**Countdown to a Great Member Experience**

**5 meaningful experiences**

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**4 ways you have grown**

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**3 things you are looking forward to**

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**2 ways to enhance** **your member experience**

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**1 reason you chose to stay**

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**Creating Your Retention Action Plan:**

**Step 1: Have at least five members respond to the Countdown Activity**

**Step 2: Assess your retention baseline**

* Review results from the Countdown Activity and sort takeaways into three categories:

|  |  |  |
| --- | --- | --- |
| Relationships | Responsibility | Recognition |

* If possible, collect some relevant historical data on your organization
	+ Major moments (instances of growth and of challenge)
	+ Membership size history
	+ Changes in member experience (expectations/opportunities)
* Take a current snapshot of your organization
	+ Current membership size
	+ Status update (what’s upcoming, the org’s most recent goals, current leadership, member, and advisor engagement).

**Step 3: Strategize your recipe for retention**

* Reflect and brainstorm after reviewing your retention baseline:
	+ Among the three categories, where has your member experience been strong? Where is it lacking?
	+ Assemble a historical narrative. Looking at your timeline combined with member feedback, what sticks out to you?
	+ Sort ideas into which elements stay in the member experience, what you could revive/rework, and new additions.
* Using the attached Strategy Guide, create a re-envisioned member experience by setting SMART goals.

**Step 4:** **Launch your re-imagined member experience**

* Ensure a fair distribution of work related to your plan, incorporate regular check-ins, and be realistic with available time and capacity.
* Measure and reflect on your progress, adjusting the plan as needed.

**Retention Strategy Guide**Use this guide to create a structured retention strategy with SMART goals.

**Writing SMART Goals:**

It is easier to succeed when you have clearly defined objectives. SMART stands for Specific, Measurable, Achievable, Relevant, and Time-Bound.

*Our goal is to [quantifiable objective] by [timeframe or deadline]. [Key players or teams] will accomplish this goal by [what steps you’ll take to achieve the goal]. Accomplishing this goal will [result or benefit].

Example: Our goal is to engage more than 50% of general members in the planning and/or implementation of org-hosted events by the end of 2022. The Vice President will oversee this goal by appointing 1-2 event coordinators who will support managing events and create at least 5 general member-led tasks for each event over at least 4 events in 2022, creating a total of at least 20 opportunities for general members. The Vice President will oversee the tracking and positive reinforcement of participation among general members. Accomplishing this goal will add meaningful opportunities for members to be more connected to the organization and practice leadership.*

**Create up to three SMART goals**

Create a timeline and designate leadership over each goal

**Identify one element that stays in your member experience that you want to strengthen in the next year.**

Goal 1:

**Identify one element that you want to revive/rework in the next year.**

Goal 2:

**Identify one completely new retention effort to put into place in the next year.**

Goal 3:

**Reach out for support.** Schedule a meeting with a Student Org Success Coach at [go.osu.edu/CoachRequest](file:///C%3A%5CUsers%5Colson.276%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CKKOU39N7%5Cgo.osu.edu%5CCoachRequest) for feedback and extra support.