

# Member Touchpoints

*Keep members engaged by tracking quality interactions throughout the year - beyond just dues and emails. This builds retention, relationships and referrals.*



*Starfish*   
PARTNERSHIPS

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# Instructions



Use this tracker weekly, monthly or quarterly to monitor:

- Personal Connections
- Member Wins and News
- Opportunities for Engagement or Feedback

# Touchpoints to Track

1

**Personal Call or  
Handwritten Note**

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5

**Recognition on Social  
Media or Email**

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2

**Visit to the  
Member Business**

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6

**Request for  
Testimonial**

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3

**Invitation to an  
Event or Program**

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7

**Solved a Problem or  
answered a  
Question**

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4

**Referral Made or  
Received**

8

**Celebration -  
birthday,  
anniversary, win**



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# Tracking

Member	Date	Type of Contact	Staff or Volunteer	Notes



**Assign 10 members a month to each staff member for proactive outreach.**

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**Use board members or ambassadors to extend your reach.**

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**Start with top 20 investors and the “quiet members”.**





I offer coaching,  
consulting, workshops,  
team retreats and  
more.

If you need me, please  
reach out!

# Contact Information



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