

Student Engagement



Client Roundtable

March 7, 2024



CONVERSATIONS THROUGHOUT THE MEMBER JOURNEY

1. Profile Updates
2. Onboarding & Member Engagement
3. Event and Program Registration
4. Membership Renewal & Retention



POP IN CHAT:

What are you most hoping to get out of our roundtable today?



POP IN CHAT:

What are your challenges when it comes to student engagement?





RELEVANT BLUEPRINTS



- Student Engagement/Onboarding
- Profile Update
- Member Acquisition Campaign
- Renewal Campaign
- Lapsed Member Win-Back
- Net Promoter Score
- Event & Conference Registration

Association of Professional Feedback Curators

APFC

Inbox
Insights
Contacts
Lists
Campaigns
Settings
My Profile
Super Admin

Pinned Campaigns

A Client - New Member Onboarding

Professional Association
New Member Onboarding EXAMPLE

Status: Active
Created on: May 4th, 2022
Next Check-in: Mar 1st, 2024

Campaigns

Create New Campaign

Campaign Name	Status	Channel	Interaction	Activity	Actions
1.22 Test Campaign	Draft	Email	Outbound Scheduled	Created on Jan 22nd, 2024	Edit ...
2.13 Test	Draft	Email	Outbound Scheduled	Created on Feb 13th, 2024	Edit ...





POP IN CHAT OR UNMUTE:

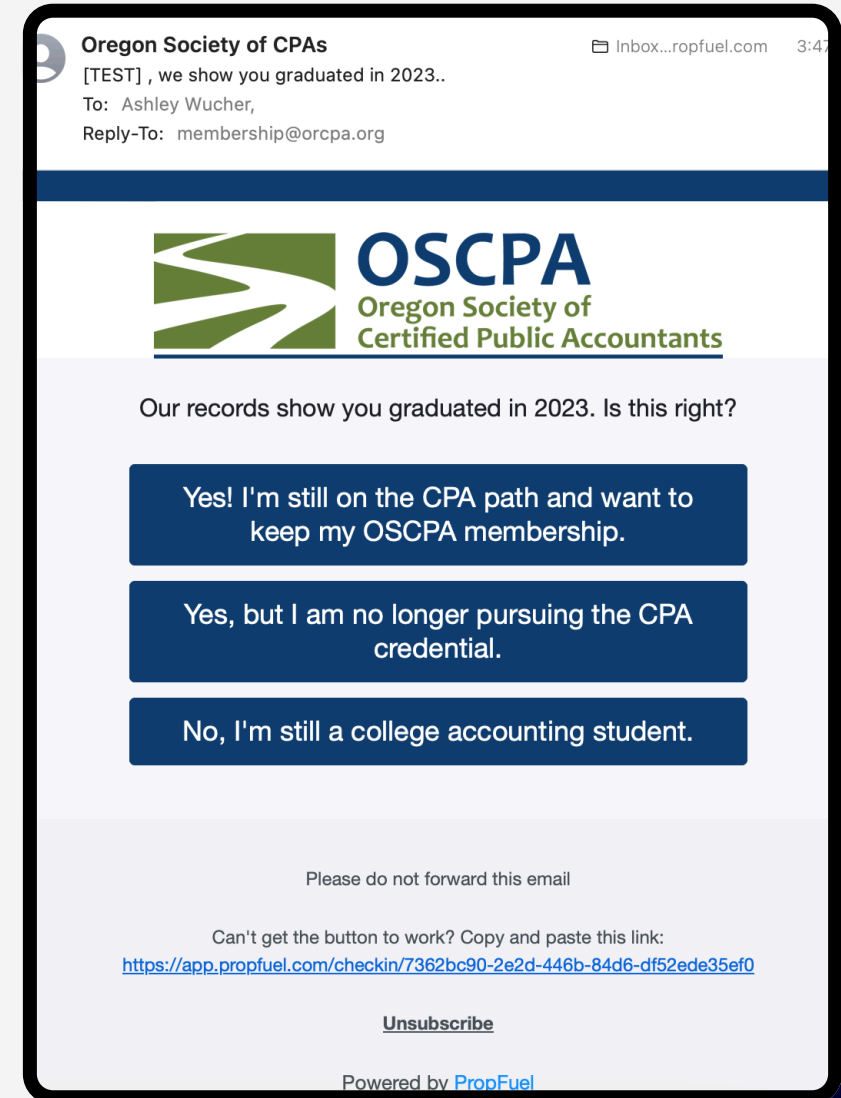
How do you currently get updated info about student members (graduation date, contact info, etc.)?

GRADUATION DATES

The Oregon Society of CPAs asks recent graduates to confirm their graduation date.

- Those who graduated keep their free membership for another year.
- Those still in school can provide a new graduation date and confirm their University.

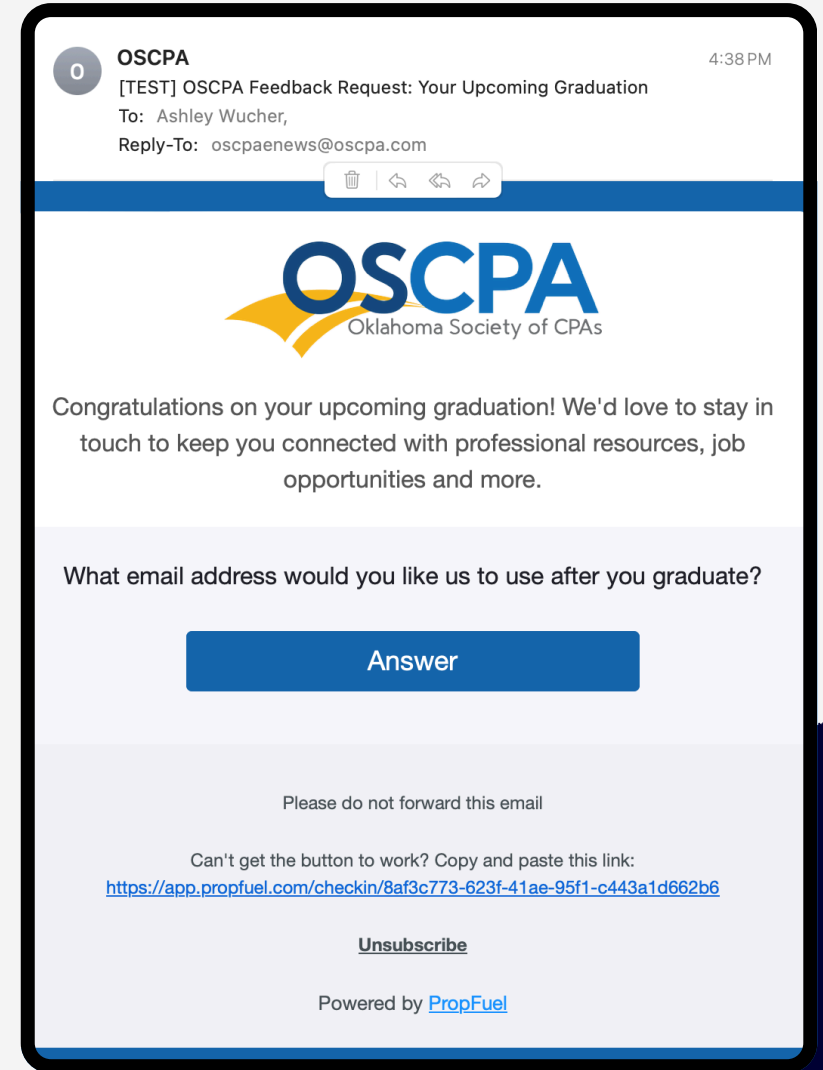
**28% response
rate (22 updated
graduation
dates)**



PERSONAL EMAIL ADDRESS

The Oklahoma Society of CPAs asked upcoming graduates to provide a secondary email address where they can keep in touch after graduation.

22%
response
rate



PROGRAM CONFIRMATION



Which best describes your current status?

I am a full-time turfgrass student.

I have graduated and I am currently employed at a golf course.

I have graduated, am working in the turfgrass industry, but not at a golf course.

I have graduated, however I am not working in the turfgrass industry.

None of the above.

Submit



Thanks for letting us know

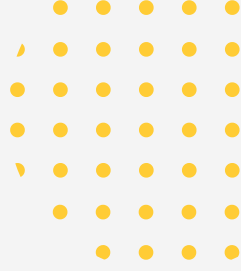
Please let us know your expected graduation date and where you are enrolled.

This information is required.

Where are you currently enrolled?

When is your expected graduation date?

Submit



STAYING IN THE INDUSTRY & NEXT STEPS

ASN asked their undergraduate and graduate students that should have graduated in the fall what their next steps were.

These responses were then written back to MemberClicks. Those enrolled in another program were then asked for that info.

16%
response
rate

Dear ,

Our records indicate that you should have completed your graduate degree in 2023! Life after graduation can get pretty busy, but ASN wants your education and expertise to be accurately represented. Please let us know what you are doing after graduation!

What are your post-graduation plans?

I will be entering the professional work force!

I will be enrolled in another graduate program!

I need more time to finish my graduate degree.

Sara Genell

Member Engagement Coordinator

American Society for Nutrition

(240) 428-4602

mem@nutrition.org



POP IN CHAT OR UNMUTE:

Do you currently segment student members from your onboarding and member engagement emails?

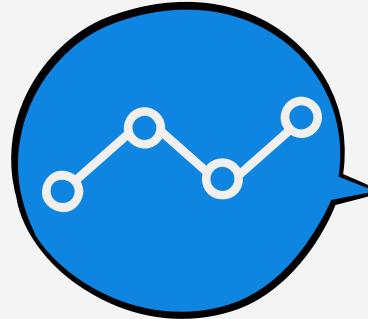


WHY IT WORKS



ASK

Engagement begins with a question.



CAPTURE

By listening we learn more about the member.



ACT

Member intelligence drives a personalized actions.

STUDENT ONBOARDING

Sequence campaign with 4 check-ins in the first month, and one 4 months into membership.

Questions:

1. Where are you in your journey?
2. What is your primary goal for joining this community?
3. Which of these deals (included with your WSCPA membership) appeals most to you?
4. Have you been taking advantage of your membership?
5. Which volunteer area is of interest to you?




Washington Society of
Certified Public Accountants



We're here to provide support as you cultivate your career journey.
Where are you in your journey?

Please select the option that best describes your current status:

ENROLLED COLLEGE STUDENT - Working
toward achieving 150/225 credit hours

STUDYING/PREPARING FOR THE CPA EXAM -
Preparing to sit for or actively taking the exam

EXAM PASSER - Working toward fulfilling the
experience or ethics requirement or looking for a job

We are excited to help you cultivate the skills and connections you need to thrive in the accounting profession. Understanding your current state in the CPA licensure process helps us provide more tailored resources and opportunities.

We know your time is valuable. This isn't a survey... just a fun way for us to share how to get the most out of your membership.

STUDENT ONBOARDING

Sequence campaign spanning 6-8 months.

Questions:

1. What member benefit are you excited about using first?
2. What is your preferred method of learning?
3. Are you interested in learning about or participating in volunteer opportunities?
4. Where are you in your career journey right now?
5. Have you visited the TXCPA Exchange member-exclusive online community?
6. Are you interested in becoming a student ambassador?
7. NPS Question
8. Have your plans to pursue accounting as a career changed in the last year?
9. Now that you've experienced the benefits of TXCPA membership, do you plan to renew your membership?

TXCPA

We're so glad you're a member, Melissa!

It's important to us that you find value in your membership, so tell us what's most important to you right now so I can guide you in the right direction.

What member benefit are you excited about using first?

Connecting with industry professionals

Registering for Free Learning Opportunities!

Networking on TXCPA Exchange

Getting involved in the volunteer opportunities

I look forward to your involvement in our community!

Sincerely,



Kristie Estrada


Manager, Membership Operations and Acquisition
972-687-8560 | 800-428-0272 x8560

STUDENT ONBOARDING

The American Academy of Pediatrics has a sequence campaign with 9 check-ins across 7 months that's been live since 2022.

Questions:

1. What are you most hoping to get from your AAP Membership?
2. Have you checked and/or updated your personal information (like mailing address, email, and demographics) in MyAccount?
3. Are you interested in finding out more about AAP advocacy efforts?
4. What AAP Educational Resources would be most helpful to you right now?
5. Are you interested in volunteering?
6. Which of these member advantage programs is of most interest to you?
7. To what degree are AAP resources helping you achieve your career goals?
(5=greatest)
8. Was there something you felt was lacking in your residency training that you hope to get through AAP membership?
9. On a scale of 1-10, how likely are you to recommend AAP membership to a colleague?



38%
engagement
rate

NEW LIST BUILDING FEATURE: CAMPAIGN ACTIVITY!



Add Filter ×

Campaign Activity

Campaign	=	Conversion Engagement
Question	=	What are you most hoping to get from your AAP Membership?
Answered	=	Yes

Cancel Save

TRY THE BLUEPRINT!

If all these onboarding questions sound great, but it seems like a lot of work, give the student onboarding/engagement blueprint a try!

Student Engagement/Onboarding - Sequence

This blueprint will help you engage with, learn about, and nurture your student members. With questions to help build their profile and find out important dates around their education journey, this will help Association Staff to better connect with and provide relevant resources to these members.

- **Campaign Type:** Sequence
- **Count of check-ins:** 9 (adjustable)
- **Length of campaign:** 200 days (adjustable)
- **Best for:** individual members

For Student Engagement/Onboarding campaign best practices and guidance, check out our [Campaign Guide](#).



Melissa - Welcome to the Idaho Society of CPAs!

There's so much you can do with your student membership. We'd like to point you in the direction of the benefits and resources you care about most.

What are you most hoping to get from your membership?

Educational opportunities

Advancing my career

Advocating for the profession

ISCPA's Universal CPA Review Program

I'm not sure yet

Sincerely,

Laura Lantz

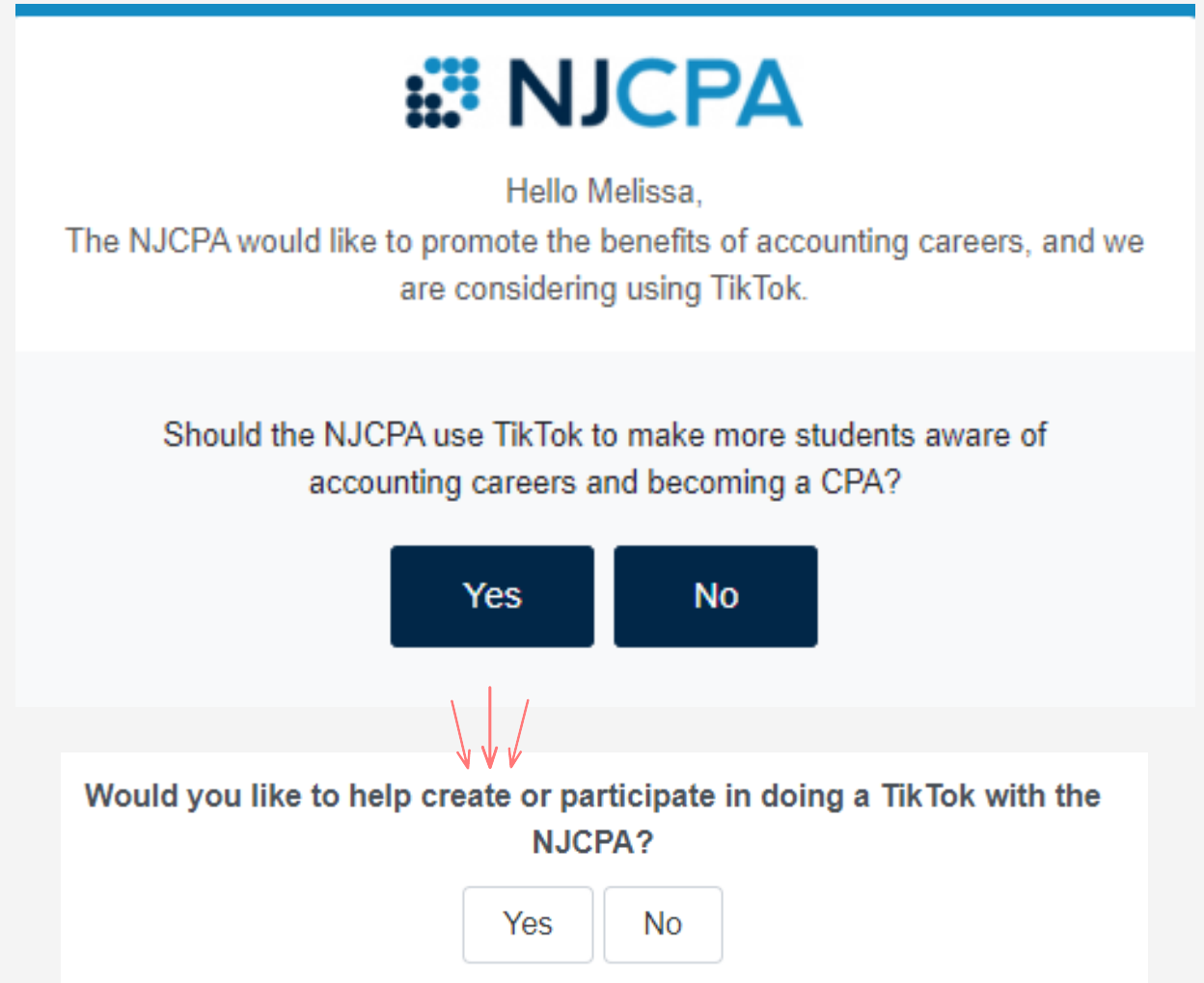
Executive Director


Idaho Society of Certified Public Accountants

STUDENT ENGAGEMENT

NJCPA reached out to students to get their feedback on how to engage the next generation.

8% response rate
2/3 said “yes”



 NJCPA

Hello Melissa,

The NJCPA would like to promote the benefits of accounting careers, and we are considering using TikTok.

Should the NJCPA use TikTok to make more students aware of accounting careers and becoming a CPA?

↓ ↓ ↓

Would you like to help create or participate in doing a TikTok with the NJCPA?



POP IN CHAT:

Do you offer events or programs specifically for students?

STUDENT EVENTS

The Oklahoma Society of CPAs uses PropFuel to register student members for events year-round *and* automatically registers them if they say yes.

- Do you want to save your spot now?
 - Yes, register me!
 - I can't make it this year
 - I'd like more info



OSCPA
Oklahoma Society of CPAs

Put your career on the best path!

At the **OSCPA's 2022 VIRTUAL Career Development Workshop**, you'll explore the journey to CPA, including what it's like to work in public accounting, private industry and government.

This is a prime opportunity to ask questions and learn more about the companies and areas of accounting that interest you - plus build up your networking skills.

February 23 from 4:30-6:30 p.m.
FREE for OSCPAs Student Members

Do you want to save your spot now?

- Yes, register me for this FREE, virtual event
- I can't make it this year
- I'd like more information



Great, you're all set for the virtual event! Our Membership Team will take care of your registration and send you a confirmation. See you virtually February 23!

STUDENT EVENTS



Many Missouri-based CPA firms offer internships, and a few offer leadership programs for rising Juniors (or equivalent). These programs offer exposure to working at a public practice firm and have the potential to lead to job offers for interested candidates. Take advantage of your MOCPA student membership to find an internship today!

Are you ready to search for internship opportunities?

Yes

No



Liz Schaetzel
Executive Assistant to Jim O'Hallaron/
Academic & Careers Manager
(314) 392-5834

Together we are stronger, smarter, better.



As a MOCPA student member, I encourage you to participate in MOCPA's free, virtual Corporate Accounting and Finance Career Fair. You'll learn about a variety of career paths for accounting students with some of the top companies throughout Missouri. You'll have the chance to meet and learn more about your potential future employer via one-to-one meeting or group video chats using the Handshake platform. You can schedule meetings with recruiters about internships, leadership programs and job opportunities. This event happens on Tuesday, February 13, from 11 a.m – 5 p.m.

Do you want to register for MOCPA's free Corporate Accounting and Finance Career Fair?

Yes

No



Liz Schaetzel
Office of CEO/Academic &
Careers Manager
(314) 392-5834



Who doesn't want money to help pay their college expenses? Each year, the MOCPA Educational Foundation awards approximately \$30,000 in scholarships to MOCPA Student Members who are majoring in accounting at Missouri universities/colleges. Recipients of the college scholarships are awarded \$1,000, and the deadline to apply is coming up on Feb. 29, 2024!

Would you like to apply for one of MOCPA's 2023-2024 scholarships?

Yes

No

I've already applied!



Liz Schaetzel
Office of CEO/Academic &
Careers Manager
(314) 392-5834

STUDENT VOLUNTEERS

Question

Would you like to have your conference fee reimbursed in exchange for volunteering at conference?

Response Type: Multiple Choice

430
Sent

21
Answered

5%
Response Rate



- 67% - Yes, sign me up!
- 33% - Maybe, I need more information.

Chart

Table



Here's some more information about the Volunteering at WSCA's Annual Conference

- Shifts last for 4 hours, some have breaks worked in around meals
- Shifts will be available on Wednesday the 2nd, Thursday the 3rd, and Friday the 4th
- You will get to choose the shift of your choosing once you have signed up as a volunteer
- When not working your selected volunteer shift, you have full access to all that conference has to offer
- Your full conference registration fee will be reimbursed after you have completed your volunteer shift, usually within one week. Only full conference fees are covered, additions such as preconference registration are not included
- Many programs will count conference attendance towards your professional hours, you just need to ask! [Here is a justification flyer](#) that will help you share what an opportunity this is with your program leadership

Do you have any specific questions we can help answer?



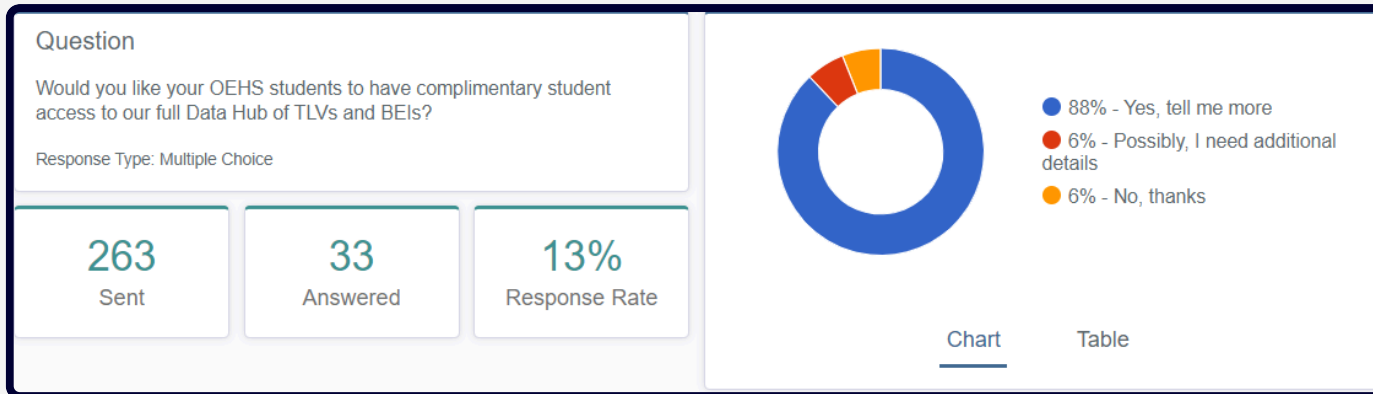
POP IN CHAT OR UNMUTE:

What suggestions do you have for retaining student members?

STUDENT RECRUITMENT

ACGIH offers complimentary student memberships. They sent this check-in to department heads at universities (publicly accessible info) and sent out a relatively cold outreach for recruitment, highlighting the benefit to students.

Those that said “yes” or “possibly” got an email they could forward on to their students.



For 85 years, ACGIH has been dedicated to the industrial hygiene and occupational and environmental health and safety industries. **We recognize the importance of fostering the learning and growth of the next generation of OEHS professionals, which is why I'm reaching out to you today.**

We offer full-time students studying in the OEHS field complimentary access to our Data Hub, with nearly 800 TLV and BEI Supporting Scientific Documentations, along with other free resources including a one-year digital subscription to the *Journal of Occupational and Environmental Hygiene*.

Would you like your OEHS students to have complimentary student access to our full Data Hub of TLVs and BEIs?

Yes, tell me more

No, thanks

Possibly, I need additional details

If so, I'd be happy to share how your students can get access for free. It's part of our effort to give back to the community and ensure the success of our industry.

RENEWAL



Dear Colleague,

A friendly reminder that national Student Academy of Audiology (SAA) membership renewals were due January 1. Renew your membership now to maintain access to national SAA/Academy communications and member benefits such as the Fellow Up! Program.

Do you plan to renew your national SAA membership for 2024?

Yes, I want to renew now!

No, I do not plan to renew.

I have a question.

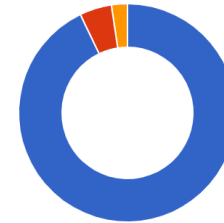
Sincerely,

Rachael Sifuentes, MA, CAE
Senior Director of Membership and SAA
American Academy of Audiology

428
Sent

84
Answered

20%
Response Rate



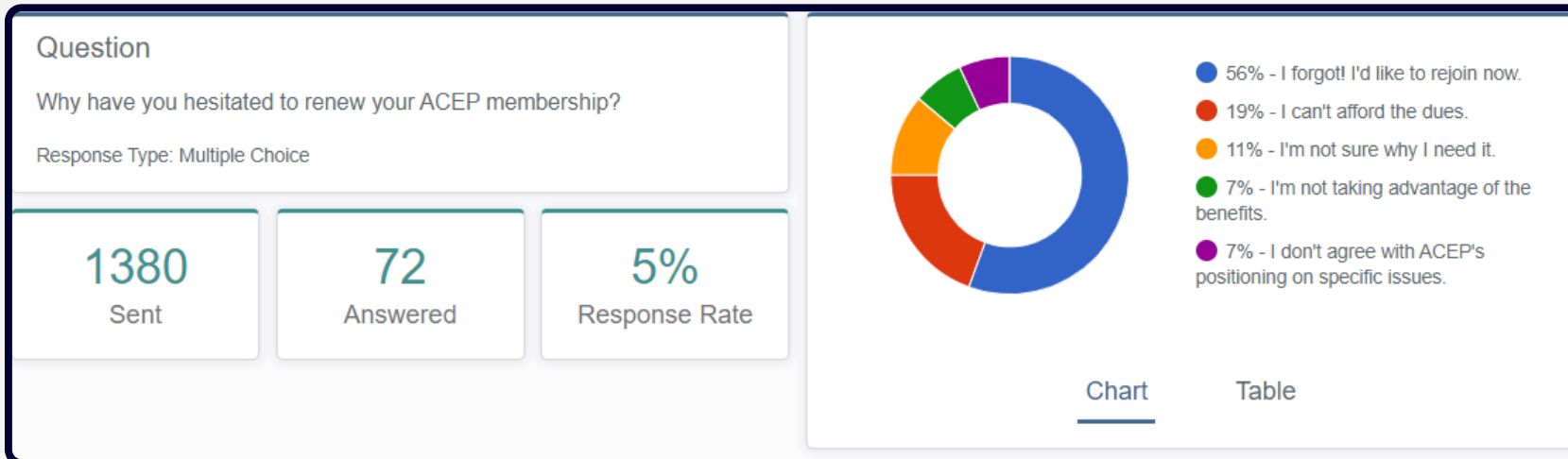
- 93% - Yes, I want to renew now!
- 5% - No, I do not plan to renew.
- 2% - I have a question.

STUDENT CONVERSION TO FULL MEMBERS

ACEP reached out to recently graduated residents to encourage them to renew before their termination date.

Questions:

1. Where are you on your EM journey?
2. Do you plan to renew your ACEP membership?
3. Why have you hesitated to renew your ACEP membership?



American College of Emergency Physicians
ADVANCING EMERGENCY CARE

Hello Ms. Bittner,

Your ACEP membership will be cancelled on December 15th if no action is taken. We'd hate to see you go! Please let us know:

Why have you hesitated to renew your ACEP membership?

- I forgot! I'd like to rejoin now.
- I'm not taking advantage of the benefits.
- I'm not sure why I need it.
- I'm taking another career path.
- I can't afford the dues.
- I don't agree with ACEP's positioning on specific issues.
- Another reason.

Thanks for taking a moment to give us your feedback! We appreciate it.

Sincerely,

Mollie Pillman, MS, MBA, CAE
SVP, Member Engagement

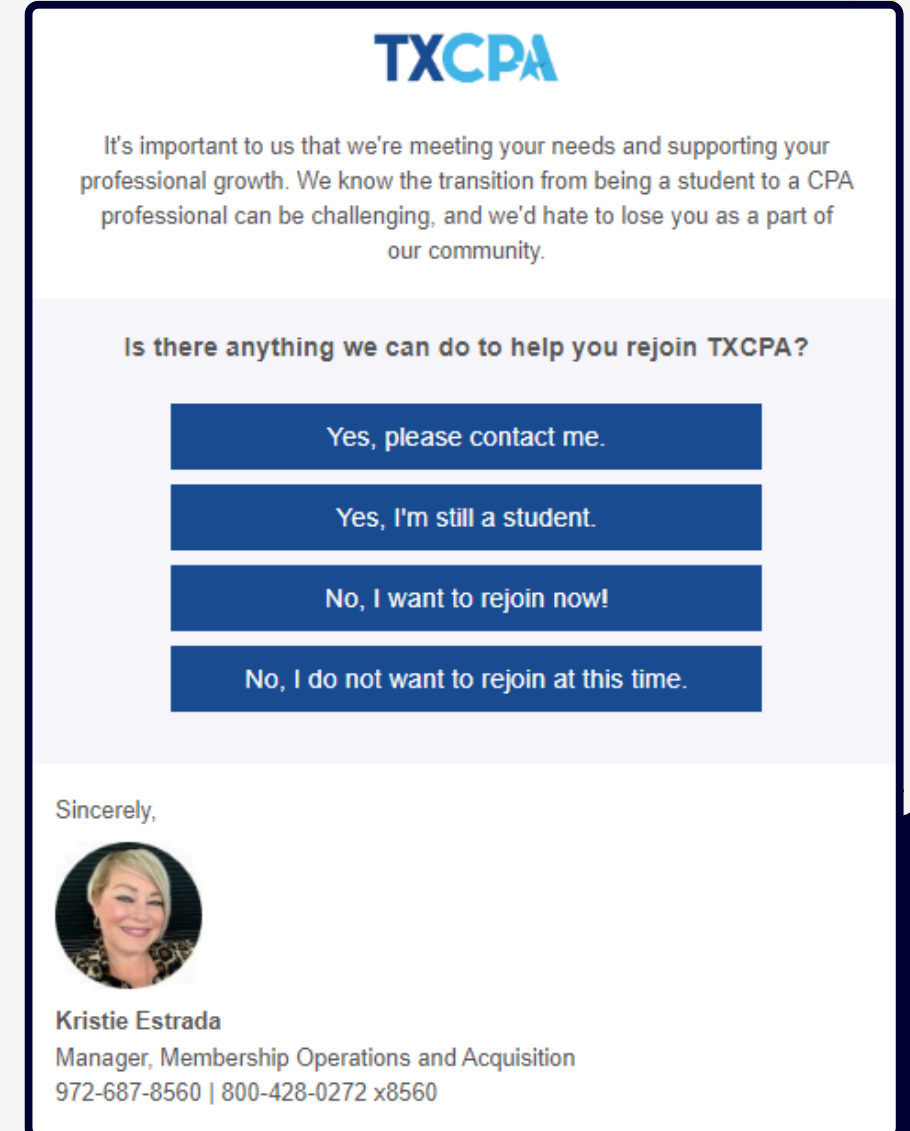
LAPSED STUDENT WIN-BACK

TXCPA reached out to their recently dropped students in November - December 2022.

Questions:

1. Did you know your TXCPA membership lapsed?
2. Is there anything we can do to help you rejoin TXCPA?
3. Are you planning to rejoin TXCPA?

4% response rate
4% rejoined within first month
11% rejoined within past year



The screenshot shows an email from TXCPA. At the top is the TXCPA logo. Below it is a paragraph of text: "It's important to us that we're meeting your needs and supporting your professional growth. We know the transition from being a student to a CPA professional can be challenging, and we'd hate to lose you as a part of our community." Below this is a question: "Is there anything we can do to help you rejoin TXCPA?". There are four blue buttons with white text: "Yes, please contact me.", "Yes, I'm still a student.", "No, I want to rejoin now!", and "No, I do not want to rejoin at this time." At the bottom, it says "Sincerely," followed by a circular profile picture of Kristie Estrada, her name, and her title and contact information: "Manager, Membership Operations and Acquisition", "972-687-8560 | 800-428-0272 x8560".

TXCPA

It's important to us that we're meeting your needs and supporting your professional growth. We know the transition from being a student to a CPA professional can be challenging, and we'd hate to lose you as a part of our community.

Is there anything we can do to help you rejoin TXCPA?


Yes, please contact me.

Yes, I'm still a student.

No, I want to rejoin now!

No, I do not want to rejoin at this time.

Sincerely,



Kristie Estrada
Manager, Membership Operations and Acquisition
972-687-8560 | 800-428-0272 x8560