Membership Recruitment, Retention and Recognition

Membership Recruitment

• Chapter Membership within The IIA
  – Why is recruitment important?
  – Recruitment of new/active members
  – Chapter assignments

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IIA Headquarters
Key Targets

• Students
  – Recent Grad Campaign
  – Chapter Engagement
• Young Professionals
  – Mentorship Program
  – CIA Campaign
• Emerging Leaders
  – Partnership/Recognition with *Internal Auditor* Magazine
• Established Leaders
  – Encouraging Staff Development/Training

Membership Recruitment

• Membership Officer Role
• Tools Available
• CAP Points
• How Chapters and HQ Work Together
• Targeting local organizations and verifying staff membership
• Form A Membership Committee
  – The membership officer should utilize other chapter volunteers to form a membership committee to support their work.
  – The membership officer should lead the committee in its formal recruitment and retention plan
  – All committee members should be aligned around the chapter recruitment and retention goals for the year

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• Research Your Market
  – Research your market to determine your prospects
  – Rate your prospects in terms of strongest leads

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**Membership Recruitment Best Practices**

- **Ideas for Prospects**
  - Certified Nonmembers
  - Lapsed Members
  - Chamber of Commerce
  - Nonmember Event Attendees
  - Fortune 500 Lists
  - Local Government Auditors
  - Schools/Universities

**Membership Recruitment Best Practices**

- **Make The Ask**
  - Send personal invitations
  - Utilize the chapter recruitment and retention handbook
  - Continually remain visible to your members and potential members
  - Personally invite to chapter meetings and introduce to other members to show value
  - Follow up with phone call to ask how it went and get feedback
Membership Recruitment
Best Practices

- **Make The Ask**
  - Personally invite to chapter meetings and introduce to other members to show value
    - Follow up with phone call to ask how it went and get feedback
  - Introduce chapter campaigns to entice new members to join
  - Evaluate all campaigns and the success of your recruitment and retention efforts during the year

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**Discussion**

1. What are other ways you identify new prospects in your chapter?
2. What recruitment initiatives does your chapter currently have in place? What’s working well and what isn’t?
3. What have been the biggest struggles for your chapter in terms of recruitment?
4. What new ideas can your chapter implement this year to encourage new members to join?
5. What additional resources can The IIA provide to assist in your recruitment efforts?
Increasing Membership Engagement

• Why is Engagement Important?
  – Increasing membership engagement will increase membership retention and satisfaction.
  – IIA Members may be more likely to engage locally than with IIA HQ.
  – The IIA’s group membership model gives members of audit departments access to IIA member benefits, but many may be unaware of opportunities available.

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Increasing Membership Engagement

• Understand chapter’s current engagement efforts and roadblocks.
  – What events are you seeing the most participation?
  – Why aren’t more members participating?
  – Are your members participating in other ways and are they satisfied?

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Increasing Membership Engagement

• Ways to understand your chapter’s engagement challenges:
  – IIA Membership Survey
  – Chapter Engagement Survey
  – Calls and/or Emails to Members

• Engagement Tips:
  – Vary the time, location, and topic of your meetings to increase attendance.
  – Utilize your membership committee to identify ways to get chapter members more involved.
  – Speak to survey results – “We listened…..”
Increasing Membership Engagement

• Engagement Tips:
  – Incentivize current members to bring another member (or nonmember) to a chapter event to highlight the benefits of your chapter
  – Utilize the speaker database and your DA and DR to identify highly-rated speakers to attract more members
  – Have your committee and other chapter leaders place individual calls to invite new and existing members to chapter events

Increasing Membership Engagement

• Engagement Tips:
  – Highlight milestones of current members, and invite them personally to let them know what will take place.
    • This can be a milestone membership anniversary, achievement of a certification, or even a promotion in their job.
  – Ensure that all members know of a person that they can contact at the chapter level to personally reach out to with any questions or concerns.
  – Ask members to volunteer to assist with tasks or participate on a committee.
Young Professionals Engagement

• Engagement Tips:
  – Have a subset of your committee dedicated to attracting young professionals.
  – Provide training and networking opportunities for young professionals. Promote via Chapter social media channels.
  – Establish an avenue for young professionals to begin volunteering within the Chapter and progress up the ranks into Chapter leadership roles.

Discussion

1. What is your chapter doing to engage its members? What are some best practices or engagement recommendations?
2. What strategies has your chapter used to engage with new members and young professionals at meetings?
3. What challenges has your chapter encountered when trying to engage its members? How can your chapter overcome them?
Membership Retention

- What is retention?
- How can your chapter help with membership retention?
- What does HQ do to retain members?

Membership Retention

- Retention Tips
  - Retention doesn’t just begin when a member is about to terminate – it is a continuous process throughout their membership lifecycle.
  - Utilize The IIA HQ retention and engagement timeline to incorporate chapter specific touchpoints.
  - If a member is engaged, it will be easier to retain them.
  - Notify members of their upcoming expiration dates as a reminder to renew.
Membership Retention

• Retention Tips
  – Determine what your chapter’s current retention rate is – this will give you a baseline of what your goal should be.
  – Use your website and chapter communication to remind members to renew and the step-by-step process to renew online.
  – If a member does not renew, reach out to find out why, which can help improve retention as well as enhance your chapter value.

Utilizing Your Website and Social Media

• Social Media can be utilized to grow your chapter membership
  – Social media allows for a larger reach
  – Increase engagement
  – Connect with your target audience
  – Increase awareness of your chapter
  – Drive traffic to your website
Discussion

1. What can your chapter do to encourage existing members to become involved and increase their engagement?
2. What ways can your website and social media be used for recognition and engagement of current members?
3. What can your chapter do to improve retention rates?

Questions/Comments?

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