Membership Campaign Checklist

40 briefing points for better campaign results

CHORD

You will be able to use this checklist if you are planning membership campaigns using the telephone for new member acquisition, welcome and touchpoint calls, renewals and lapsed members.

You may be delivering the campaign in-house, or you could use it to brief an outsourced telemarketing agency. The better briefed your outbound team is, the more successful your campaign will be.

Overview

1 Campaign background and aims

Describe the background to the campaign, the challenges that you face and what you are trying to achieve in relation to the aims of your organisation.

2 Telemarketing objectives

Outline the specific objectives of the campaign, for example the target number of members renewing, or lapsed members re-joining, new members acquired, or retained as a result of regular welcome and engagement calls.

3 Criteria for campaign success

Clarify how you will judge the success of the campaign. You should also set out the anticipated outcomes that you expect and what assumptions you have made.

4 Pilot campaign

Consider a pilot campaign to demonstrate that the telephone is the best channel to use and you have the right audience and offer. A pilot also provides important information about potential return on investment should you decide to rollout to a larger campaign. If you are outsourcing, a pilot campaign will enable you to share the risk with your agency partner.

5 Timing and milestones

Set out a clear timing plan for each stage of the campaign: set up, telemarketing, review and evaluation.

Target Audience

6 Typical member personas

Create semi-fictional representation of your ideal member for each of your membership categories, based on your market research and real data about your existing members. This will help you develop your messaging and tone for the calls. Personas can be created using:

- **Demographics** - gender, occupation, employer, age, education, career aspirations etc.
- **Behaviour patterns** - what does their typical day look like? Where do they go to find information? How did they find out about your organisation? How do they network etc.?
- **Motivation** - Why did they join your organisation? Why did they renew their membership? What objections do they have to membership and membership renewal?
- **Goals** - What do they want from your organisation? What do they hope to achieve as a member? What are they responsible for, whether as a member or in life?
- **Persona Image** - Use a stock photo or an illustration to make the persona come alive.

7 Reasons and ways to join

Summarise the main member benefits and reasons why members join. Describe the different ways members can join.

8 Industry sectors and job titles?

If your audience is business-to-business members or prospects, define the specific industry sectors and likely job titles that you are trying to reach.

Data

9 Data protection

Consider how you will will comply with all current data protection and e-privacy legislation, including which data you will use, for what purpose and which legal basis for processing is appropriate. If you are outsourcing, formalise in a data processing agreement to include how data will be kept secure, for what purpose the data will be used and with whom it will be shared. A separate non-disclosure agreement may also be required.

10 Secure data sharing

If you need to share data with an outsourced agency, agree how you will securely share data and reports (if they contain personal data). You should make sure that your agency keeps your data secure at all times to the highest standards. This could include data encryption, using high-grade Secure Sockets Layer (SSL) or Secure Shell (SSH) when data is being transferred and using 256-bit Advanced Encryption Standard (AES) when 'at-rest' (being stored and processed on the agency's server). Chord uses secure FTP (SFTP) for file transfers.

11 Data supply requirements

Estimate the quantity of data records required, decide on the data source(s) you will use (either sourcing new data or using existing data), which data you would like to exclude, how data will be prioritised for calling and de-duplicated if required. If you are sourcing new data from a supplier, undertake due diligence on the data supplier to ensure that the data is legally compliant.

12 Data input requirements

To ensure that data captured and input during the campaign is consistent with your member database, set out data standards and protocols that are required for each data field (including picklists etc.). If you are securing consent to future marketing, or verifying existing marketing preferences, ensure that this can be recorded and evidenced robustly.

13 Corporate / telephone preference service (C/TPS) screening

C/TPS screening may be required to exclude new prospects and existing / lapsed members who have not consented to receiving unsolicited calls. Monetary penalties of up to £500,000 can be enforced by the Information Commissioner's Office (ICO) for breaches of the current legislation.

Telemarketing Approach

14 Primary outcomes

Define your main campaign outcomes clearly so that you can measure the success of the campaign and evaluate it. For example these could include the number of new joiners, re-joiners, engaged members, questions answered, event bookings etc.

15 Secondary outcomes

Set out the other measurable outcomes that you would like to see. For example, consent to receive future marketing, referral to the membership enquiries team, information requests, referral to your website etc.

16 Qualification criteria

Clearly set out the qualification criteria (the minimum criteria) that every outcome must meet. These must be objective not subjective so there is no doubt what qualifies as a relevant outcome.

17 Call tone, pace and language

Research[1] has shown that human feeling and attitudes are typically based on 55% facial expression, 7% the words spoken and 38% paralinguistic (the way that words are said). As members cannot see you, the way that the words are said is vitally important. Do you want your callers using an engaging, professional and even passionate tone or something else? The pace of the call should typically match the pace of the person that you are calling. You will need to consider the language that is used during the calls to ensure relevance and clarity.

[1] source: Mehrabian, A. (1981) Silent messages: Implicit communication of emotions and attitudes.

18 Quantity and timing of calls

Decide how many call attempts you would like to make per member/record and how long to wait before retrying. Effective call schedules can make or break campaigns.

19 Time of day to call

Decide on the ideal time of the day to call your audience. Consider early evening or weekend calls and test reach and response rates and compare them to calls made during working hours.

20 Email and voicemail

Consider how you would like to use email to support the campaign and when they will be sent; before, during and after calls as appropriate. Leaving voicemail can be very effective when planned and delivered consistently. Decide what you want to say and give a clear call to action.

21 Integrating calls

Make sure that your calls are integrated with other relevant marketing activity in terms of messaging and timing. Consider how and when it is best to use one-to-one telephone contact within your member journeys.

22 Marketing schedule

Callers should be aware of all planned marketing activity, including advertising, that your audience may experience. Provide them with a current marketing and media schedule to make sure that they are fully-informed.

Development of Call Guide

23 Call opening

The opening to the call needs to clearly introduce your organisation and identify the reason for the call. For a member acquisition or retention campaign summarise a clear benefit, before open questioning to identify issues that are most important to the person you are calling. If appropriate, use a carefully worded privacy notice, so that the individual understands how their personal data will be used and how to exercise their rights.

24 Positioning

Clearly define how best to position your organisation consistently versus your competitors, if you have any.

25 Member benefits and your unique selling proposition (USP)

Set out the full list of benefits for all member categories to give your callers a full and clear briefing. Ensure that these are benefits and not just features. A useful way to develop features into benefits is to use 'which means that...' after stating each feature. If possible isolate a USP based on the benefits that are most important to members and that make you different.

26 Primary offer

Decide on the main offer for the campaign and how this can best be worded.

27 Frequently asked questions (FAQs)

Put together a summary of FAQs and clear answers to them.

28 Objection-handling

Put together a list of regular objections to the offer and a short, positive reply that provides additional useful information or additional relevant offer if possible.

29 Specific examples

With permission, give examples of specific members and their reasons for joining/re-joining.

30 Levels and cost of membership

Summarise the different levels or categories of membership and the costs for each.

31 Renewal cycle

Clearly set out the renewal cycle, including any grace periods and renewal methods.

Administration & Reporting

32 CRM access

If you are outsourcing, consider if you want calls and outcomes recorded directly into your CRM application. If so, do you have sufficient user licenses and do your policies and privacy notices permit 3rd party access?

33 Email templates

Draft email templates. Check that sending emails complies with current e-privacy legislation.

34 Email address domain

Consider if outsourced callers should send out emails using an email address from your domain.

35 Marketing collateral

Confirm what marketing collateral will support the campaign - web content, PDFs / etc.

36 Forms of payment

Decide how you want callers to take payments, direct debit and / or credit or debit cards.

37 Contact points

Confirm the main points of contact for the campaign for all outcomes and reports.

38 Outcome referral

State how often you would like to receive details for all outcomes secured during the campaign and what they should include.

39 Reporting

State how often you would like to receive progress reports, including call statistics summaries and more detailed reports and what they should include.

40 Data return

State how often you would like to receive campaign data to update your member database.

NEXT STEPS...

Contact us today to discuss a campaign. Or get in touch to request an MS Word version of this checklist, so that you can use it as a template

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