



# Solving the Membership Mystery!

Methods for finding and keeping members.

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## Introduction to the Workshop

At the risk of being accused of outright heresy, the AMA Alliance leadership has gradually realized that despite our prior decades saying otherwise, membership is not everyone's responsibility. Before you stop reading and toss this workbook, let us explain. We all have different talents, motivations, and passions...and thank goodness for that. Some people may want membership to grow, but they lack the desire or psychological makeup to ask people to join. Some people do not like talking on the phone. Some do not like using e-mail. We all are different. If you are asked to do something you enjoy and have a passion for and a "knack" for, you will probably do a great job at that task.

When it comes to organizing an event, producing flyers for an event, editing a newsletter, generating donations for AMAF, keeping pressure on legislators, and so forth, we have no problem with the concept that some people just are not effective in some of those roles. Why should it be different when it comes to recruiting members? The fact is that it is not different. Some people are just better at doing it. If we ask those who are not good at membership to recruit members, they may not say no, but they also may not be able to do it well. We need to have people who specialize in recruiting members and not expect everyone to try to do it.

With that realization, the Integrated Marketing and Communications Committee (IMCC) and the Membership Advisory Committee (MAC) of the American Medical Association Alliance formed a Joint Committee on Membership Recruiting to create this workshop – a "how-to" for people who both enjoy recruiting new members and who want to become better at it.

The goal of the workshop is to help current Alliance members to express and teach others more clearly the Alliance's purpose, benefits, and structure. Through a series of interactive exercises, participants will learn effective recruiting skills and more. Furthermore, this workshop will offer tips on "closing the sale" and following up on prospects.

This is a work in progress. There could be many different ways to present the sections. Indeed, the Joint Committee hopes that as the workshop is presented by the many Alliance members they will create fresher, perhaps more effective, exercises that can be added to future revisions of this manual. Sometimes, different people require different approaches and it is always nice to have more than one option.

The IMCC and MAC hope that this workshop will make it easier for you to recruit new members. As our research shows, the most effective method of growing membership is for us, the current members, to ask potential members to join the Alliance. If this makes it easier, then we have accomplished our goal.

*Many thanks to the Joint IMC and MAC Committee for the development of this document. Joint Committee Members include: John Lovin, IMCC Chair; Kathy Lariviere, MAC Chair; Sue Anne Addy, Gretchen Dupps, Ginny Green, Laura Reynolds, Dave Street, Anita Watkins. And a special thanks to Judi Chavez, staff, for her input and attending all the chats.*

## **Membership Workshop Outline**

- I. Introduction
  - a. Facilitator's bio with personal testimonial
  - b. Purpose of the Workshop
  - c. What is the Alliance?
- II. Definition of the Alliance – Major Benefit Areas
  - a. Community
  - b. Making a Difference
  - c. Personal Growth
- III. Personal Testimonials
  - a. The importance of a personal testimonial
  - b. How to write your own testimonial
  - c. Practicing your own testimonial
- IV. Attracting Members
  - a. Primary methods of recruiting members
  - b. Secondary methods of recruiting members
- V. Welcoming New Physicians to Your Community
- VI. RPS/MSS Membership
- VII. Overcoming Objections
- VIII. Closing the Sale
- IX. Follow-up and Retention
  - a. Prospective members
  - b. Current members
  - c. All members
  - d. Retention issues
- X. Summary
  - a. Resources
  - b. Question and Answer time

## Activity 1



What would you tell someone who didn't know anything about the Alliance?

What would you like potential members to know about the AMA Alliance?

## **WHAT IS THE ALLIANCE?**

The Alliance is the largest, most important organization that represents the family of medicine in the United States. It consists of a nationwide network of organizations whose mission is to partner with physicians to build healthy communities and support the family of medicine.

## **WHO BELONGS TO THE ALLIANCE?**

If you are the spouse of a physician, resident physician, or medical student, or if you are a physician or resident physician, you are invited to join the Alliance today. Your level of involvement depends on you! All members are important and valued whatever your phase of life, whatever time, talent, or resources you are able to contribute.

## **WHAT ARE THE BENEFITS OF MEMBERSHIP?**

- **Belong to the “family of medicine”** where you will develop lifelong friendships, build an effective network of co-workers, and find a ready-made support system for the unique challenges of life in a medical family.
- **Make a difference in your community** by raising funds for scholarships, research, and grants, by participating in health projects that improve people’s lives, and by protecting the future of medicine through legislative advocacy.
- **Grow and enrich your life** by attending workshops and seminars that will contribute to your personal development. Receive professional training to enhance your leadership skills, make valuable contacts, and enjoy unique opportunities because of your membership in this dynamic organization.

## **HOW IS THE ALLIANCE STRUCTURED?**

The Alliance consists of three component levels that work together:

- **County Alliances** provide personal support for members with one another at the grassroots level and are where most of the “hands-on” work is done for fund raising, health projects, and legislative advocacy.
- **State Alliances** provide ideas for local Alliances, coordinate efforts between county Alliances, provide leadership training for local members, and partner with other like-minded organizations and policy makers.
- **The AMA Alliance** provides national support for both the county and state Alliances, ties together the county and state networks, and serves as a national voice for issues that concern the family of medicine. The AMA Alliance also provides a variety of resources for all Alliance projects, is a liaison between state and national legislative activities, and offers outstanding personal development training.

## **THE ALLIANCE: BELONG... MAKE A DIFFERENCE... GROW**

## Activity 2



**List examples of:**

**Belonging to the “family of medicine”:**

**Making a difference in your community:**

**Growing and enriching your life:**

## Integrated Marketing Communication Committee Survey

The work of the IMC Committee began at the Annual Meeting where an admittedly unscientific survey was conducted to answer two questions. Here are the results.

### How did you learn about the Alliance?

Personal Invitation	47	73.4%
Non Stated	5	7.8%
Sought Membership	2	3.1%
Mailing	4	6.3%
Group Meeting	4	6.3%
Other	2	3.1%
Total	64	

The answers to this question made it very clear how we could most effectively increase membership: get more of our current members to give a **personal invitation** to their Alliance-eligible friends. When the “Not Stated” is taken out, almost 80% of our current members joined because of a personal invitation.

### What are you most passionate about?

Friendships	21	19.6%
Health Promotions	34	31.8%
Leadership Development	4	3.7%
Legislative Advocacy	15	14.0%
Making a Difference	11	10.3%
Scholarships	6	5.6%
Support	14	13.1%
Other	2	1.9%
Total	107	

As you can see, there are seven distinct answers to the second question, but several seem to go together. For instance, “Support” and “Friendships” could be seen as the same answer, just stated a bit differently. They are at least in the same category. Also, if you look at “Legislative Advocacy”, “Scholarships”, and “Health Promotions” as three different ways to “Make a Difference,” then they all actually can easily fit into one general category.

Therefore, the IMC Committee breaks the three primary benefits as shown in our survey:

Support: friendships, support system, and networking

Making a Difference: scholarships, health projects, legislation

Personal Development: meeting programs, leadership development, new contacts.

## Writing Your Personal Testimonial

## Activity 3

Describe briefly how you first heard about the Alliance: \_\_\_\_\_

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What prompted you to join or attend your first meeting? \_\_\_\_\_

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What needs were met by the Alliance? (A desire to make a difference, to be involved, to gain support of like-minded individuals, opportunities to grow and learn?) \_\_\_\_\_

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List one or two of your best Alliance memories. (A special project, a long-lasting friendship, a memorable event.) \_\_\_\_\_

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Why do you stay active in the Alliance? \_\_\_\_\_

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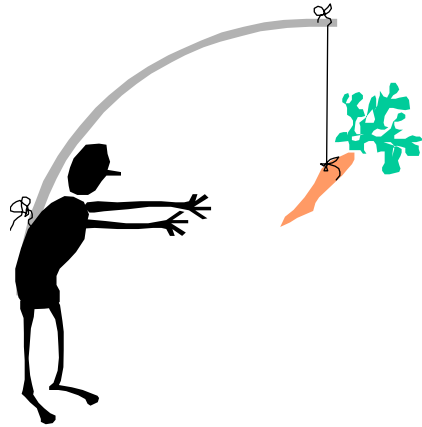
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Once you have these basic facts in place, it is easy to put together a short (3-5 minutes) narrative of how you became aware of the Alliance, what prompted you to join the Alliance, what one or two memorable events or projects were, and why you stay active in the Alliance. This will become your “testimonial” and can be used in a variety of situations when someone asks you why they should join the Alliance.

## Reaching Out to Potential Members

## Activity 4

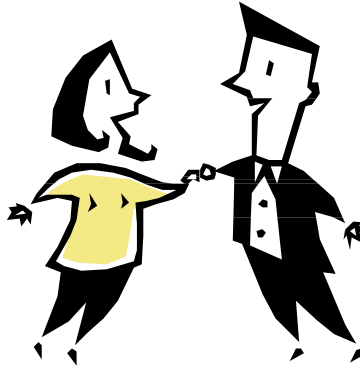


**What have you found to be the most effective ways to reach out to potential members?**

## **Top Ten List**

### Attracting New Members to the AMA Alliance

10. Someone sees a county, state or national website and decides to become a member of this wonderful organization!
9. Send out invoice mailings to prospective members.
8. Send mass mailings inviting prospective members to join the Alliance.
7. Develop and distribute attractive newsletters.
6. Develop and distribute membership brochures.
5. Telephone prospective members.
4. Talk about the Alliance at Alliance sponsored events.
3. Talk to prospective members about the Alliance at community gatherings.
2. Mail a personal letter stating why you joined the Alliance *and* ask the prospective member to join.
1. **Personally invite a prospective member to join!**



What are the potential resources for getting a list of new physicians in your area?

What items would you include in a welcoming packet for new physician families?

## Activity 6

### **Resident Physician Spouses & Medical Student Spouses (RPS/MSS) Recruitment**

What is the fastest growing membership segment of the AMA Alliance?

How to recruit RPS/MSS as well as Resident and Medical Students:

Ways to make your Alliance inviting to RPS/MSS members:

Ways to defer the cost of RPS/MSS membership:

# Overcoming Objections



What objections have you heard when asking someone to join the Alliance?

How would you respond to the following?

*“I really don’t have the time.”*

*“I don’t think the Alliance is for someone like me.”*

*“I have my own career. I don’t want to be identified as just the spouse of a physician.”*

*“I want to think it over.”*

*“\$90 is a lot to pay to be a member of a volunteer organization.”*

*“Isn’t the Alliance a women’s organization? Why would a man want to be a member?”*

## Objections

Objections are really just doors opening for you to tell your story and talk about why the Alliance is important to you. Being prepared to hear them and respond to them, makes your job, selling the Alliance, so much easier.

*–Kathy Lariviere  
2004-2005 Membership Advisory Committee Chair*

### ***“I really don’t have the time.”***

Possible response: “I understand completely how you feel. However, I felt the Alliance was an organization I could belong to and yet participate at the level that suited me at the time. My calendar is full, too. But, I attend a meeting or participate in a project when my schedule permits. I feel accepted for who I am and what I can bring. Otherwise my membership is there to help the others, and my dues still have a positive impact on our community. I’ve found that as a member I know more of what’s going on in the medical community because I get their mailings, newsletters, and emails. I have access to the AMAA website and especially like getting the legislative alerts and having the opportunity to talk to my legislators about these issues. I’m proud to be part of a national group that does so much good.”

### ***“I don’t think the Alliance is for someone like me.”***

Possible response: “I appreciate how you feel. But, the Alliance is for all spouses of physicians and physicians. The medical profession is made up of all ethnicities and genders. The Alliance IS you. I’ve found that the fact that we come from all walks of life and from different generations only enhance what we can offer each other. The Alliance would be better with you in it. Your expertise would be an asset to the Alliance”

### ***“I want to think it over.”***

Possible response: “I realize you might not be ready to join right now. Why don’t you come with me to the next meeting? I’ll introduce you to some of the members, and you can get a feeling for what we do. The next meeting is on \_\_\_\_\_. I can pick you up, if you like.”

### ***“I have my own career. I don’t want to be identified as just the spouse of a physician.”***

Possible response: "I can understand how you might feel that way. I feel my career is equally as important and so is yours. I've found that Alliance members represent a wide variety of professions. Alliance membership has allowed me to network and interact with other career-oriented people like myself as well as those who have postponed or put their careers on hold until their families are grown. Through the Alliance I've been able to take advantage of their free leadership development conferences and I've learned skills that help me in my own career."

***"\$90 is a lot to pay to be a member of a volunteer organization."***

Possible response: "I can see how you might think at first glance that \$90 was a lot to pay for membership. I have felt that my money was well spent supporting an organization that did so much with so little and had a national image and local impact. For the cost of a ticket to the play I can support the family of medicine even if my schedule doesn't allow me to attend all the meetings and/or projects. There are bullying programs for kids, Hands Are Not for Hitting programs, Health Literacy, legislative activities to help medicine, and the list goes on. The Alliance is made up of three interconnected, component groups (county/state/national) whose mission is to partner with physicians to build healthy communities and support the family of medicine. The \$90 in dues that members pay goes to make all three levels effective.

***"Isn't the Alliance a women's organization? Why would a man want to be a member?"***

We really couldn't respond better than John Lovin, IMCC Chair did:

*"I joined because I had come to a place in my life I was a stay at home Dad for a few years...another non-traditional role. I needed an outlet for what I felt were my business and leadership abilities (the jury's still out on that after over a decade, but hey...). I also discovered that it gave me a means by which I could make a difference in the world...leave a footprint, so to speak.*

*The TRUE benefits of membership include making a difference, support, and learning/growing. These are "gender free" benefits. If we remove barriers to men...flower arranging classes, afternoon teas at homes, fashion shows, etc...and highlight these "gender-free" benefits, more men will join.*

*Well...there's also the fact that for a mere \$100 a year I can attend meetings filled with lovely, passionate, talented women who think I'm wonderful just for showing up. What a country!"*

# *Closing the Sale*



**What is the craziest place you have been when talking to someone about the Alliance?**

# **HOT Buttons!**

**List several activities that you enjoy or things that you are passionate about (not necessarily related to the Alliance).**

(Examples: building websites, giving back to the community, fundraising, fixing up old houses, writing, traveling, women's health issues, etc.)

**Can you match your interests to an Alliance benefit?**

# Follow-up and Retention

Here are some ideas for different membership segments.

## 1) Prospective (New) Members

- a. Make a phone call to the prospective member to see if they have questions or if they have joined.
- b. Send a card, and/or ask another member to do so thanking them for attending. (Example: Thank You card/letter)
- c. Include a membership form and pre-addressed return envelope (make it easy to pay dues) in the card. (Example: Membership Form) - Possibly include “Interests” sheet with membership form.
- d. Add prospective members to newsletter mailing list to help them get a better understanding of the Alliance.
- e. Print “welcome” to new members (with names) in newsletter.
- f. Pair them with an established member as an “Alliance Buddy” who answers their questions, takes them to meetings or sits with them at meetings (familiar face), helps them meet/get acquainted with other members.

## 2) Previous (Non-Renewing) Members

- a. Have a system in place to send thank you notes or an acknowledgment as soon as dues are received. (Possibly develop own “membership card”)
- b. Make several attempts to retain each member including a letter, telephone call, etc. if dues are not received late in the year (everyone is very busy and may not remember if they have paid their dues or not). (Example: Retention Letter/Retention Phone Call Script)
- c. Include a membership form and pre-addressed return envelope (make it easy to pay dues) in each mailing. (include “Interests” sheet)
- d. Keep on newsletter mailing list for period of time while trying to get them back. (This can be cost prohibitive for a long period)
- e. Print “welcome back”, “we missed you”, etc. (with names) in newsletter of those who rejoin.

## 3) All Members

- a. Have a system in place to send thank you notes or an acknowledgment as soon as dues are received
- b. Forward dues to state or national Alliance on a regular basis (new members won’t receive newsletters and mailings until their dues are received at all three levels.
- c. If they indicate that they are interested in a project or “benefit area” (see “Interests” sheet), make sure they have an opportunity to participate (assign a mentor if a new member).
- d. Consider developing Special Interest Groups (Examples: Book Club, Garden Club, Moms Groups, Fun Nights Out, Antiquing, etc. – whatever interests your particular group)
- e. Get members involved:
  - i. Ask for their opinion and listen – respond to ideas

- ii. Give them little jobs (helping plan special meetings, stuffing envelopes, etc.) – good way to get new members acquainted with other members.
- iii. Use their talents, not just their time (include on “Interests” sheet any special talents/interests, hobbies, etc. to learn what people are good at and like to do).
- iv. Offer recognition to those who are involved (big and small tasks/projects)
  - Thank them publicly and personally.

4) Retention Issues

- a. Lack of feeling connected to the Alliance – **communication** (newsletters, personal contact, etc.) is the key to feeling connected.
- b. Lack of feeling welcomed or involved – keep cliques from developing. Activities/Projects are important to get people to want to join and to get/keep members active.
- c. Fragmented medical communities – emphasis the common goal/purpose of the Alliance – support of the family of medicine (avoid “taking sides”).

## Follow-up Postcard Ideas

The Membership Advisory Committee has developed these postcards to assist counties in retaining their members. Postcards can be edited and printed from a home computer. They print four to a page and may be printed in either color or black and white. These postcards are downloadable in .pdf format on the AMA Alliance website:

[www.ama-assn.org/go/alliance](http://www.ama-assn.org/go/alliance) on the Membership Resources page. If you do not have access to Adobe Acrobat and would prefer the documents sent in Word format, please send an email to Kathy Lariviere at [glariviere@mchsi.com](mailto:glariviere@mchsi.com)



Our records indicate that you have not renewed your JCMSA membership this year. We hope that you will rejoin the alliance because we miss you.

We miss seeing your name on our membership list. We miss the good that your dues accomplish – building healthy communities in Iowa and strengthening the medical profession. We miss the ideas you bring to us. We miss the friendship that you share with us.

It is an exciting time to belong to the Alliance and we hope that you will send in your dues today even if you are not able to actively participate at this time. Please mail your check for \$80 to: JCMSA  
PO Box 5452  
Coralville, IA 52241

**We Miss You!**



**Thank You**

Just a quick note to thank you for joining the Johnson County Medical Association Alliance this year. Your membership is important to us, your influence vital, and your participation is welcome. Whether you support us financially, with your time, or in spirit, we embrace you.

JCMSA has a long history of fundraising and service projects that benefit the health of our community. We could not continue to support the family of medicine without you.

Sincerely,  
Leila Hoballah, JCMSA President

## Wrap Up and Evaluations



Did the Membership Workshop meet your expectations?  
If so, why?

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Why not?

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How can we make it better?

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What was your favorite section?

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What was your least favorite section?

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Is there a membership topic/section that you would like to see added?

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