarterly newsletter is a good idea. In addition, a brief one-page bulletin or letter should be sent out monthly, perhaps both in hard copy and by email to maintain a regular contact with the members. The regularity of contact is important to maintain a professional image.</li> <li>• <i>Develop an annual directory.</i> Consider including advertisements and selling it to non-members. This will yield additional income. It should be provided to members for no charge.</li> <li>• <i>Issue regular press releases.</i> Press releases to newspapers, TV, and radio should be used as a low cost way of getting noticed.</li> </ul>	ED	12/31/00

<b>B. Situational analysis</b>		
1. Satisfaction survey <ul style="list-style-type: none"> <li>• <i>Take a satisfaction survey at least once each year.</i> This will enable BPWA to re-evaluate its program and make adjustments.</li> <li>• <i>Different sizes and types of surveys might be tested to determine which yield the best results.</i> Be sure to test each one first so that revisions can be made before it goes out to the whole membership.</li> </ul>	ED	12/31/00
2. Review of benefits—delivering <u>value</u> ? <ul style="list-style-type: none"> <li>• <i>Base this review on the satisfaction survey and other available information.</i> The Membership Committee should make recommendations to the Board on changes in benefits which will help build the membership of BPWA.</li> <li>• <i>Provide for the needs of the core membership.</i> Make sure that the needs and expectations of those members which are providing the most revenue and are most active are being met.</li> </ul>	MC	12/31/00
	ED	12/31/00

<b>C. Renewal process</b>		
1. Timing and methods <ul style="list-style-type: none"> <li>• <i>Develop a series of renewal communications.</i> These could include telephone calls, a thank you letter from the Chairman, other letters, emails, faxes, etc.</li> </ul>	ED	8/31/00
2. Follow up on unpaid renewals <ul style="list-style-type: none"> <li>• <i>Use reminder communications.</i> These could include weekly telephones, letters, emails, faxes, etc.</li> </ul>	ED	12/31/00
3. Termination of membership for unpaid members <ul style="list-style-type: none"> <li>• <i>Make a Board decision on grounds for termination.</i> It is 6 to 7 times less expensive to salvage an existing member than recruit a new one. Therefore, care should be taken in terminating unpaid members. Extenuating circumstances may exist for delayed payment. On the other hand, a policy should be set by the Board so that termination decisions are consistent.</li> <li>• <i>Consider an inactive status category as an alternative.</i> Inactive status could be considered for members who are having, for example, serious financial problems. They should receive minimum benefits</li> </ul>	Board	9/30/00
	Board	9/30/00

<p>D. Exit interviews of former members</p> <ul style="list-style-type: none"> <li>• <i>All non-renewing members should be interviewed. Why did they join? What did they expect? Were there difficulties?</i> BPWA lost a large number of members this past year. A good portion of these should be called personally, but interviews with all might be impossible. A form should be faxed to the others and then followed up. This feedback can yield valuable information about changes which may be needed.</li> <li>• <i>Leave former member on a list so that you may go after them again in the future</i> Consider sending them mailings from time to time.</li> </ul>	<p>ED</p> <p>ED</p>	<p>12/31/00</p> <p>12/31/00</p>
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## **Appendix C**

### **Information Technology Association—Jordan, (INT@J) Recruitment and Retention Program Proposal**

**Information Technology Association—Jordan, (INT@J)**  
**Recruitment and Retention Program Proposal**

5/13/01

**Draft**

**Recruitment Program**

CEO=Chief Executive Officer      MC=Membership Committee  
MDO=Membership Development Officer

	Responsible	Due Date
<b>A. Preparation</b>		
1. Membership staff <ul style="list-style-type: none"> <li><i>Hire the Membership Development Officer.</i> Part or most of his/her compensation should be based on performance, both for recruitment and retention.</li> </ul>	CEO	8/31/00
2. Membership Committee <ul style="list-style-type: none"> <li><i>Committee members need to participate in recruitment.</i> Besides attending meetings, their participation is necessary for meeting INT@J goals.</li> </ul>	MC	12/31/00
3. Membership goal <ul style="list-style-type: none"> <li><i>14 “working” paid members and 50 “affiliated” paid members by May, 2001.</i> This goal has already been exceeded financially and should be reachable in numbers of members.</li> </ul>	MC	12/31/00
4. Membership development budget and financing <ul style="list-style-type: none"> <li><i>Include a separate amount in the overall budget.</i> This has been done and should be detailed, depending on the annual recruitment and retention plans.</li> <li><i>Keep track of revenues generated by individual members.</i> This can be done by using QuickBooksPro software. It is an excellent way of determining the value of individual members to INT@J and should be taken into account in specific retention efforts, especially with affiliate members.</li> </ul>	MC MDO	9/30/00 12/31/00
5. Membership survey <ul style="list-style-type: none"> <li><i>Conduct a survey of needs and expectations as soon as possible.</i> A personal survey should be done with each of the working members. A faxed, or telephone survey could be done with the affiliate members. Some important issues appear to be: development of quality standards (“Made in Jordan” = quality), improvement of Human Resources, software development methodology, improved member profitability, international matchmaking, outsourcing arrangements, etc. Following up on international leads from the IT Forum could be extremely valuable. The survey should be tested before it is sent out to members.</li> </ul>	MDO	9/30/00

<p>6. Review benefits</p> <ul style="list-style-type: none"> <li>• <i>Develop a very specific list based on a careful examination of the needs and expectations of all members, but particularly the working members.</i> Because financing is so dependent on the continuing support of the working members, it is critical that these benefits conform to their needs and expectations .</li> <li>• <i>Focus benefits on INT@J's uniqueness which is its representation of the IT industry.</i> <i>This competitive advantage should be exploited and continually promoted.</i></li> <li>• <i>Provide benefits that are deliverable.</i> Make sure the association has the capacity.</li> <li>• <i>Provide benefits on a consistent basis.</i> Consistency is a key to maintaining a professional image.</li> </ul>	CEO	10/31/00
<p>7. Review membership categories</p> <ul style="list-style-type: none"> <li>• <i>Consider seriously a third membership level in between working and affiliate.</i> This would attract a group who cannot afford JD5,000 and help to spread the risk of losing working members.</li> <li>• <i>The amount of benefits should be reduced for the lower membership categories.</i> The higher levels pay more and should receive proportionately higher benefits.</li> </ul>	BOARD	12/31/00
<p>8. Membership fees</p> <ul style="list-style-type: none"> <li>• <i>Consider a review of these if there are many complaints.</i> This does not appear to be a problem at this time.</li> </ul>	CEO	12/31/00
<p>9. Review effects of competition and alliances</p> <ul style="list-style-type: none"> <li>• <i>Be ready to adjust to the effects of competition.</i> Although competition does not now seem to be a problem, circumstances can change.</li> <li>• <i>Take advantage of existing alliances.</i> Alliances with JTA, YEA, and JABA should be used as much as possible to build up INT@J.</li> </ul>	CEO	12/31/00
<p>10. Target market</p> <ul style="list-style-type: none"> <li>• <i>Focus on the present market, unless there is a severe limitation to growth, in which case the market should be reviewed.</i> Focusing on those IT industry firms which add value and are interested in the objectives of INT@J is appropriate. However, the fact that this number, although growing, is presently only between 70 and 100, could be limiting in years to come. Thus the definition of the target should be reviewed every year.</li> </ul>	MDO	12/31/00

<p>11. Database of potential members</p> <ul style="list-style-type: none"> <li>• <i>Include those from INT@J events and Ministry lists.</i> Get names from trade exhibits, training events, and seminars, as well as from the Ministry of Industry and Trade.</li> <li>• <i>Request suggestions from present members.</i> Existing members know who would benefit from membership. Consider giving them an incentive or gift if the suggested company becomes a member.</li> <li>• <i>Develop new sources of potential members.</i> These could include: visitors to website, directories from other associations, etc.</li> <li>• <i>Open a computer file for each potential member.</i> This will help keep track of recruitment efforts. Consider using the new AMIR Access database software which will be available in August or September.</li> </ul>	MDO	12/31/00
	MDO	12/31/00
	MDO	12/31/00
	MDO	12/31/00

<b>B. Recruitment activities</b>		
<p>1. Promoting the association</p> <ul style="list-style-type: none"> <li>• <i>Develop a program.</i> This could include trade fairs, mailing promotional materials, hand deliveries, faxes, e-mails, seminars and other events, newspaper advertisements, etc.</li> <li>• <i>Determine how people are discovering INT@J.</i> The office should keep track of how new (and prospective) members found about INT@J. This information will help in judging the effectiveness of various promotional vehicles.</li> <li>• <i>Experiment with different forms of promotion.</i> The effectiveness of each should be tested and more use made of those which bring better results.</li> </ul>	MDO	9/30/00
	MDO	12/31/00
	MDO	12/31/00
<p>2. Deliver information to prospects</p> <ul style="list-style-type: none"> <li>• <i>Develop a prospective members kit.</i> This could include a basic informational brochure, an application form, activities schedule, and an invitation from the Chairman. The kits should be delivered to all additions to the prospect list even before they are personally contacted.</li> </ul>	MDO	9/30/00
<p>3. Telephone calls and emails</p> <ul style="list-style-type: none"> <li>• <i>Contact new additions to the database as soon as possible.</i> Telephone calls are a good way of making an initial determination of which new prospects to concentrate. Emails will help get their attention.</li> </ul>	MDO	12/31/00
<p>4. Personal meetings</p> <ul style="list-style-type: none"> <li>• <i>Hold as many personal meetings as possible.</i> These will usually be necessary to “make the sale.”</li> </ul>	MDO	12/31/00
<p>5. Follow up</p> <ul style="list-style-type: none"> <li>• <i>Follow up all prospects in a systematic way with telephone calls, faxes, e-mails, etc.</i> Tailor each follow up to the particular prospect.</li> </ul>	MDO	12/31/00

<p>6. Close the sale</p> <ul style="list-style-type: none"> <li>• <i>Train membership committee on closing techniques.</i> Everyone involved in solicitations needs to know how to do this.</li> <li>• <i>Ask for payment with the completed application.</i> Sales are not really “closed” until payment is received</li> <li>• <i>Sell benefits.</i> Emphasize those benefits which are important to the prospect.</li> </ul>	MDO	9/30/00
	MC	12/31/00
	MC	12/31/00
<p>7. Recruitment progress</p> <ul style="list-style-type: none"> <li>• <i>Monitor monthly progress and make adjustments.</i> Monitoring should be done systematically to better assure that goals will be met.</li> </ul>	CEO	12/31/00

<b>C. Annual Campaign</b>		
<p>1. Organizing</p> <ul style="list-style-type: none"> <li>• <i>Seriously consider organizing a special campaign.</i> The campaign would be an intense effort over a limited length of time, often 1 month, when resources and efforts are targeted to gaining a number of new members in a limited time. This should be done by the membership committee who must be actively participating in the recruitment efforts. Responsibilities and separate lists of prospects should be divided up among the staff and committee. A special budget should be developed. The time of year should be carefully chosen.</li> </ul>	MC	10/31/00
<p>2. Special incentives</p> <ul style="list-style-type: none"> <li>• <i>Offer something free or heavily discounted.</i> This gives the prospect an extra reason to join during the campaign period--perhaps a discounted or even free membership service.</li> </ul>	MC	10/31/00
<p>3. Promotional media</p> <ul style="list-style-type: none"> <li>• <i>Use a combination of media.</i> Depending on the budget—newspaper, radio, TV, faxes, emails, special deliveries, etc. could be used. This will, hopefully, “saturate” prospective members with messages about INT@J.</li> </ul>	MDO	10/31/00
<p>4. Telephone calls</p> <ul style="list-style-type: none"> <li>• <i>Make calls to all prospects.</i> The membership committee should participate.</li> </ul>	MC	10/31/00
<p>5. Personal meetings</p> <ul style="list-style-type: none"> <li>• <i>Conduct as many personal meetings as possible.</i> Membership committee should participate.</li> </ul>	MC	10/31/00

<p>6. Special activities</p> <ul style="list-style-type: none"> <li>• <i>Schedule at least one special activity each week.</i> These could include seminars, training, social activities, etc. and will help get prospective members into an INT@J setting where they can be solicited and approached individually. These events should also attract new prospects. The membership committee should participate.</li> </ul>	CEO	10/31/00
<p>7. Follow ups</p> <ul style="list-style-type: none"> <li>• <i>Make follow ups on all prospects.</i> These should include telephone calls, faxes, personal calls, emails, etc. The membership committee should participate.</li> </ul>	MC	10/31/00
<p>8. Close the sale</p> <ul style="list-style-type: none"> <li>• <i>Attempt to close the sale on all contacts with prospects.</i> The membership sale is not closed until the fees have been paid.</li> </ul>	MC	10/31/00
<p>9. Review campaign</p> <ul style="list-style-type: none"> <li>• <i>Assess goals, results, organization, promotional effectiveness, activities, etc.</i> This will help in plans for the next campaign.</li> </ul>	MC	11/30/00

<b>D. Completion of recruitment</b>		
<p>1. Approve applications</p> <ul style="list-style-type: none"> <li>• <i>Conduct an informal check of the applicant, if not well known.</i> This will ensure the applicant is legitimate.</li> </ul>	MDO	12/31/00
<p>2. New member packet</p> <ul style="list-style-type: none"> <li>• <i>Develop a special packet for the new member.</i> The packet could include welcoming letter from the Chairman, membership card, membership certificate, annual report, directory of members, information on INT@J, committee preference card, and other activities/ event information.</li> </ul>	MDO	9/30/00

<b>Retention program</b>		
<b>A. Integration of members</b>		
1. Member files <ul style="list-style-type: none"> <li>• <i>Set up a hard copy file for each new member.</i> These should be closely monitored, and coordinated with the member database on the computer.</li> </ul>	MDO	12/31/00
2. Initial meeting <ul style="list-style-type: none"> <li>• <i>Hold personal meeting with new members within first month.</i> Affiliate member could be welcomed as a group, but working members should receive a personal visit. These visits will help INT@J understand the <u>expectations</u> of the new members regarding membership. Meeting expectations is critical to effective retention.</li> <li>• <i>Try to involve the new member on a committee or project.</i> Active members are more easily retained.</li> </ul>	MDO	12/31/00
3. Follow up on participation of new members <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> These should then be entered into the member files.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> </ul>	MDO	12/31/00
4. Follow up on participation of old members; recognize efforts <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> These should then be entered into the member files.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> <li>• <i>Recognition should be given at an annual special meeting and continued in the newsletters.</i> Recognize “Member of the Year,” “Best Website,” and others who have made significant contributions—be creative in thinking of other sorts of recognition. Give out certificates for length of membership—5, 10, etc. years, and also for attendance at INT@J events. Recognize members in the newsletters.</li> </ul>	MDO	12/31/00
5. Personal meeting with all members during the year to review their needs and expectations <ul style="list-style-type: none"> <li>• <i>Meet with each working member, preferably at his/her business, on a quarterly basis.</i> Although most of these meetings should be conducted by the Membership Dept and Committee, the CEO should hold a personal meeting with each working member once a year.</li> <li>• <i>Meet with each affiliate member, preferably at his/her business, once a year.</i> Most of these meetings should also be conducted by the Membership Dept and Committee. The CEO should conduct some of these meetings in order to keep in touch with the membership.</li> </ul>	CEO	12/31/00

<p>6. Communications</p> <ul style="list-style-type: none"> <li>• <i>Make maximum use of the website, with frequent updates.</i> This is certainly to be expected of an IT association and has significant potential for association growth.</li> <li>• <i>Send frequent, individualized communications.</i> Continue the excellent practice of individualizing, for example, emails and “hot news.” These should also be frequent—several per month is good, several per week is even better.</li> <li>• <i>Start a regular newsletter.</i> If this is sent bi-monthly, than a brief one-page bulletin could be sent out monthly to maintain a regular contact with the members.</li> <li>• <i>Develop an annual directory.</i> The directory could include advertisements and be sold to non-members. This will yield additional income. It should be provided to members free of charge.</li> <li>• <i>Issue regular press releases.</i> Press releases to newspapers, TV, and radio should be employed as a low cost way of getting noticed.</li> </ul>	MDO	12/31/00
	MDO	12/31/00
	MDO	9/30/00
	MDO	12/31/00
	MDO	12/31/00

<b>B. Situational analysis</b>		
<p>1. Satisfaction survey</p> <ul style="list-style-type: none"> <li>• <i>Take a satisfaction survey at least once each year.</i> This will enable INT@J to re-evaluate its program and make adjustments. Once again, personal surveys should be done of the working members.</li> <li>• <i>Try different sizes and types of surveys.</i> This will help determine which will yield the best results.</li> </ul>	MDO	12/31/00
	MDO	12/31/00
<p>2. Review of benefits—delivering <u>value</u>?</p> <ul style="list-style-type: none"> <li>• <i>Base this review on the satisfaction survey and other available information.</i> The Membership Committee should make recommendations to the Board on changes in benefits which will help build the membership of INT@J. The views of the working members should be given special consideration.</li> </ul>	MC	12/31/00

<b>C. Renewal process</b>		
<p>1. Timing and methods</p> <ul style="list-style-type: none"> <li>• <i>Develop a series of renewal communications.</i> These could include telephones, letters, emails, faxes, etc. Renewals for working members should be handled carefully and include participation by the CEO.</li> </ul>	MDO	9/30/00
	MDO	12/31/00
<p>2. Follow up on unpaid renewals</p> <ul style="list-style-type: none"> <li>• <i>Use reminder communications.</i> These could include telephones, letters, emails, faxes, etc. Follow up with working members should be done by the CEO.</li> </ul>	MDO	12/31/00

<p>3. Termination of membership for unpaid members</p> <ul style="list-style-type: none"> <li>• <i>Make a Board decision on grounds for termination of affiliate members.</i> It is less expensive to salvage an existing member than recruit a new one. Therefore, care should be taken in terminating unpaid members. Extenuating circumstances may exist for delayed payment. On the other hand, a policy should be set by the Board so that termination decisions are consistent.</li> <li>• <i>The CEO should handle potential termination of working members.</i> These should be handled with ultimate care, on a case-by-case basis, in consultation with the Board.</li> <li>• <i>Consider an inactive status category as an alternative.</i> Inactive status could be considered for members who are having, for example, serious financial problems.</li> </ul>	BOARD	12/31/00
	CEO	12/31/00
	BOARD	12/31/00
<p>D. Exit interviews of former members</p> <ul style="list-style-type: none"> <li>• <i>All non-renewing members should be interviewed.</i> This is a good way to discover problems and a basis for making future adjustments.</li> <li>• <i>Leave former members on a list so that they can be solicited again in the future.</i> Consider sending them mailings from time to time.</li> </ul>	MDO	12/31/00
	MDO	12/31/00

Other comments:

Dealing with INT@J's working members requires extra special consideration in retention efforts because of the large amount of their membership dues relative to affiliate members and also relative to dues in other associations. They are making a sizeable investment and deserve good service. They require more individual attention, recognition, and personal meetings. The CEO needs to be more involved with them than with the other members. It is critical that the association stay current with their needs and expectations, and try to respond quickly in an attempt to meet these needs and expectations.

## **Appendix D**

### **Jordan Trade Association (JTA) Recruitment and Retention Program Proposal**

**Jordan Trade Association (JTA)**  
**Recruitment and Retention Program Proposal**

5/13/01

**Draft**

**Recruitment Program**

MD=Managing Director MC=Membership Committee MM=Membership Manager

	Responsible	Due Date
<b>A. Preparation</b>		
1. Membership staff <ul style="list-style-type: none"> <li>• <i>Consider a salary incentive.</i> Part of the Membership Manager's compensation should be based on performance, both for recruitment and retention.</li> </ul>	MD	9/30/00
2. Membership Committee <ul style="list-style-type: none"> <li>• <i>Re-organize the Membership Committee.</i> This committee needs to include people who will be active, including non-Board members, to assist with membership development efforts. They should review these Recruitment and Retention Programs and also suggest, to the Board, possible changes in benefits.</li> <li>• <i>Committee members need to participate in recruitment.</i> Besides attending meetings, their participation is necessary for meeting JTA goals.</li> </ul>	Board	8/31/00
	MC	9/30/00
3. Membership goal <ul style="list-style-type: none"> <li>• <i>136 paid members by end of 2000.</i> This goal will take some strong efforts by the membership staff and committee since 41 more members will need to be recruited.</li> </ul>	MC	12/31/00
4. Membership development budget and financing <ul style="list-style-type: none"> <li>• <i>Include a separate amount in the overall budget.</i> This should be based on details of the annual recruitment and retention plans.</li> <li>• <i>Keep track of revenues generated by individual members.</i> Use QuickBooksPro software to record these revenues. It is an excellent way of determining the value of individual members to JTA and can help determine the core members.</li> </ul>	MC	10/31/00
	MM	12/31/00
5. Membership survey <ul style="list-style-type: none"> <li>• <i>Conclude the satisfaction survey soon.</i> This has been an excellent activity and appears to have gotten a fairly good response.</li> <li>• <i>Call a few non-responders to check validity.</i> Find out why they did not respond; get their opinions.</li> </ul>	MM	7/31/00
	MM	7/31/00

<p>6. Review benefits</p> <ul style="list-style-type: none"> <li>• <i>Base a review on results of the satisfaction survey and other information.</i> It appears, from the initial response, that members are satisfied in general, although JTA could work on improving the degree of satisfaction. The low dissatisfaction level also indicates that JTA is delivering good service. The new services—market studies, discount card, Internet searches, more networking meetings, the directory on CD-ROM, member flag banner on the website, and books—when combined with the existing services appears to offer a broad choice that should satisfy most members. It is good to hear that JTA has received a favorable response from its publication of the list of services. The association should make sure that they can properly deliver on all these services.</li> <li>• <i>Emphasize the trade facilitation efforts.</i> This ability is a special competitive advantage for the association. It should be exploited and continually promoted.</li> <li>• <i>Provide benefits on a consistent basis.</i> Consistency is a key to maintaining a professional image.</li> </ul>	<p>MC</p> <p>MD</p> <p>MD</p>	<p>8/31/00</p> <p>12/31/00</p> <p>12/31/00</p>
<p>7. Review membership categories</p> <ul style="list-style-type: none"> <li>• <i>Consider new membership categories if the potential for the existing membership level seems to have been exhausted.</i> The present JTA membership represents 85% of the total exports of the country. The non-member 15% are mostly small and medium size firms who cannot afford JTA fees. The number of JTA members at the present level of fees may be reaching a saturation point. A lower level category could include small members and students with minimum benefits and low fees. A medium level could include suppliers with moderate benefits and fees. JTA has discussed this many times and is understandably concerned about the risks of adding lower levels at lower fees, even with lower benefits, for fear of losing revenues from higher level members who switch—but there may be no other choice. JTA will need to stress the extra benefits of the higher levels.</li> </ul>	<p>Board</p>	<p>12/31/00</p>
<p>8. Membership fees</p> <ul style="list-style-type: none"> <li>• <i>Consider a review of these if there are many complaints.</i> This does not appear to be a problem this year.</li> </ul>	<p>Board</p>	<p>12/31/00</p>
<p>9. Review effects of competition and alliances</p> <ul style="list-style-type: none"> <li>• <i>Be ready to adjust to the effects of competition.</i> Although competition now seems to benefit associations in general, circumstances can change.</li> <li>• <i>Take advantage of existing alliances and build new ones.</i> Alliances with local associations should be used as much as possible to build up JTA, contact new prospective members, and become better known. Consider also developing alliances with associations in other countries and use these to organize more trade missions and shows.</li> </ul>	<p>MD</p> <p>MD</p>	<p>12/31/00</p> <p>12/31/00</p>

<p>10. Target market</p> <ul style="list-style-type: none"> <li>• <i>Continue to focus on the present target market.</i> Focusing on Jordanian companies which export, and on some service firms, is appropriate.</li> </ul>	MM	12/31/00
<p>11. Database of potential members</p> <ul style="list-style-type: none"> <li>• <i>Expand the existing database to at least 100 potential members.</i> This number is needed to better assure chances of meeting the membership goal.</li> <li>• <i>Include those from JTA events and other sources.</i> Continue getting names from industrial estates, internet, seminars, Amman Chamber of Industry directory, and training events,</li> <li>• <i>Request suggestions from present members.</i> Existing members know who would benefit from membership. Consider giving them an incentive or gift if suggested company becomes a member.</li> <li>• <i>Develop new sources of potential members.</i> These could include: visitors to website, directories from other associations—such as ACC, support and service firms, etc. The response of non-members to a JTA survey from the recently organized food sector committee indicates another good new source. These new committees not only involve more members but can attract new members through their activities.</li> <li>• <i>Open a computer file for each potential member.</i> This will help keep track of recruiting efforts.</li> </ul>	MM	7/31/00
	MM	12/31/00
	MM	8/31/00
	MM	12/31/00
	MM	12/31/00

<b>B. Recruitment activities</b>		
<p>1. Promoting the association</p> <ul style="list-style-type: none"> <li>• <i>Develop a program.</i> This should continue to include trade fairs, trade missions, website, hand deliveries, faxes, e-mails, training events, workshops, newsletter, and seminars. Newspaper, radio, TV, and co-sponsoring events should also be considered.</li> <li>• <i>Determine how people are discovering JTA.</i> The office should keep track of how new (and prospective) members found about JTA. This information will help in judging the effectiveness of various promotional vehicles.</li> <li>• <i>Experiment with different forms of promotion.</i> The effectiveness of each should be tested and more use made of those which bring better results.</li> </ul>	MM	8/31/00
	MM	12/31/00
	MM	12/31/00

<p>2. Deliver information to prospects</p> <ul style="list-style-type: none"> <li>• <i>Provide a kit for prospective members.</i> The present packet which includes mission statement and objectives, member benefits, fees, Board member list, sector member list, application form, and Exporter Newsletter is good. An invitation from the Chairman could also be included. These should be sent out to all additions to the prospect list even before they are personally contacted.</li> </ul>	MM	7/31/00
<p>3. Telephone calls and faxes</p> <ul style="list-style-type: none"> <li>• <i>Call and fax new additions to the database as soon as possible.</i> Continue present practice of trying to contact the GM or MD and sometimes conduct joint calls with the JTA MD. The telephone calls are a good way of making an initial determination of which new prospects to target. The faxes will get their attention.</li> </ul>	MM	12/31/00
<p>4. Personal meetings</p> <ul style="list-style-type: none"> <li>• <i>Hold as many personal meetings as possible.</i> JTA should continue to do this.</li> </ul>	MM	12/31/00
<p>5. Follow up</p> <ul style="list-style-type: none"> <li>• <i>Follow up all prospects in a systematic way with telephone calls, faxes, e-mails, etc.</i> Continue the present practice of weekly follow up calls. Try to tailor each follow up to the needs of the prospect.</li> </ul>	MM	12/31/00
<p>6. Close the sale</p> <ul style="list-style-type: none"> <li>• <i>Train membership committee on closing techniques.</i> Everyone involved in solicitations needs to know how to do this.</li> <li>• <i>Ask for payment with the completed application.</i> Sales are not really “closed” until payment is received</li> <li>• <i>Sell benefits.</i> Emphasize those benefits which are important to the prospect.</li> </ul>	MM MC MC	9/30/00 12/31/00 12/31/00
<p>7. Recruitment progress</p> <ul style="list-style-type: none"> <li>• <i>Monitor monthly progress and make adjustments.</i> Monitoring should be done systematically to better assure that the annual goal will be met.</li> </ul>	MD	12/31/00

<b>C. Annual Campaign</b>		
<p>1. Organizing</p> <ul style="list-style-type: none"> <li>• <i>Seriously consider organizing a special campaign.</i> The campaign would be an intense effort over a limited length of time, often 1 month, when resources and efforts are targeted to gaining a number of new members in a limited time. This should be done by the membership committee. Responsibilities and separate lists of prospects should be divided up among the staff and committee. A special budget should be developed. The time of year should be carefully chosen.</li> </ul>	MC	10/31/00

<p>2. Special incentives</p> <ul style="list-style-type: none"> <li>• <i>Offer something free or heavily discounted.</i> This gives the prospect an extra reason to join during the campaign period--perhaps a free book or extra Internet search time or meals at a restaurant, or a discount on the membership price.</li> </ul>	MC	10/31/00
<p>3. Promotional media</p> <ul style="list-style-type: none"> <li>• <i>Use a combination of media.</i> Delay scheduling of the AMIR marketing campaign in business newspapers until it could be used with a campaign. JTA's idea of promoting one of services each week, along with a testimonial from a member is a good idea. The advertisements should stress how the potential member will directly benefit from JTA membership. Depending on the budget—faxes, emails, special deliveries, etc. could also be used. The message of the newspaper advertisements, for example, could be repeated in the faxes. This will, hopefully, “saturate” prospective members with messages about JTA.</li> </ul>	MM	10/31/00
<p>4. Telephone calls</p> <ul style="list-style-type: none"> <li>• <i>Make calls to all prospects.</i> The membership committee should participate.</li> </ul>	MC	10/31/00
<p>5. Personal meetings</p> <ul style="list-style-type: none"> <li>• <i>Conduct as many personal meetings as possible.</i> Membership committee should participate.</li> </ul>	MC	10/31/00
<p>6. Special activities</p> <ul style="list-style-type: none"> <li>• <i>Schedule at least one special activity each week.</i> These could include seminars, training, social activities, etc. and will help get prospective members into a JTA setting where they can be solicited and approached individually. These events should also attract new prospects. The membership committee should participate.</li> </ul>	MD	10/31/00
<p>7. Follow ups</p> <ul style="list-style-type: none"> <li>• <i>Make follow ups on all prospects.</i> These should include telephone calls, faxes, personal calls, emails, etc. The membership committee should participate.</li> </ul>	MC	10/31/00
<p>8. Close the sale</p> <ul style="list-style-type: none"> <li>• <i>Attempt to close the sale on all contacts with prospects.</i> The membership sale is not closed until the fees have been paid.</li> </ul>	MC	10/31/00
<p>9. Review campaign</p> <ul style="list-style-type: none"> <li>• <i>Assess goals, results, organization, promotional effectiveness, activities, etc..</i> This will help in plans for next campaign.</li> </ul>	MC	11/30/00

<b>D. Completion of recruitment</b>		
<p>1. Approve applications</p> <ul style="list-style-type: none"> <li>• <i>Conduct an informal check of the applicant, if not well known.</i> This will ensure applicant is legitimate.</li> </ul>	MM	12/31/00

<p>2. New member packet</p> <ul style="list-style-type: none"> <li>• <i>Add a few new items to the packet.</i> The packet should continue to include: the Value Plus discount and membership card, a market study, and membership directory. Consider adding: a welcoming letter from the Chairman, a membership certificate, an annual report, committee preference card, and other activities/ events information.</li> </ul>	MM	8/31/00
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<b>Retention program</b>		
<b>A. Integration of members</b>		
<p>1. Member files</p> <ul style="list-style-type: none"> <li>• <i>Set up a hard copy and computer file for each new member.</i> These should be closely monitored. The new AMIR database should be used when it becomes available in August or September.</li> </ul>	MM	12/31/00
<p>2. Initial meeting</p> <ul style="list-style-type: none"> <li>• <i>Hold personal meeting with new members within first month.</i> This will help JTA understand the <u>expectations</u> of the new member regarding membership. Meeting expectations is critical to effective retention.</li> <li>• <i>Try to involve the new member on a committee or project.</i> JTA should continue adding new committees as needed; these will help provide places for more members to get involved. Active members are more easily retained.</li> </ul>	MM	12/31/00
<p>3. Follow up on participation of new members</p> <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> This is an excellent practice which JTA should continue.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> </ul>	MM	12/31/00
<p>4. Follow up on participation of old members; recognize efforts</p> <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> This is an excellent practice which JTA should continue.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> <li>• <i>Recognition should be given at an annual special meeting and continued in the newsletters.</i> Give out certificates for length of membership—5, 10, etc. years, and also for attendance at JTA events. Recognize “Member of the Year,” “Exporter of the Year,” and others who have made significant contributions—be creative. Involvement of the EU in developing criteria for “Exporter of the Year” and the support of sponsors should enhance the recognition value of the award. The member news in the <u>Exporter</u> is an excellent practice.</li> </ul>	MM	12/31/00
<p>5. Personal meeting with all members at least once per year</p>		

<ul style="list-style-type: none"> <li>• <i>Meet with each member, preferably at his/her business.</i> This excellent practice should be continued. Most of these meetings should be conducted by the MM and Committee; however, the MD should conduct one per week as a way of keeping in touch with the membership.</li> </ul>	MM	12/31/00
<p>6. Communications</p> <ul style="list-style-type: none"> <li>• <i>Make maximum use of the website, with frequent updates.</i> The website should be updated at least monthly.</li> <li>• <i>Communicate with members on a monthly basis.</i> The quarterly <u>Exporter</u> provides good information—putting it on the website is a good idea, although hard copies should still be available for publicity purposes. In addition, a brief one-page bulletin or “awareness” letter should be sent out monthly, by hard copy and email, to maintain a regular contact with the members. The regularity of contact is important to maintain a professional image.</li> <li>• <i>Develop an annual directory.</i> Making this available on CD-ROM is a good idea. Consider including advertisements and selling it to non-members. This will yield additional income. It should be provided to members for no charge.</li> <li>• <i>Issue regular press releases.</i> Continuing to do this on a weekly basis is an excellent practice.</li> </ul>	MM  MM  MM  MM	12/31/00  12/31/00  12/31/00  12/31/00

<b>B. Situational analysis</b>		
<p>1. Satisfaction survey</p> <ul style="list-style-type: none"> <li>• <i>Take a satisfaction survey at least once each year.</i> This will enable JTA to re-evaluate its program and make adjustments.</li> <li>• <i>Different sizes and types of surveys might be tested to determine which yield the best results.</i> Be sure to test each one first so that revisions can be made before it goes out to the whole membership.</li> </ul>	MM  MM	12/31/00  12/31/00
<p>2. Review of benefits—delivering <u>value</u>?</p> <ul style="list-style-type: none"> <li>• <i>Base this review on the satisfaction survey and other available information.</i> The Membership Committee should make recommendations to the Board on changes in benefits which will help build the membership of JTA.</li> <li>• <i>Provide for the needs of the core membership.</i> Make sure that the needs and expectations of those members which are providing the most revenue and are most active are being met.</li> </ul>	MC  MD	12/31/00  12/31/00

<b>C. Renewal process</b>		
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<p>1. Timing and methods</p> <ul style="list-style-type: none"> <li>• <i>Develop a series of renewal communications.</i> These could include telephone calls, a thank you letter from the Chairman, other letters, emails, faxes, etc.</li> </ul>	MM	8/31/00
<p>2. Follow up on unpaid renewals</p> <ul style="list-style-type: none"> <li>• <i>Use reminder communications.</i> These could include telephones, letters, emails, faxes, etc.</li> </ul>	MM	12/31/00
<p>3. Termination of membership for unpaid members</p> <ul style="list-style-type: none"> <li>• <i>Make a Board decision on grounds for termination.</i> It is 6 to 7 times less expensive to salvage an existing member than recruit a new one. Therefore, care should be taken in terminating unpaid members. Extenuating circumstances may exist for delayed payment. On the other hand, a policy should be set by the Board so that termination decisions are consistent.</li> <li>• <i>Consider an inactive status category as an alternative.</i> Inactive status could be considered for members who are having, for example, serious financial problems. They should receive minimum benefits</li> </ul>	Board	9/30/00
	Board	9/30/00
<p>D. Exit interviews of former members</p> <ul style="list-style-type: none"> <li>• <i>All non-renewing members should be interviewed. Why did they join? What did they expect? Were there difficulties?</i> The follow up calls are an excellent practice and should be continued. They can yield valuable information about changes which may be needed.</li> <li>• <i>Leave former member on a list so that you may go after them again in the future</i> Continue sending them mailings from time to time. Finding out that this practice has enabled JTA to re-sign some former members is a good justification for this practice.</li> </ul>	MM	12/31/00
	MM	12/31/00

## **Appendix E**

### **Young Entrepreneurs Association (YEA) Recruitment and Retention Program Proposal**

**Young Entrepreneurs Association (YEA)  
Recruitment and Retention Program Proposal**

5/13/01

**Recruitment Program**

ED=Executive Director    MDO=Membership Development Officer    MC=Membership Committee

	Responsible	Due Date
<b>A. Preparation</b>		
1. Membership committee <ul style="list-style-type: none"> <li>• <i>Increase committee size to at least 7 people.</i> Size of committee should be increased so enough members are available to assist with membership development efforts.</li> <li>• <i>Committee members need to participate in recruitment.</i> Besides attending meetings, their participation is necessary because staff cannot alone meet the YEA goals.</li> </ul>	Board	7/31/00
	ED	8/31/00
2. Membership goal <ul style="list-style-type: none"> <li>• <i>250 paid members by end of 2000.</i> There were 130 paid, plus 29 applications, as of 6/20/00, less than the goal of 185 for this date. 250 is a very ambitious goal; the achievement of it will take maximum efforts by the committee and Membership Development Officer.</li> </ul>	MC	12/31/00
3. Membership development budget and financing <ul style="list-style-type: none"> <li>• <i>A separate amount should be included in the overall budget.</i> This should be based on details of the annual recruitment and retention plans.</li> <li>• <i>Keep track of revenues generated by individual members.</i> Use QuickBooksPro to record these revenues, a very good way to help determine the value of individual members to YEA, especially core members.</li> </ul>	MC	8/31/00
	MDO	12/31/00
4. Membership survey <ul style="list-style-type: none"> <li>• <i>Try different types to determine the most effective.</i> Different lengths and styles of survey instruments should be tried; a one-page form, with boxes to check (tic) answers is sometimes the best. Test the survey before sending it out to members.</li> <li>• <i>Call a few non-responders to check validity.</i> Find out why they did not respond; Were they too busy? Did they not like the survey form? What are their opinions?</li> </ul>	MDO	10/31/00
	MDO	10/31/00

<p>5. Review benefits</p> <ul style="list-style-type: none"> <li>• <i>Hold networking events every month.</i> This is a critical benefit. Members need to be assured that YEA is providing this benefit on a consistent basis.</li> <li>• <i>Conduct roundtables on a regular basis.</i> This is also a critical benefit which must be provided on a consistent basis. Consistency helps maintain a professional image.</li> <li>• <i>Focus on entrepreneur.</i> This is a competitive advantage for the association. Make sure all activities have an entrepreneurial component and all promotions emphasize entrepreneurs. This will help develop an image that YEA is <u>the</u> place for entrepreneurs in Jordan.</li> <li>• <i>Promote member benefits of affiliated programs</i> Maximize the potential benefits of programs such as EMPRETEC and the entrepreneurs handbook.</li> <li>• <i>Consider more informational activities, development of institutional linkages, and a member discount card.</i> These services received high priority ratings on the recent survey. Increased benefits are going to be necessary to ensure achievement of the ambitious membership goals.</li> </ul>	<p>ED</p> <p>ED</p> <p>ED</p> <p>MDO</p> <p>Board</p>	<p>12/31/00</p> <p>12/31/00</p> <p>12/31/00</p> <p>12/31/00</p> <p>10/31/00</p>
<p>6. Review membership categories</p> <ul style="list-style-type: none"> <li>• <i>Seriously consider an upper level corporate membership.</i> This level would be charged higher dues with more benefits than a regular individual membership, permitting several company officials to participate. It would increase the breadth of membership, and the potential for reaching financial sustainability.</li> <li>• <i>Consider a student membership category.</i> This level would be at a reduced rate, with reduced benefits, but would encourage youth to move up to regular membership as they enter the business world. The values of entrepreneurship could also be encouraged.</li> </ul>	<p>Board</p> <p>Board</p>	<p>12/31/00</p> <p>10/31/00</p>
<p>7. Membership fees</p> <ul style="list-style-type: none"> <li>• <i>The Board of Directors should decide the amounts of membership fees.</i> Membership fees should be reconsidered annually. It is presently much too difficult to change them, if needed, since the amounts are stipulated in the by-laws.</li> </ul>	<p>General Assembly</p>	<p>12/31/00</p>
<p>8. Review effects of competition and alliances</p> <ul style="list-style-type: none"> <li>• <i>Be ready to adjust to the effects of competition.</i> Although staff does not feel that any other associations are presently competitors, circumstances can quickly change.</li> <li>• <i>Take advantage of existing alliances.</i> Alliances with JTA, AWTC, and JABA should be used as much as possible to build up YEA, contact new prospective members, and become better known.</li> </ul>	<p>ED</p> <p>ED</p>	<p>12/31/00</p> <p>12/31/00</p>

<p>9. Target market</p> <ul style="list-style-type: none"> <li>• <i>Continue to focus on the prescribed target market.</i> The target of individuals under the age of 50, with an “entrepreneurial spirit,” in any part of country, engaged in any type of business</li> </ul>	MC	12/31/00
<p>10. Database of potential members</p> <ul style="list-style-type: none"> <li>• <i>Request suggestions from present members.</i> This will continue to be the best source of potential members since existing members have the clearest idea of who would benefit from membership.</li> <li>• <i>Include those with any sort of contact with YEA and those who exhibit entrepreneurial qualities.</i> Other sources should continue to be: correspondence, attendees at YEA events, referrals, IT Forum attendees, JEDCO, and names in newspaper stories.</li> <li>• <i>Develop new sources of potential members.</i> These could include: visitors to website, directories from other associations, office building tenants, and credit bureau lists.</li> <li>• <i>Consider increasing the existing database.</i> The existing database of 300 appears to be sufficiently large. However, achieving the goal of 250 by the end of 2000 may require increasing its size. A one-by-one assessment of the 300 names should be conducted to estimate how many are likely to join. Then a decision on adding to the database can be made.</li> </ul>	MDO	12/31/00
	MDO	12/31/00
	MDO	8/31/00
	MDO	8/31/00

<b>B. Recruitment activities</b>		
<p>1. Promoting the association</p> <ul style="list-style-type: none"> <li>• <i>Use present methods, but focus on the more effective ones.</i> Delivery of prospective member kits, faxes, e-mails, city and country maps, “meals on wheels” restaurant menu books, websites, etc. should all be used. The effectiveness of each should be tested and more use made of those which bring better results.</li> <li>• <i>Determine how people are discovering YEA.</i> The office should keep track of how new (and prospective) members found about YEA. This information will help in judging the effectiveness of various promotional vehicles.</li> <li>• <i>Experiment with initial “YEA On the Road” presentations.</i> Some presentations to individual companies should be carried out. Continuation of the presentations should depend on their effectiveness.</li> <li>• <i>Experiment with the “Point Scheme” program.</i> The proposed program to encourage members to promote and market YEA should be developed and tested. Continuation should depend on its effectiveness.</li> </ul>	MC	12/31/00
	MDO	12/31/00
	MDO	8/31/00
	MC	10/31/00

<p>2. Deliver information to prospects</p> <ul style="list-style-type: none"> <li>• <i>Develop a new modular brochure.</i> The basic informational brochure is extremely attractive, but should be re-designed in a modular fashion, with a separate sheet of paper for each item, so that periodic changes in benefits, objectives, etc. can be made without having to re-print the entire brochure. This should reduce costs. A list of Board members should also be included.</li> </ul>	MDO	10/31/00
<p>3. Telephone calls</p> <ul style="list-style-type: none"> <li>• <i>Call new additions to the database as soon as possible.</i> This is a good way of making an initial determination of which new prospects to target.</li> </ul>	MDO	12/31/00
<p>4. Personal meetings</p> <ul style="list-style-type: none"> <li>• <i>Hold as many personal meetings as possible.</i> Personal meetings are one of the best ways to recruit new members, though it is difficult to get busy people to agree to meet. The conduct of these meetings is very important considering the ambitious membership goals of YEA.</li> </ul>	MC	12/31/00
<p>5. Follow up</p> <ul style="list-style-type: none"> <li>• <i>Follow up all prospects in a systematic way with telephone calls, faxes, e-mails, etc.</i> Prospects will often defer a decision so follow up at frequent intervals is necessary. This is especially critical considering YEA's ambitious membership goals.</li> </ul>	MC	12/31/00
<p>6. Close the sale</p> <ul style="list-style-type: none"> <li>• <i>At all YEA activities, solicit non-members to join.</i> This should include one-on-one efforts as well as a public announcement, if appropriate.</li> <li>• <i>"Closings" should be attempted on all follow up activities.</i> Membership people need to remember to do this.</li> <li>• <i>Train membership committee on closing techniques.</i> Everyone involved in solicitations needs to know how to do this.</li> <li>• <i>Ask for payment with the completed application.</i> Sales are not really "closed" until payment is received</li> </ul>	MDO	12/31/00
	MC	12/31/00
	MDO	8/31/00
	MC	12/31/00
<p>7. Recruitment progress</p> <ul style="list-style-type: none"> <li>• <i>Monitor monthly progress and make adjustments.</i> Strong growth of YEA is so critical that recruitment progress should be monitored on a monthly basis and adjustments made to better assure that goals will be met.</li> </ul>	ED	12/31/00

<b>C. Annual Campaign</b>		
<p>1. Organizing</p> <ul style="list-style-type: none"> <li>• <i>Seriously consider organizing a special campaign.</i></li> </ul> <p>The campaign would be an intense effort over a limited length of time, often 1 month, when resources and efforts are targeted to gaining a number of new members in a limited time. This should be done by the membership committee. Responsibilities and separate lists of prospects should be divided up among the staff and committee. A special budget should be developed. The time of year should be carefully chosen.</p>	MC	9/30/00
<p>2. Special incentives</p> <ul style="list-style-type: none"> <li>• <i>Offer something free or heavily discounted.</i></li> </ul> <p>This gives the prospect an extra reason to join during the campaign period--perhaps a discounted membership price or a special service, a free book or dinner at a restaurant, etc.</p>	MC	9/30/00
<p>3. Promotional media</p> <ul style="list-style-type: none"> <li>• <i>Use a combination of media.</i></li> </ul> <p>Depending on the budget—newspaper, radio, TV faxes, emails, special deliveries, etc. could be used. These “bombard” the prospects from a number of directions and hopefully will help them think more about YEA.</p>	MC	10/31/00
<p>4. Telephone calls</p> <ul style="list-style-type: none"> <li>• <i>Make calls to all prospects.</i></li> </ul> <p>The membership committee should participate.</p>	MC	10/31/00
<p>5. Personal meetings</p> <ul style="list-style-type: none"> <li>• <i>Conduct as many personal meetings as possible.</i></li> </ul> <p>Membership committee should participate.</p>	MC	10/31/00
<p>6. Special activities</p> <ul style="list-style-type: none"> <li>• <i>Schedule at least one special activity each week.</i></li> </ul> <p>These could include networking, seminars, training activities, etc. and will help get prospective members into a YEA setting where they can be solicited and approached individually. These events should also attract new prospects. The membership committee should participate.</p>	MC	10/31/00
<p>7. Follow ups</p> <ul style="list-style-type: none"> <li>• <i>Make follow ups on all prospects.</i></li> </ul> <p>These should include telephone calls, faxes, personal calls, emails, etc. The membership committee should participate.</p>	MC	10/31/00
<p>8. Close the sale</p> <ul style="list-style-type: none"> <li>• <i>Attempt to close the sale on all contacts with prospects.</i></li> </ul> <p>The membership sales is not closed until the fees have been paid.</p>	MC	10/31/00
<p>9. Review the campaign</p> <ul style="list-style-type: none"> <li>• <i>Assess goals, results, organization, promotional effectiveness, activities, etc.</i></li> </ul> <p>This information will assist in planning the next campaign.</p>	MC	10/31/00

<b>D. Completion of recruitment</b>		
1. Approve applications <ul style="list-style-type: none"> <li>• <i>Remove requirement for recommendations from members.</i> The present requirement should be ended due to logistical problems. Instead, staff should do some research to assure suitability of applicants.</li> </ul>	Board	9/30/00
2. New member packet <ul style="list-style-type: none"> <li>• <i>Add a few new items to the packet.</i> The packet should include welcoming letter from President, membership card, membership certificate, annual report, directory of members, by-laws, committee preference card, training schedules, and other activities/ event information.</li> </ul>	MDO	7/31/00

<b>Retention program</b>		
<ul style="list-style-type: none"> <li>• <i>Pay particular attention to this program.</i> YEA needs to pay particular attention to retention as the membership grows, since member losses are inevitable. Keeping attrition at a rate below 10 to 15%--which is typical for associations-- will take considerable efforts. At a break-even estimate of 600 members, a 15% loss will be difficult to overcome. Follow up, based on proper maintenance and monitoring of computer databases, will ease the efforts.</li> </ul>	ED	12/31/00

<b>A. Integration of members</b>		
1. Member files <ul style="list-style-type: none"> <li>• <i>Continue practice of setting up a hard copy file for each new member.</i> These should be closely monitored, and coordinated with the member database on the computer.</li> </ul>	MDO	12/31/00
2. Initial meeting <ul style="list-style-type: none"> <li>• <i>Hold personal meeting with new members within first month.</i> This personal contact is important for making the new member feel part of the organization. This will help YEA understand the <u>expectations</u> of the new member regarding membership. This step could also be accomplished through new member orientation meetings.</li> <li>• <i>Try to involve the new member on a committee or project.</i> Active members are more easily retained.</li> </ul>	MDO MDO	12/31/00 12/31/00
3. Follow up on participation of new members <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> These then need to be kept and recorded in the files.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> </ul>	MDO MDO	12/31/00 12/31/00

<p>4. Follow up on participation of old members; recognize efforts</p> <ul style="list-style-type: none"> <li>• <i>Record attendance at all events.</i> These then need to be kept and recorded in the files.</li> <li>• <i>Use exception reports.</i> These can be produced from the computer database. Non-participating members should be contacted.</li> <li>• <i>Recognition should be given at annual special meeting.</i> Give special awards for special contributions, for 100% participation, plus “Member of the Year,” “Entrepreneur of Year,” etc. Be creative in thinking up new categories. As YEA grows older give certificates for length of membership—5, 10, etc. years.</li> </ul>	MDO	12/31/00
	MDO	12/31/00
	MC	12/31/00
<p>5. Personal meeting with all members at least once per year</p> <ul style="list-style-type: none"> <li>• <i>Meet with each member, preferably at his/her business.</i> Although most of these meetings should be conducted by the MDO and MC, the Executive Director should conduct one per week as a way of keeping in touch with the membership.</li> </ul>	MC, ED	12/31/00
<p>6. Communications</p> <ul style="list-style-type: none"> <li>• <i>Exploit the new website.</i> YEA has a membership attuned to use of the Internet, so the website should be developed in a way that members will find useful and interesting. The website should be updated frequently, to encourage member visits, and certain sections should be restricted to members only. This may prove to be a good medium to build member loyalty. The kind of people who YEA wants to add to its list are also likely to be Internet users. If they are impressed with the website and visit frequently it will be easier to solicit their applications.</li> <li>• <i>Start a regular newsletter.</i> This should preferably be both on-line (for ease of distribution) and in hard copy (so copies can be handed out to prospects and others). It needs to be started as soon as possible. If impossible to produce monthly, then it should be distributed on a regular basis—bi-monthly or quarterly—and a brief one-page bulletin could be sent out monthly. Communications of some type, at least once per month, is important to maintain a professional image.</li> <li>• <i>Develop an annual directory.</i> The directory should include advertisements, which will yield additional income, and should be provided to members for no charge. YEA should consider selling a version of it (which has been edited to delete sensitive information) through its website.</li> <li>• <i>Issue regular press releases.</i> Press releases to newspapers, TV, and radio should be employed as a low cost way of getting noticed.</li> </ul>	MDO	12/31/00
	ED	8/31/00
	MDO	12/31/00
	ED	12/31/00

<b>B. Situational analysis</b>		
1. Satisfaction survey <ul style="list-style-type: none"> <li>• <i>Take another survey during the second half of the year.</i> This will enable YEA to re-evaluate its program and make adjustments, increasing the chances of reaching the membership goal of 250.</li> <li>• <i>Different sizes and types of surveys should be tried.</i> This will help determine which yield the best results.</li> </ul>	MDO	8/31/00
	MDO	12/31/00
2. Review of benefits—delivering <u>value</u> ? <ul style="list-style-type: none"> <li>• <i>Base this review on the second half survey and other available information.</i> The Membership Committee should make recommendations to the Board on changes in benefits which will help build the membership of YEA.</li> <li>• <i>Provide for the needs of the core membership.</i> Make sure that the needs and expectations of those members which are providing the most revenue and are most active are being met.</li> </ul>	MC	9/30/00
	ED	12/31/00

<b>C. Renewal process</b>		
1. Timing and methods <ul style="list-style-type: none"> <li>• <i>Seriously consider renewal on an anniversary basis.</i> Renewing on the anniversary date instead end of year should help avoid several problems: discounting membership fees for initial memberships of less than a year; lack of interest by prospective members during November and December; focusing all renewal activities into one short period; and fluctuating cash flow.</li> <li>• <i>Use the proposed series of renewal letters.</i> These include: six months, 30 day advance, invoice/ thank you letter/ suggestion request.</li> </ul>	Board	9/30/00
	MDO	12/31/00
2. Follow up on unpaid renewals <ul style="list-style-type: none"> <li>• <i>Use reminder letters and telephone calls.</i> The series of proposed letters should be used/ past due statements</li> </ul>	MDO	12/31/00
3. Termination of membership for unpaid members <ul style="list-style-type: none"> <li>• <i>Make a Board decision on grounds for termination.</i> It is less expensive to salvage an existing member than recruit a new one—and certainly YEA needs many paid members. Therefore, care should be taken in terminating unpaid members. Extenuating circumstances may exist for delayed payment. One the other hand, a policy should be set by the Board so that termination decisions are consistent.</li> <li>• <i>Consider an inactive status category as an alternative.</i> This would help keep them connected, but they should receive minimum benefits.</li> </ul>	Board	8/31/00
	Board	8/31/00

<p>D. Exit interviews of former members</p> <ul style="list-style-type: none"> <li>• <i>All non-renewing members should be interviewed.</i> These interviews, even if done by telephone, can yield valuable information about changes which may be needed.</li> <li>• <i>Leave former members on a list so that they can be solicited in the future.</i> Consider inviting them to events from time to time.</li> </ul>	MDO	12/31/00
	MDO	12/31/00

<p><u>Other Comments:</u></p>		
<ul style="list-style-type: none"> <li>• In general, YEA appears to be well organized and doing many of the right things; the growth in membership is proof that the concept is well-developed and that the organization is functioning well.</li> </ul>		
<ul style="list-style-type: none"> <li>• The membership program also appears to be well organized and to be doing many of the right things. It has some very challenging goals.</li> </ul>		
<ul style="list-style-type: none"> <li>• YEA should be careful that it does not become too dependent on donors for financial assistance by support of affiliated activities such as EMPRETEC.</li> </ul>		
<ul style="list-style-type: none"> <li>• YEA should be careful that it does not spread its staff “too thin” on activities for which members do not see direct benefits such as development of regional associations, Vision 2020, etc.</li> </ul>		
<ul style="list-style-type: none"> <li>• The projected “break even” estimate of 600 members seems ambitious, considering that AMIR ends in 1-1/2 yrs, before this level is reached. A detailed analysis of YEA should be made during Spring, 2001, to consider re-structuring and re-programming, in order to ensure future sustainability.</li> </ul>		

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## Appendix F

### Documents Read During the Consultancy

- Alan R. Andreasen, Philip Kotler, Strategic Marketing for Nonprofit Organizations, Prentice Hall, Upper Saddle River, NJ, 1996
- Christopher Bonner, "The New and Improved Association Marketing Machine," Association Management, February, 1998.
- Ty E. Gable, "Six Keys to Better Retention," unpublished, 1992
- Larry S. Milner, editor, Business Associations for the 21st Century, Center for International Private Enterprise, Washington, DC, 1997
- Annette E. Petrick, "Getting Members, Keeping Members," Association Management, November, 1991
- Arlene Farber Sirkin and Michael McDermott, Keeping Members: the Myths and Realities, Foundation of the American Society of Association Executives Washington, DC, 1995
- Kerry C. Stackpole, "Made-to-Order Marketing," Association Management, March, 2000
- LeAnn Zotta, 1,001 Ideas for Membership Professionals, Berkshire Press, Yarmouthport, MA, 1998
- \_\_\_\_\_, "More Than 75 Great Membership Ideas," Association Management, August, 1995
- \_\_\_\_\_, "Evaluating Your Membership Program Against These Criteria," Association Management, April, 1996
- \_\_\_\_\_, Jordan Business Association Management Training Program, Center for International Private Enterprise, Washington, DC, 1999

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## Appendix G

### Persons Interviewed

#### AMIR Project

Stephen P. Wade, Program Director  
Zaki Ayoubi, PhD, Business Association Component Leader  
Robert L. Ash, Business Association Specialist

#### Amman Chamber of Commerce, ACC

Mohammad Ammar, Director General  
Majdi Abdel-Qader, head of Certificates of Origin and Visitors Guarantees, Membership Dept  
Mohammad Abu Sa'Adeh, Second Assistant Director General  
Hisham Al-Dweik, Director, Board Members Affairs Dept

#### Amman World Trade Center, AWTC

Yassar Toukan, General Manager

#### Business and Professional Women—Amman, BPWA

Fitna Kalaji, Executive Director  
Malak Mahadin, P.R. Manager, Board member, Membership Committee member

#### Information Technology Association—Jordan, INT@J

Ra'ed A. Bilbessi, Chief Executive Officer  
Yousef Barghouthi, Board and Member Services Committee

#### Jordanian American Business Association, JABA (The American Chamber of Commerce in Jordan)

Raghda Butros, Executive Director  
Jumana Naber, Membership Services Manager

#### Jordan Trade Association, JTA

Halim F. Abu-Rahmeh, Managing Director  
Fareez Barakat, Marketing and Membership Development Manager

#### Young Entrepreneurs Association, YEA

Ghalia Alul, Executive Director  
Ashraf Zeitoun, Membership Development Officer

**Appendix H**

**AMIR Workshop Report, held June 28, 2000**  
**Recruitment and Retention Program**

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**FINAL ATTENDANCE LIST****"Membership Recruitment/Retention Workshop"**

28-Jun-2000

Marriott Hotel, Amman - Jordan

Total Number at Event: 18

<b>Guest Name</b>	<b>Company Name</b>	<b>Business Phone</b>	<b>Gender</b>
Hatem Abdel-Ghani	Institute of Management Consultants of Jordan	(962) 553-0856 /7	M
Majdi Abdul-Qader	Amman Chamber of Commerce	+962 (6) 566-6151	M
Halim Abu-Rahmeh	Jordan Trade Association	+962 (6) 568-5603 /4	M
Moh'd Abu-Sa'adeh	Amman Chamber of Commerce	(962) 566-6151	M
Rawda Abu-Taha	Roda's Design Graphics Advertising & Publishing, Business & Professional Women Amman	+962 (6) 552-3277	F
Bassam Al-Asass	Jordanian Association of Certified Public Accountants	+962 (6) 5669916 /18	M
Ra'ed Bilbessi	INTAJ - Information Technology Association	+962 (6) 5161116	M
Rana Hassouneh	Jordanian American Business Association	+962 (6) 5667640	F
Fitna Kalaji	Business & Professional Women Amman	+962 (6) 551-1647 /8	F
Hani Khalili	Amman Chamber of Commerce	+962 (6) 5666151	M
Nadera Mdanat	Business & Professional Women Amman	+962 (6) 551-1647 /8	F
Yousef Mwaswes	Jordan Society of Tourist & Travel Agents	+962 (6) 463-8599	M
Jumana Naber	Jordanian American Business Association	+962 (6) 5667640	F
Rajai Nasr	Computer Triangle Corp. (CTC)	+962 (6) 569-0444	M
Hanan Sboul	Jordan Association of Manufacturers of Pharmaceuticals and Medical Appliances	+962 (6) 560-5634 / 5691134	F
Ashraf Zeitoun	Young Entrepreneurs Association	+962 (6) 593-1145	M
Robert Ash	AMIR Program	+962 (6) 560-1831 /2/3	M
Tulin Bakeer	AMIR Program	+962 (6) 566-1831	F
Wayne Meyer	AMIR Program	+962 (6) 5661831	M

AMIR Workshop Report, held June 28, 2000  
Recruitment and Retention Program

[Please note: the next portion of the report in *Times New Roman italics* includes a substantial part of the presentation given by the speaker. The copy in **Times New Roman Bold Face** is a substantial part of the comments and suggestions from the participants.]

*Hope that workshop will be practical & useable, will enable you to have programs in writing. The result is that you should be able to take notes and go back and write your own programs. Important considerations while preparing R&R programs:*

- *Meet the needs of members, not the association.*
- *Treat each member as an individual*
- *Emphasize uniqueness of each association, competitive advantage*
- *Treat the BA as if it were a business*

*R&R Program Outline Summary, [1 page Handout A], you may not want to include all of these steps but this will serve as an outline for a starting point.*

*Make your notes on this 10 page copy of an R&R Program Outline which is the same as the overhead transparencies [10 page Handout B]*

*Continuation of CIPE training—10 step marketing, member retention, [1 page Handout C], you should find that the issues mentioned on these 2 lists from the CIPE training are included in these recommended R&R programs.*

*Why people join associations—CIPE, [1 page Handout D],*

**Prestige and power, teamwork, exports, trade relationships, contacts, networking, meet new people, coordinate common interest, information, cooperation, facilitation, pressure—advocacy, uniformity effects, training, social, discounts, loans, community projects, publications, insurance, education.**

*Responsible, due dates columns should be filled in after the steps have been completed.*

Recruitment Program

	<i>Responsible</i>	<i>Due Date</i>
<i>A. Preparation</i>		
1. <i>Membership staff</i> <i>Compensation should be partially determined by performance</i> <b>Some wondered whether this practice was appropriate, but others said that, yes, it should be.</b>		
2. <i>Membership Committee</i> <ul style="list-style-type: none"> <li>• <i>Organize a Membership Committee.</i> <i>Not just Board members</i> <b>Several have Committees already</b></li> <li>• <i>Committee members need to participate in recruitment.</i> <b>None have members or committees which actively participate in the recruitment</b></li> </ul>		
3. <i>Membership goal</i> <i>What is reasonable</i> <i>% of potential database—maybe 1/2 to 1/3 maximum</i>		

<p>4. Membership development budget and financing</p> <ul style="list-style-type: none"> <li>• Include a separate amount in the overall budget. <b>Only a few of the participants have a budget</b></li> <li>• Keep track of revenues generated by individual members. Use QuickBooksPro. This will help determine the core members; part of this determination is based on total revenue produced by members.</li> </ul>		
<p>5. Membership survey, [1 page Handout E]</p> <ul style="list-style-type: none"> <li>• Conduct a satisfaction survey. <u>Handout</u>—Pros—have found short and simple, for smaller associations with no resources to hire a marketing firm, is good because it usually get higher response. You can fax the 1 page to them; they can fax back just the one page. This simple survey can be completed very quickly, just check the boxes, but still has a place for comments and to add extra services. Several choices of answers are given. A due date is given. The boxes are easy to set up in preparing the form. Some important questions are asked: satisfaction with existing services, importance of new services, meeting expectations, and value of membership. And, it is easier to score. Cons—limited number of questions, limited number of answers, less depth of response. Test your survey first, before sending out 1/3 to 1/2 response is fairly good <b>Several have done surveys but have had trouble getting good response, e.g. the JSTTA (travel agents) have only gotten replies from 80 of 400. So maybe the BAs will try some different types of surveys</b></li> <li>• Call a few non-responders to check validity.</li> <li>• Try different sizes and types of surveys to see which brings the best response. Also use for specific subjects like training.</li> <li>• Focus &amp; discussion groups—another way to research—more depth, but harder to narrow conclusions, can be peer pressure among participants, smaller sample</li> <li>• Best is combination of survey and focus group</li> </ul>		

<p>6. Review benefits/services—based on survey and other information [1 page Handout F]</p> <ul style="list-style-type: none"> <li>• List of possibilities Make sure you can deliver on promised services.</li> <li>• Focus on uniqueness of BA, competitive advantage <b>For example, JABA’s contacts with US companies, YEA with entrepreneurs, etc.</b></li> <li>• Provide benefits on a consistent basis—help professional image. I have seen associations which have not been consistent and have lost members’ faith and loyalty. Needs of core membership—these are the ones who contribute the most financially and in participation. Try your best to discover their needs and expectations and provide benefits to meet them. I know one association that was not terribly consistent in its delivery of services, but has survived because it did have the sense to satisfy the important needs of the core members-- advocacy and lobbying.</li> </ul>		
<p>7. Review membership categories –if complaints or growth slows Students, corp vs. individuals, an associate category composed of suppliers or international firms or staff Higher levels—higher benefits, lower, etc. <b>JPMA (pharmaceuticals) has only 15 members with very high fees and seemed interested in considering a new category such as associates.</b></p>		
<p>8. Membership fees –espec if complaints Should cover costs of members servicing, this is an accounting exercise. Higher benefits should pay higher fees <b>Participating accountants agreed that their accountants should be involved in determining this.</b></p>		
<p>9. Review effects of competition and alliances</p> <ul style="list-style-type: none"> <li>• Be ready to adjust to the effects of competition. May be beneficial at present time, overall BA image helped by new voluntary assoc and by AMIR</li> <li>• Take advantage of existing alliances. e.g. Exec Director Roundtable</li> </ul>		
<p>10. Target market (segment) Geography, types of businesses, sectors, size of businesses, individual vs. companies, <b>Financial ability, age, male or female, years of experience, types of business activity, international connections.</b> <b>Comments that they might consider variances to this to increase size of target market.</b></p>		

<p>11. Database of potential members—AMIR software (Arabic/English) Aug/Sept</p> <ul style="list-style-type: none"> <li>• <i>Include those who contact the association.</i> <i>Min Industry/ Commerce</i></li> <li>• <i>Request suggestions from present members on renewal forms, surveys. Consider providing incentives for referrals—perhaps a gift or prize—realizing may be some cultural problems with this.</i></li> <li>• <i>Develop new sources of potential members—website visitors, building tenants, suppliers, international firms, business cards in return for chance to win a prize, etc..</i> <b>Get from other associations; ACC charges JD 25 for diskette of members; lists from activities—participants, referrals from members; lists from newsletters</b></li> <li>• <i>Open a computer file for each potential member.</i> <b>Can use ACT 2000 in combination with WinfaxPro 9.0 to keep files in both Arabic and English.</b> <b>Do need this database integrated with financial software—using QuickBooksPro mean double entries.</b> <b>Some of the associations have limits on potential databases because of the size of their industry or type of business; thus they might consider new membership categories, e.g. suppliers.</b></li> </ul>		
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<b>B. Recruitment activities</b>		
<p>1. <i>Promoting the association--marketing</i></p> <ul style="list-style-type: none"> <li>• <i>Develop a program.</i> <i>Hand delivery, couriers. A mixture is usually best.</i> <b>Brochures; media—newspapers, TV, magazines; websites; seminars; activities; expos; workshops; international conferences; social meetings; advocacy; emails; mail; visits;</b></li> <li>• <i>Determine how people are discovering the association.</i> <i>Ask prospects, new members</i></li> <li>• <i>Experiment with different forms of promotion.</i> <i>Find out what is most effective. My experience is that it is difficult to predict what will be most effective for a particular organization, so you need to try different approaches, keep track of the effects of each, then come to a decision on which are most cost-effective.</i></li> </ul>		

<p>2. <i>Deliver information to prospects</i></p> <ul style="list-style-type: none"> <li>• <i>Develop a kit for prospective members. Brochure should include: mission statement, activities, committees, Board members, basic information, work program for year, objectives. Suggest print brochure “modular” with each item on separate page—saves on reprinting costs.</i></li> </ul> <p><b>Charter, annual report, newsletter, information, schedule of activities, application, invitation from Chairman, brochure, map</b></p>		
<p>3. <i>Telephone calls</i></p> <ul style="list-style-type: none"> <li>• <i>Call new additions to the database as soon as possible. Then you can make an initial determination of best prospects on which to focus. Or use faxes or emails.</i></li> </ul>		
<p>4. <i>Personal meetings</i></p> <p><i>Hold as many personal meetings as possible—important.</i></p>		
<p>5. <i>Follow up</i></p> <ul style="list-style-type: none"> <li>• <i>Follow up all prospects in a systematic way</i></li> </ul> <p><i>Tailor to the individual prospect</i> <i>Telephone, fax, email, , letter</i></p> <p><b>Don’t give up!!!</b> <b>Personal calls—get an appointment</b></p>		
<p>6. <i>Close the sale</i></p> <ul style="list-style-type: none"> <li>• <i>Train membership committee on closing techniques.</i></li> <li>• <i>Ask for payment with the completed application, sales is not closed until paid</i></li> </ul> <p><b>Several asked whether payment should be expected with the application.</b></p> <ul style="list-style-type: none"> <li>• <i>Sell benefits</i></li> <li>• <i>Ask for the sale, completed application and payments—but avoid a question that can be answered with yes/no—a question that begins with “when,” or “where,” or “how,” etc.--make it with the presumption that prospect has decided to join. Examples:</i></li> </ul> <p><b>“When can I come back to get the application and payment?”</b> <b>“Where shall I leave the discount card [which presumes application and payment will be ready]?”</b></p> <p><b>Make suggestions.</b> <b>Split payments—accepted by some associations, but more bookkeeping and followup.</b></p>		
<p>7. <i>Recruitment progress</i></p> <ul style="list-style-type: none"> <li>• <i>Monitor monthly progress and make adjustments.</i></li> </ul> <p><b>YEA is already doing this.</b></p>		

<p><i>C. Annual Membership Campaign (or Membership Drive)</i>  <i>Cannot depend only on staff--must have participation of members, especially the Membership committee</i>  <b>None of the participating association have done these, but there appeared to be interest in trying a campaign.</b></p>		
<p>1. <i>Organizing</i></p> <ul style="list-style-type: none"> <li>• <i>Seriously consider organizing a special campaign. Intense effort---limited time, usually one month</i>  <i>Resources/efforts are targeted, XX members in limited time</i>  <i>Divide responsibilities and lists, Membership committee should take charge. Campaigns can get quite complicated and take months to organize—so start yours in a simple way to see whether it is effective. Choose the time of year carefully—avoid potential problems with company budgets, vacations, other distractions.</i></li> <li>• <i>Special budget</i>  <b>If spending too high, won't have any money for rest of the year; however, if goal reached than may be worthwhile. But normally, funds should be kept for the rest of the year.</b></li> </ul>		
<p>2. <i>Special incentives</i></p> <ul style="list-style-type: none"> <li>• <i>Offer something free or heavily discounted.</i>  <i>Service, dues, publication, research, dinners, trips, gifts, etc.</i></li> </ul>		
<p>3. <i>Promotional media</i></p> <ul style="list-style-type: none"> <li>• <i>Use a combination of media.</i>  <i>Newspapers, magazines, radio, TV, faxes, emails, meetings, trade shows, website, mail, hand delivery, couriers. Hope to result in “saturating” potential members such as Coca-Cola might do when coming out with a new product.</i></li> </ul>		
<p>4. <i>Telephone calls</i>  <i>Make calls to all prospects.</i></p>		
<p>5. <i>Personal meetings</i>  <i>Conduct as many personal meetings as possible.</i></p>		
<p>6. <i>Special activities</i></p> <ul style="list-style-type: none"> <li>• <i>Schedule at least one special activity each week.</i>  <i>Seminars, training, networking, social activities that will interest people in attending.</i>  <i>Provides setting for more efficient solicitation, can combine general solicitation (if appropriate) plus 1 on 1 with prospects.</i>  <b>Set aside time to solicit at all activities, some associations have missed golden opportunities, e.g. 300 people at YEA anniversary.</b>  <i>Will also attract non-members</i></li> </ul>		
<p>7. <i>Follow ups</i></p> <ul style="list-style-type: none"> <li>• <i>Make follow ups on all prospects.</i>  <i>Telephone, fax, emails, personal</i></li> </ul>		

8. <i>Close the sale</i> <i>Attempt to close the sale on all contacts with prospects.</i>		
9. <i>Review campaign</i> <ul style="list-style-type: none"> <li>• <i>Assess goals, results, organization, promotional effectiveness, activities, etc..</i></li> </ul> <i>Will help in plans for next campaign</i>		

<i>D. Completion of recruitment</i>		
1. <i>Approve applications</i> <ul style="list-style-type: none"> <li>• <i>Conduct an informal check of the applicant, if not well known.</i></li> </ul> <i>To ensure legitimacy of applicant</i>		
2. <i>New member packet</i> <ul style="list-style-type: none"> <li>• <i>Also provide committee preferences, invitation. Should preferably be done at a personal meeting.</i></li> </ul> <b>Welcome/thank you letter from Chairman; certificate; gift; brochure; directory; bylaws; identification card; discount card; member list—if by email is more useable; list of advantages; annual report; activities schedule</b> <i>Actually start of the Retention Program</i>		

<i>Retention program</i> <ul style="list-style-type: none"> <li>• <i>Recruiting a new member costs 6 to 7 times more than retaining an existing member</i></li> <li>• <i>Many association don't do a good job with this</i></li> <li>• <i>Don't take member for granted</i></li> <li>• <i>Build 1 to 1 relationship</i></li> <li>• <i>Treat each member individually</i></li> <li>• <i>This builds loyalty</i></li> <li>• <i>Loyal members actually require less service, have fewer demands, will pay premiums</i></li> <li>• <i>Try to meet every need of the core members</i></li> </ul> <b>JPMA (pharmaceuticals) has only 15 members with very high fees. It is crucial that they have a high quality retention program since they can hardly afford to lose even 1 member. INT@J is similar.</b>		
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<b>A. Integration of members</b>		
<p>1. <i>Member files</i></p> <ul style="list-style-type: none"> <li>• <i>Set up a hard copy file for each new member and computer file. Use ACT or the new Access database.</i></li> </ul>		
<p>2. <i>Initial meeting</i></p> <ul style="list-style-type: none"> <li>• <i>Hold personal meeting with new members within first month.</i></li> <li>• <i>Or new member orientation meetings</i></li> <li>• <i><u>Expectations</u>--find out what benefits they expect to receive; this is most important.</i></li> </ul> <p><i>Try to involve on a committee or a task force or project. Some people prefer short-term involvement rather than staying on a committee for years. If there is more than 1 membership level, be sure to get all levels involved. I have seen in many organizations that early involvement is a key to longer-term participation.</i></p>		
<p>3. <i>Follow up on participation of new members</i></p> <ul style="list-style-type: none"> <li>• <i>Record attendance at all events and put in files.</i></li> </ul> <p><b>Keep both paper and computer files? At first, yes, but switch to computer files once certain that discipline is sufficient. Must backup files once a day. But still may keep hard copies of important documents.</b></p> <p><i>Use exception reports, shows where to concentrate.</i></p>		
<p>4. <i>Follow up on participation of old members; recognize efforts</i></p> <ul style="list-style-type: none"> <li>• <i>Record attendance at all events and put in files.</i></li> <li>• <i>Use exception reports, shows where to concentrate. If participation lessens, are they starting to lose interest or what?</i></li> </ul> <p><b>Meet their needs; contact them; give them personal attention; add new activities; certain privileges for members only.</b></p> <ul style="list-style-type: none"> <li>• <i>Recognition should be given at an annual special meeting and in newsletter and in annual report.</i></li> </ul> <p><i>Length of service—5, 10, ...yr; attendance; Member of the Year, Exporter of the Year, special contributions to BA, be creative in finding other ways to recognize. Many associations do much of this.</i></p> <p><b>Make sure all are treated fairly and equally, special publicity should not be seen as “advertising” certain companies.</b></p>		
<p>5. <i>Personal meeting with all members at least <u>once per year</u></i></p> <ul style="list-style-type: none"> <li>• <i>Meet with each member, preferably at his/her business. Perhaps as part of renewal process</i></li> </ul> <p><i>Executive Director should meet <u>one member per week</u> in order to keep in better personal touch with the membership.</i></p>		

<p>6. <i>Communications</i></p> <ul style="list-style-type: none"> <li>• <i>Communicate at least <u>once a month</u>--this helps maintain professionalism. Associations which are sporadic about communications lose member support and loyalty. Determine which types of communications members prefer—I have seen here than one association prefers newsletters via email and another has tried email but finds hard copy is better. If you do email newsletter, print some copies to hand out to prospective members.</i></li> </ul> <p><b>Circular, emails, telephone, faxes, social, meetings, seminars, workshops, websites, newsletters, annual reports, committee meetings, tournaments</b></p> <p><b>Very small associations like JPMA (pharmaceuticals) are in contact with members on almost a daily basis.</b></p> <ul style="list-style-type: none"> <li>• <i>Develop an annual directory, advertising, sell to non-members, N/C to members, income producer.</i></li> <li>• <i>Issue regular press releases—radio, TV, newspapers—try to do once/ month.</i></li> </ul> <p><i>Make use of your website, if appropriate. Frequent updates, links to members</i></p>		
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<b>B. Situational analysis</b>		
<p>1. <i>Satisfaction survey—duplicate of Recruitment Program</i> <i>Take a satisfaction survey at least once each year.</i></p>		
<p>2. <i>Review of benefits—delivering <u>value</u>? This is very important.</i> <i>Base this review on the satisfaction survey and other available information. Membership Comm considers, sends recommendations to Board</i></p>		

<b>C. Renewal process</b>		
<p>1. <i>Timing and methods</i></p> <ul style="list-style-type: none"> <li>• <i>Develop a series of renewal communications—tel, fax, email—possibly tie this with the annual visit.</i></li> </ul> <p><b>YEA discusses their set of communications at 30 days prior to renewal and then on renewal.</b></p> <p><b>Possible discount for early renewal.</b></p> <p><b>Include letter from Chairman/President and reminder of benefits.</b></p>		
<p>2. <i>Follow up on unpaid renewals</i></p> <ul style="list-style-type: none"> <li>• <i>Use reminder communications—tel, fax, emails—few days, weekly, bi-weekly, monthly, etc.</i></li> </ul> <p><b>YEA discusses their set of communications at 30 days past due and then on a monthly basis.</b></p> <p><b>Some associations charge fines for late payment.</b></p>		

<p>3. Termination of membership for unpaid members</p> <ul style="list-style-type: none"> <li>• This is always difficult issue for BAs, they want to keep their numbers high</li> <li>• Make a Board decision on grounds for termination. Care should be taken, could be extenuating circumstances. On the other hand, policy should be set so that termination decisions are consistent</li> </ul> <p><b>Some associations have strict policies: 3 warnings over 3 months and then suspension. Another, a 1 year extension ACC allows up to 2 years</b></p> <ul style="list-style-type: none"> <li>• Consider an inactive status category as an alternative. <b>Start fresh or catch up dues after no payment for a period of time? This will vary with the association, the circumstances, and the competitive situation.</b></li> </ul>		
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<p>D. Exit interviews of former members</p> <ul style="list-style-type: none"> <li>• All non-renewing members should be interviewed. Why joined? What expected? Difficulties? What wanted? Can yield valuable information about changes which may be needed. Executive Director should personally see core members.</li> <li>• Review services</li> <li>• Go after again later</li> </ul>		
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10 to 20% leave, US BA average is 11-12%

Only a small % complain, 1 out of 10, or fewer?

Information for ordering Keeping Members book [1 page Handout G],

Information for ordering 1001 Ideas for Membership Professionals book [1 page Handout H],

**Seemed to be interest in ordering these books.**

Website Do's and Don'ts for associations [1 page Handout I]

**AMIR Workshop, June 28, 2000**  
**Recruitment and Retention Program Outline Summary**

**Handout A**

Recruitment Program

- A. Preparation
  - 1. Membership staff
  - 2. Membership Committee
  - 3. Membership goal
  - 4. Membership development budget and financing
  - 5. Membership survey
  - 6. Review benefits
  - 7. Review membership categories
  - 8. Membership fees
  - 9. Review effects of competition and alliances
  - 10. Target market (segment)
  - 11. Database of potential members
- B. Recruitment activities
  - 1. Promoting the association
  - 2. Deliver information to prospects
  - 3. Telephone calls
  - 4. Personal meetings
  - 5. Follow up
  - 6. Close the sale
  - 7. Recruitment progress
- C. Annual Campaign
  - 1. Organizing
  - 2. Special incentives
  - 3. Promotional media
  - 4. Telephone calls
  - 5. Personal meetings
  - 6. Special activities
  - 7. Follow ups
  - 8. Close the sale
  - 9. Review campaign
- D. Completion of recruitment
  - 1. Approve applications
  - 2. New member packet

Retention program

- A. Integration of members
  - 1. Member files
  - 2. Initial meeting
  - 3. Follow up on participation of new members
  - 4. Follow up on participation of old members; recognize efforts
  - 5. Personal meeting with all members at least once per year
  - 6. Communications
- B. Situational analysis
  - 1. Satisfaction survey
  - 2. Review of benefits—delivering value?
- C. Renewal process
  - 1. Timing and methods
  - 2. Follow up on unpaid renewals
  - 3. Termination of membership for unpaid members
- D. Exit interviews of former members

**Recruitment Program**

	Responsible	Due Date
<b>A. Preparation</b>		
1. Membership staff		
2. Membership Committee <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>		
3. Membership goal		
4. Membership development budget and financing <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>		
5. Membership survey <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>		

<p>6. Review benefits</p> <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>		
<p>7. Review membership categories</p>		
<p>8. Membership fees</p>		
<p>9. Review effects of competition and alliances</p> <ul style="list-style-type: none"><li>•</li><li>•</li></ul>		

10. Target market (segment)		
11. Database of potential members <ul style="list-style-type: none"><li>•</li> <li>•</li> <li>•</li> <li>•</li></ul>		

<b>B. Recruitment activities</b>		
1. Promoting the association <ul style="list-style-type: none"><li>•</li>          <li>•</li>          <li>•</li></ul>		
2. Deliver information to prospects <ul style="list-style-type: none"><li>•</li></ul>		
3. Telephone calls <ul style="list-style-type: none"><li>•</li></ul>		

4. Personal meetings <ul style="list-style-type: none"><li>•</li></ul>		
5. Follow up <ul style="list-style-type: none"><li>•</li></ul>		
6. Close the sale <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li></ul>		
7. Recruitment progress <ul style="list-style-type: none"><li>•</li></ul>		

<b>C. Annual Campaign</b>		
1. Organizing <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>		
2. Special incentives <ul style="list-style-type: none"><li>•</li></ul>		
3. Promotional media <ul style="list-style-type: none"><li>•</li></ul>		
4. Telephone calls		
5. Personal meetings		

6. Special activities <ul style="list-style-type: none"> <li>•</li>   <li>•</li> </ul>		
7. Follow ups		
8. Close the sale		
9. Review campaign <ul style="list-style-type: none"> <li>•</li> </ul>		

<b>D. Completion of recruitment</b>		
1. Approve applications <ul style="list-style-type: none"> <li>•</li> </ul>		
2. New member packet <ul style="list-style-type: none"> <li>•</li> </ul>		

<b>Retention program</b>		
<b>A. Integration of members</b>		
1. Member files <ul style="list-style-type: none"><li>•</li></ul>		
2. Initial meeting <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>		
3. Follow up on participation of new members <ul style="list-style-type: none"><li>•</li><li>•</li></ul>		
4. Follow up on participation of old members; recognize efforts <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>		

5. Personal meeting with all members at least once per year <ul style="list-style-type: none"><li>•</li> <li>•</li></ul>		
6. Communications <ul style="list-style-type: none"><li>•</li> <li>•</li> <li>•</li> <li>•</li></ul>		

<b>B. Situational analysis</b>		
1. Satisfaction survey		
2. Review of benefits—delivering value?		

<b>C. Renewal process</b>		
1. Timing and methods <ul style="list-style-type: none"><li>•</li></ul>		
2. Follow up on unpaid renewals <ul style="list-style-type: none"><li>•</li></ul>		
3. Termination of membership for unpaid members <ul style="list-style-type: none"><li>•</li><li>•</li></ul>		

<b>D. Exit interviews of former members</b> <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>		
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**Continuation from CIPE training:**

**10 –Step method of Marketing an Association**

1. Compile a specialized target list.
2. Build a database.
3. Plan how to build a solid relationship.
4. Use many different channels of communication.
5. Close the sale at every opportunity.
6. Offer tangible products or services.
7. Create networking opportunities.
8. Stress the value of your organization.
9. Keep records of contacts.
10. Do not give up.

**Membership Retention**

1. Costs more to recruit than maintain.
2. Begins when sale is made.
3. Focus on new members.
4. Get new members involved.
5. Say thank you.
6. Ask for renewal of dues.
7. Develop plan for past dues collection.

Used with the permission of The Center for International Private Enterprise

Why people join associations

- Monetary gains from contact with new customers, clients, or allies
- Networking opportunities with other business associates
- Industry or community involvement
- Projects that improve the community or the industry
- Unity
- Political contacts and information
- Pro-business participation in government
- Opportunity to influence public policy
- Valuable information sources
- Latest technology information
- Publications
- Services and benefits such as insurance
- Economies of scale
- Personal ambitions to accomplish individual goals
- Educational programs
- Personal and professional growth and development
- Professional and personal recognition
- Corporate and personal-image improvement
- Feeling of belonging to a group
- Social functions

Used with the permission of The Center for International Private Enterprise

**Sample Membership Satisfaction Survey**

**Handout E**

Please check (tic) (✓) your answers inside the proper box  
 and then fax this survey to XYZ Association, Fax: 99999999  
 Please return on or before July 15, 2000  
 Thank you very much!

**1. How satisfied are you with the following existing services?**

	High Satisfaction	Moderate Satisfaction	Low Satisfaction	Dissatisfied	No Opinion
Workshops					
Industry Information					
Seminars					
Trade shows					
Membership Directory					
Newsletter					
Annual report					

Comments \_\_\_\_\_

**2. How important would it be to you for the association to offer the following new services?**

	Very Important	Important	Slightly Important	Not Important	No Opinion
Social Events					
Networking meetings					
Trade missions					
Research					
Member Discount Card					
Internet Website					

Comments \_\_\_\_\_

**3. Is the association meeting your expectations?**

	Very much	Moderately	Very little	No	No opinion
Meeting expectations					

Which expectations are not being met? \_\_\_\_\_

**4. Do you feel, overall, you are getting good value for your membership dues?**

	Very good	Good	Some	No	No opinion
Getting value					

Comments \_\_\_\_\_

(Optional) Name \_\_\_\_\_ Company \_\_\_\_\_

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## List of potential Business Association Member Services

## Handout F

Advocacy with government	Information library
Annual report	Internet access
Arbitration	Internships
Audio recordings	Legislative information
Books	Mailing lists
Bulletins	Market reports
Buyers guides	Matchmaking
Catalogs	Member exhibits at trade shows
Certification	Networking meetings
Consulting projects	Newsletters
Contract services	Office services
Convention advertising	Partnerships
Convention materials	Product testing
Convention records	Professional education
Conventions	Property rental
Directory of members	Research
Directory of suppliers	Retail association products
Discount card	Seminars
Employee placement services	Social events
Employment testing	Special events
Foundation	Sponsorships
Government regulations information	Supplier memberships
Group purchasing	Surveys
Industry awards	Trade facilitation
Industry database access	Trade leads
Industry databases	Trade missions
Industry publications	Trade shows
Industry reports	Training
Industry software	Training facilitation
Industry speakers	Video recordings
Industry standards	Website for association members
Industry tours	Workshops

Excerpts from: A.F. Sirkin and M.P. McDermott, Keeping Members, Foundation of the American Society of Association Executives, Washington, DC, 1995.

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**Recommended Book on Retention Program**

**Handout G**

Keeping Members: the Myths and Realities

Authors: Arlene Farber Sirkin and Michael McDermott

Copyright 1995

Foundation of the American Society of Association Executives

1575 Eye Street, N.W.

Washington, DC 20005-1168

[www.asaenet.org](http://www.asaenet.org)

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**Recommended Book on Membership Development Program**

**Handout H**

1,001 Ideas for Membership Professionals

Author: LeAnn Zotta

Copyright 1998

Berkshire Press

70 Ellis Circle

Yarmouthport, MA 02675

Tel: 508-362-0479

Fax: 508-362-3596

Email: lzotta@ultranet.com

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## Websites Dos and Don'ts

## Handout I

### Dos:

- List key information about the association.
- Reply to submissions made on the website.
- Request email addresses on the site.
- Give members first chance to see news.
- List controversial or current topics for discussion by the members.
- Permit searching of information such as previous publications.
- Make the site interactive.
- Promote the site.
- Keep site up to date.
- Members should register
- Educate members in use of site.
- Show members how to use skills acquired on the site.
- Use skilled technical advisors to set up site.
- Make sure staff knows and uses site.
- Include appropriate linkages.
- Use site as a service center.

### Don'ts:

- Don't set up if members will not make good use of the site.
- Don't set up unless the setup and maintenance costs justify the investment.
- Don't let non-members have access to all parts of the site
- Don't plan to have all organizational functions available just on the website; some will still need hard copies.
- Don't make all parts of association publications freely available on the site to non-members.

Excerpts from: Leann Zotta, 1001 Ideas for Membership Professionals, Berkshire Press, Yarmouthport, MA, 1998