



National FSP's

Digital Recruiting and Retention Resource Package

for Chapters, 2020-2021





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INTRODUCTION



This document is a compilation of the resources national provides your chapter to support your recruiting and retention efforts. As always, our goal is to provide a variety of options to allow you to customize your messaging based on your specific objectives, targeted audience, and whatever unique opportunity you are exploiting. While the options presented here are available “on demand,” remember to let us know about any projects that may require customized support, as we can address those on a one-off basis.

For now, please review this Digital Recruiting and Retention Resource Package and familiarize yourself with the contents, so you can put together a recruiting strategy and a communications plan that works for you and your chapter. (Note: If you want guidance on creating a messaging plan, please contact Donna Giacobello at dgiacobe@societyoffsp.org. There are additional resources available if you need them.)

This document represents multiple influences: the guidance of our national volunteer leadership, input from chapter leaders, feedback we hear directly from membership, and the combined expertise of staff in navigating the current environment. Also, please keep in mind that this resource was assembled in a very different time than previous membership kits were put together, so it reflects our current circumstance and the specific challenges it presents. While you will find a number of items you can download and print or attach as a pdf to email messages, as has been offered in previous years, you will also find a number of suggestions and some guidance focusing on ways to bring the chapter together without physically gathering.

Speaking for a moment to the challenges presented by the COVID-19 crisis, it is good to recognize that viewed from a different perspective, the forced movement toward remote activities has given us all an opportunity to look at things differently. It may well be that electronic events become the norm post-pandemic and we have to reconsider how we define community and connection. So, it makes sense to prepare for that kind of situation, acknowledging that connecting virtually, networking from a distance, and remote learning can deliver unexpected benefits, too.



MARKETING RESOURCES



There are several marketing pieces available for you to download and print for distribution or use as attachments to email messages. The Chapter Marketing and Communications Resources page on the Chapter Leaders' website offers many options so you can customize your communications to each unique situation. While many of the items are evergreen, we have modified several pieces to reflect the new benefits added to membership and an updated positioning for FSP in the financial services arena. We have also taken into account feedback from volunteer leaders that we need a sharper focus in our recruiting and retention materials on the benefits of belonging to FSP, both professionally and on a practical basis.

The updated items include:

- Membership FAQ flyer
- Snapshot of benefits flyer
- Snapshot/Checklist of discounts flyer
- Chapter flyer/ad
- PowerPoint slide deck "Why Belong to FSP?"
- Email templates for recruiting, welcoming, and renewing membership

You can access the full inventory of marketing pieces on the [Chapter Marketing and Communications Resources page](#) on the Chapter Leaders' website.

In addition to the above recruiting aids, we will be generating lists of prospective members by using our new automated email marketing system, which we hope to have up and running in late summer. National will create campaigns targeting nonmembers, gather contact information, sort it by chapter, and send names etc. to the appropriate chapter for local follow-up.

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DOWNLOAD FILES

FAQ

Benefits Flyer

Discount Flyer

Chapter Ad

Why Belong to FSP?

Email Templates

We have modified several pieces to reflect the new benefits added to membership and an updated positioning for FSP.

Marketing Resources Continued

Discounted National Fees

As an incentive to join FSP, there will a 25 percent discount on national fees available to all new members. This is a valuable message to incorporate into your recruiting communications. It's also a good message to build around when creating MGI emails/campaigns.

Recruiting Video

A new item for 2020 is a short video with a recruiting message about the benefits of belonging, presented by incoming FSP National President, Mike McGlothlin. The video is a very strong message and can be a valuable addition to your recruiting efforts. [The video is available here.](#)



SOCIAL MEDIA



Stay connected to FSP national and encourage your membership to do so as well. It's an easy way to stay current on resources national is offering in addition to getting information on industry trends and happenings. Join us on our social media channels:

- FSP Twitter
- FSP on LinkedIn
- FSP on Facebook
- FSP Section Discussion Forums

For guidance on starting or enhancing your chapter's activity on social media, refer to the [Society of FSP Social Media Guide for Chapters](#). You may also reach out to national's social media consultant (at no cost to the chapter) with any questions you may have: socialmedia@societyoffsp.org.

CONNECT TO

Twitter

LinkedIn

Facebook

Section Discussions

Stay connected to FSP national and encourage your membership to do so as well. Reach out to national's social media consultant (at no cost to the chapter) with any questions you may have.



EDUCATIONAL RESOURCES



National Programs

- Chapters are encouraged to use any of the nationally sponsored educational offerings as chapter events. You have the option of airing the program live or scheduling a date to present the archive recording. Look on the [Calendar of Events](#) on national's homepage for the list of upcoming programs.
 - National can supply your chapter with a timed outline that you can use to apply for CE in your state.
- Take advantage of the timely programs addressing topics of interest in light of the pandemic and current market volatility. Once again, keep an eye on the national calendar for coming events and check the [Archived Webinars page](#) on national's website for titles that are of particular value now.
- In addition to the above, several case studies are available for chapter programming. You can review the list of ready-to-implement programs here. These can be done live or virtually.

Virtual Meetings and Events

While the value of in-person events cannot be overstated, restrictions on gathering may continue to impact your chapter's ability to present live programs. Considering that circumstance, here are some tools to facilitate virtual meetings and events.

- AnyMeeting (free and low-cost webinars)
- FreeConferenceCall.com (free teleconferencing, dial-in numbers not toll free)
- FreeScreenSharing.com (free online meetings; uses FreeConferenceCall.com for audio)
- ooVoo (video chat for small groups)
- GoToMeeting (tiered pricing model)
- Zoom (tiered pricing model)

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CONNECT TO

AnyMeeting

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FreeScreenSharing.com

ooVoo

GoToMeeting

Zoom

Chapters are encouraged to use nationally sponsored educational offerings as chapter events.

Educational Resources Continued

Even though you may be in an area where gatherings are permitted and live events are an option, travel restrictions or personal preference may preclude your speaker from getting to your meeting venue. When that is the case, consider asking your speaker to use one of the virtual meeting options listed above; alternatively, the speaker can record their presentation for you to make available either at a live chapter event or for download from your chapter's website.

National has compiled a list of speakers and their respective areas of expertise, each of whom is available to do virtual events for chapters. You can [access that list here](#).

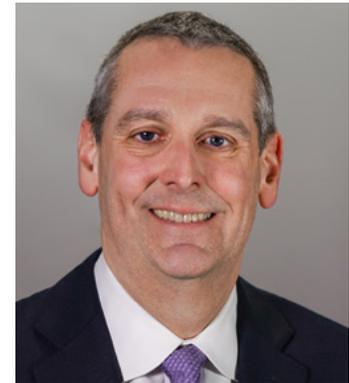
When planning virtual events, consider reaching out to other local chapters nearby and/or to other industry associations in your state, as they may be interested in being cohosts of the event and therefore sharing costs, including CE expenses.

Special Option for 2020: A Program with FSP's President

Incoming FSP President Michael J. McGlothlin, ChFC, CLU, CFP, LUTCF, is offering to waive his speaker's fee for the upcoming year and present to your chapter, whether in person or virtually. He has provided his speaker's kit, outlining 12 presentation topics ([access it here](#)) from which you can choose. You can reach out to Mike's Sales Coordinator, Megen Gaylord, at Megen.Gaylord@ashbrokerage.com or FSP's Member Services department at info@societyoffsp.org.

Custom Chapter Programming Guidance

As always, FSP national's Professional Development staff is available to assist you with identifying topics and/or speakers to engage with your chapter. Contact Patti McFadden with any questions pmcfadden@societyoffsp.org. Similarly, the Marketing Team is ready to assist with promoting your event, if requested.



*Incoming FSP President
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JOURNAL OF FSP

AN ASSET TO YOUR CHAPTER



Maximizing the Impact of FSP's Signature Publication

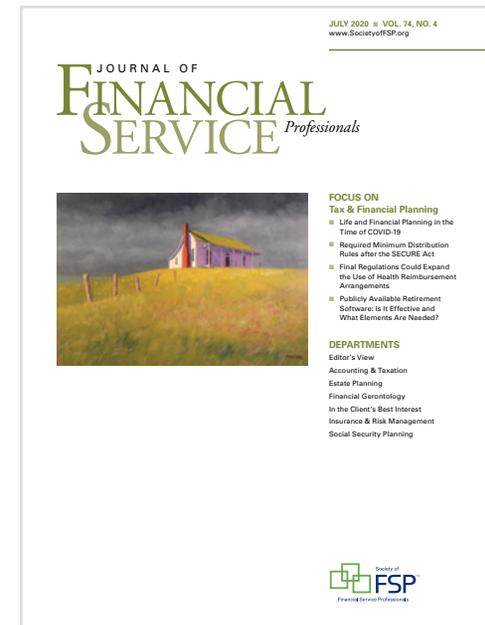
The Journal is more than a highly esteemed, widely respected industry publication, a resource for ground-breaking research and practical application of the newest information.

Use the Journal as a recruiting tool:

- Cited as most valuable membership benefit → an effective recruiting incentive (no prorated subscriptions, receive 6 issues regardless of when you join).
- Review the TOC—if there is a column/article that would be of interest to a specialty field, send out the abstract to that mailing list; follow up with membership messaging.
- Review the authors in each issue—if they're local and not members—recruit them!

Use the Journal as a source of meeting content:

- A local author may accept an invitation to speak at a chapter event; or an author may be willing to do a “remote” meeting with your chapter.
- Use the Discussion Guide as a roadmap for study groups.
- Remember the *Journal Live!* Programs:
 - Check the calendar on the national's home page for upcoming events.
 - Organize a chapter meeting around these interactive programs.



*Use the Journal as a
recruiting tool, as a
source of meeting content.*

