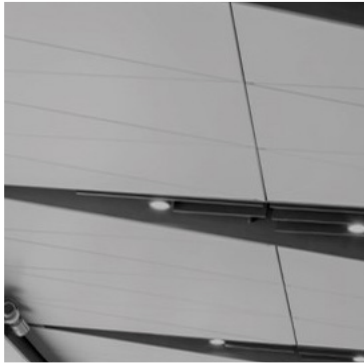


smps[®]

chapter
management
manual



MEMBERSHIP

2020-21



SMPS MISSION

To advocate for, educate, and connect leaders in the building industry.

SMPS VISION

Business Transformed through Marketing Leadership.

Our vision is for firms to execute marketing principles (research, strategy, branding, communications) to drive business decisions and pursue work that aligns with their brand, which will result in profitable operations and a respected market position.

What does “business transformed” mean?

- Being able to clearly define and communicate what sets your firm apart
- Understanding the important balance between marketing and business development
- Helping our members anticipate and navigate the trends and challenges on the horizon
- Operating your business like it’s not business as usual

SMPS DEI PHILOSOPHY & POLICY

SMPS recognizes, respects, and values the dignity of all people. We are united in our stance against all forms of injustice and inequity. SMPS commits to actively champion diversity, equity, and inclusion (DEI) within our organization, the firms we represent, the communities we serve, and the architecture/engineering/construction (A/E/C) industries. We are intentionally working to increase participation in our organization and the A/E/C industries by underrepresented groups; advocate for recruitment and retention of professionals of all backgrounds by creating inclusive and welcoming environments; and promote equality and opportunities for advancement in the Society and industry overall. Together, we can transform our businesses, enhance membership experiences, and influence change in our communities.

We recognize that our diversity is reflected by our different people and firms. We believe our varying ethnicities, cultures, religious beliefs, genders, sexual orientations, ages, levels of experiences, physical abilities, and other differences benefit us as individuals and as an organization. In SMPS, we will organize and promote programs and activities that espouse our beliefs and increase awareness, understanding, recruitment, and participation of diverse persons and firms.

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MEMBERSHIP

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SAMPLES, RESOURCES, AND FORMS

All samples, resources, and forms referenced in this manual may be found in the [MySMPS All Chapter Leaders](#) community library, in the Membership folder.

Samples and forms:

- Membership Applications
(SMPS HQ website: smps.org/join)
 - New
 - Renewal
 - Reinstatement
 - Student
 - Transfer (online form)
- Membership collateral
- Sample recruitment postcards
- Chapter membership recruitment and retention strategies
- Striving for Excellence (SFE) and Chapter President of the Year (CPY) winning submittals

INTRODUCTION

A successful chapter understands the critical role membership recruitment and retention play in its overall success. Remember, your chapter was developed because there was a need to provide professional service marketers quality local educational programs and a forum to network and learn among one another. To serve these needs well, it is imperative to build, keep, and strengthen your membership base.

MESSAGING AND VALUE PROPOSITIONS

When espousing the value of membership, it is often helpful to have a foundation of fundamental values and “elevator” speeches in which you can begin a dialogue. Through our brand positioning the following narrative and value propositions will help you in your recruiting efforts (also available in printed membership collateral).

MESSAGING SPECIFICALLY FOR PROSPECTIVE MEMBERS

Are you ready to take your career to the next level?

Yes, there are several organizations that cater to the A/E/C industries. And there are quite a few marketing associations focused on marketing, advertising, and design. **But SMPS is the only organization that brings together marketing and A/E/C in order to transform the way A/E/C firms attract, gain, and retain new business.**

In the not-so-distant past, many A/E/C firms relied solely on reputation and word of mouth, and that was enough to keep winning new projects and generating new income. But as competition increased, and technology made it easier to research and compare vendor partners, differentiating your firm from the competition became increasingly important. Critical, even.

Whether it's being able to clearly articulate your firm's key differentiators or being recognized as a subject matter expert in certain markets, **SMPS helps its members develop the skills to transform the way businesses do business. And we can do the same for you.**

Where professional services marketers find their community.

Many times, the A/E/C marketer belongs to the smallest department in the firm, which can feel a bit isolating. SMPS brings together like-minded professionals from different disciplines and a wide range of firms, all sharing common goals and challenges. **Most SMPS members cite this sense of community as their number one reason for getting and staying involved.**

SMPS starts with membership in your local chapter, but there are additional opportunities at different levels. From the Southeast to the Pacific Northwest, and all points in between, SMPS has close to 7,000 members who enjoy a wide variety of career-bolstering benefits.

“SMPS gave me a shot to present in my own way. They welcomed me with open arms and I have become a better professional speaker, business woman, and person.”

—Danielle Gray
Content Marketing Strategist
DG Marketing

Build your network.

It's not who you know. (Okay, maybe it is.) SMPS connects you with other A/E/C professionals looking to share ideas and best practices from all types of firms, large and small, multidisciplinary and specialized. You'll not only get to know other experts in your community, but from across North America.

Sharpen your skills.

SMPS is the go-to resource for marketers who want to further their education and evolve their skillset. Marketing teams come to SMPS not to find clients, but to develop the skills to go after clients. If you want to grow and develop your marketing team, SMPS is a game changer. Where professional services marketers find their community.

Earn your stripes (AKA professional certification).

Once you meet certain industry criteria, you'll have the opportunity to become a Certified Professional Services Marketer (CPSM). It not only demonstrates your experience and knowledge in the industry, it's recognized (and required) by many firms looking to fill marketing roles.

Gain leadership opportunities.

Especially earlier in your career, you don't always get a chance to lead a committee, plan an event, or manage a budget. SMPS gives you opportunities to lead and excel at various levels.

Differentiate your firm.

By understanding and mastering the six domains of practice for professional services marketing, you'll learn how to position your firm (and yourself) for success.

Advance your career.

Even if you hadn't planned on a career in marketing, SMPS professional development curriculum gives you the opportunity and knowledge base to do truly valuable work.

Amplify your influence.

SMPS offers opportunities to learn, lead, and connect to become a more influential player in your organization.

MESSAGING SPECIFICALLY FOR FIRMS AND COMPANIES

What's the relationship between marketing and business development?

In today's most successful A/E/C firms, marketing and business development work hand in hand. SMPS helps lead that charge.

Through education, networking, and mentoring, our members are able to implement best practices that help attract and retain clients and employee talent.

What's the value of SMPS membership?

It's a question we often get from A/E/C professionals and firm leaders. SMPS membership puts you in the company of hundreds of other leading A/E/C firms who have made marketing and business development a priority.

As the industries and technology continue to evolve, SMPS will continue

SOME PROSPECT SOURCES

- City and industry directories
- Event rosters
- Trade and technical publications
- University lists (majors, graduates)
- Commercial lists
- Rosters of industry counterparts to related organizations
- Business journals
- Other A/E/C industry associations
- Existing members

to lead the way with the latest tools, resources, and opportunities. To help keep you and your firm well ahead of the curve.

Can joining SMPS really impact your business?

SMPS is so much more than just local events. It's a powerful network of close to 7,000 A/E/C professionals that encompass 80% of the *Engineering News-Record* Top 500 Design Firms and Top 400 Contractors. The knowledge, tools, and resources that SMPS provides can help differentiate your firm and win more business. Which helps drive profit and growth.

What is Business Transformed Through Marketing Leadership?

You may see the SMPS vision statement and wonder what it means for your firm. Simply put, we believe that marketing plays an important and integral role in a firm's success. When done consistently over time, it can be transformational to the way your business operates and performs.

How does SMPS drive additional value for the A/E/C industries?

SMPS membership complements your firm's involvement with other professional organizations, such as AIA, ASCE, ACEC. In fact, SMPS regularly partners with these groups to provide marketing expertise across the industries.

MESSAGING FOR RECRUITING CHAPTER VOLUNTEERS

SMPS chapters connect local marketers and business developers and their firms to the regional network to explore business opportunities. SMPS provides connections to other chapter leaders through activities including the Chapter Leadership Symposium (CLS), monthly Chapter Leader Meetups, MySMPS community, private Facebook groups, Society Volunteer Forums at regional conferences, and leadership reunions at the annual conference.

SMPS supports chapter volunteers by providing:

- training for leaders through webinars, virtual roundtables, the CLS program, the Chapter Manual, and more
- guidance and support for developing and managing regional conferences
- access to advice, information, and smart practices from other SMPS chapters via the SMPS website, the MySMPS community, CLS communities, private Facebook groups, All Chapter Leaders Community, regular conference calls, and the Striving for Excellence and Chapter President of the Year Award programs,
- connections to other chapter leaders through activities including CLS, forums, leadership reunions at the annual conference, and conference calls
- opportunities to connect with the SMPS board of directors and SMPS committee leaders to “tap into” their leadership experiences, insights, and activities
- a dedicated headquarters staff who supports every chapter's growth and development

RECRUITMENT AND RETENTION

Each and every chapter has an obligation to recruit and retain their members. SMPS is here to help you in your efforts and welcomes your suggestions and opportunities to work with you in your recruitment and retention efforts. Consider the successful practices and ideas below.

- You **MUST** have a membership chair or co-chair. Without an individual leading the membership effort, it is difficult to divide the time among other volunteers, and focus on membership becomes diluted. If you decide to go with co-chairs, one person can focus on recruitment while the other focuses on retention. This helps with the division of work. These individuals should work closely together.
- Know your numbers! It is very difficult to know where to focus your efforts if you do not understand how many members have dropped, renewed, or joined in a given period of time. SMPS archives chapter statistical reports and provides a monthly member demographics report, which can be found on the All Chapter Leaders Community at MySMPS.org. Should you need historical information (statistical reports), please contact SMPS headquarters. Also, designated chapter leaders have access, 24/7, to the SMPS Chapter Reports Extranet. Here you will find all your individual chapter membership reports. Reports are “live data” generated through the SMPS database, therefore providing you with the most current information. Each chapter president, president-elect, and membership chair has access to the the Extranet. To access the Extranet, visit www.smeps.org/extranet.
- Keep a prospective member list at all times and make contact with the individuals on a regular basis. Make sure to collect all contact information of nonmembers who attend chapter programs/events. Share this list with SMPS headquarters for additional recruitment support and outreach efforts.
- Take a few minutes during one of your monthly chapter meetings to work with current members to identify and build out a list of prospective members/colleagues that the chapter can reach out to.
- Keep meeting attendance records, including members and guests. Contact members who do not attend meetings and follow up with guests to encourage joining. Acknowledge new members and guests at every meeting. Make sure every guest is invited to join SMPS.
- Personally address mailings to prospective members. This is more effective than sending a blind notice to a company. If a name is not known, send the mailing to a title like “marketing manager” or “marketing coordinator.”
- Conduct new member orientations regularly to introduce new members to the chapter offerings, highlight various benefits (e.g., MySMPS, MARKENDIUM, etc.), and share volunteer opportunities.
- **WELCOME NEW MEMBERS!** At their first function, welcome them to the group and ask them to say a few words about themselves and why they joined. Assign them a buddy to help them get to know the ropes and meet other members.
- Develop simple guest packets that include information about SMPS, your chapter, and key members they may wish to talk to for information. SMPS is happy to provide membership brochures, applications, and other materials. To request materials, please contact the SMPS membership team at membership@smeps.org.
- Encourage your membership committee and board of directors to call members for meetings and special events and to encourage inactive or lapsed members to reactivate.
- Encourage members to bring and introduce guests at meetings. Have guest registration forms available to facilitate introductions and augment your prospect list.

- Be prepared to have individuals sign up for membership at each event: Set up a laptop for individuals to join online.
- At the beginning of each event, set aside a brief amount of time to discuss the benefits of membership and highlight accomplishments of your chapter. Invite members/volunteers to share their SMPS story—why and how they engage, how to make the most of their membership. Show SMPS membership videos (available in MySMPS All Chapter Leaders community) when you don't have a live testimonial.
- Make sure you know your members. Are they primarily leaders within the industry, entry, or mid-level? Take a moment to reference the monthly Chapter Leaders Newsletter or the All Chapter Leaders Community on MySMPS.org to view the monthly demographics report. This will provide an understanding of who your members are, the level they operate at and help with member recruitment.
- Adjust your programming accordingly to ensure you are providing the most relevant education for all members and closing any gaps in your programming schedule.

MEMBERSHIP OPERATIONS

SMPS is responsible for membership dues collections, renewal notices, and recruitment efforts. All member information is kept and maintained within a professional Association Management System (AMS) database.

As a leader in your chapter, from time to time, you will be asked various questions about membership. To help you answer these questions, below is some information on some of the more technical aspects of managing the SMPS membership effort.

Membership Dues

Below are the current dues rates. Each year the dues rates are reviewed by Society staff and board of directors. Dues may only be raised by the SMPS board of directors.

Member Type	Dues 2020
New member dues (\$32 is distributed to chapter)	\$399
Renewal dues (\$29 is distributed to chapter)	\$399
New and renewing student dues	\$25
Retired dues	\$30
Transfer dues	No cost

Member Type Definitions

“Regular” member refers to those individuals who are not student, retired, or lifetime members.

- **New Regular Member.** An individual who is new to SMPS.
- **Renewing Regular Member.** A member who renews their membership annually.
- **Reinstating Regular Member.** A member who has let their membership lapse more than four months and wishes to rejoin after being dropped. This member may reinstate their membership any time and pay the standard renewal dues.
- **Student Member.** Student membership in the Society is available to students enrolled in a full-time study program at an accredited post-secondary institution or to part-time students who are not employed full-time in the A/E/C industries or not otherwise eligible for regular membership in SMPS. A student member is not eligible to vote or to serve as a member of the Board of Directors. Once a student member no longer qualifies under the above requirements, they may continue their SMPS membership one additional year for \$25.
- **Transfer Member.** A transfer member is an individual who has taken over the remainder of another member’s membership. This person may or may not be new to SMPS or to a chapter. They have simply taken over a membership their firm has paid for previously (see Interim Member below). There is no cost to transfer a membership.
- **Life Member.** Distinguished life membership in the Society is automatically awarded to each president of the Society (not chapter presidents) upon completion of his or her term of office. In addition, the SMPS Board of Directors may award distinguished life membership to other individuals who have made extraordinary contributions towards enabling the Society to accomplish its purposes and goals. Distinguished life members shall be exempt from payment of membership dues.
- **Retired Member.** Retired membership is available to any regular member in good standing who is retired and who has been an active member of SMPS for a minimum of 15 years. Upon electing this status, a retired member will no longer be eligible to vote or to serve as a member of the board of directors.

Membership Fulfillment

SMPS headquarters sends several notices to members throughout the year to ensure high retention levels.

- Renewal paper invoice (sent via USPS)
- Renewal e-invoice (sent via email)
- Renewal postcards (postcard reminder of expiration date)
- Reinstatement postcards (postcard sent to encourage members to return to SMPS)
- Welcome email (sent day after joining; includes member number, expiration date, chapter and member benefits information)
- Renewal “Thank You” (email sent within 3-7 days of renewal, thanking member for renewing and includes member number, expiration date, chapter and member benefits information)
- New member/reinstatement member packet (typically includes *Marketer* journal, member brochure, Build Business new member discount certificate, CPSM certification brochure, SMPS headquarters event promotional postcards, and member benefit details)

FULFILLMENT EFFORT New Members	
1. Upon joining	Welcome email message is sent the day after a new member joins; A new member packet is mailed 7-10 days after a member joins the Society.
2. 3rd month	An email thanking them for joining with link to a short survey and highlighting member benefits is sent.

FULFILLMENT EFFORT Renewals	
1. 75 days before expiration	E-invoice is sent
2. 60 days before expiration	Printed invoice is sent
3. 45 days before expiration	E-invoice is sent
4. 30 days before expiration	Printed invoice is sent
4. 15 days before expiration	E-invoice is sent
5. 1 day prior to expiration	E-invoice is sent
6. 1 day after expiration	Printed invoice is sent
7. 30 days after expiration	Reminder postcard is mailed
8. 10 days before drop	A personal call is made
9. Upon renewal	A thank you email is sent highlighting member benefits

FULFILLMENT EFFORT Drops	
Members are not dropped until 70 days after the expiration date listed on their record.	
2. 30 days after drop	A postcard is mailed to encourage them to come back
3. 45 days after drop	A reinstatement e-invoice is sent
4. 90 days after drop	A printed reinstatement notice encouraging them to come back is sent
5. Upon reinstating	A welcome back email is sent and packet is mailed

Chapter Extranet and Reports

SMPS developed the SMPS Extranet to give designated chapter leaders online access to live (real-time) chapter membership report data. Accessing the reports is simple: for those designated leaders, go to www.smeps.org/extranet, use your user name and password as you would to log in to the SMPS website. Once signed in, you will have immediate access to your chapter's membership reports.

Listed below are the types of membership reports you'll find on the extranet.

- **Chapter Roster**

The chapter roster lists all active members of a chapter, including those within the grace period.

- **New and Transferred Members**

The new and transferred members report lists the new members who joined during the selected month as well as members who transferred into an active membership. A transferred member may or may not be a new member to SMPS. This report includes the following member types: Regular New, New Student, and Regular Transfer.

- **Renewed Members**

The renewed members report lists all members who have renewed in the selected month. This report includes the following member types: Renew Regular, Reinstating Regular, and Renewing Student.

- **Expire Reports**

- Memberships Expiring Next Month**

This report lists all members with an expiration date in the following month. If, for example, you select the August report, then the expiration date for these members will be 9/30. There is a 130-day grace period from the time a membership expires until the member is actually dropped or made inactive. Use this report to contact these members to remind them that their membership will expire in 30 days. They have 190 days before their membership is made inactive.

- Memberships Expiring This Month**

This report lists all members expiring in the month you select. If, for example, you select the August report, then the expiration date for these members will be 8/31. There is a 130-day grace period from the time a membership expires until the member is actually dropped or made inactive. Use this report to contact these members to remind them that their membership expires this month and they have 160 days to renew before they are placed on inactive status.

- Memberships Expired Last Month**

This report lists all members who expired during the previous month. If, for example, you select the August report, then the expiration date for these members was 7/31. Use this report to contact these members to remind them that their membership expired last month and they have 130 days to renew before their membership is made inactive.

- Members Dropped (expired 130 days)**

SMPS HQ has extended the grace period from 70 days to 130 days. If a member is listed with a March 31 expiration date, the membership will not lapse until August 10. Members listed with an April 30 expiration date will not lapse until September 10, and so on. Use this report to remind these members that their membership expired and they are no longer active SMPS members. If you have questions regarding dropped members, please contact Member Engagement Coordinator, Matthew McFadden at matthew@smps.org.

- Prospects**

This report lists individuals who have been added to our database from various resources (list of nonmembers provided by the chapters, individuals who have contacted SMPS regarding membership, had activity online at www.smps.org, attended an SMPS HQ event, returned referral cards from members, etc.). We give them an overview of what SMPS has to offer and add them to our database as a prospective member. We email them information on SMPS and a membership application.

- Former Members**

This report lists all members who have lapsed, no longer active.

SMPS Membership and Management Resources

To support your chapter's membership and management efforts, SMPS provides several resources to chapter leaders.

- **Membership Campaigns**

SMPS headquarters conducts membership campaigns and/or special promotional offers from time-to-time and also has an on-going referral campaign: [Share SMPS: Refer a Friend](#).

- **Participate on Chapter New Member Orientations**

When requested, SMPS will participate, virtually, in a Chapter New Member Orientation to review features and benefits of membership, including a brief MySMPS overview.

- **Conference Calls, Webinars, Recorded Training Tutorials**

SMPS routinely schedules conference calls/webinars on membership to discuss best practices, share ideas, and inform you about SMPS initiatives and campaigns. Depending on the topic, SMPS will send invitations to the chapter president and the primary volunteer responsible for the corresponding effort in your chapter. For example, when conference calls are scheduled to discuss membership, the membership chairs will be invited to participate with the chapter's president.

- ☑ Topics on membership, education, finance, MySMPS, and more
- ☑ Scheduled throughout the year or upon request (view the Chapter Volunteer Calendar to register)

- **Extranet**

- ☑ Live membership data/reports for chapters
- ☑ Chapter president, president-elect, and membership chairs will typically be given access; the chapter president may designate access to two additional chapter volunteers—all of whom must be SMPS members
- ☑ Reports can be exported into Excel format

- **MySMPS Community**

To learn more about MySMPS or to schedule a training webinar for your chapter's board of directors, please contact Matthew McFadden at matthew@smps.org or 703.549.6117, x246.

- ☑ Connect with chapter leaders, share ideas, or ask questions of your peers
- ☑ Create communities for your board of directors, committees, special interest groups, task forces, and chapter members
- ☑ Use your chapter's community library as a repository for your chapter's historical documents, reports, budgets, etc.
- ☑ Create blogs and forums to communicate in different ways

- **Recruitment Support**

Depending on the needs and resources of the chapter, once a year, SMPS will support one of the following recruitment efforts. This support is for recruiting new members only and must be pre-approved. For further information, contact Matthew McFadden at matthew@smps.org or 703.549.6117, x246.

- Reimburse a chapter for recruitment mailing costs (includes design, printing, and postage)
- Design postcard (oversized, 4 color), print, and mail
- Print and mail a postcard that has already been designed

Should you want HQ to print postcards for you, please use the following specifications for document layout:

- Document size: 8.64" x 5.59"
- Bleed: .137 (all edges)
- Send us the original design package (e.g., InDesign, Photoshop, etc.) links, fonts, and images (300 dpi)

Sample postcards from other chapters can be found in the MySMPS All Chapter Leaders community library or upon request from the membership team at membership@smps.org.

Other ideas not listed above? Let us know to see how we can support your recruitment efforts.

SMPS HQ STAFF

EXECUTIVE TEAM & OPERATIONS

Chief Executive Officer

Michael V. Geary, CAE
michael@smps.org
703.684.2260

Deputy Chief Executive Officer

Tina Myers, CAE
tina@smps.org
703.684.2263

Operations Manager

Kevin Doyle
kevin@smps.org
703.684.2271

FINANCE

Chief Financial Officer

Antonio Payne, CPA
antonio@smps.org
703.684.2261

GROWTH, ENGAGEMENT, AND PROFESSIONAL DEVELOPMENT

Chief Strategy Officer

Marci Thompson
marci@smps.org
703.684.2262

Publications Manager

Christine Chirichella
christine@smps.org
703.684.2264

Program and Logistics Coordinator

Semra C. Ergun
semra@smps.org
703.684.2275

Vice President, Component Relations

Natalie Gozzard
natalie@smps.org
703.684.2265

Member Engagement Coordinator

Matthew McFadden
matthew@smps.org
703.684.2277

Component Relations Manager

Julio Santos
julio@smps.org
703.684.2269

MARKETING AND ANALYTICS

Awards Program Director

Molly Dall'Erta
molly@smps.org
703.684.2270

Content Manager

Linda Smolkin
linda@smps.org
703.684.2266

smps

625 N. Washington Street
Suite 302
Alexandria, VA 22314
Phone 703.549.6117
@SMPSHQ