

Subject Matter of Motion	<b>Automate ACBL New Member Recruitment and Retention</b>
Audience: Type:	[X] Board of Directors [X] ACBL Management [ ] Advisory Council [ ] Bylaws [ ] Codification [X] Work Process [ ] Business Proposal
Statement of Issues/ Opportunities	<p>As a pilot manual work process, BOOST has been a success, and much better than any prior approach. The decision to pilot a series of manual trials was right. Now we must move smartly to a more powerful approach. We need faster results, a broader reach, and immediate commitment from prospects.</p> <p>BOOST has several limitations that slow results.</p> <ul style="list-style-type: none"> <li>• BOOST is not scalable and focuses only on face-to-face beginner classes.</li> <li>• Other Beginner and I/N offerings are important to prospects and beginners.</li> <li>• Online teaching is a powerful tool we should exploit.</li> <li>• Prospects react to only one offering, not all in their area.</li> <li>• Other Clubs and Teachers are not aware of interested prospects in their area.</li> <li>• Payment is separated from a trial decision by a manual process lasting days. Follow-up is burdensome to both prospects and teachers/clubs.</li> <li>• Teachers can delay offering ACBL memberships.</li> </ul> <p>The solution must:</p> <ul style="list-style-type: none"> <li>• provide prospects and beginners all options at a given point in time so they make informed choices at the moment they decide to try bridge.</li> <li>• not trap prospects and beginners to only one club or teacher.</li> <li>• be under the ACBL brand.</li> </ul>
The motion:	Define the plan to transition BOOST to a new automated, scalable process (Name to be defined) and broaden its use under the ACBL Brand. Staff the effort. Deploy capability every year until done.
Discussion	<p>The ideal solution broadens coverage to include all offerings to prospects and beginners, whether in-person or online.</p> <p>Prospects want to see everything that's available and choose what's best for them. They want an "Amazon-like" experience. They want to explore alternatives and commit to their choice at once. Clubs and teachers want to invest time and effort in great offerings for new players, not in recruiting and contact management. Automation maximizes reach without increasing cost. Clubs and teachers are more efficient and effective.</p> <p>Collaboration among clubs and teachers keeps the marketplace filled with compelling offerings. The ACBL supports offerings through automated contact management and attractive online experiences.</p>
Material impacts	Costs and payouts are an output of the project planning process. The expected business impact can be estimated from BOOST.
Reasons why the Advisory Council should adopt the motion	Member growth and retention drives all growth. We need to reach prospects with appealing offers more quickly, more broadly, and more effectively than ever before. We need a working online presence to turn around the current decline.
Risk if the motion is not approved	Without an effective automated process unifying Clubs, Teachers, and the ACBL we do not expect to reverse membership decline.

Respectfully Submitted,

Steve Moese K082411-Chair, Advisory Council Teacher and Club Committee

## Appendix – Building An Effective New Member Retention and Recruiting Automated Process

There is a clear gap in the capability of the clubs, teachers, and the ACBL's approach to how we recruit and retain new members. What follows are a list of topics that frame possible business requirements for a functional automated online system.

When designing an automated process, the first step is to identify the outages. The second is to define the set and sequence of projects that when complete will deliver the desired results. The third is to define the business requirements that guide the scope of each project. With the Business Requirements in hand, the next step is to determine the functional requirements that render the automation.

We offer only the project elements based on the single goal to improve new member recruiting and retention.

Ideally the final solution should:

1. Create one **ACBL database** to manage prospects' contact information as they begin their relationship with the ACBL. Ideally one database manages prospects, guest members, and members in the same source.
2. Deploy the **ACBL Marketplace** to promote all prospect and beginner activities offered by clubs and teachers (classes, games, supervised play, parties, online classes and online bridge).
3. Require clubs and teachers to provide timely fresh content.
4. To view offerings on the ACBL marketplace, the prospect must provide their name and email address. If possible, automate this feed from the online provider (Facebook, Instagram, Google, etc.)
5. Empower the customer. Have prospects choose their club/teacher and not the other way around.
6. Help all prospects and beginners choose a time frame then see all options within their chosen radius from zip code as well as online in a specified time frame (dates, times of day).
7. Make online advertising through the ACBL Marketplace by clubs and teachers so attractive and simple that they do not want to advertise beginner and I/N offerings elsewhere. Do not include tournaments.
8. Since the Marketplace is live and current, online/social media advertising can be continuous and focused where prospects are more likely to be found.
9. Services for clubs and teachers include time-bounded offerings, radius or zip code targets, demographic targets, membership targets, payments for service by customers, subscription payments by Clubs and teachers, feedback – ratings and comments, and simple polls in limited geography.
10. Consider redirecting CAP funds through this service.
11. When a prospect engages, encourage them to pay immediately.
12. Get a prospect's contact information to both teachers and club managers
13. Track prospect engagement. Secure ratings and feedback from participants.
14. Measure success.
15. Automate the contact management process to simplify the work of individual club managers and teachers. Clubs and teachers want transparency to speed new member growth.
  - a. After 3 months if a prospect has not engaged, offer them other opportunities in their neighborhood (up to 50 miles) and online. Prospects can search convenient and appealing opportunities (based on ratings & curated user comments).
16. Stop recruiting/retention support for clubs and teachers who do not perform.