

NATIONAL ASSOCIATION OF HEALTH UNDERWRITERS

Membership Blitz Tips and Resources

*An Intense One Day Effort Focused on
Increasing Membership*



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Membership Blitz: How to be Successful

What is a membership blitz?

A membership blitz is a one-day event that is held to increase an association's membership. A blitz works well because it is a complete team effort. A group of members volunteer to dedicate 2-3 hours on a specific day to make calls at a prearranged location to recently lapsed and prospective members in your area. We have seen as many as 25 new members recruited during one 2-hour period!

The membership chairman is the team leader of the event. This person puts the team of volunteers together, chooses a location, time and date, and keeps the team of volunteers motivated through out the course of the blitz day.

Why hold a membership blitz?

- A membership blitz is a proven method of recruiting new members and retaining recently lapsed members.
- By generating new members, your chapter's size will increase thereby increasing your visibility.
- New membership recruitment and retention ideas will be created during the course of the day.
- Increase dues revenue for your chapter.
- This is a great way to recruit new enthusiastic and energetic members and volunteers for your chapter.

Sample Timeline: Below is a sample timeline for organizing the membership blitz. Details on each action item are given starting on page 3.

<u>When</u>	<u>Action</u>
5 to 6 weeks prior	Secure prospect list. Secure your facility (find a place to hold the blitz). Determine if you will be using cell phones or office phones. Contact carriers for financial support: <ul style="list-style-type: none">• Food (breakfast and lunch)• Prizes (items or money)
4 weeks prior	Recruit volunteers - ask volunteers to bring at least 5 member prospects each. Send volunteers a form to fill in 5 names – Encourage them to put it by their phone to jot down names of potential members while they are working. Establish prize list. Order prizes (if applicable).

2 weeks prior	Re-confirm volunteers – remind them to collect at least 5 names and phone numbers of prospective members. Collect prizes.
1 week prior	Re-confirm volunteers – remind them to bring their prospect list of at least 5 names.
Day before blitz	Pack office supplies and other items for the event, such as: Pens, paper, markers, name tags, prizes, napkins, paper plates, food items, beverages, etc.
Day of blitz	Arrive early to set up.

Sample Budget: Below is a sample of how much to expect to spend on the blitz. However, securing donations for these items will negate the chapter from incurring any expenses.

FOOD	\$50 - \$100
PRIZES	\$50 - \$100
ROOM	\$50 - \$100

Secure the Calling Lists

The member prospect list is the most crucial part of the membership blitz. Not only do you need to obtain the lists well in advance of your blitz (4-6 weeks), but you will also need to cross-reference each list with your entire member database. You don't want to call and ask a dedicated NAHU member to join!

Here are a few good list sources:

- Managing General Agents
- Insurance Carriers
- NAHU – lapsed member lists, prospective or temporary member lists, etc.

Once you have your lists, create a master excel spreadsheet that includes the contact name, company name, and telephone numbers. Depending on the size of the local or state chapter you should have approximately 20 names to give each volunteer caller. You should have two separate lists, one comprising prospects and the other comprised of lapsed members.

Secure Your Facility

- First, go to your carriers or large agencies for support. Ask them if you could have their sales floor for the day. Typically their sales force are not in the office, they are out selling and if you can preplan for this event, they will be more than happy to support you and your efforts. All you have to do is ask!
- Ask if anyone in your chapter has office space available such as a conference or board room that could be used.
- It is possible that someone in your chapter has a house that would work for this event. Gather around the kitchen and dining room table and make your calls!
- If you cannot find a carrier or agency, go to a hotel and set up a banquet room with telephones – it is recommended to use a U-shaped table format. If this is

your best option, ask your carrier for support through contributions as this will help offset the cost.

- If you are unable to get a location that has several phones available, remember to have your volunteers bring their cellular phones.

Secure Your Volunteers

- Begin rallying your volunteers at least 4 weeks in advance. You want to give ample notice so people can schedule time to dedicate for the event. A good place to start is with your local board. Remember, an entire day is generally not necessary, ask for a half day or couple of hours commitment.
- For those individuals who are unable to attend the blitz, ask if they will be available to pick up membership applications throughout the day. It would be good to have at least 2 runners available to pick up membership applications and checks.
- Lastly, put a call out to your membership for volunteers. Remember, this is also a good way to recruit new volunteers to the chapter.

The number of volunteers needed for the blitz will depend on the size of the chapter; however, more is better. The first task for each volunteer is to prepare a list of at least 5 new prospective members to contact. Possibly send them a pre-made excel sheet that they can use to set by their phones and over the next 2-3 weeks they can jot the names down of prospects.

Prizes

Since your colleagues and fellow members are fairly competitive, you can really have fun with the blitz! Set up a few different contests that will encourage your volunteers to recruit new members. Below are a few contest ideas for prize awards:

- The volunteer who brings the most prospective member names to the blitz.
- The volunteer who recruits the first new member.
- The volunteer recruiting the most new members.
- The volunteer who retains the most members.
- The volunteer who “closes the most deals” (i.e. gets the most paid new members before the end of the blitz).
- The volunteer who stays at the blitz the longest.

The idea is to keep the contests going throughout the whole day – this will really help to keep the level of excitement up and encourage your volunteers.

Examples of prizes – gift certificates, golf balls, and cash.

This is another area that you should ask for financial support from your carriers. Advertise this in your mailings to the prospective members and to your current membership through your newsletters.

Food

Ask a carrier representative who cannot attend the blitz to bring in donuts and juice to kick off your day. Do the same for lunch. Usually you will have a place that will prepare brown bag lunches or order pizza.

Prepare EVERYTHING for your Blitz Day Volunteers

The day of the blitz, you will need to arrive early to prepare everything before your volunteers arrive.

- You want your volunteers to be greeted with a warm welcome and a big “thank you” for volunteering. In addition, give a little time for the volunteer to get acquainted with their area. Make sure to have a person designated to train the callers. Then, let the calling begin!
- Have a script ready and make sure to have one available for each volunteer and have one placed at each calling station. There are sample telephone scripts available on page 7.
- Each call list should contain two lists – a lapse member list and a prospective member list. The first list, the NAHU lapse member list, should indicate when the member joined and when their membership lapsed. It may be a good idea to call the lapse members first. Also, there should be a separate script for your two groups, a script for lapses and a script for prospective. As a reminder, sample scripts are provided on page 7. The second list is a list of prospective members. This list will be comprised of approximately 15-20 names that you gathered from your carrier, MGA lists, etc.
- Remember to double check your carrier and MGA lists. You should have one master list that you create that only has 15-20 names per sheet. This is very important as it will determine the success of your blitz.

Each call station should have:

- Telephone scripts, including the membership dues amounts for your state and local chapter.
- 10 faxable membership applications.
- Call lists (NAHU lapsed member list & the prospective member list).

Tips for Training your Blitz Day Volunteers:

A good place to start is to ask each volunteer why they became a NAHU member. Write the responses on a large board so all can see. This will give the volunteers some ideas to use when they speaking to prospects and encouraging them to join.

It is a good idea to have one person designated to train the callers. This will help free up the time of the membership chairperson to attend to other responsibilities.

When training your callers, make sure to have them leave messages when they get voicemail. Often times, these prospects will call back. Maybe not all of them, but most will. Include the telephone number of the facility, your chapter contact number or the cellular telephone number on the script for return calls. *It is a good idea to designate one person to handle all return calls.*

Encourage your volunteers to talk about why they are members of the association. Rather than have them read through a list of benefits, let them talk about what is important to them. If a potential member believes that the caller is being honest (and actually sees value to being a member) they will be more likely to join.

Make sure to have a good paper trail from the volunteers. This makes the follow-up process so much easier.

Follow up

This is the area that tends to be overlooked. A person is not a member until they have paid their membership dues or given us their information for monthly draft. Follow up on those people that say they will mail or fax the application and check. Also have a person that will handle all of the callbacks. Once the final numbers have been tallied, give a report to the general membership in the newsletter or at the next monthly meeting.

Most of All - Have Fun and Enjoy the Day!

Running a membership blitz is a lot of work but it is also very rewarding. Remember to have some fun, get creative, have prizes, and keep your volunteers energized throughout the day. By everyone working together we are sure to grow NAHU membership!

Sample Phone Script and Helpful Hints

When making the telephone calls, it is important to convey a sense of urgency. TODAY, TODAY, TODAY. We are holding the blitz TODAY. I am volunteering TODAY. Make it seem like TODAY is the only day they can join!

1. Before you call

Read the entire phone script. Familiarize yourself with what you will need to know and say. Read the name out loud to practice pronouncing it.

2. Identify yourself

"Hello, this is (your name) from the (National/local) Association of Health Underwriters."

3. Encourage them to join.

"I am calling today about membership in the (your association name). As an important part of the health insurance industry here in (your state or area), I would like to invite you to join."

4. Talk about the benefits:

"NAHU offers many valuable benefits."

(Hint: Be as honest as possible. Talk about the benefits that mean the most to you, things that you think are the most valuable. If you sound like you believe in what you are saying, they are more likely to join).

- **Top-Quality Representation** – Each year, NAHU spends over \$1,000,000 to present your interests before Congress and regulatory agencies. NAHU employs an outstanding team of experienced professionals to ensure your needs come first.
- **Information Straight From the Source** – When something happens that affects your business, you'll hear about it first from NAHU. We talk to the power brokers you need to hear from – and pass the information on to you.
- **Moving Ahead** – Health care reform continues to be the leading issue on Capitol Hill and in statehouses around the county. The combined strength of 19,000+ NAHU members means your voice will be heard. Through NAHU, you have the power to decide the future of your industry. Don't give up your power – renew your NAHU membership today.
- **Note** – There also needs to be some local flavor in the script. This gives the state and local chapters a chance to brag about what you have accomplished, local events and conferences, and what is occurring on the local legislative front.

5. Close the sale:

“If you would like to join, I can take your information right over the phone.”

Also, remember to offer them payment options:

“Would you like to charge that to your credit card? We also have a monthly draft program that enables you to pay your membership dues in low monthly payments.” The goal is to get a payment NOW. We accept:

- Visa
- MasterCard
- American Express
- Discover

If paying by credit card, you need to get the following information:

- Name as shown on card
- Card number
- Expiration date

If paying by bank draft, offer to fax a bank draft form or you can take the information over the telephone and complete the form. Make sure to confirm or ask the following information:

- Name with spelling
- Company
- Address
- Phone
- Fax
- E-mail
- Home Address (so we know their Congressional district)
- Local chapter
- Bank routing number
- Bank account number
- Bank name

6. If they are a former member:

Ask if they would like to rejoin! If they would, follow the instructions beginning with number 5 above. If they don't want to rejoin, remember to ask them why.

Some common reasons for quitting, and possible responses

REASON	RESPONSE
I don't have time	Most chapters have just one meeting a month, lasting just one to two hours. Even if you don't actively participate, you still benefit from our legislative activity and from our monthly HIU magazine.
It costs too much	If you'd like, you can pay by monthly bank draft for just \$??? per month. Dues for your chapter are just \$??? per year.
I'm a member of NAIFA/AHIAA	NAIFA/AHIAA and NAHU work together on a number of projects, but only NAHU is dedicated solely to your interests as a health insurance professional.

If yes, but met with a complaint – Try to address that concern.

- If something that was done by staff person in the past, explain that we've reorganized our operations to so that we can better serve members.
- If related to legislative positions, explain that the Legislative Council and Board of Trustees must endorse positions that represent the interests of the majority of our members. Note that all positions are reviewed annually, and that his/her opinions would be considered during the upcoming review. In fact, this is a great reason to belong because their voice will be heard!
- If it is something you don't feel you can address, refer the caller to NAHU headquarters or get their number and have NAHU call them directly.
E-mail: membership@nahu.org
Telephone: 202-552-5060.

7. If the answer is no, encourage them to join in the future:

“I sincerely hope you'll keep NAHU membership in mind. If cost is an issue, I'd be happy to set up a payment plan that will let you pay a small amount each month.”

If they still want to do not want to join - “Please feel free to call me with any questions. Here's my phone number just in case.” Give them your phone number.

8. Thank them for their time.

“Thanks for taking a few minutes to talk with me.”