

# **THE** SEVEN TOUCHES **PROGRAM**

**CONNECTS YOU TO SUCCESS**



NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS

## Background:

The Seven Touches of Membership (Seven Touches) is based on a study done by association researcher Dave Nygaard of Nygaard Research. During the fall of 2004, NAIFA-California State Executive David Dellinger had the opportunity to review the initial results of this study. The point of the study was to find out if certain “automatics” could be established in “any” membership-based organization to increase renewals, particularly among first-year members, whose commitment to long-term membership may remain uncertain. It is a study that crosses all lines of membership organizations, including trade associations, professional associations, civic groups and non-profits.

The 2004-05 National Membership Committee (NMC) reviewed the findings of the study and concluded that the implementation of a Seven Touches program could significantly improve NAIFA’s membership retention. Subsequently, the program was adopted as an official membership marketing strategy. This document is the NAIFA Federation guide to successfully implementing the Seven Touches Program.

The Program consists of a series of interconnected membership and recruitment activities initiated at the national, state and local levels. It should be viewed as a system for “proactive” membership retention, and the Nygaard study suggests that it will NOT work unless it is launched thirty to sixty days after a new member joins. It emphasizes the idea that we get only one chance to make a first impression. We cannot easily change someone’s impression of us if we only contact them at renewal time, almost 12 months after they joined. Retention is crucial. The best member is the one we already have. In addition, to expand the effectiveness of the program, Touches 6 and 7 should continue for all members even after their first year of membership.

## The Goal of Seven Touches

The goal of the Seven Touches Program is to surprise and WOW your members by telling them how much they mean to you. The key to this is: personalize... personalize... personalize. The underlying theme of this concept is a reversal of practice for most membership organizations. Rather than selling the value of our organization to members, the Seven Touches concept reverses this process by telling new members how much we value them... first! In fact, the Seven Touches program reaches out to members at least seven times during their first ten months of membership. Most members come to us perceiving value in our group, but their impressions can be fleeting if they are not personally affected. If a deep personal connection is made, we have a member for life.

**PEOPLE WANT TO BE WHERE THEY ARE PERSONALLY VALUED, AND THEY WILL STAY A LIFETIME.**



**Touch 1a:** **Email welcome** — New members receive a 2-3 line email from the NAIFA president thanking them for joining, welcoming them to NAIFA and advising them that they will receive a New Member Welcome Kit within two weeks.

**Time Period:** As soon as NAIFA–National processes the payment.

**Responsible Party:** NAIFA–National

**Touch 1b:** **Member Services email** — New members receive a 2-3 line email from the director of member services that introduces them to the Member Service Center and the NAIFA website, [www.naifa.org](http://www.naifa.org).

**Time Period:** One week after Touch 1a above.

**Responsible Party:** NAIFA–National

**Touch 2:** **State association email and mailing** — New members receive a 2-3 line email from the state association (preferably the membership chair) welcoming them to the state association and advising them that they will receive state association information (e.g., newsletters and member directories) soon. Call the member if no email address is on file.

**Time Period:** One week after Touch 1b above.

**Responsible Party:** State Association

**Touch 3:** **New Member Welcome Kit from NAIFA–National** — Each new member receives a national New Member Kit containing a membership card, a description of member benefits, legislative advocacy information and the member’s NAIFA web site login ID and password.

**Time Period:** Two weeks after Touch 1a above.

**Responsible Party:** NAIFA–National

**Touch 4:** **New Member Welcome Kit from the state association** — Each new member receives a state New Member Kit containing a description of member benefits and state-specific legislative advocacy information.

**Time Period:** Two weeks after Touch 1a above.

**Responsible Party:** State Association

**Touch 5:** **Face-to-Face Meeting** — The local sends a current member or members to briefly meet face-to-face with the new member. During the 10- to 15-minute meeting, representatives welcome the new member and answer any questions about association benefits, meetings, etc. The representatives thank the new member for joining. See Sample 1, page 4.

**Time Period:** Within thirty days of Touch 1a above.

**Responsible Party:** Local Association

**Touch 6\*:** **Phone call** — The local calls each new member to ask how things are going with his or her NAIFA membership. Any questions or concerns should be addressed immediately. See Sample 2, page 5.

**Time Period:** Six months after Touch 1a above.

**Responsible Party:** Local Association

**Touch 7\*:** **Phone call** — A local leader calls the member to again ask how things are going with his or her NAIFA membership. In addition, remind the member that his or her renewal will arrive soon. Ask the member to return it as soon as possible. Any questions or concerns about membership should be addressed immediately. See Sample 3, page 6.

**Time Period:** Ten months after Touch 1a above (75 days before the member’s renewal date).

**Responsible Party:** Local Association

## Summary

The structure of the Seven Touches Program is simple, as long as we proactively trigger the contacts before it is too late. The point of the program is to ensure a minimum of seven “automatic” contacts. In the Nygaard study’s initial findings, organizations that implemented the seven touches on time and in a professional manner with a personal touch (not one that was mechanical and rushed) improved their chances of renewing a member by 65%. Organizations that creatively expanded the seven touches to nine or more improved their chances by 80%. NAIFA continues two of the touches even after the members’ first year.

## NAIFA Resources

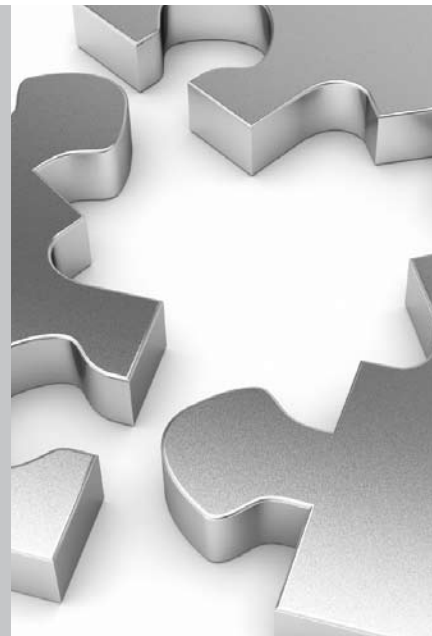
The goal of the National Membership Committee (NMC) is to dramatically improve NAIFA membership retention rates using the Seven Touches Program as a central strategy. NAIFA–National is fully committed to fulfilling its obligations in the program (Touches 1a, 1b and 3). National will also provide a Seven Touches Program worksheet for state and local associations to track their Touches for each new member (See Samples 4 and 5 on page 7) and sample scripts for new member communications. In addition, NAIFA-National will send association leaders weekly notification of new members who received Touches 1a and 1b. These resources will help state and local associations implement and maintain the program.

You should consider your NMC liaison as your Seven Touches Program “consultant.” He or she will directly assist you with questions or concerns regarding the implementation of the program. For example, the structure and size of your association may dictate that you adjust the Seven Touches model presented here before you can implement it effectively. Your NMC Liaison can assist you with making any necessary adjustments.

### Making it Work:

The Seven Touches Program is strongly driven by the timeliness of the First Touch from NAIFA-National. Use the following pointers to help ensure that the First Touch is sent in the most efficient manner:

- Don’t hold membership applications. Send applications with payment to NAIFA-National as soon as you have received them.
- Encourage members to sign up for the monthly bank draft/credit card program.
- Include payment with the application. Checks should clearly identify the name of the member to whom the dues payment applies. Credit card information must be complete (card name, card number, expiration date and signature).
- Payments sent by mail must be addressed to: NAIFA Membership Lockbox, P.O. Box 758658, Baltimore, MD 21275-0001.



# APPENDIX

## SAMPLE 1

### TOUCH #5 — LOCAL WELCOME CALL AND MEETING INVITATION

*Is this John Smith? Hi John, this is (insert your name) with (insert your NAIFA local association name). Do you have a moment? (If “yes,” proceed; if “no,” ask when would be a good time to call back.)*

*I just wanted to give you a call to thank you for joining (insert your NAIFA local association name). As you may know, NAIFA is the association of choice for those in the insurance and financial services business. I would like to congratulate you for joining NAIFA’s 58,000 members whose efforts protect and preserve our business.*

*I also would like to personally invite you to our next monthly meeting. It will be held on (insert date, time and location). Our speaker will be (insert if known), and we’re expecting a large turnout. I will be there to answer any questions you may have about our association and all of the different things we do, including our legislative activities, community service and more. Can you make the meeting? (Respond accordingly, if “no”) I’m sorry you won’t be able to be there, but mark your calendar for the next one which will be (insert date, time and location). I hope to see you.*

*Do you have any questions that I can answer right now, or is there any other way I can help? (Answer or help as indicated.)*

*I look forward to seeing you at (the meeting or at the next meeting date), which again, will be (insert date, time and place) and if I can help, please do not hesitate to contact me. You can reach me at (insert your phone number). Once again, congratulations on joining your professional association.*

## SAMPLE 2

### TOUCH #6 — LOCAL MID-YEAR CHECK-IN CALL.

(If this is a call back by the same contact person, just identify yourself and go on to paragraph 2) If a new person: *Is this John Smith? Hi John, this is (insert your name) with (insert your NAIFA local association name). Do you have a moment to speak on the phone? (If “yes,” proceed; if “no,” ask when would be a good time to call back.)*

*I wanted to check in with you to get your feedback on your association experience so far. (At this point, solicit information about the member’s experiences and impressions of the chapter. The questions below, as well as any you may choose to add depending on how the conversation goes, can provide you with insight as to this member’s perceived value of the association.)*

- *Have you been to any meetings this year?*
- *Did you enjoy them? Were they informative?*
- *Do you like the venue?*
- *Was it worth your time to come and hear the speakers?*
- *You know, our local has a number of committees, and we are always looking for talented people. Do you have any interest in serving on one of our many committees, such as (insert list of committees — suggest membership first!)?*
- *How do you like our national publication, Advisor Today?*
- *Did you know that every month in Advisor Today, there are a number of great sales ideas and practice management tips to help you improve your bottom line?*
- *Are you receiving the legislative updates, such as GovWatches and GovAlerts, and other important emails from NAIFA–National? (On this one, if they say “no,” get or verify their email address and update NAIFA accordingly.)*
- *Did you know that our state association has been working on our behalf? In the last 6 months, our state association was successful in (insert topic of state interest.)*
- *Is there anything we can do to help you in your practice?*

*Thank you very much for your time, and I look forward to seeing you at the next meeting. It will be held (insert date, time and place), and if I can help, please do not hesitate to contact me. You can reach me at (insert your phone number) or (email).*

## SAMPLE 3

### TOUCH #7 — LOCAL PRE-RENEWAL THANK YOU.

(If this is a call back by the same contact person, just identify yourself and go to the next paragraph. If a new person: *Is this John Smith? Hi John, this is (insert your name) with (insert your NAIFA local association name). Do you have a moment to speak on the phone? (If “yes,” proceed; if “no,” ask when would be a better time).*

*John, I just wanted to call on behalf of the association and thank you again for making the decision to join NAIFA. Hopefully, you’ve seen the value of membership over the past year; and if you’re not already serving on one of our committees, I hope you’ll consider doing so very soon.*

*As you know, NAIFA renews its dues on a yearly basis. According to our records, you paid your dues for the past year via (insert payment method here — depending on method, see below).*

**Monthly Credit Card** – In an effort to offer expanded payment options, NAIFA will charge your account on the 5th of every month. Payments will be made in 12 easy monthly installments. Note: the monthly credit card program accepts only VISA and MasterCard. We take AMEX for full payments, only.

**Bank Draft** – When your renewal comes up, you will be automatically renewed via your bank draft plan. NAIFA will send you a thank-you letter for your renewal, along with your new membership card.

**Annual Credit Card** – You will receive your renewal statement in the mail from NAIFA very soon. You have the option of paying with your credit card again by completing and returning the form they will send you, or you can renew online at [www.naifa.org](http://www.naifa.org). Not only is it easy to do, but I would be happy to help you.

**Annual Check** – You will receive your renewal statement in the mail from NAIFA very soon. You have the option of renewing in the same manner by simply putting your check in the envelope provided, and returning it to NAIFA with your dues renewal card. You may also renew with a credit card if that’s more convenient. Just return your renewal in the mail with your credit card information enclosed or renew online at [www.naifa.org](http://www.naifa.org). Not only is it easy to do, but I would be happy to help you.

*Is there anything else we can do to help you advance your practice and improve your overall bottom line? (Answer and/or help as indicated).*

*Thanks again for your membership and your time today. I look forward to seeing you at the next meeting, and if I can be of any help, please do not hesitate to contact me. You can reach me at (insert your phone number) or (insert your email address).*

**SAMPLE 4**

DOWNLOADABLE SEVEN TOUCHES TRACKING SHEET

NAIFA Seven Touch Worksheet						
					Report Date:	March 4, 2005
NAIFA Touch Schedule						
Enter State Association Here					Complete items in BLUE	
Enter Local Association Here						
		Touch #1 - NAIFA Welcome Email		Touch #3 - NAIFA New Member Kit		
New Members Name		Date Joined	Date Due	Date Complete	Due Date	Date Complete
Joe Member		1/1/2004	1/31/2004	1/18/2004	1/31/2004	1/19/2004
			#VALUE!		#VALUE!	
			#VALUE!		#VALUE!	
			#VALUE!		#VALUE!	
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Visit [www.naifa.org](http://www.naifa.org) to download this tracking sheet to your computer. Follow the steps below to get started.

- 1) Save the document on your computer.
- 2) Open it and enter the new member's name on the New Member Tab. It will carry over automatically to the State Touch Tab and the Local Touch Tab. In addition, the due dates for the Touches are automatically calculated and put into the appropriate cells.
- 3) On the New Member Tab, enter the people at the state and local levels who will be responsible for the respective touches. The information will carry over to all tabs.
- 4) Update the spreadsheet as touches are completed. When a member joins your association, NAIFA–National will send an email alert containing the name and contact information for the new member to the membership chair. Alerts are sent weekly.

Manage the **SEVEN TOUCHES** from your desktop!



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