

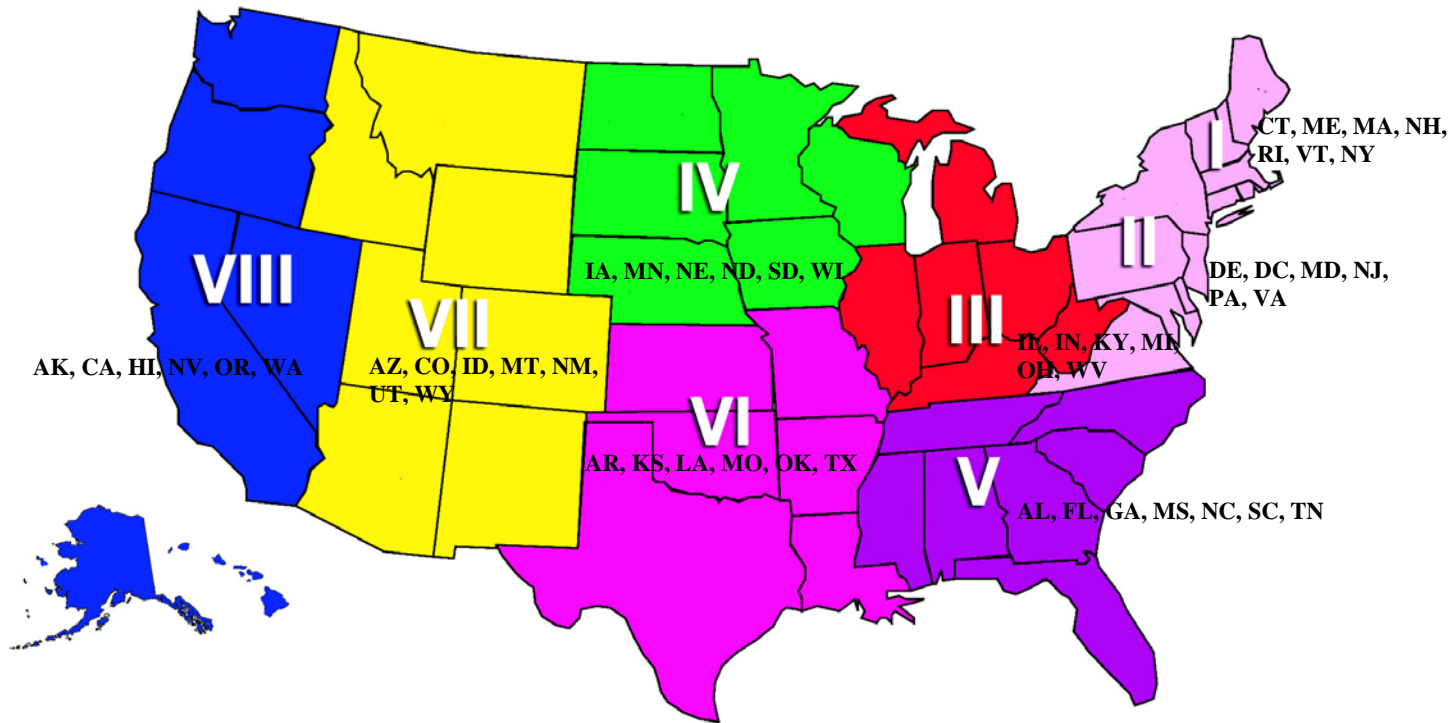


Membership Officer's Guide To Leadership

**National Association of Health Underwriters
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What Region Are You In?



Introduction



Congratulations!

So you've accepted the position of membership officer for your chapter. Serving as membership officer is a great way to get to know the people in your chapter. During your tenure, you'll get to know all of your fellow members and enjoy lots of time talking to prospective members. If you are a people person, then this is the job for you.

Basic Responsibilities

As membership officer you are primarily responsible for

- Promoting recruitment of new members with your chapter members
- Maintaining good membership records
- Promote monthly dues payments either by recurring monthly payments – members on bank draft have a higher retention rate than annual paying members.
- Promoting chapter involvement in the Getting Agents Involved Now (GAIN) contest.
 - *Members have 60 days (2 months) from their paid thru date before their membership lapses. Then the chapters have an extra 30 days (1 month) to retain this member before they are considered a new member and given a new join and a new paid thru date.*
- Understanding and utilizing eCommerce – NAHU's online membership database system.
- Participating on monthly teleconference calls with your State – Regional – National committees.

"Every man owes a part of his time and money to the business or industry in which he is engaged. No man has a moral right to withhold his support from an organization that is striving to improve conditions within his sphere. "

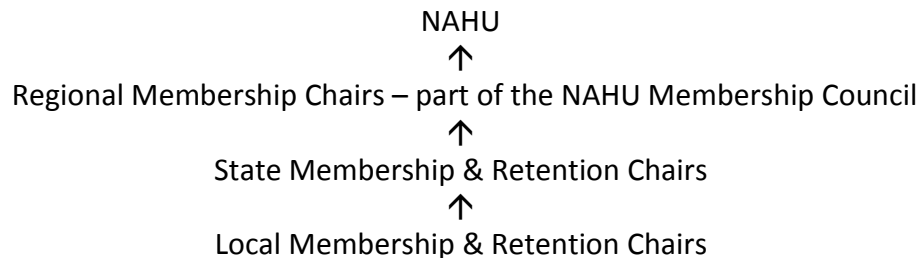
Theodore Roosevelt

building stronger
organizations through
better communication



Membership Communication

No one expects you to be an expert in the area of membership services. Additionally, no one expects you to accomplish all of your goals alone. NAHU has set up a communication tree that ensures you will always have someone to turn to for advice or assistance. The NAHU communication tree works as follows:



Because there are hundreds of people involved in the NAHU membership process, this tree was set up to ensure that you can quickly and easily contact your peers for ideas and answers. Should a problem arise, you should immediately contact your leader at the level above you (Local chairs should contact State chairs, State chairs should contact Regional chairs and so on) to ensure that the problem is quickly resolved.

My State Membership Contact: _____

phone _____ Email _____

My Regional Membership Chair name: _____

Phone: _____ email : _____

National Membership Chair: _____

Phone: _____ email: _____

Monthly communication

As a **state/local/regional** membership or retention chair you can expect regular communication via a monthly conference call or email with your peers.



I am a Membership Officer ... Now what ???

Local Membership Officer

- Attend state membership conference calls if scheduled
- Report any areas of concern within your chapter
- Share any membership recruiting ideas on this call
- Network with fellow local chairs in your state to share ideas
- State chair will report any activities on a regional or national level

Other Responsibilities

- Appoint a vice-chair to help with responsibilities of recruiting
- This person will be your right hand and work closely with you all year long
- The vice-chair will serve as membership chair the next year
- Organize and hold a membership blitz/recruitment campaign
- Implement a membership contest (give away a prize at your local meeting to the member who recruits the first member, the most members, etc.)
- Give monthly reports at your local chapter meetings as to the progress of your membership
Below are some ideas of the kind of reporting to your chapter
 - Membership additions/deletions since last month and have this list at your local meetings registration desk.
 - National membership growth/news/contests etc. - You can obtain much of this information from your state membership chair or from the NAHU web site.
 - When your membership blitz will take place.
 - Any contests you are running.
- Work with your vice chair to organize a member follow up campaign:
- Each month, obtain list of prospective members from eCommerce. Contact each of them and encourage them to join the association.
- Make sure your state membership chair is aware of all of your efforts. Relate to them your recruitment effort success stories, concerns with any membership-related issues. It is important that you communicate with your state membership chair so that they can share your ideas with the entire membership team. This is done through the Monthly State Teleconference Calls.



State Membership Officer

- The regional membership chair assigned to your state will schedule regular membership teleconference calls with the state membership chairs.
- It is very important that you attend each of these calls to receive the most recent and up to date information from the National Membership Council
- If unable to attend, please ask your vice-chair to attend or a local membership chair. It is very important that your state has representation on the calls.
- These calls are for discussing what is and isn't working in your area and any particular problems you may be having or issues affecting your region
- Use this time to network with your peers and ask for their assistance.
- It is the state membership chair to then schedule regular conference calls with the local membership chairs in your state.
- Follow the above guidelines and solicit their input so you can report that on the Regional Calls
- If participation is low on your calls, contact the state and local presidents for their assistance in getting full participation from the local chairs

Other Responsibilities

- First thing, appoint membership vice chairs to help in the responsible of recruitment efforts. This person will be your right hand and will work with you closely all year long.
- Participate whenever possible in your local chapter membership blitzes
- Participate in your regional membership chair's regular teleconferences
- Stay in touch with your local membership chairs & vice chairs to learn of their recruitment success stories/failures/concerns & report these back to your regional membership chair
- Make sure your local membership chair & vice chair are using the reports from eCommerce to help in their recruitment efforts
- Implement a membership contest (give away a prize at your state meeting to the member who recruits the first new member, the most new members, etc. CASH is always a good incentive!)
- Attend and help lead the membership session at your state annual leadership conference. Remember, by offering effective training, you'll ensure that the future state membership chairs know what they are doing.
- Keep your local membership chairs and vice chairs "in the loop" by communicating with them what you've heard from your Regional Membership Chairs



National Membership Council

The Membership Committee creates, develops and communicates effective tools that will assist state and local chapters for recruiting and retaining members. These tools will enhance the membership experience as value added benefits. The Membership Committee will work together with all other national committees to develop sound strategies to show the value of NAHU's membership and grow the association

The above statement is the guideline for the NAHU Membership Council as outlined by the NAHU Board of Trustees. Communication to the state and local membership chairs is vital to their chapter's success. Many chairs are serving for the first time and do not realize what their responsibilities may be. It is the primary responsibility of the NAHU Membership Council to educate and be a resource for the state and local membership chairs and the chapter members. The NAHU Membership council consists of the following members.

1. Council Chair
2. Council Vice Chair
3. Council Membership Manager
4. 8 Regional Council Chairs representing each region
5. 8 Regional Retention Chairs representing each region
6. Additionally one NAHU staff and one Board of Trustees liaison

NAHU Membership Council Responsibilities

- Regional Membership Chairs will host Regular Conference Calls with state membership chairs and Retention Chairs are to be on those calls
- All National Council Members should communicate with the state and local chairs via email
- Participate on the monthly NAHU Membership Council Teleconference
- NAHU Membership Council members are expected to send a brief written report on issues, comments and concerns with their designated chapters to the Council on a regular basis
- NAHU Regional Chairs must attend the Regional Leadership calls hosted by Regional Vice Presidents

Membership / Retention Strategy



Current membership: _____ **Membership goal:** _____

Membership goals:

1. _____% net membership growth: _____NET new members
2. 100% board involvement in new membership growth
3. Meet or exceed all awards criteria
4. Membership is everyone's responsibility

Retention goals:

1. _____ % retention
2. Communicate and create association membership value
3. Meet or exceed all awards criteria
4. Retention starts the day after new member joins

		<u>Membership</u>	<u>Retention</u>
Luncheons	<ul style="list-style-type: none"> Membership chair at all sign in tables to target guests 	X	
	<ul style="list-style-type: none"> Give new member packet to all non-members (with application, of course) 	X	
	<ul style="list-style-type: none"> Welcome committee – changes month to month (ask new members to do this) 		X
	<ul style="list-style-type: none"> 2 year, 5 year etc pins / ribbons or awards 		X
	<ul style="list-style-type: none"> Recruiter ribbons 		X
	<ul style="list-style-type: none"> Certificate when join at first luncheon. 		X
	<ul style="list-style-type: none"> Special name tags for guests 	X	
	<ul style="list-style-type: none"> Who hasn't RSVP'd and call them 		X
	<ul style="list-style-type: none"> New member names and recruiter announced at lunch 	X	
	<ul style="list-style-type: none"> Talk up association at luncheon 	X	X
	<ul style="list-style-type: none"> Lunch purchase deals. Buy 6 in advance, get one free.... 		X
All events	<ul style="list-style-type: none"> Sort names of attendees into member/non-member and give to the membership chair to follow up with non members 	X	
	<ul style="list-style-type: none"> Membership chair at all sign in tables to target guests 	X	
	<ul style="list-style-type: none"> Talk up association at all events. What/who is NAHU??? 	X	X
	<ul style="list-style-type: none"> Program to encourage carrier reps to bring new broker to events 	X	
General	<ul style="list-style-type: none"> Holiday party or happy hour(s)-invite non members to come 	X	
	<ul style="list-style-type: none"> Cc: all board members on welcome letter 		X
	<ul style="list-style-type: none"> Membership chair controls emails to members. List changes constantly 		X
	<ul style="list-style-type: none"> Encourage bank draft option when joining. Change application to promote monthly dues. 		X
	<ul style="list-style-type: none"> Companies can switch memberships if employee leaves if membership paid by the company (but let's go after the one who's leaving too) - be sure home address is on chapter membership application. 		X
	<ul style="list-style-type: none"> Have committee talk to carriers not supporting the chapter 	X	
	<ul style="list-style-type: none"> If someone you know is a member, and changes jobs or emails, please tell the membership chair. 		X
	<ul style="list-style-type: none"> New member orientations every quarter. Full board present. What are initials, why are you asked to give \$\$, etc. 		X
	<ul style="list-style-type: none"> Have recruiter involved in any follow up calls for first couple of lunches, events, renewal, etc. 		X
	<ul style="list-style-type: none"> Every event needs to be viewed as a new membership event!! 	X	X
	<ul style="list-style-type: none"> Ad in business journal listing all members 	X	X
	<ul style="list-style-type: none"> Periodic membership blitzes and programs to recruit 	X	
	<ul style="list-style-type: none"> ARE WE REACHING THE MEMBERSHIP ADEQUATELY? (emails only) 		X
Newsletter	<ul style="list-style-type: none"> Gossip column. Who's moved or who's missing 		X
Contests	<ul style="list-style-type: none"> New members contest every quarter 	X	

	• Retention contest		X
	• Support the triple crown program	X	X



- Membership officers can find this report on the website under “Leadership Tools, then Membership Tools, reports”

Monthly Membership Reports

- Membership reports are generated on or before the 15th of each month
- Report shows number of members at end of previous month as well as GAIN contest standings
- Report is broken down by region, state and local chapters



eCommerce

- NAHU on line database access tool is called ECOMMERCE.
- Members have access to change their own personal records
- State, local and regional chairs have access to print their own personal reports

What type of reports can you run using eCommerce?

1. **Current Roster of Members** – extract a list of all current chapter members.
2. **New Members (with Recruiter) who have joined** - Lists all members and their recruiter joining within the last month.
3. **Members who have been billed but have not yet paid their dues** – Extract a list of members who have been billed but have not paid their membership dues.
4. **Members who lapsed or cancelled (with Recruiter)** - Lists members and their recruiter who were removed from the roster of Active members because their expiration dates passed without payment or because they contacted NAHU to request that their membership be cancelled.
5. **Members not receiving mail due to bad addresses** - Lists members for whom NAHU does not have a correct mailing address (mail has been returned by the post office.)
6. **Prospective members from a chapter/state or region** – Extract a list of names and addresses of all persons considered prospects from your chapter or state. Persons on this list have contacted NAHU for products or services but have not applied for membership.
7. **Members with address changes during the past 60 days** – Lists all members whose address has been changed within 60 days. Also allows you to see what changes were made.
8. **Balance Due** – Extract a list of members who did not pay the full amount of their membership dues. These members are not counted as a full member until the entire dues amount is paid.

9. **New Members** – Extract a list of new members who joined the association and make sure to welcome them to your chapter!

There are one page instructional sheets, linked on the eCommerce homepage, that will take you step-by-step through extracting all these membership lists.

As a membership officer, you should have been designated by your president as one of **three** people in your chapter to have access to eCommerce. To find out whether you have access, just send an e-mail with your name, chapter and position to membership@nahu.org. Make sure you ask, “Do I have eCommerce access?” so we’ll know why you are contacting us.

Questions on using eCommerce? You can always contact NAHU at membership@nahu.org.

Using eCommerce

How to Use the NAHU Online Reporting System

This system has been set up to be as user friendly as possible with detailed directions included online.

- 1) Go to the NAHU website.
- 2) Click on Membership and Chapter Resources
- 3) Click on Membership Tools
- 4) Click on eCommerce

Under the eCommerce section you will find a link for eCommerce Instructions. These one page instructional sheets will guide you through, step-by-step, on extracting various membership reports.

You can also locate eCommerce training presentations online at:

- Go to NAHU website.
- Click on Membership and Chapter Resources
- Click on Membership Tools

Maintaining good membership records

In order for your chapter to function, you must first know how many members you have and who they are.

- Keep all member addresses up-to-date
- Collect any missing information (phone, email, fax)
- Access monthly membership reports through eCommerce
- Contact new members by extracting a New Member List. Welcome them to the association. Invite them to the next meeting and encourage them to get involved.
- Make corrections to the bad address and send to NAHU asap



Recruiting New Members

Recruiting new members is one of your most important tasks. How well you do this job directly reflects on your skills and will become your legacy once you have given up the membership officer position. It is also important because a growing chapter is a vibrant chapter. The only way to ensure that your chapter continues to be a strong, powerful voice for health insurance agents in your area is to keep its number multiplying.

Some basic things you'll need to recruit new members

- A supply of new member application
- A good contact list of potential new members
- Ask Insurance Carriers or loyal chapter sponsors for their list of agents in your area
- Pull a lapsed list from eCommerce and work with the Retention Chair to call them to rejoin
- Obtain a list of agents from the Department of Insurance
- Plan to hold at least one membership blitz during the year

Sample recruitment letters and forms

Enclosed here are a few samples of successful recruitment tools written by NAHU staff and various membership officers. No matter who you want to contact, do not feel the need to do it all yourself. NAHU staff, the membership committee and your peers are always happy to help.

Guidelines for “List Billing Membership” Program
One Invoice System

Minimum Size to Participate 3 new or current members enrolled in program.

Dues Paid All applicable national, state and local dues owed by each member; no discounts can be offered.

Billing Cycle All members’ dues will be prorated to a uniform renewal date in the first year; date to be determined by existing members’ renewal dates, in concert with sponsoring company’s wishes. Payment may also be made by bankdraft or credit card draft on the corporate account.

Invoicing Schedule First consolidated invoice sent 60 days prior to renewal date. Groups over 50 members may pay in two installments, provided that final payment is made within 90 days of paid through date.

Changes to Roster Sponsoring company may change members upon the transfer or termination of any members under the program. Additional members may be added at any time, with first year dues prorated to the uniform renewal date.

Ownership of Membership While the sponsoring company may determine which of its producers or staff may participate in the program, the memberships attach to the individuals – the sponsoring company does not derive any benefits of membership as a result of its participation.

Enrollment Process

1. Sponsoring company sends a list of prospective members, including name, address, phone, fax, email.
2. NAHU staff reviews list, determines appropriate chapter affiliations and calculates prorated dues.
3. Consolidated invoice is sent to sponsoring company.
4. Memberships are activated upon receipt of payment from sponsoring company.

Recruiter Recognition NAHU will provide a complimentary membership to the recruiter if his/her referral results in ten or more new members. Recruiter may use membership for self, or can give to his/her corporate contact.

Sample Recruitment Letter Cold Prospect

Date

Name

Company

Address

City, State Zip

Dear Name:

I am writing today to encourage you to join the National Association of Health Underwriters - the only association devoted to you, the health insurance agent. As members of an increasingly threatened and little understood vocation, it is more important than ever that health insurance professionals band together for maximum impact.

By becoming a NAHU member, you ally yourself with the best the industry has to offer. NAHU members include not only the top health insurance agents in the nation, but also the most respected. Likewise, NAHU membership guarantees your access to the best resources available to health insurance professionals. Here are some of the benefits your NAHU membership provides:

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 country. The combined strength of 20,000 NAHU members means your voice will be heard. Through NAHU, you have the power to decide the future of your industry.

I've enclosed information to help you fully evaluate NAHU membership, including the latest issue of *HIU – Health Insurance Underwriter Magazine*. *HIU* is a good example of the high caliber information NAHU delivers to health insurance professionals like you. I know that you will find it useful.

Please feel free to call on me with any questions you may have. You may reach me at _____ or via e-mail at _____. I look forward to hearing from you.

Sincerely,

Recruiter Local AHU

Sample Recruitment Letter

Prospect with whom you've had initial contact

Date _____

Dear _____

I was a pleasure speaking with you about the (local) Association of Health Underwriters. I was very glad to hear of your interest in becoming a member.

While NAHU has long worked to represent the interests of health insurance agents in Washington, DC, we at the (local) AHU are also working for your benefit. Let me tell you a few of the benefits you'll enjoy by becoming an (?)AHU member.

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. Because of our efforts, NAHU has earned a stellar reputation among national lawmakers.

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 directly to you.

Moving Ahead – Health care reform continues to be the leading issue on Capitol Hill and in statehouses around the country. The combined strength of 20,000 NAHU members means your voice will be heard. Through NAHU, you have the power to decide the future of your industry.

I've enclosed information to help you evaluate all the benefits NAHU membership provides including a copy of *HIU – Health Insurance Underwriter*. Every month HIU delivers the most current information available to health insurance professionals like yourself. I hope that you will find it useful.

If I can answer any questions about (?) AHU, please do not hesitate to call on me. I may be reached at _____ or via e-mail at _____. I look forward to hearing from you.

Sincerely,

Recruiter
(local) Association of Health Underwriters

Sample Recruitment Letter for Email For Carriers & GA's

Dear Health Insurance Professional:

I am writing this email to invite you to join the (local) Association of Health Underwriters. (?)AHU is a local association of over (?) insurance agents and insurance professionals dedicated to preserving and enhancing the health care benefits industry. Our local association also participates on a state and national level via the (state) Association of Health Underwriters (?)AHU) and The National Association of Health Underwriters (NAHU). At the local, state and national level, we are committed to the agent distribution system. Here are just some of the perks you get with your (?)AHU membership:

- Monthly membership meetings with guest speakers on topics that affect your career...
- Discounted rates for annual benefits expo...
- Annual Golf Outing...
- Industry Publications.. HIU Magazine.. Minute Man Newsletters...
- C.E. License credits through Education Programs..
- RHU/REBC Classes/Designations...
- Discounts on C.E. class fees...
- Eligibility for Leading Producer Round Table Award...
- Enhanced professional image...
- Representation in (state) and in Washington to safeguard your livelihood...
- Personal recognition through community service...

Attached are links to our local and national websites and a membership application. I have also attached a link to our upcoming benefits expo website. Please complete the membership application and return it to my attention. I may be reached at _____, if you have any questions.

I look forward to welcoming you as a new member at an upcoming meeting. I also hope to see you at our benefits expo on _____.

Sincerely,

Recruiter

(local) Association of Health Underwriters