

NATIONAL ASSOCIATION OF HEALTH
UNDERWRITERS

How to Hold a Successful Membership Blitz



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How to hold a successful Membership Blitz

What is a blitz?

A membership blitz is an event that is held on a particular day to focus on increasing an association's membership. A blitz works well because it is a complete team effort. A group of members take 2-3 hours one day to make calls at a certain location to prospective members in your area. I have seen as many as 25 new members recruited during one 2-hour period.

The membership chairman is the coach of the event. That person puts the team of volunteers together, chooses a location, a time & date and motivates the team through the event. This is a great event to get prospective leaders involved with.

Why hold one? Here are just a few reasons to hold a membership blitz.

- Recruit new members
- Increasing your chapter's visibility by increasing its size
- Bring in new ideas
- Increase dues revenue
- Get members involved

Timeline

<u>When</u>	<u>Action</u>
6 weeks prior	Secure Lists Secure your facility (find a place to hold the blitz) Contact carriers for financial support: <ul style="list-style-type: none">- Food (breakfast and lunch)- Prizes (items or money)
4 weeks prior	Recruit volunteers - ask volunteers to bring 10 names each Send volunteers a form to fill in ten names – encourage them to put it by their phone to jot down names of potential members while they are working. Establish prize list Order prizes (if applicable) Test your lists (make sure you have good phone numbers) – just call a few people on the list randomly.
2 weeks prior	Reconfirm volunteers – remind them to collect at least 10 names and phone numbers of prospective members. Collect prizes
1 week prior	Reconfirm volunteers - Remind them to bring their prospect list of 10 names.
Day of blitz	Arrive early to set up

Sample Budget

FOOD	\$25-\$50
PRIZES	\$50
ROOM	\$50

Most of these items will usually be donated. So it may not cost your association any money to hold one.

Secure the Lists

This will be the most crucial part of your entire blitz. Not only do you need the lists well in advance of your blitz (4-6 weeks), but you will also need to cross-reference each list with your entire member database.

Here are a few good list sources:

- Managing General Agents
- Insurance Carriers
- NAHU – past member lists

Once you have your lists, create an excel spreadsheet with only Company names, contact names and phone numbers. Depending on the size of the local or state you should have at least 20 names to give each volunteer caller.

Secure Your Facility

- First go to your carriers or large agencies for support. Ask them if you could have their sales floor for the day. Typically their sales force are not in the office, they are out selling and if you can preplan for this event, they will be more than happy to support you and your efforts. All you have to do is ask!!
- If you can not find a carrier or agency go to a hotel and set up a banquet room with telephones set up with a U-shaped table.
- If you are unable to get a location that has several phones, have the members bring their cellular phones.

If you have to go the hotel route, go to your carriers for support through contributions, this will help offset the costs.

Secure Your Volunteers

- You should do this at least 4 weeks in advance. First go to your local board and ask for their support. You don't need a whole day commitment; ask for a ½ day or a couple of hours.
- For those individuals that are not able to attend the blitz, ask if they will be available to possibly pick up applications throughout the day. You need to have at least 2 runners available to pick up checks.
- Ask your membership, those agents or carrier representatives that you know are not only involved in the health underwriters, but also very active within the industry.

Once you have a comfortable volunteer list, size is going to depend on the local, however more is better, ask them to bring at least 10 names to call first. Give them time to gather this list. Possibly send them a pre-made excel sheet that they can use to set by their phones and over the next 2-3 weeks they can jot the names down of these individuals.

Prizes

Since your fellow members are fairly competitive, you can really have fun with this. Set up a few different contests to encourage your volunteers to recruit new members. Below are a few contest ideas.

Consider giving prizes for:

- The volunteer who brings the most prospective member names to the blitz.
- The volunteer who recruits the first new member
- The volunteer recruiting the most new members
- The volunteer who “closes the most deals” (ie: gets the most paid new members before the end of the blitz)
- The volunteer who stays at the blitz longest

The idea is to keep the contests going throughout the whole day – this will really help to keep the level of excitement up and encourage your volunteers.

Examples of prizes – gift certificates, golf balls, NAHU giveaway items (call NAHU and ask them what they have available.)

This is another area that you should ask for financial support from your carriers. Advertise this in your mailings to the prospective members and to your current membership through your newsletters.

Food

- Ask a carrier representative who cannot attend the blitz to bring in donuts and juice to kick off your day. Do the same for lunch. Usually you will have a place that will prepare brown bag lunches or order pizza.

Prepare EVERYTHING for your volunteers

The day of the blitz, you will need to arrive early to prepare everything before your volunteers get there.

- You want your volunteers to walk in the room, get acquainted with their area and then start calling. Have a person designated to train the callers when they walk in the room.
- Have a script set up in advance for each caller set up at each station. (Sample attached)
- Each call list should contain two sheets of paper. The top page being the NAHU past member list that indicates when the member joined and when their membership lapsed. Call these people first. The second sheet of paper should include approximately 15-20 names from your excel spreadsheet that you prepared from your carrier, MGA lists, etc.
- NEVER just hand out the carrier or MGA lists without going through them. You should have one master list that you create that only has 15-20 names per sheet. This is so important. This will determine the success of your blitz.

Each call station should have:

- Telephone script that includes the membership dues and local/state events - go to your local and state board and ask for their support in waiving the first 5 or 10 local and/or state dues.
- 10 faxable applications
- Call lists (NAHU Past member list & your list)

Training your Callers:

Before you get the volunteers to start making their calls you should go around the room and ask each member why they became a member. Put these responses on a large board so all can see. This will give the callers some ideas to use when telling prospective members why they should join.

You will need to recruit an assistant to help you train callers the day of the blitz. You'll have a bunch of other responsibilities, so plan on having one person just for training callers.

When training your callers, make sure to tell them to leave a message when they call, these people will call back. Maybe not all of them, but most will. Include the number of the facility that you are at on the script.

Also, encourage your volunteers to talk about why they are members of the association. Rather than have them read through a list of benefits, let them talk about what is important to them. If a potential member believes that the caller is being honest (and actually sees value to being a member) they will be more likely to join.

Follow up

This is the area that tends to be overlooked. A person is not a member until we have check or credit card information. Follow up on those people that say they will mail or fax the application and check. Also have a person that will handle all of the callbacks. Once

the final numbers have all come in give a report to the general membership in the newsletter or at the next monthly meeting.

Have Fun

Lastly, don't forget to have fun. Running a membership blitz is a lot of work. But it is important that you remember to keep it fun for your volunteers.

Recruitment Phone Script

1. Before you call

Read the entire phone script. Familiarize yourself with what you will need to know/say. Read the name out loud to pronounce it

2. Identify yourself

"Hello, this is (your name) from the (National/local) Association of Health Underwriters."

3. Encourage them to join.

"I am calling today about membership in the (your association name). As an important part of the health insurance industry here in (your state or area), I would like to invite you to join."

4. Talk about the benefits:

"NAHU offers many valuable benefits."

(Hint: Be as honest as possible. Talk about the benefits that mean the most to you, things that you think are the most valuable. If you sound like you believe in what you are saying, they are more likely to join.)

- **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 county. The combined strength of 15,000 NAHU members means your voice will be heard. Through NAHU, you have the power to decide the future of your industry. Don't give up your power – renew your NAHU membership today.

5. Close the sale:

“If you would like to join, I can take your information right over the phone.”

Offer them payment options – “Would you like to charge that to your credit card, or pay by bankdraft?” **Try to get a payment NOW.**

- Visa
- MasterCard
- American Express

If paying by credit card, we need:

Name as shown on card

Card number

Expiration date

If paying by bankdraft, offer to fax a bankdraft form to them.

Confirm or ask for the following information the following information :

Name with spelling

Company

Address

Phone

Fax

E-mail

Home Zip Code (so we know their

Congressional district)

Local chapter

6. If they are a former member:

Ask if they would like to renew.

If yes, see go back to #5 (above)

If no, ask why not.

Some common reasons for quitting, and possible responses

REASON	RESPONSE
I don't have time	Most chapters have just one meeting a month, lasting just one to two hours. Even if you don't actively participate, you still benefit from our legislative activity and from HIU magazine and NAHUnet
It costs too much	Dues for your chapter are just \$??? per year. If you'd like, you can pay by monthly bankdraft for just \$??? per month.
I'm a member of Life Underwriters	NALU and NAHU work together on a number of projects, but only NAHU is dedicated solely to your interests as a health insurance professional.

- **If Yes with a complaint** – Try to address that concern.
 - If something that was done by staff in the past, explain that we've reorganized our operations to serve members better.
 - If related to legislative positions, explain that the Legislative Council and Board of Trustees must endorse positions that represent the interests of the majority of our members. Note that all positions are reviewed annually, and that his/her opinions would be considered during the upcoming review.
 - **If it is something you don't feel you can address, refer the caller to headquarters or get their number and have NAHU call them directly.**
(e-mail information to membership@nahu.org or call 703-276-0220 to report a complaint.)

7. If the answer is no, encourage them to join in the future:

“ I sincerely hope you'll keep NAHU membership in mind. If cost is an issue, I'd be happy to set up a payment plan that will let you pay a small amount each month. “

If they still want to do not want to join - “Please feel free to call me with any questions. Here's my phone number just in case.”
Give them your phone number.

8. Thank them for their time.

“Thanks for taking a few minutes to talk with me.”