



Membership Recruitment

“The personal approach is always the most successful.”

Attracting members and recruiting them should be an ongoing activity throughout the year.

People join associations for different reasons. This has to be understood. Your appeal has to meet a specific, unfulfilled need. Member needs vary and can be based on such factors as:

- Mode of practice or practice setting
- Length of time in the profession
- Demographics (age, background, etc.)
- Participation levels
- Special interests

Each of these different groups or segments may have different reasons for joining and different expectations of the association that will affect recruitment and retention.

The following may offer some insights into the behavior and the psyche of potential members, or prospects.

THE PSYCHE OF “MEMBERSHIP”

Many theories abound that describe the type of people who tend to join, or not join, organizations. The following offer some background.

General Reasons Members Join and Stay Loyal to your Association

- Mailboxer—someone who wants primarily a mail or computer relationship
- Relevant Participant—someone who will participate primarily through meetings
- Shaper—Someone who wants to influence the association’s policies
- CompShopper—someone who is sampling membership
- Cognoscenti—someone who wants to gain specialized information
- Status Conscious—someone who uses the association for his or her status
- Altruistic—someone who wants to support the goals of the association
- Doubter—someone who resists change
- Non-relevant—someone who no longer finds the association to be relevant

(Paulson, Dale G. *Allegiance: Fulfilling the Promise of One-to-One Marketing for Associations*. Washington, D.C.: American Society of Association Executives, 1998)

Three Prospect Types

Here is an example of three types of prospects as identified by Philip Kotler in *Marketing for Non Profit Organizations*:

- **Resisters: People who dislike the organization**
They may disagree with the organization’s principles or feel the organization doesn’t do any good. If these views are unfounded and the association can refute the negative impressions through well-founded evidence, you may be able to recruit some of these individuals. But if these views are well founded, then the organization will gain little by pursuing this group.

- **Indifferents: Prospects who don't see much benefit to joining the organization.**
The typical response you hear from this group is: "The dues are too high relative to the benefits I would receive," or "I can get that benefit from other associations or organizations." This group includes free riders—people who feel they can get the benefits of membership without joining. The best approach to indifference is to demonstrate that the organization's value is high in relation to the cost.
- **Uninforms: Prospects who have little information on which to base a judgment.**
They are the ones who say: "I really don't know what you do," or "I have no idea of the dues, but I think they are high." The best way to approach these individuals is to send them information to increase their knowledge of your association.

Excerpted from Lauren L. Corbin and Richard P. Whelan "Recruitment Techniques," Membership Marketing, ASAE, Washington, D.C., 2000, p. 42.

Ready to recruit? Be prepared if you're going to do the "ask."

If you are conducting a recruitment campaign, or simply encouraging a doctor to join COA, keep some of these things in mind:

- Know your association.
- Know your society.
- Do you know the key benefits of membership?
- What's your approach?
- Do you have an application on hand?
- Be ready for questions, or know where to get the answers. Then get back to your prospect.

While personal contact is more impressive than just a telephone call, use the initial phone call to set up a personal visit or to invite them to a Local Society meeting. Find out as much as you can about the prospect's interests and practice setting.

LISTEN CAREFULLY! It's not your job to do all the talking. The conversation may offer you important clues as to the best way to proceed with the membership approach. Be direct and honest. Let your colleague know why you want to get together and that you intend to talk about membership.

WHAT ARE SOME REASONS DOCTORS JOIN COA?

"I believe that it is my duty to support my profession."

"Why did I join? Simple: lobbying, lobbying, lobbying."

"To maintain my insurance coverage through California Optometric Sponsored Insurance Services."

"My friend is a member."

"I enjoy getting COA publications in the mail."

THINGS TO TALK ABOUT

- **How membership in the association will benefit your colleague. Be specific.** This is where your listening skills come in. Shape your discussion of benefits to fulfill any needs that have been identified. Example: don't focus on association-sponsored insurance programs if the prospect is interested in legislative activity and future scope enhancement.
- **Tell your colleague why you're a member and how your membership has been helpful to you, personally and professionally. Be specific.**

- **Benefits should be personalized.** The recruiter should be able to talk about not only the service or activity of the association, but more importantly, how the prospect directly benefits from the services. **Be specific.**
 - Do not dictate that it is “their duty as an optometrist,” or that it is “their obligation” to become a member (even if you think so) because they may not feel this way.
 - Remember, not all members are alike. One member may have joined for a very different reason than yours. The appeal of member benefits is subjective.
- **Don’t memorize an approach.** People recognize when a speech is “canned.” Take a list of key benefits with you and focus on those areas in which your colleague indicates his/her interest or need.
- **Be courteous of your colleague’s time and schedule.** Stay within your appointed time.

THE PERSONAL TOUCH:

Ways to approach a colleague about joining.

A benefits approach

“As an association member, you will receive...that will help you to...”

A conditional invitation approach

“Come to the meeting with me next Thursday and see for yourself...”

A single-issue approach, based on a known interest

“I know how interested you are in getting involved with vision screening. Our society needs another person on their committee to coordinate...” or “COA is currently developing...”

A problem-oriented solution approach

“We’ve all been working to achieve glaucoma certification for California. Even though SB1406 passed, there is still more work to do. If we could unite our efforts...”

Networking approach

“As a new O.D. in California, this meeting will give you an opportunity to meet...” or “find out about...”

Old buddy/new buddy approach

“I’d like to meet you for coffee early and then we can go to the meeting together.”

Become involved approach

“I know that you are concerned about...would you be interested in serving on this committee/task force that’s working on the issue?”

An appeal to opportunities for leadership

“COA needs input from concerned members like you. Leadership positions come from members who take active roles in the association.”

WHAT IF THE PROSPECTIVE MEMBER SAYS “NO” TO JOINING?

- **That’s okay.** Qualify the turn-down.

- **Ask why and remember to listen.** Inquire why the O.D. chose not to join (this may help you in the future to fine tune your approaches). “I can understand that you may not want to join right now. Would you mind sharing the reasons why?”
- **Don’t push.** There will be other opportunities to re-approach membership in the future and to reinforce benefits that meet his/her needs.
- **Say “thank you.”** Always thank the prospect for his/her time and attention: at the end of the meeting, at the end of a phone call, follow-up with a note. Always be professional.

IF YOUR PROSPECT SAYS “YES” TO MEMBERSHIP:

- Encourage your colleague to complete the membership application right there. Make sure you get a signature and payment information.
- Offer to mail it for him/her.
- If your colleague wants to fill it out “later” try to set a specific time to get it back.
- **Say “thank you.”** Always thank the prospect for his/her time. Thank them, but also remember to stay in touch with them.

YOU’VE RECRUITED A NEW MEMBER. WHAT NOW?

WELCOME THE NEW MEMBER AND GET THEM INVOLVED!

“The more a member participates or uses member benefits, the more likely that member is to retain membership. When members perceive they are getting value, they retain membership. The more benefits used by a member the closer to the association he or she will be.”

Arlene Farber Sirkin and Miriam T. Meister, CAE, “Retention Marketing,” Membership Marketing, ASAE, 2000, page 68.

ANSWERS TO THE RESISTANT PROSPECTIVE MEMBER

Below is material offered by the American Optometric Association regarding recruitment and answers to questions asked by prospective members.

In Article 1 of this section, there are numerous benefits listed available through membership in organized optometry. When presenting benefits to a prospective member, you may occasionally face resistance. Here are some of the most common objections to membership, and some suggestions for responding to these concerns.

“I’m a busy person. I don’t want to join if I can’t be active”

We also want you to be an active member. But if you don’t have time at this point in your professional career, that’s all the more reason to help in the only other way possible—your interest, support and your dues investment. In representation of the profession, numbers count. By being a member and contributing to the local, state, and national organizations that are working for you every day, you’ll be helping to support the very associations that are protecting and advancing your profession. The associations need your support in representing the profession to the legislative bodies. And, when the time comes that you’re ready to take a more active role, we’ll be there for you.

“I don’t always agree with organized optometry.”

That’s understandable. Freedom to disagree is guaranteed in a democracy, and organized optometry acts through the democratic process. Its decisions are the majority view . . . and every member can come to meetings, air opinions, be elected to office and work to change what he or she thinks is wrong.

“Organized optometry can’t benefit me.”

You may think you don’t receive immediate and direct benefits from organized optometry, but the AOA and the affiliated associations are continually working for you. The associations represent your profession of optometry to the legislature, protecting your right to practice to the full extent of your licensure. The associations provide education and updates to help you in all of your practice concerns, clinical and practice management.

In a personal sense, as well, organized optometry enables you to meet and make new friends within your peer group which broadens your interests. You can gain a great deal through this network. Try it and see for yourself.

“There’s too much duplication of work, too many organizations.”

What do you mean by duplication? It’s true there are local, state and national organizations, and membership in one means membership in all. But each association serves a specific purpose, from your opportunity to be a part of a local network of optometrists, to the state affiliation that speaks to your specific state legislative needs and concerns and the national association that responds to federal agency and legislative concerns.

“Why join AOA and the affiliated associations in preference to other organizations?”

Each organization has specific goals and the goal of organized optometry is to serve the profession—protecting and advancing optometry. You are the ultimate winner each time your profession of optometry makes advances.

“Membership in organized optometry is too expensive.”

It’s true that membership is a significant investment, but you can receive a return on your investment through the many benefits of membership. Some of those benefits are returned to you through the ongoing programs of the associations. For example, the national and state associations ensure a voice for optometry’s concerns in legislative and regulatory agency decisions, advocating your right to practice independently, and allow you the opportunity to participate in an expanded scope of practice and in third party programs, as well as enjoy parity in the Medicare program.

In addition, the associations conduct programs that enhance your image as a primary eye care provider and inform you patients and the public about the scope of optometric services.

Membership in organized optometry offers tremendous opportunities for career advancement, practice development and personal growth.

Considering what your membership does for you, your practice and your profession, it’s quite a bargain.