

Member Touchpoints

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



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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

5

Recognition on Social Media or Email

2

Visit to the Member Business

6

Request for Testimonial

3

Invitation to an Event or Program

7

Solved a Problem or answered a Question

4

Referral Made or Received

8

Celebration - birthday, anniversary, win



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Tracking



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

Use board members or ambassadors to extend your reach.

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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