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**BUILDERS**  
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# **Membership Retention Best Practices**

**July 2020**



*The following best practices are a collection of activities and information contributed by local Pennsylvania home builder associations. The PBA Membership Task Force recommends local associations, along with their Board of Directors, review these offerings and determine how they can adopt these tactics to retain and grow membership.*

*The recommendations are broken down into four categories (**Onboarding, Structured Communications, Ambassadors, Participation**). Finally, the contributing locals have broken down their individual **Blueprints for a Successful Membership**.*

*For more detailed information on any of the suggestions, please contact Rick Cochran at [rcochran@pabuilders.org](mailto:rcochran@pabuilders.org). We will put you in direct contact with the Executive Officer(s) who submitted information connected to your specific request.*

### **Task Force Members**

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# Onboarding

***Retention starts Day 1, and the first few months are crucial. Local associations should aim to get the new member involved in at least one new activity, and the on boarding process is an opportunity for two-way learning.***

## **Special benefits or events offered by the HBA for new members?**

- Discount on a booth at a home show.
- Business logo placement on HBA website.
- New member benefit seminar plus overview of ways to get involved.
- Invitation to attend an event for free.
- Quarterly new member orientation.
- Discount on advertising in membership directory.
- One-on-one orientation sessions.
- Discount on education classes.
- Listing on HBA website membership directory.
- Opportunity to win a free booth at the HBA home show.

## **What's the most important information/activity to share during an orientation event?**

- Have current, seasoned members speak of how membership has impacted their businesses and why they have continued to be part of the HBA.
- The significance of the 3-in-1 membership.
- Explanation of member benefits, website logins, contact information – include any exclusive benefits offered by the local association (marketing assistance, HBA discounts, etc.).
- Annual calendar of events and how to get involved.
- Local, state, and national advocacy efforts and resources.
- Match the new member with a mentor (someone they either know or is in the same industry).
- Cater the presentation to the audience. (If it is a combination of builder and associate members, select three important benefits for each. If the gathering is associate members, tailor the details for them.)

- Promote the culture of the HBA and membership.

### **What types of materials can the HBA provide to make members feel good about joining?**

- Summary of member successes due to membership.
- Printed membership directory (plus online member-only directory).
- Member packet/handbook including local, state, and national member benefits – and how to access them.
- Welcome letter from president, membership chair, and/or executive officer.
- Report on legislative/advocacy successes.
- Copy of the local by-laws.
- Exclusive access to industry presentations and resources.
- Personal emails to all new members with links for state and national website login access for member-only information.
- Calendar of events and personal invitations to events.
- Local HBA, PBA, and NAHB logo stickers.

### **What kind of new member data is collected by the HBA?**

- Accurate email addresses and contact information (including who to contact for marketing, billing, website, home shows, social media, etc.).
- Who referred them to the HBA.
- What are new members looking for from their membership and why did they join.
- How does the member want to receive HBA communication.
- Social media handles (usernames).
- Photos that could be used for promotion on printed materials, HBA website, and social media platforms.
- Company size.



## Structured Communications

***You don't want the first communication from the HBA to new members to be a renewal notice! The easiest thing the association can do to help with retention is to ensure the association and its happenings are in front of members.***

**What communication strategies could the HBA implement to improve overall retention in the first month of their membership journey? First six months? First year?**

- Three-letter process. First is a welcome letter from president (sent within one month of membership). At three months, a letter is sent requesting involvement in a committee. Third letter is before year ends and encourages membership renewal.
- Subscribe member to a weekly newsletter.
- Have either the EO or membership committee members reach out to a new member if they have not yet attended an event.
- Make an initial phone call or in-person visit to the member to welcome them.
- Close to renewal date, make sure the member is aware of the HBA's activities and the value of their membership.
- Always ask for feedback from members.
- One to two weeks after joining, send a membership packet and an invitation to an upcoming event.
- Conduct six-month and first-year surveys/call for questions.

**Examples of the single most effective communication tools used by local HBAs.**

- Member-to-member contact
- Email
- Regularly scheduled emails through Constant Contact so opens and clicks can be tracked
- Facebook, Instagram, and LinkedIn
- Punch List that includes Government Affairs updates, news from agencies
- Phone calls
- Individual emails

## **Tips to use social media as an HBA's member communication strategy?**

- Promotion of all events.
- Promote individual members on social media platforms.
- Always follow and tag everyone associated with the local association.
- Post-event promotion with photos and videos on social media.
- Use social media to thank members and welcome new members.
- Post at least three times per week.
- Share members' posts.
- Be consistent with posting and use the scheduling assistant.
- Keep it all fresh and current!

## **Tactics for cutting through the daily email clutter.**

- Use the same "sender" and "from" names.
- Be sure the content is relevant.
- Adopt an email schedule (but know it is okay to skip an email if the content is not pertinent to the members).
- Be straightforward in the subject line, use eye-catching subject lines.
- Provide a sense of urgency – if needed.
- Use bold or italic (or highlight) fonts in the body of the text to make important information stand out.
- Use key words and timing.
- Segment your mailing list and only send emails to the members who need to receive them (Builders, Associates, Home Show Participants, etc.)
- Subject lines can include "Re [HBA Name]" so members know it is not spam.
- Produce different types of emails and schedule them (for example, events newsletter and general information newsletter sent on opposite weeks).



# Ambassadors

*Mentoring exposes new members to opportunities specific to their needs and pairing them with an ambassador or buddy system will help make them feel more at home.*

## Who are the “Ambassadors” at an HBA?

- Board of Directors
- HBA committee members
- Membership committee
- Executive leaders
- HBA staff
- Long-term members
- Pair up members at events
- Individuals who recruited the member
- Spike Club members
- Active members

## Types of training and resources provided to Ambassadors.

- Brochure of benefits from local, state, and national levels.
- Handouts provided by PBA and NAHB.
- Member benefit seminars.
- Education through communication on an ongoing basis including member benefits and advocacy.
- Regular meetings with membership committees to keep them updated on benefits and activities.
- Development of a “Little Black Book of Benefits”.
- Flyer of membership benefits including member return on investment (ROI), committee descriptions, and summary of events.

## Ways to make new members feel comfortable when they attend their first event.

- Have the EO or another staff member walk the member around an event and introduce them to other members.
- Announce any new members that are in attendance from the podium.

- Allow the new member to speak for a few minutes at an event to inform others of what their company offers.
- Designate new members at events with yellow ribbons on their name badges.
- Make sure all board members and membership committee members are introduced to the new members.
- Ask new members who they are interested in connecting with and make those introductions.
- Send an email to the new members and be sure to ask questions to learn about their business and their needs.
- Notify membership committee and leadership, in advance, which new members are going to be attending an event.
- Make sure new members have a special badge when they attend an event so that other members can introduce themselves and make them feel welcome.
- Assign a mentor or a member to the new member and have them introduce them to others.

## Participation

*Getting members engaged in HBA events or service to the association is an important strategy to rev up retention. Providing positive service experiences can turn members into HBA champions.*

**What are the opportunities for people to get involved at an association?**

- Committees
- Board of Directors
- Recruiter
- Event volunteers
- Charity initiatives
- Home expo
- Professional Women in Building
- Task forces
- What micro-communities could be created?
- Associates Council
- Young Professionals Network



## **Tips for training members to serve on a committee or board of directors.**

- Have committee chairs devote time with new committee/board members.
- Have EO/staff members devote time with new committee/board members.
- Develop a packet of information that includes goals and expectations along with policies and procedures and the committee mission.
- Allow potential new committee/board members to attend a meeting to get a better feel for the expectations and duties.
- Set up annual training meetings.
- Provide a list of acronyms and a breakdown of committees and benefits.
- Pair the new member up with a mentor who is already serving on the committee/board.

Tools that can be used to determine member satisfaction with the engagement opportunities at the HBA

- Short, easy surveys.
- One-on-one conversations.

# Blueprint for a Successful Membership

*Think about what a new member's ideal first year could look like for them to get the most of their membership so that they remain members for many years to come. What would you recommend a member do in the first...*

## 30 Days

- Actively participate in a social meeting.
- Introduce themselves at the next event.
- Meet with the association staff and get information about benefits.
- Tell the association staff what they want from a membership.
- Explore the local, state, and national websites.
- Review benefits and ask any questions you may have.
- Review the membership directory.
- Join the local and state social media platforms.
- Create profiles/logins on the local, state, and national data registries.
- Add the membership logos on your website.
- Read all the emails that come from your membership.
- Sign up for discount programs.
- Attend a new member orientation.

## 60 Days

- Volunteer to be on a committee.
- Sponsor (or be present) at an event.
- Determine which other members you would like to be connected with.
- Determine which member benefits your company should be using.
- Send business news to HBA to be promoted on social media.
- Sign up for the builder rebate program.
- Attend an HBA-organized benefits seminar.
- Connect with the HBA and provide any feedback you have to offer.



## **90 Days**

- Check in with the HBA staff and let them know if you need anything.
- Bring a business associate or a colleague to an educational or networking event.
- Submit entries to the local HBA awards program.
- Look at the possibility of joining a state committee.
- Consider a slot on the Board.
- Attend a PBA meeting.
- Consider sponsorship opportunities within the HBA.
- Actively participate in at least one major event.



**If you have any additional suggestions that can be used by other local associations in their member retention plans, please be sure to send them to Rick Cochran at [rcochran@pabuilders.org](mailto:rcochran@pabuilders.org). We will be sure to share them with the Executive Officers.**

***Thank you***

