



# NABIP

Shaping the *future* of healthcare

# Membership Chair's Guidebook

## 2023-2024

**National Association of Benefits and  
Insurance Professionals (NABIP)**  
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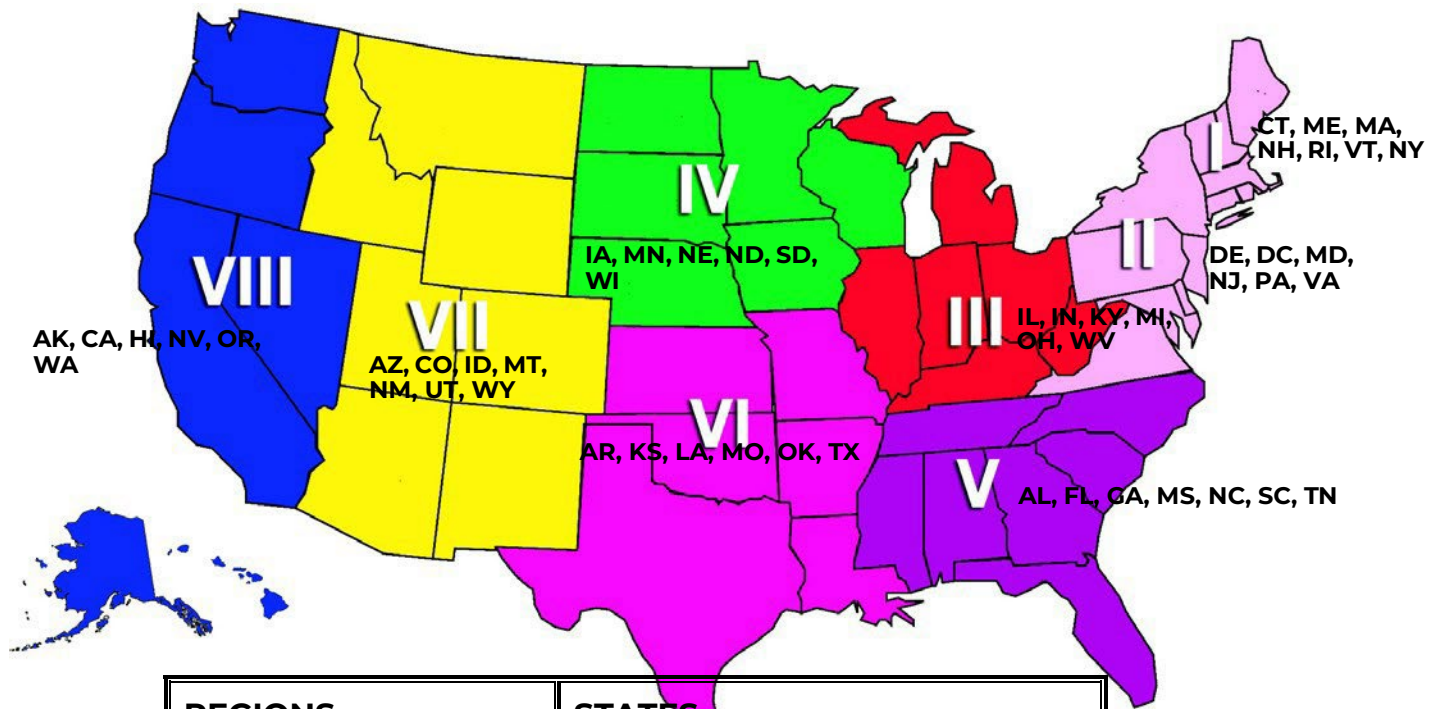
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## What Region Are You In?



REGIONS	STATES
Region I	CT, ME, MA, NH, NY, RI, VT
Region II	DE, DC, MD, NJ, PA, VA
Region III	IL, IN, KY, MI, OH, WV
Region IV	IA, MN, NE, ND, SD, WI
Region V	AL, FL, GA, MS, NC, SC, TN
Region VI	AR, KS, LA, MO, OK, TX
Region VII	AZ, CO, ID, MT, UT, WY
Region VIII	AK, CA, HI, NV, OR, WA

## **INTRODUCTION**

You have accepted the role of Membership Chair for your chapter. This is an incredibly important position as the success of your chapter (and NABIP itself) depends on

growth, and your leadership and active participation impacts that. Your performance and influence as the Membership Chair will go far in leading and motivating your committee members toward achieving the chapter's goal. Planning, organizing and implementing your plan will make a positive start and ensure a productive year for your chapter.

## **ALL MEMBERSHIP CHAIR BASIC RESPONSIBILITIES**

- Making every effort toward growing your membership, while contributing toward common goals of the chapter, as a committee member.
- Maintaining good membership records.
- Promoting monthly dues payments through recurring monthly payments – members on bank draft have a higher retention rate than annual paying members.
- Promoting chapter involvement in the Region of Membership Excellence (RME) contest.<sup>1</sup>
- Understanding and utilizing ecommerce – NABIP's online membership database system.
- Participating on monthly teleconference calls with your State – Regional – National committees.

## **Membership Chairs Dos and Don'ts**

- If you find yourself in position where your expertise is limited or you are unable to commit time for assigned projects, ask for help. The best source is another member of your committee or your vice-chair, or someone else on your local board.
- Failure to recognize and ask for help when it is needed will cause unnecessary delays in reaching your goals as a chapter and furthermore, as an association.

This guidebook should answer many questions and help resolve issues that are bound to emerge during your tenure as chair.

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<sup>1</sup> Members have 60 days from their paid through date before their membership lapses. After that, chapters have an extra 30 days to retain this member. If their membership lapses after that date and they rejoin, they will be considered a new member.

## LOCAL MEMBERSHIP CHAIR

- Attend state membership conference calls.
- Report any areas of concern within your chapter.
- Share any membership recruiting ideas on state membership call.
- Network with fellow local chairs in your state to share ideas.

### Other Responsibilities

- Appoint a vice-chair to help with the responsibilities of recruiting new members. This person will be your right-hand and work closely with you all year long, as he/she prepares to serve as Membership Chair the next year.
- Announce yourself as Membership Chair and introduce your vice-Chair to your local members at the chapter meeting/luncheon or thru e-communication.
- Based on chapter's strategic plan, organize and hold a membership blitz or/recruitment campaign/s.
- Implement a membership contest (give away a prize at your local meeting to the member who recruits the first member, the most members, etc.)
- Report your progress at monthly local chapter meetings to inspire members and volunteers.
- Always ask for referrals from members at monthly meetings or via e-communication. Use your leads to invite them to join.
- Keep member records up to date, make membership additions/deletions every month and have revised list available at your local meeting's registration desk.
- Keep track of your membership numbers and retention % on a monthly basis – these are obtainable from national website.
- Be on the edge of latest membership news and national contest information. You can always make it personal by adding a chapter-only special incentive, such as a free lunch or discounted local chapter dues.
- Organize special events, such as Medicare Events (you may refer to guidelines of Medicare Summits & related events found in the [Medicare Summit manual](#)).
- Each month, obtain list of prospective members from eCommerce (further details on page 7). Contact each of them and encourage them to join the association. Set and track time of contact, schedule a follow-up call and record the results (you may refer to principles of [Recruitment & Retention manual](#)).
- Make sure your state membership chair is aware of all of your efforts. Relate to them your recruitment efforts and success stories or concerns with any membership-related issues. It is important that you communicate with your state membership chair so that they can share your ideas with others on the membership team. This is done through the monthly state membership calls.

## **STATE MEMBERSHIP CHAIR**

- The regional membership chair assigned to your state will schedule regular membership teleconference calls with the state membership chairs.
- It is very important that you attend each of these calls to receive the most recent and up to date information from the National Membership Council.
- If unable to attend, please ask your vice-chair to attend or a local membership chair. It is very important that your state has representation on the calls.
- These calls are for discussing what is and isn't working in your area and any particular problems you may be having or issues affecting your region.
- Use this time to network with your peers and ask for their assistance.
- It is up to the state membership chair to then schedule regular conference calls with the local membership chairs in your state.
- If participation is low on your calls, contact the state president and local chapter presidents for their assistance in getting full participation from the local chairs.

## **Other Responsibilities**

- Appoint membership vice-chairs to help with recruitment efforts. This person will be your right hand and will work with you closely all year long.
- Participate whenever possible in your local chapter membership blitzes and campaigns.
- Participate in your regional membership chair's regular calls.
- Stay in touch with your local membership chairs & vice-chairs to learn of their recruitment success stories/failures/concerns & report these back to your regional membership chair.
- Make sure your local membership chair & vice-chair are using the reports from eCommerce to help in their recruitment efforts.
- Implement a membership contest (give away a prize at your state meeting to the member who recruits the first new member, the newest members, etc. CASH is always a good incentive!)
- Attend and help lead the membership session at your state annual leadership conference.
- Remember, by offering effective training, you'll ensure that the future state membership chairs know what they are doing.
- Keep your local membership chairs and vice chairs "in the loop" by communicating with them what you've heard from your Regional Membership Chairs.

## **NATIONAL MEMBERSHIP COUNCIL**

*The Membership Council creates, develops, and communicates effective tools that will assist state and local chapters for recruiting and retaining members. These tools will enhance the membership experience as value added benefits. The Membership Council will work together with all other national councils to develop sound strategies to show the value of NABIP's membership and grow the association.*

The above statement is the guideline for the NABIP Membership Council as outlined by the NABIP Board of Trustees. Communication to the state and local membership chairs is vital to their chapter's success. Many chairs are serving for the first time and do not realize what their responsibilities may be. It is the primary responsibility of the NABIP Membership Council to educate and be a resource for the state and local membership chairs and the chapter members. The NABIP Membership Council consists of the following members.

1. Council Chair
2. Council Vice-Chair
3. Council Membership Manager
4. 8 Regional Council Chairs representing each region
5. 8 Regional Retention Chairs representing each region
6. One NABIP staff and one Board of Trustees liaison

## **NABIP Membership Council Responsibilities**

- Regional Membership Chairs will host regular conference calls with state membership chairs;  
Retention Chairs are to be on those calls.
- All National Membership Council members should communicate regularly with their state and local chairs via phone and email.
- Participate on the monthly NABIP Membership Council conference calls.
- NABIP Membership Council members will be expected to report on any issues, comments, and concerns with their designated chapters to the Council on a regular basis.
- NABIP Regional Chairs must attend the Regional Leadership calls hosted by their Regional Vice President.

## MONTHLY MEMBERSHIP REPORTS

- Membership reports are generated on the 15<sup>th</sup> of each month.
- Report shows number of members at end of previous month as well as Regional Membership Excellence (RME) contest standings.
- Report is broken down by region, state and local chapters.
- Membership Chairs can find this report on the website under:
  - Resources
    - Leadership Reports
      - Membership Reports
        - Read More and scroll down to access the reports

## eCOMMERCE

- NABIP online membership database access tool is called eCommerce.
- Members have access to change their own personal records.
- State, local, and regional chairs have access to export and print their own chapter reports.

### What type of reports can you run using eCommerce?

#### eCommerce:

- 
- a. Current Membership report
  - b. Credit card expiration report (monthly members)
  - c. Prospective Member report
  - d. Mass Emails
  - e. Category Codes

#### Sponsors Reports:

- a. New Member report (with sponsor information)
- b. Billed but not paid report (with sponsor information)
- c. Lapsed or cancelled (with sponsor information)
- d. Members not receiving mail due to bad address (undeliverable/bounced back)

#### Dues Reports:

- a. Chapter Dues Deposits Report
- b. Associate member tracking



- 1. Current Membership Report** – extract a list of all current chapter members.
- 2. New Member Report with Recruiter** - Lists all members and their recruiter joining within the last month. Extract a list of new members
- 3. Members who have been billed but have not yet paid their dues** –Extract a list of members who have been billed but have not paid their membership dues.
- 4. Members who lapsed or cancelled (with Recruiter)** - Lists members and their recruiter who were removed from the roster of Active members because their expiration dates passed without payment or because they contacted NABIP to request that their membership be cancelled.
- 5. Members not receiving mail due to bad addresses** - Lists members for whom NABIP does not have a correct mailing address (mail has been returned by the post office.)
- 6. Prospective members from a chapter/state or region** – Extract a list of names and addresses of all persons considered prospects from your chapter or state. Persons on this list have contacted NABIP for products or services but have not applied for membership.
- 7. Members with address changes during the past 60 days** – Lists all members whose address has been changed within 60 days. Also allows you to see what changes were made.
- 8. Dues Report** – shows monthly dues deposits and also allows tracking of associate members.

There are links provided under the eCommerce section that will take you step-by-step on how to extract all these membership lists.

**Questions on using eCommerce?** - contact NABIP at [membership@NABIP.org](mailto:membership@NABIP.org)

### **Leadership Roster**

As a Membership Chair, you should have been designated by your president as one of three people in your chapter to have access to eCommerce. To find out whether you have access, just send an e-mail with your name, chapter and position to [membership@NABIP.org](mailto:membership@NABIP.org) . Make sure you ask, “Do I have eCommerce access?” so we’ll know why you are contacting us.

### **Monthly Communication**

As a state/local/regional membership chair you can expect regular communication from the National office with a friendly reminder on how to run monthly reports and how to read obtained data.

There are monthly conference calls where 100 % attendance and participation are vital as a team leader.

There should be two goals as it pertains to membership – recruiting new members and retention. The communications to each group will be different, but the main theme will always be the same – the value of NABIP membership.

### **Maintaining good membership records**

In order for your chapter to function effectively, you must first know how many members you have and who they are. You should:

- Keep all member addresses up-to-date.
- Collect any missing information (phone, email, fax).
- Access monthly membership reports through eCommerce.
- Contact new members by extracting a New Member List. Welcome them to the association; invite them to the next meeting and encourage them to get involved.
- Make corrections to the bad address and send to NABIP immediately.

### **Recruiting new members**

Recruiting new members is one of your most important tasks. How well you do this job directly reflects on your skills and will become your legacy once you have given up the membership officer position. It is also important because a growing chapter is a vibrant chapter. The only way to ensure that your chapter continues to be a strong, powerful voice for health insurance agents in your area is to keep its number multiplying. You should plan to hold at least one “membership blitz” during the year.

### **Some basic things you’ll need to recruit new members**

- A supply of new member applications
- A good contact list of potential new members
- Ask Insurance Carriers or loyal chapter sponsors for their list of agents in your area
- Pull a lapsed list from eCommerce and work with the Retention Chair to call them to rejoin
- Obtain a list of agents from the Department of Insurance

## Membership / Retention Strategy

**Current membership:** \_\_\_\_\_ **Membership goal:** \_\_\_\_\_

Membership goals:

1. \_\_\_% net membership growth: \_\_\_\_\_NET new members
2. 100% board involvement in new membership growth
3. Meet or exceed all awards criteria
4. Membership is everyone's responsibility

Retention goals:

1. \_\_\_\_\_ % retention
2. Communicate and create association membership value
3. Meet or exceed all awards criteria
4. Retention starts the day after new member joins

		<u>Membership</u>	<u>Retention</u>
<b>Luncheons</b>	<ul style="list-style-type: none"> <li>• Membership chair at all sign in tables to target guests</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• Give new member packet to all non-members (w/ application form &amp; value flyer)</li> </ul>	X	
	<ul style="list-style-type: none"> <li>•</li> </ul>		
	<ul style="list-style-type: none"> <li>• Welcome committee – changes month to month (assign new members to small projects or assist</li> </ul>		X
	<ul style="list-style-type: none"> <li>• 2-year, 5 year pins / ribbons or awards</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Certificate when join at first luncheon.</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Special name tags for guests</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• Who hasn't RSVP'd and call them</li> </ul>		X
	<ul style="list-style-type: none"> <li>• New member names and recruiter announced at lunch</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• Lunch purchase deals. "Buy 6 in advance, get one free...."</li> </ul>		X
<b>All events</b>	<ul style="list-style-type: none"> <li>• Sort names of attendees into member/non-member and have vice-chair,</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• Membership chair at all sign in tables to target guests</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• Talk up association at all events. What/who is NABIP???</li> </ul>	X	X
	<ul style="list-style-type: none"> <li>• Program to encourage carrier reps to bring new brokers to</li> </ul>	X	
<b>General</b>	<ul style="list-style-type: none"> <li>• Holiday party or happy hour(s)-inviting non- members to</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• Cc: all board members on welcome letter</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Membership chair controls emails to members. List</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Encourage bank draft option when joining. Change application to promote monthly dues.</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Companies can switch memberships if employee leaves if membership paid by the company (but let's go after the one who's</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Have committee talk to carriers not supporting the chapter</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• If someone you know is a member, and changes jobs or emails, please</li> </ul>		X
	<ul style="list-style-type: none"> <li>• New member orientations every quarter. Full board present. What are the acronyms, why are you asked to</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Have recruiter involved in any follow up calls for first couple of lunches,</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Every event needs to be viewed as a new membership</li> </ul>	X	X
	<ul style="list-style-type: none"> <li>• Ad in business journal listing all members</li> </ul>	X	X
	<ul style="list-style-type: none"> <li>• Periodic membership blitzes and programs to recruit</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• ARE WE REACHING THE MEMBERSHIP ADEQUATELY?</li> </ul>		X
<b>Newsletter</b>	<ul style="list-style-type: none"> <li>• Gossip column. Who's moved or who's missing</li> </ul>		X
<b>Contests</b>	<ul style="list-style-type: none"> <li>• New members contest every quarter</li> </ul>	X	
	<ul style="list-style-type: none"> <li>• Retention contest</li> </ul>		X
	<ul style="list-style-type: none"> <li>• Support the Triple Crown program</li> </ul>	X	X

## **MARKETING**

Membership is the lifeblood of any organization/association, and for good reason – it represents a group of professionals that establish standards and ethics in a given industry. That is certainly true at NABIP, and our members are dedicated to ensuring that everyone – individuals and employers, large and small – has access to adequate, affordable health coverage.

If membership is the lifeblood, then recruiting is the heart. Recruiting new members is one of the most important tasks that your chapter will face during the year. It is important because a vibrant and healthy chapter has to grow, and the only way to ensure that your chapter continues to be a strong, powerful voice is to keep its numbers multiplying. There is definitely strength in numbers!

While at first this task may seem overwhelming, it can be accomplished as long as there is a plan that has the buy-in of the board and the members. A cause that is not supported by everyone cannot succeed. **ALWAYS THINK MEMBERSHIP!**

### **Tips on recruiting new members:**

Some chapters use a percentage of total membership as a measure of growth. For example, if the chapter is comprised of 100 members, it might have a growth rate of 10% - or 10 new members. The problem here is that retention is not taken into consideration. If the chapter gets 10 new members, but loses 20, they have a net of -10.

That means you will need to look at retention numbers, especially if you have a long history of members lapsing each year. Once you determine what your retention rate will be (and the goal for your chapter should be at least 85%), then you can use that number to figure how many new members you need to reach your growth objective. In the example above, if the retention rate is 85% and 15 members are anticipated to lapse, then you will need 25 new members to reach your growth objective of net +10, or 10% in this case.

Prospect lists can come from many sources – you can buy a list of health producers by zip code, you can obtain a list from your state's Department of Insurance, or you can refer co-workers or others you know to be in the health insurance field. The nature of the list will determine the success rate of each. As you would expect, the warmer the lead (co-worker, friend in business, etc.), the better the success rate.

### **List Bill**

As we look to recruit multiple members from one organization, a popular program that is available is the List Bill Membership Program. This is a convenient way for the organization to have one invoice for 3-9 employees who are NABIP members. The following page lists the requirements for the program.

Guidelines for “List Billing Membership”  
Program  
One Invoice  
System

<b>Minimum Size to Participate</b>	3 new or current members enrolled in program.
<b>Dues Paid</b>	All applicable national, state and local dues owed by each member; no discounts can be offered.
<b>Billing Cycle</b>	All members’ dues will be prorated to a uniform renewal date in the first year; date to be determined by existing members’ renewal dates, in concert with sponsoring company’s wishes. Payment may also be made by bank draft or credit card draft on the corporate account.
<b>Invoicing Schedule</b>	First consolidated invoice sent 60 days prior to renewal date. Groups over 50 members may pay in two installments, provided that final payment is made within 90 days of paid through date.
<b>Changes to Roster</b>	Sponsoring company may change members upon the transfer or termination of any members under the program. Additional members may be added at any time, with first year dues prorated to the uniform renewal date.
<b>Ownership of Membership</b>	While the sponsoring company may determine which of its producers or staff may participate in the program, the memberships attach to the individuals – the sponsoring company does not derive any benefits of membership because of its participation.
<b>Enrollment Process</b>	<ol style="list-style-type: none"><li>1. Sponsoring company sends a list of members to be included on the bill, including name, address, phone, fax, and email.</li><li>2. NABIP staff reviews list, determines appropriate chapter affiliations and calculates prorated dues.</li><li>3. Consolidated invoice is sent to sponsoring company.</li><li>4. Memberships are activated upon receipt of payment from sponsoring company.</li></ol>

## **Recruiting Carrier Reps and General Agents**

NABIP is an association of health insurance professionals, and that includes not just producers, but all who work in the health care industry. This includes those who work in employee benefits, and areas such as dental, disability income, Medicare-eligible products, long term care, and other related insurance markets. Carrier representatives and general agents are just two segments that are possible members, as it is important for them to stay up to date on issues affecting the producers who sell their products or put business through your organization.

Here are some benefits of membership that may be available through your chapter or at the national level for this group:

- Local membership meetings with guest speakers on pertinent topics
- Ability to exhibit and possibly speak during the chapter meetings
- Discounted rates for annual benefits expo or other events
- Annual Golf Outing – sponsorships and putting together a foursome
- Industry Publications such as ABS Magazine, Washington Update, other pertinent Newsletters
- C.E. License credits through Education Programs
- Certification Courses, Compliance information and tools, and the REBC designation
- Discounts on C.E. class fees
- Eligibility for Leading Producer Round Table (LPRT) Award
- Enhanced professional image while working with fellow NABIP members
- Representation in (state) and in Washington DC

Many carrier reps and general agents will want to become members to support their producers, as many NABIP members like to do business with fellow members.

Sample emails and letters can be found at the end of this Guidebook.

## **ADVERTISING**

Advertising is the act of communicating directly to an audience using all available sources, such as sending segmented emails and promoting online. A successful campaign attracts the viewer's attention and makes them want to learn more about the promotion. Highlighting reasons to join during the promotion generates excitement, especially if there are incentives to win.

### **Target & Segmentation**

Remember, general mass emailing promotions have a very poor response rate. The more targeted message, the better the response. Divide your lists and target prospective members with messages geared towards each group.

### **Repetition**

Repetition is exactly what it sounds like, and it is a very effective method. It is a means of getting a message into the memory of a receiver. This is particularly helpful, because it gives the opportunity for prospects to weigh the message and make a final decision.

### **Set Deadlines**

Always set an expiration date for promotions to end, which will create a sense of urgency and generate a missing opportunity scenario.

### **Flyers/Marketing Pieces**

NABIP flyers and some marketing pieces can be personalized and used for chapter campaigns and blitzes.

### **Tracking and Analyzing**

Keep track of response rates - this is the last step, which uses specific methods to measure how effective the campaign was and whether it met the desired objectives.

The following pages contain sample communications (emails and phone tracks) to use in your recruiting efforts. They include:

- Sample email for non-members (general use)
- Sample phone track for non-members
- Sample recruitment letter/email for cold prospects
- Sample recruitment letter/email for warm prospects
- Sample email for non-members who attended an NABIP event
- Sample recruitment letter – general use
- Sample recruitment letter/email for Carrier Reps or General Agents

## **SAMPLE COMMUNICATIONS**

### **Sample Email to use for non-members (general use):**

Good Morning < >:

The National Association of Benefits and Insurance Professionals represents more than 100,000 licensed health insurance agents, brokers, general agents, consultants, and benefit professionals through more than 200 chapters across the country. Every day NABIP members help their clients with their health insurance needs. NABIP conducts advocacy efforts at the state and federal levels of government to advance the interests of health insurance professionals and to promote affordable and responsible private health insurance market solutions.

NABIP members help millions of consumers by guiding them through the complexities of health insurance purchasing and enrollment while ensuring they get the best policy at the most affordable price. Our members seek to understand each personal situation to create recommendations that complement their clients' financial and medical security needs.

NABIP's mission is to advocate for our members, provide professional development and deliver resources to promote excellence.

As a professional in the health insurance industry, the question is – Why aren't you a member of NABIP?

You will be making a tremendous investment in yourself and reap the value of being an NABIP member. A recent analysis of our member benefits shows that the value of NABIP membership is worth \$8,000/year. That's a return on investment of up to 20%!

Please go to our website to join by clicking on this link:

<https://NABIP.org/membership/join-now>

Join today! Don't get left behind when it comes to investing in your future.

Sincerely,

Insert Recruiter Name  
Local NABIP Chapter



## **Sample Phone Call track to use for non-members (general):**

Good Morning/Afternoon, this is < >, from the National Association of Benefits and Insurance Professionals.  
Do you have a few minutes to talk about NABIP?

*(At this point they may ask who NABIP is, or something like that. Continue on)*

The National Association of Benefits and Insurance Professionals represents more than 100,000 licensed health insurance agents, brokers, general agents, consultants, and benefit professionals through more than 200 chapters across America. I belong to the < > > chapter here

NABIP members are dedicated to ensuring that everyone has access to adequate, affordable health coverage. Our members help millions of consumers by guiding them through the complexities of health insurance purchasing and enrollment. Our staff works tirelessly advocating for public policies that will make health insurance coverage more affordable.

It is so important to invest in your career and profession, and studies have found that our benefits of membership equal about \$8,000/annually. That's a 20:1 return on investment.

There is strength in numbers, and we cannot accomplish what we have done and plan to do without the support of members nationwide. Will you join us and become a member of NABIP?

***(answer any objection they may have – value will be a big one, so use the Value of NABIP Membership to answer that)***

Thank you for your time today!

Sincerely,

Insert Recruiter Name  
Local NABIP Chapter

## Sample Recruitment Letter (Cold Prospect):

Date

Name

Company Address

City, State Zip

Dear Name:

I am writing today to encourage you to join the National Association of Benefits and Insurance Professionals - the only association devoted to you, the health insurance professional. As members of an increasingly threatened and little understood vocation, it is more important than ever that health insurance professionals band together for maximum impact, speaking with one strong voice.

By becoming a NABIP member, you ally yourself with the best the industry has to offer. NABIP members include not only the top health insurance professionals in the nation, but also the most respected. Likewise, NABIP membership guarantees your access to the best resources available. Here are some of the benefits your NABIP membership provides:

**Professional Development and Networking** – National, state and local chapters provide up-to-date continuing education opportunities to keep you abreast on trends, new products and policy changes in the industry.

**Information Resources** – With our website, [www.NABIP.org](http://www.NABIP.org), *America's Benefit Specialist (ABS)* magazine, newsletters and electronic communications at your fingertips, you'll always have the most current industry information.

**Member Recognition** – Every day NABIP works to reward members who are making a difference in their communities and the nation. Leading Producer Round Table (LPRT) encourages excellence among NABIP's health and benefit insurance professionals by recognizing their sales achievements, while many other awards recognize members who stand out in various areas such as leadership, working with the media and legislative efforts.

**Member-only discount programs** – From an exclusive agreement for agent preferred errors and omissions insurance to discounts on shipping, NABIP offers you opportunities to save money on the items you need to operate your business.

I've enclosed information to help you fully evaluate NABIP membership, including the latest issue of *America's Benefit Specialist magazine*. This is a good example of the high caliber information NABIP delivers to health insurance professionals like you. I know that you will find it useful.

Please feel free to call on me with any questions you may have. You may reach me at \_\_\_\_\_ or via e-mail at \_\_\_\_\_. I look forward to hearing from you.

Sincerely,

Insert Recruiter Name Local NABIP Chapter

## Sample Recruitment Letter (Warm Prospect):

Date Name Company Address  
City, State Zip

Dear Name:

It was a pleasure speaking with you about the National Association of Benefits and Insurance Professionals and our local chapter. I was happy to hear of your interest in investing in your profession and becoming a member.

NABIP has grown into one of the most respected voices in Washington D.C. on health insurance and benefits issues. As such, we are hard at work educating and informing federal, state and local government leaders about the important work you do every day on behalf of your clients. In addition to advocacy, NABIP membership guarantees you access to the most valuable resources available to health insurance professionals. Your NABIP membership will keep you informed, making your business easier to manage.

Here are some of the benefits your NABIP membership provides:

**Professional Development and Networking** – National, state and local chapters provide up-to-date continuing education opportunities including certification and designation programs to keep you abreast on trends, new products and policy changes in the industry.

**Information Resources** – With our website, [www.NABIP.org](http://www.NABIP.org), *America's Benefit Specialist (ABS)* magazine, newsletters and electronic communications at your fingertips, you'll always have the most current industry information.

**Member Recognition** – Every day NABIP works to reward members who are making a difference in their communities and the nation. Leading Producer Round Table (LPRT) encourages excellence among NABIP's health and benefit insurance professionals by recognizing their sales achievements, while many other awards recognize members who stand out in various areas such as leadership, working with the media and legislative efforts.

**Member-only discount programs** – From an exclusive agreement for agent preferred errors and omissions insurance to discounts on shipping, NABIP offers you opportunities to save money on the items you need to operate your business.

I've enclosed information to help you evaluate all the benefits NABIP membership provides including a copy of *ABS – America's Benefit Specialist* magazine. Every month *ABS* delivers the most current information available to health insurance professionals like you. I hope that you will find it useful.

Please feel free to call on me with any questions you may have. You may reach me at \_\_\_\_\_ or via e-mail at \_\_\_\_\_. I look forward to hearing from you.

Sincerely,  
Insert Recruiter Name Local NABIP Chapter

## Sample Email to use for non-members attending an NABIP event (Sales Meeting, Medicare Summit, etc.):

Subject Line: Special Offer to Join NABIP!

Good Afternoon:

Thank you for attending the <Chapter's Medicare Summit>. I hope you found the time was well invested.

I want to talk to you about joining NABIP. It's your support of the association that allows us to keep you informed and ready to meet the health, financial and retirement security needs of all Americans through education, advocacy and professional development.

As someone who works in the <Medicare-eligible> market, you know too well the regulations and legislation of this market. It is essential to be up to date and fully informed on the latest happenings. That is where NABIP becomes your advocate. We know this market and they know us. It takes years of hard work to become an effective advocate, and we have been extremely involved in the <Medicare-eligible> market for the past <15+> years.

**(If you are extending an offer to join: Because I believe so strongly in this association and what we can do for you, I am extending a special offer to you. Join NABIP by < > and get \$50 off the national dues!) – THIS OFFER NEEDS PRIOR APPROVAL**

Your NABIP membership has tremendous value - it is worth \$8,000/year. That's a return on investment of up to 20:1!

To join, click on the link: <https://NABIP.org/membership/join-now>

Again, thank you for attending the <Summit>. I hope to see you at future NABIP events. Have a safe weekend!

Sincerely,

Insert Recruiter Name Local NABIP Chapter

**Sample Recruitment Letter – general use (can use for producers, carrier reps, GAs):**

Date

Name

Company A

Address City/State/Zip

Dear Health Insurance Professional:

The National Association of Benefits and Insurance Professionals is the only national association working solely on behalf of health insurance and benefit professionals. By joining NABIP, you become a part of an elite group of health insurance professionals who are dedicated to the principle that everyone should have access to affordable, high-quality health insurance coverage.

NABIP has grown into one of the most respected voices in Washington D.C. on health insurance and benefits issues. As such, we are hard at work educating and informing federal and state government leaders about the important work you do every day on behalf of your clients. As health care continues to be one of the leading issues on Capitol Hill, NABIP is the one unwavering voice representing your interests. We know how important you are to the health and well-being of your clients, and we bring that powerful message to your elected officials every day.

In addition to advocacy, NABIP membership guarantees you access to the most valuable resources available to health insurance professionals. Your NABIP membership will keep you informed, making your business easier to manage. Here are some of the benefits your NABIP membership provides:

**Professional Development and Networking** – National, state and local chapters provide up-to-date continuing education opportunities and certification and designation programs to keep you abreast on trends, new products and policy changes in the industry.

**Information Resources** – With our website, [www.NABIP.org](http://www.NABIP.org), *America's Benefit Specialist (ABS)* magazine, newsletters and electronic communications at your fingertips, you'll always have the most current industry information.

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**Member-only discount programs** – From an exclusive agreement for agent preferred errors and omissions insurance to discounts on shipping, NABIP offers you opportunities to save money on the items you need to operate your business.

Start receiving your member benefits today by visiting [www.NABIP.org](http://www.NABIP.org) and clicking on "Join NABIP Today!" To learn more about NABIP, please refer to the enclosed brochure. If you have any questions, please contact Robert Tretter at (202) 595-7564 or [btretter@NABIP.org](mailto:btretter@NABIP.org). We look forward to hearing from you!

Sincerely,

Insert Recruiter Name Local NABIP Chapter

## Sample Recruitment Letter for Email for Carriers & GA's

Dear <Health Insurance Professional>:

I am writing this email to invite you to join the (local) Association of Benefits and Insurance Professionals. (?)ABIP is a local association of over (?) insurance agents and insurance professionals dedicated to preserving and enhancing the health care benefits industry.

Our local association also participates on a state and national level via the (state) Association of Benefits and Insurance Professionals (NABIP) and The National Association of Benefits and Insurance Professionals (NABIP). At the local, state, and national level, we

are committed to the agent distribution system, of which you are an integral part. Here are just some of the benefits you receive with your (?)ABIP membership:

- Membership meetings with guest speakers on topics that affect your career
- Discounted rates for annual benefits expo
- Annual Golf Outing (if applicable for your chapter)
- ABS Magazine, Washington Update, and other Newsletters
- CEU credits through programs at the local, state and national level.
- Certification programs on many topics and the REBC designation
- Discounts on C.E. class fees (if applicable for your chapter)
- Eligibility for Leading Producer Round Table Award
- Enhanced professional image
- Representation in (state) and in Washington

Attached are links to our local and national websites and a membership application. I have also attached a link to our upcoming <benefits expo website>. Please complete the membership application and return it to my attention. I may be reached at \_\_\_\_\_, if you have any questions.

I look forward to welcoming you as a new member! I also hope to see you at our <benefits expo> on \_\_\_\_.

Sincerely,

Insert Recruiter Name Local NABIP Chapter