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To: Kay Nauta
Subject: Summary of December CALIFORNIA YAT CHAT - Increase YAT membership, attendance & Involvement

Importance: High

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Summary of December CALIFORNIA YAT CHAT – Increase YAT membership, attendance & Involvement

Thank you to those who participated in our third YAT Chat conference call. Below you will find a **compilation of all that was discussed**. A special thank you to Gabe Smith, the National YAT Chair, for providing a tremendous amount of value on this call.

December's call focused on increasing YAT membership and involvement.

Below are the key factors discussed on the call:

- 1. Using agencies to increase YAT membership** - *Sales Managers can help you reach your target market.*
 - **Connect with Agency Managers.** Ask the managers what kind of value they would like agents to get out of monthly YAT meetings. Try to incorporate those values into your YAT meetings.
 - **Collaborate on your YAT Agenda.** Ask sales managers to work with YAT on a meeting agenda, location, and time to ensure their support and a large draw from that agency.
 - **Ask Sales Managers to be on the YAT committee.** This is a way of developing a strong relationship – get them involved.
- 2. How to find offices with multiple people** – *Paramedical companies could be the answer.*
 - **Ask your local Paramedical representative for referrals to large offices.**
 - Ask your local Paramedical representative to be on the YAT committee, to boost membership.
 - **Here are some ways your paramedical Rep. can help boost YAT attendance & membership.**

- They can help you find & reach out to large & small offices within the area.
- Provide them with membership brochures to carry around and pass out to offices with non- NAIFA members.
- Ask them to leave the yearlong NAIFA/YAT agenda at various offices.
- Ask them for email opt in permission from Non-NAIFA and NAIFA members at their various offices. Then send prospects and members personalized emails on: how to get more involved, where & when the next meeting is held, along with the benefit and value NAIFA provides its members.

3. How to get YATs involved & keep them involved.

- **Find an ambassador.** Look for the most social person within various social groups to get the word out regarding upcoming meetings, events, involvement opportunities.
- **Active People Do Not Lapse** - Find what your members are good at, and put them to work. Why not give all members a reason to be active in some way or another– who said you could only have four people on your YAT committee.
 - **Get yourself a social chair:** Ask your most social outgoing YAT member to greet all of the new members, learn who they are, and call them before the next meeting.
 - **Technology Chair:** Ask someone who loves technology and social media to be responsible for setting up the various social media channels for your YAT local.
 - **PR Chair:** This chair can be responsible for disseminating information via the social media channels.
 - **XXX Chair:** find a job for all your members and make them feel included.
- **Encourage your members to bring non-members:** Provide prizes to those YAT members who bring friends, peers, and colleagues to meetings. Let non-members show up a few times, encourage them to come again before signing up. It may take a year, but if you make a member feel welcomed, make the environment stress free and provide value.... They will sign up.
- **Invite general membership:** Encourage general membership to attend YAT events to mentor and provide new agents with their experience and expertise. Meetings are still run and held by YAT, but understand the importance and

potential in inviting your entire membership to YAT events. Some locals have even asked experienced and well known agents to greet all the new members. It helps to make yet another very important personal connection with prospects and new members.

4. Make it personal.

- Entice Non-NAIFA members to join by showing them the value in becoming a NAIFA member
 - **Make a point to speak with all Non-NAIFA members at the end of every YAT meeting.** Find out who they are, what they do, what they like, why they are attending the meeting, and what they thought of the meeting. Then follow-up with the prospect over the next two weeks. Refer to things they told you at the first meeting, invite them to the next meeting, ask them to get involved – make it personal.
 - **Know your members.** Ask new members and old members alike to fill out a characteristic one pager on themselves. Truth be told, we forget a lot of very important information about our membership. The more you know about your members the easier it will be to grow your YAT program.
 - **Become a friend first.** Call all new members & prospects once a month just to say hello. Also remind them of upcoming events, ways they can get involved and the benefit of their NAIFA membership.

January 4th Agenda:

Technologies for YAT –

- Reach the masses.
- Social Media Options
- An efficient way to manage ALL social media outlets.
- Creating a YAT standard for social media.

California YAT Chair Buddy List:

Brian Ness – San Fernando Valley	&	Jason Koo – Los Angeles
Irma Romero – Mt. Diablo	&	Tynecia Martin – Long Beach
Todd M. Allen – San Diego	&	Shawn Minton – Central Coast
Jesse Parenti – San Francisco Peninsula	&	Sunny S. Wang – Silicon Valley
David Gingerich – Central Valley	&	John Nilmeier – Fresno

