



UNDERSTANDING THE MEMBERSHIP LIFECYCLE

The Membership Lifecycle is a tool used to help understand the stages someone will pass through on their way to becoming a renewing and sustainable member. This brochure explains each stage of the lifecycle and ways chapters can use it to maximize success.

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Introduction

The first stage of the Membership Lifecycle is the introduction phase, when people become familiar with the chapter and its initiatives. Activities done in this stage are meant to create awareness, providing prospective members with more understanding of the chapter's offerings and recognition for the name and brand. This frame of reference helps people make informed decisions in other stages of the lifecycle.

Chapters can and should take strategic steps to create a successful introduction:

1. Define Identity and Chapter Value

- Develop a value proposition statement and elevator speech (a short, easy-to-recite pitch) so leaders and established members can easily explain the value of the chapter.
- Use correct Sigma branding, and frequently communicate the chapter name, logo, links to online platforms, and contact information.

2. Manage Member Pride

- Survey members to find out what the chapter can do to create an exceptional membership experience that they will want to share with others. Then, make a plan to implement their feedback.
- Create a sense of community and a welcoming environment through frequent communication, inclusion of all membership segments, and positive recognition.
- Develop ways for members to get involved, such as committee positions, volunteer opportunities, and meaningful programming.

3. Create Awareness and Build Reputation

- Increase the chapter's presence in member workplaces through events and collateral to expose the chapter to potential nurse leader members and further instill member pride.
- Partner with other organizations in the community that have similar goals to develop relationships, and seek out sponsorship and philanthropic opportunities to increase brand awareness.



Utilize Sigma's pre-made resources, like this Member Orientation Card, to help create awareness for your chapter and instill member pride.

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Recruitment

Recruitment is the active process of attracting qualified candidates. The purpose is to develop well-educated potential members who are likely to accept the invitation to join. If the introduction was successful, the chapter will be able to spend less time educating about what the chapter is, and more time explaining the benefits of membership.

Sigma chapters have experienced much success by hosting events and programming during the recruitment phase. This helps others understand the breadth and capacity for success of the chapter, and allows the chapter to have meaningful, face-to-face conversations with others. Recruitment event resources and examples are in the All Chapter Officers Workgroup on The Circle.



Download recruitment resources, like the posters seen here, from the All Chapter Officers Workgroup on The Circle.

Interesting ideas include:

Meet and Greet Sessions – Invite nonmember guests to spend time with established members and leaders in a relatively informal atmosphere. Ask members to share their positive experiences with attendees, and play Sigma’s recruitment video to supplement.

Professional Development Training – Offer skill development opportunities, such as how to write a resume, study sessions, tips for job interviews, career path exploration, and educational speakers. This helps demonstrate the chapter’s value, especially to membership candidates.

Founders Day Celebration – Sigma has a rich, 100-year-old history of advancing the nursing profession. Founders Day, celebrated annually on 5 October, is a milestone to recognize the success, honor, and longevity of the organization.

International Nurses Day – Annually celebrated on 12 May, International Nurses Day is the perfect time to establish the chapter as a leader in nursing and acquire exposure through a public event. Use this time to make attendees aware of the contributions the chapter has made to support the profession.

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Induction

The third phase, induction, is where the success of the introduction and recruitment will translate into gains for the chapter. At this point, the chapter is ready to begin working in the Online Induction System (OIS) to issue invitations.

Remember, the invitation to join Sigma should never be a surprise for prospective members. In order to see the best acceptance rates, it is imperative that candidates are effectively introduced and recruited to join. Otherwise, chapters run the risk of overlooked invitations, fewer inductees, and a loss of potential revenue. When candidates do not understand what they are being asked to join, they are less likely to accept.

Induction Communication Timeline

8-12 weeks prior to induction:

- Determine eligible candidates and host a prospective member meeting to cover the expectations of induction and membership.
- Send an email to candidates that outlines what was covered during the prospective member meeting and allow all candidates to understand the membership expectations. It will also alert individuals to be on the lookout for the invitation to join. A sample is available in the All Chapter Officers Workgroup.
- Add candidates and send the invitation to join through the OIS.

6-8 weeks prior to induction:

- Schedule two or three email reminder messages through the OIS to candidates who have not accepted the invitation.
- Send a save the date card for the induction to established chapter members and post the event dates online.

4-5 weeks prior to induction:

- Make personal contact outside of the OIS to unresponsive candidates to ensure they received their invitations.
- If the ceremony is occurring on campus, post the event on the campus calendar.
- Set a date for the new member orientation and communicate this date to candidates outside of the OIS. As you will further read, this orientation will ensure they fully understand how to be active and engaged with your chapter.

1-2 weeks prior to induction:

- Reach out again to candidates who have not yet accepted the invitation. Reach out again to candidates who have not yet accepted the invitation and include a copy of Sigma's acceptance video to reinforce your message.
- Communicate with attendees to let them know any final induction details.

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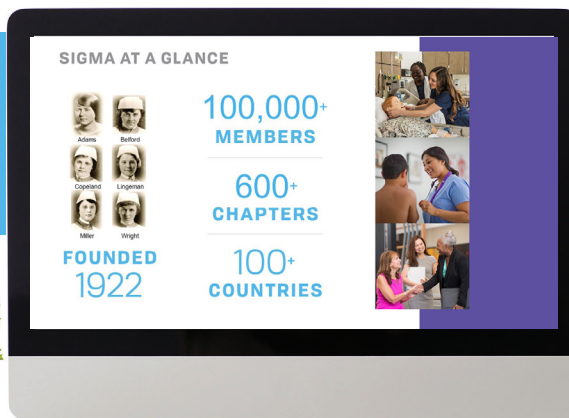
Orientation

The orientation phase of the lifecycle is when you introduce your members to the ways they can make the most of their membership and establish a connection with the chapter. Without this connection, members may become disengaged and forget the value that made them join initially.

Chapters should capitalize on a new members' induction excitement and hold an orientation session soon after the ceremony, also inviting recently transferred members and those who have recently renewed after a period of inactivity. Cover items like:

- Sigma and chapter history; board and committee structure; and the values, goals, and mission of the organization, including the current biennium's Organizational Call to Action. This helps describe the prestige of being a member and explains the rich and honorable history of the organization.
- Upcoming chapter and Sigma activities, including the details for how to attend and why members would find value in participating.
- Chapter and headquarters contact information and links to online platforms, so members know where to turn if they have questions or want to engage with the chapter virtually.
- Sigma and chapter-specific benefits, including The Circle, career resources, how to access journals, the My Membership portal for renewals and updates, how to find free member nursing continuing professional development (NCPD), and special members-only discounts at the Sigma Marketplace.
- Communication norms, including the *Sigma Update* e-newsletter that is sent from headquarters, and the frequency and delivery of chapter communication. This is a good opportunity to help members add Sigma email addresses to safe-sender lists.

Download Sigma's New Member Orientation slide and script template from the All Chapter Officers Workgroup on The Circle.



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Involvement

A member's decision to renew will be based on the value of the experience they have received, and chapters can help members get involved by providing opportunities to participate and ensuring they are taking advantage of benefits.

One of the most important components of keeping members involved and engaged is through regular communication. Members want to be informed of the chapter's progress and activities, and they need to be reminded of benefits and other Sigma offerings they can take advantage of. Your chapter may offer exceptional member benefits, but if they are not communicated to members, they may not be perceived as valuable.

Keeping members informed plays a large part in creating relationships and helping them establish a connection to the chapter and organization. The first step to keeping members continually involved is to create a communication plan that aligns with the chapter's strategic plan and the Membership Lifecycle. Sample templates are available in the All Chapter Officers Workgroup.

Other strategies to help keep your members active and engaged with the chapter are:

Establishing volunteer programs.

Create committees and task forces, ask members to help at events, organize philanthropic activities in the community, or create virtual opportunities members can do from home.

Ensuring accessibility.

Is your chapter offering benefits and services for each membership segment? A career mentoring program might be valuable for some, but what about your members who are already in the workforce? Likewise, do you only hold membership meetings in the evening? You may be excluding members who work the night shift or are raising families.

Asking for feedback.

A simple way to keep members involved is to provide exactly the kind of membership they want. Surveying members regularly allows the chapter to assess what members want and need, and then create benefits and programs to support them in their membership. Nursing is an ever-evolving profession, and the needs of members now may be different than the needs of members even five or 10 years ago.

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6 Renewal

Renewal is the final stage of the Membership Lifecycle, and success will be determined by the chapter's efforts during the other stages. The most critical time for a member is when they approach the first renewal after one year of membership. For members who are considering not renewing, the supplemental messaging provided by the chapter is imperative.

Sigma's Renewal Cycle

- The renewal process begins three months prior to a member's expiration date.
- Within this three-month period, members can receive up to five different email reminders and three mailed notices. Members can renew online or by mail.
- Additionally, members receive reminders in *Sigma Update* and on The Circle as they approach the renewal date.
- If a member has lapsed, they receive additional communication, including an exit survey and a biannual newsletter with society updates.

Sigma's communications will highlight benefits at the international level, but chapters should also craft messaging about chapter-specific benefits and resources. Samples and templates are available in the All Chapter Officers Workgroup on The Circle, some of which are written for new members renewing after one year.

As mentioned, once someone has let their membership lapse, they hear from Sigma twice a year through an electronic newsletter. The chapter can also help supplement this messaging to encourage expired members to reactivate membership. Chapters should establish a habit of pulling the "All Activity – Last 90 Days Report" regularly from the Chapter Management System to identify people who have recently lapsed.

Much of Sigma's communication is through electronic means, so the chapter can take additional measures to speak with renewing members on the phone or in person. Consider creating a committee or volunteer opportunity to get members involved with a calling campaign or an event aimed at re-engaging lapsed members.

One of the very best ways to help members in the renewal phase is to create a strategic plan that incorporates all aspects of the Membership Lifecycle. When a chapter crafts a strategic plan and considers all membership segments, it allows the chapter to set goals for an ideal membership experience. Strategic plans help chapters evaluate and update programs, services, and benefits that are incentives for renewal, and informs actionable approaches for each phase of the lifecycle.

Remember to visit the All Chapter Officers Workgroup on The Circle at **<http://TheCircle.SigmaNursing.org/MyGroups>**. Sign in to view training videos, post conversations with other leaders, or submit a one-on-one consultation request.

Additional questions can be sent to Chapter Services at:

chapserv@sigmanursing.org

888.634.7575 (US/Canada toll-free)

+1.317.634.8171 (International)