PRACTICE: CALL & EMAIL SCRIPT TEMPLATES

PURPOSE: To provide consistency in membership messaging

GOAL: To increase member, recruitment, engagement and retention

DELEGATE: VP Membership

RECRUITMENT TEMPLATES

1) NON-MEMBER EVENT ATTENDEES-

Email Follow up:

- **Content:** The email message below is to be sent by an MPI-CAC Membership Committee Member. If using your work email signature, please include your committee role/title as well so the prospective member is not confused.
- **Timeframe:** Management to provide Membership Committee non-member event attendee list within 72 hours post event. Membership to email contacts within 1-week post event.

Good morning/afternoon, (insert name).

My name is (insert name) and I am a member of the MPI (insert Chapter name) Chapter. I wanted to thank you for attending (insert event) and find out if I can answer any questions you may have about membership.

In the meantime, please visit www.yourchapterswebsite.org for more information about our organization: (For the below hyperlinks, link to your chapter specific pages, these are hyperlinked to MPI Chicago Area Chapter)

- Stay up to date on our [chapter events](#) … we hope you will attend!
- Social Media Buff? Fan us on [Facebook](#), follow us on [Twitter](#) and keep in touch on [LinkedIn](#). This is a great way to check us out and stay connected!
- Learn more about the [benefits of membership](#) with MPI and the local (insert Chapter name).
- We know how to have fun! Check out "[Taking it to the Streets](#)" to find out what MPI-CAC is up to now.

Feel free to call or email me if you have any questions or need additional information. I am happy to help and look forward to meeting you soon.

(Insert Your Signature)
2) TRADESHOWS -

Step 1 - Trade show Follow up Call:

- **Content:** The following script is ideal for leaving a voicemail message. If the prospective member answers the call, walk through the email “script” to start the conversation.
- **Timeframe:** Membership to make call one week post show

**Voicemail Message:**

Good morning/afternoon, (name). My name is (name) and I’m a member of the MPI (insert Chapter name) Chapter.

I wanted to thank you for stopping by our booth at (insert trade show name here) and to see if I can help answer any questions you may have about becoming a member of our chapter?

Our next event is (insert next event) and I hope to see you there!

Feel free to call me back at (number) any time. Thanks and I hope to hear from you soon!

Step 2 – Trade Show Email Follow up:

- **Content:** The email message below is to be sent by your chapter Membership Committee Member. If using your work email signature, please include your committee role/title as well so the prospective member is not confused.
- **Timeframe:** Membership (Trade show Sub-Committee) to provide excel spreadsheet of show contacts within 2 weeks post show. Membership to email contacts no later than 2 weeks post show.

**Email Message:**

Good morning/afternoon, (insert name).

My name is (insert name) and I am a member of the MPI (insert Chapter name) Chapter. I wanted to thank you for stopping by the MPI-CAC booth at (tradeshow) and find out if I can answer any questions you may have about membership.

Please visit www.yourchapterswebsite.org for more information about our organization: (For the below hyperlinks, link to your chapter specific pages, these are hyperlinked to MPI Chicago Area Chapter)

- Keep informed of upcoming chapter events we hope you will attend.
- Social Media Buff? Fan us on Facebook, follow us on Twitter and keep in touch on LinkedIn.
- Learn more about the benefits of membership with MPI and the local (insert Chapter name).

Feel free to call or email me if you have any questions or need additional information. I am happy to help and look forward to meeting you soon!

(Insert Your Signature)
3) WEB CONNECT USERS -

Email Introduction:

- **Content:** The email message below is to be sent by an MPI-CAC Membership Committee Member. If using your work email signature, please include your committee role/title as well so the prospective member is not confused.
- **Timeframe:** To be sent within 1 week after receiving the list from MPI. The list is provided on a quarterly basis to the chapters.

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Dear (name):

Welcome to the MPIWeb Connect user community! I am (insert sender’s name) of the MPI (insert Chapter name) Chapter. I hope you are taking advantage of the MPIWeb Connect service by exploring the articles, engaging in group conversations and reviewing some of the online professional development tools available.

One of the best ways for you to enhance your MPI experience is to attend one of our chapter meetings and events. There is nothing more impactful than connecting face-to-face with other meeting and event professionals. Our next event is:

(Insert specifics regarding the next event)

We hope to see you there! Once you have completed your registration, please give me a call at (insert contact phone) so we can make arrangements to personally meet.

Again, thank you for your interest in MPI and our chapter! I look forward to meeting you soon.

(Insert Your Signature)
1) New Member Buddy Calls –

You always want to start with a phone call and if you’re not getting anywhere, follow up with an email.

- Be-friend them, invite them to join you or a member of our committee at the next chapter event
- If there is a New Member Mixer, touch base with your new members that have not attended one to find out if they can join us.

Talking Points

- Introduce Yourself
- Welcome them to MPI
- What are they looking to get out of MPI? (Remember you get out what you put in)
- Upcoming Events
- Join a Committee
  - Chapter website – Leadership – Join a Committee
  - Guide them to decide if they want to be on an event based committee or service based committee
- Grant Information
  - Chapter website – Community – Education & Membership Grants – Apply Now

Sample Email:

Hello and welcome to (insert your Chapter)!

Allow me to introduce myself. I’m (your name) and I’m part of the welcoming committee for (your chapter). We want you to know that we are very glad you made the decision to join our organization. Now that you have made the financial commitment to join us, we hope that you will make the further commitment of your time and energy and consider becoming an active member of (your chapter’s) various committees. It has been my experience the more active and involved you are in an organization, the more benefits you will receive from your membership.

I am your “buddy” and hope to be able to meet you at the first event you attend. If I’m not able to meet you, I’ll get you connected with someone from my committee. We will be more than happy to act as your “buddy” and introduce you to your fellow members over the course of the event.

Also, make sure to attend one of the New Member Mixers. It’s a great way to start meeting and networking with your fellow new members. Watch your email inbox for an invitation in the next few weeks.

If you have any questions, please feel free to give me a call or email!

Regards,

(Your Name)
2) Customer Service Calls –

Membership Retention “Customer Care” Call Script

Hello, this is (insert name) with the (your chapter). I’m simply calling today to touch base with you on your current membership and see how things are going for you?

Potential Questions to ask - pick 3 to focus on each call:
• What was the last MPI event you attended?
  o If they haven’t, then why not?
• Are you on a committee?
  o If so, which one? What do you like, what would you improve?
  o If not, tell them why you became involved and explain the benefits.
• Our chapter mission is to help our members grow their career and build their business. Do you feel your membership helped you with this?
  o If so, how?
  o If not, what can we do differently?
• What do you think the (your chapter) is doing right? Doing wrong?
• Specifically, what can I / (your chapter) do for you?
• Do you plan on staying/getting involved?
• What do you hope to gain from your MPI membership?
• What are some of the most important benefits that MPI offers to you personally?
• Do you plan on renewing your MPI membership? Why or why not?

Wrap up the call by reminding them of the following benefits:
• Are they receiving (your newsletter/event invitations)?
• Visit our website (insert your website URL) for all chapter information and to update their membership profile
• Let them know about our next event (link to your event calendar) and that you’d like for them to come
• Tell them to follow us on Social Media: Fan us on Facebook, follow us on Twitter and keep in touch on LinkedIn.
• Mention our Education grants that will help cover the cost of attending our events if awarded or Membership Grants that will cover the cost to renew their membership if awarded. To apply, visit the Grants page on website under the COMMUNITY tab.

THANK THEM for being an MPI member, for their time, and for being a leader in the meetings/conventions/events industry!