Membership Renewal Kit

Everything you need for a calm renewal season. Replace the words in [brackets] with your own details.

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1. The renewal checklist

Six to eight weeks before expiry

- [ ] Merge duplicate member records and fix bounced email addresses.
- [ ] Confirm membership categories and fees for next year. If fees are rising, tell members now.
- [ ] Renew as a member would, on a phone, and write down every confusing step.
- [ ] List what members got this year: events, resources, savings, advocacy, wins.
- [ ] Load the four reminder emails below into your platform and schedule them.
- [ ] Check that card payments, invoices and receipts work, and who handles failed payments.

During renewal season

- [ ] Reply to renewal questions within one business day.
- [ ] Follow up failed or declined payments the same week.
- [ ] Compare renewals each week with the same week last year.
- [ ] Ask board members to personally contact any key members who have not renewed.

After the deadline

- [ ] Call your most valuable lapsed members (script below).
- [ ] Send the two-question survey to everyone who did not renew.
- [ ] Move lapsed members to a separate list, rather than deleting them.
- [ ] Send your board the one-page report (outline below).

2. Four reminder emails

30 days before expiry

Subject: Your [Organisation] membership: a look back at [Year]

Hi [First name],

Your membership renews on [Date]. Before it does, here is what members got this year:

- [Benefit or event 1]
- [Benefit or event 2]
- [Saving, resource or result 3]

Next year we are planning [one thing members will care about].

Renewing takes about two minutes: [Renewal link]

Thank you for being part of [Organisation].
[Your name]

14 days before expiry

Subject: Two weeks left to renew

Hi [First name],

A quick reminder that your [Organisation] membership expires on [Date].

Renew here: [Renewal link]

If anything has changed for you, or the fee is a problem this year, just reply. We would rather talk than lose you.

[Your name]

3 days before expiry

Subject: Your membership expires on [Date]

Hi [First name],

Your membership ends in three days. After [Date] you will lose access to [member benefit, directory listing, member rates].

Renew now: [Renewal link]

[Your name]

7 days after expiry

Subject: We miss you at [Organisation]

Hi [First name],

Your membership lapsed last week, and we noticed. If you meant to renew and it slipped, here is the link: [Renewal link]

If you decided not to, would you tell us why? Two quick questions: [Survey link]

Either way, thank you for your time with us.
[Your name]

3. Lapsed members

The two-question survey

1. What was the main reason you did not renew? (Cost / Not using the benefits / Changed job or role / Forgot or payment problem / Other)
2. What one thing would bring you back?

A short call script

"Hi [Name], it's [Your name] from [Organisation]. I noticed your membership lapsed and wanted to check in personally, not to sell you anything. Was there a reason, or did it just slip? ... Thank you, that's really useful. If it helps, I can send the renewal link now / tell [colleague] about [the issue]."

4. One-page board report

The five numbers

1. Renewal rate (renewed / due to renew), compared with last year.
2. Members lost, and the top three reasons from the survey.
3. Lapsed members won back after the deadline.
4. Renewal revenue, compared with budget.
5. New members joined in the same period.

The three sentences

1. What went well.
2. What did not, and why.
3. The one change we will make next year.

> Prefer to hand this over? Halia & Co can clean your member data, set up the reminders in your platform and run renewal season with you. Start with a Membership Health Check (US$490) or email hello@haliaco.com.

Membership Renewal Kit, Halia & Co, haliaco.com. Free to use and share inside your organisation.