



Marketing Update

College of NARFE Knowledge 2017

8/17/2017

National Active and Retired Federal Employees Association

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Notes:



Agenda

- **Marketing Department Overview**
- **2018 Conference**
- **NARFE Federal Benefits Institute**
- **NARFE Membership Trends**
- **Recruitment & Retention – Headquarters**
- **Recruitment & Retention – Field Support**
- **NARFE Membership and Renewal Forms**

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Notes:



Marketing Department

NARFE Federal Benefits Institute

Deputy Director: Vacant

Membership Marketing

Deputy Director: Monica Williams

Recruitment & Retention

Advertising, Fundraising

Business Development

Deputy Director: Jennifer Bialek

Sponsorship, Exhibitors

Affinity Partners (Member Perks)

Event Planning

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Notes: _____



2018 National Conference

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Notes:



2018 National Conference

SAVE the DATE!

AUGUST 26-29, 2018	2018 NARFE NATIONAL CONFERENCE
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Hyatt Regency Riverfront, Jacksonville, FL

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Notes:



2018 National Conference

This conference is an opportunity for the federal community to:

- Learn about important legislative issues
- Understand and maximize federal benefits
- Build valuable skills
- Enjoy dynamic speakers and entertainment

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Of course the main group will be NARFE members, but we want to attract non-members as well and convert them.

Notes:



2018 National Conference

General Sessions

This will be a chance for everyone to gather at the beginning and end of the day and hear from dynamic speakers

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Notes:



2018 National Conference

Breakout Sessions

- These offer the opportunity to break out into smaller groups based on interest.
- Over 20 sessions in total!

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Notes:



2018 National Conference

Breakout Sessions under consideration:

Legislative

Legislative Updates

Grassroots Advocacy

PAC

Federal Benefits Institute

Pre-Retirement

Post retirement

FEHBP & Medicare

Personal Finance

NARFE Business

Leadership Development

Chapter Development

Technology

Social Media

Microsoft Suite 101

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Nothing definitive, this is what we are sourcing

Notes:



Conference Schedule

Sunday	Monday	Tuesday	Wednesday
<ul style="list-style-type: none">• Half Day• Afternoon Opening Session	<ul style="list-style-type: none">• Full Day• General Sessions• Breakout Sessions• Florida Night	<ul style="list-style-type: none">• Full Day• General Sessions• Breakout Sessions• Gala	<ul style="list-style-type: none">• Half Day• Business Meeting

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Notes:



NARFE Federal Benefits Institute

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Notes:



NARFE Federal Benefits Institute What is It?

**Accurate, Timely, Accessible Federal Benefits
Information and Guidance**

Delivered in a growing number of formats

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Notes:



NARFE Federal Benefits Institute

Why is it Important?

Federal Benefits Expertise:

- What active federal employees seek
- What human resources and OPM fail to provide
- What has become more difficult for NARFE to sustain locally

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Notes:



NARFE Federal Benefits Institute Why is it Important?

A NARFE Unique Value

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Notes:



NARFE Federal Benefits Institute How Does it Benefit NARFE?

- **Recruitment**
- **Retention**
- **Non-Dues Revenue**
- **Branding**

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Notes:



Membership Status and Trends

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Notes:



Membership Status and Trends

- **Slowing of membership decline continues**
- **2016 year-end decline of 4%**
 - 2015 5%
 - 2014 7%
- **2017 trend continues**

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Notes:



Membership Status and Trends

July 2017	
Total Membership	210,770
Year-to-Date Loss	(5,446)
July 2016	(6,673)
July 2015	(8,878)
July 2014	(13,806)

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Notes:



Recruitment & Retention Headquarters Initiatives

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The four major activities for our membership program for NARFE are.

Lead Generation – is developing contacts

We get lists and M-2 cards from chapters and individuals

We get lists and contacts from shows that are manned by NARFE Staff

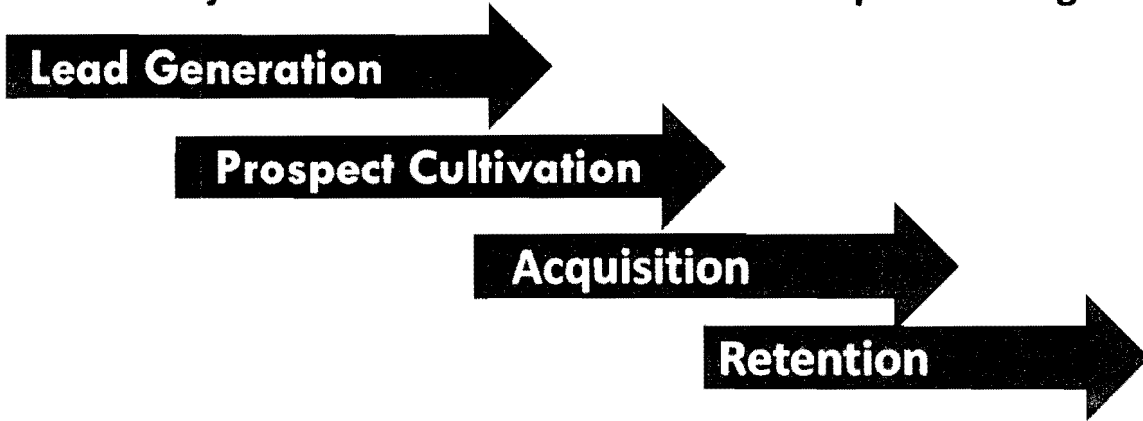
We get most leads from our online lead generation program.

Notes:



Membership Acquisition and Retention

Major Activities for NARFE Membership Marketing



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Lead Generation – is developing contacts

We get lists and M-2 cards from chapters and individuals

We get lists and contacts from shows that are manned by NARFE Staff

We get most leads from our online lead generation program.

Notes:



Online Ad



FEDS! Take Charge of Your Financial Future

May 17, 2017

Download Your **FREE** Guide to Retirement Savings Planning Here!

FREE Retirement Planning Help for Feds!

How confident are you about YOUR financial plan for retirement? Get your **FREE Guide to Retirement Savings Planning** — and **BONUS Choosing the Right Financial Planner** — today!



NARFE Experts on Federal Benefits

What You Will Learn:

- ✓ Everything you need to consider to create a solid financial plan
- ✓ Who to contact for help with questions about your benefits
- ✓ Where to turn for financial training
- ✓ PLUS our Bonus Guide to Choosing the Right Financial Partner
- ✓ And more

To learn more about the National Active and Retired Federal Employee Association visit www.NARFE.org

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Our online lead generation campaigns bring in thousands of leads a month. It starts with an ad like this, or a

Notes:



Experts on Federal Retirement and Benefits

Landing Page

Feds! Take Charge of Your Financial Future

Are you confident in your federal plan for retirement? Do you have a plan? Download the FREE Guide to Retirement Savings Planning from NARFE — the experts on federal retirement and benefits.

Download Your FREE Guide to Retirement Savings Planning Here!

What you'll learn:

- ✓ Everything you need to consider to create a solid financial plan
- ✓ How to contact the pros with questions about your benefits
- ✓ Where to turn for financial training
- ✓ Plus, our Bonus Guide to Choosing the Right Financial Planner

NARFE
400 North Washington Street
Alexandria, VA 22314
800-456-4412, 703-636-7790
202-691-2500
This offer cannot be placed to those in Canada due to Canada's Anti-Spam Legislation (CASL).
Please call 800-456-4412 if you would like more information about this offer.



FREE!

Complete this form to receive your FREE Guide to Retirement Savings Planning and the BONUS Guide to Choosing the Right Financial Planner Today!

YES! Please send NARFE's FREE Guide to Retirement Savings Planning with BONUS Guide to Choosing a Financial Planner! Complete this form to receive a link to your FREE Download:

First Name

Last Name

Email Address

Street Address

Apartment, Suite, or P.O. Box

City

State

Zip Code

Country

Phone Number

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That connects to a page like this.

If someone is interested enough in the content, they will fill out their contact information and a pdf of the article will be provided to them in link that is sent to their email address.

This is considered a "Contact for Content" program.

Notes:



TSP Withdrawal Strategies
 Get Your Guide to TSP Withdrawal
 Options Free from NARFE Today
discovernarfe.org/TSPWithdrawal

Manage Your TSP Income
 Get Your Guide to TSP Withdrawal
 Options Free from NARFE Today
discovernarfe.org/TSPWithdrawal



NARFE National Headquarters

Like Page

FREE Download: Explore your best options to manage your TSP withdrawals



Withdrawing from TSP?

Get tips and tools to implement a sound TSP withdrawal strategy that fits your lifestyle and retirement plan. Download Your FREE white paper from NARFE-- experts on 'federal retirement benefits--today'

DISCOVER NARFE.ORG

Download

Sample Google Ads

Sample Facebook Ad

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We place ads in targeted online newsletters
 Push out to targeted Third party email lists
 And use Facebook and Google ads and remarketing

Notes:



Online Lead Generation

- Reaches people who are seeking information about federal benefits
- Provides an immediate benefit
- Demonstrates value of NARFE content
- Person must provide contact information to get content!

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Notes:



All leads with email address are added to a 6-part email cultivation series

The collage displays six different email newsletters from NARFE. Each newsletter features the NARFE logo and various headlines and content. The newsletters include:

- True Your:** A newsletter with a 'True Your' headline and a 'Download Now!' button.
- NARFE Survey:** A newsletter titled 'NARFE Survey' with a 'Take the Survey' button.
- NARFE's role in helping federal employees:** A newsletter with a headline about NARFE's role in helping federal employees.
- NARFE Survey:** Another newsletter titled 'NARFE Survey' with a 'Take the Survey' button.
- NARFE's role in helping federal employees:** A newsletter with a headline about NARFE's role in helping federal employees.
- NARFE Survey:** A newsletter titled 'NARFE Survey' with a 'Take the Survey' button.

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These online leads become prospects for NARFE. Within two days of receiving content we introduce them to more of NARFE's information with the start of a 6-part email cultivation series.

This series trickles out over 45 days. Ending with with a direct join offer.

Notes:



Prospect Conversion

Richard G. Thiesen
National President



Jon Dowie
National Secretary/Treasurer

May 26, 2017

11111189

Marquise Santiago
Unit 36
54281 Spyglass Ave.
Desert Hot Springs, CA 92240-1227
[Barcode]

Dear Marquise Santiago,

Thank you for your interest in NARFE – the National Active and Retired Federal Employees Association.

Whether currently working or already retired, your co-workers and colleagues turn to NARFE when they need help – and very often it is the first place they learn about proposed changes to benefits that may affect their financial well-being.

Tireless Advocacy...Trusted Advice

With each new legislative session, there are new attacks aimed directly at your compensation, annuity, health insurance and more. For nearly 100 years, NARFE has led the charge to protect and preserve the benefits you were promised when you joined federal service.

**We fight for your benefits while you earn them
and after retirement while you enjoy them.**

There's no better time than now to join NARFE. The low annual dues of \$40 give you:
National Active and Retired Federal Employees Association

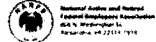
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All prospects – whether from the field or our online campaigns -- are mailed a letter which includes the F-135 within 14 days of being entered in the NARFE database.

All leads with an email address receive a "Prospect" version of NARFE NewsWatch each week.

Notes:



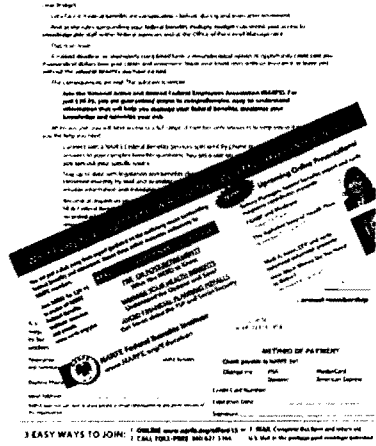
» IMPORTANT »
REGULAR MAILING 08/17/17

Prospect Conversion

All prospects are selected for the next available acquisition mailing.

NARFE mails 75,000 pieces every 6 weeks.

NARFE tests creative and messaging in every mailing.



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Prospects are selected to for direct mail campaigns that are mailed in January, March, May, July, September, and November.

We also include selections of lapsed members. Two times a year we have access to a list of recently retired feds and survivor annuitants.

Notes:



ⓘ If there are problems with how this message is displayed, click here to view it as a web browser.
 From: Richard G. Thayer, NARFE (rthayer@narfe.org)
 To: DuPhan, Jennifer (JGZ)
 CC: Jemel, Christy (JGZ)
 Subject: Fast Send - 837-NARFE-7673-254-MayWebinar-Estate Planning for Feds - New Webinar on May 11

Prospect Conversion
 All prospects with an email address receive invitations to the NARFE Federal Benefits Institute Webinars



Estate Planning for Feds
 A NARFE Federal Benefits Institute Webinar

Thursday, May 11, 2017 at 2 p.m. ET

Regardless of your income, personal wealth or current state of estate planning, isn't something you should do up?

A few hours of planning on your part will provide a smooth transition for your beneficiaries and maximize estate tax savings. Feds need to consider the impact of their already-unique FERS account as well as 401k accounts.

Mark A. Keen, CFP® and wife Margaret A. "Margaret Mackey" (consortium) guide estate planning for the individual with a 401k/403(b) or 457(b) plan. You need to read your 401k and your interests - first!

Register today for this one-hour webinar on May 11 at 2 p.m. ET. Stay online for a 30-MINUTE one-hour Q&A session.

What You Will Learn:

- ✓ The estate planning documents that everyone needs
- ✓ How Can I Benefit From Your Federal Benefits?
- ✓ How proactively protected are... and how you can make sure it goes where you want it?
- ✓ Should you try to avoid probate?
- ✓ And more...

Space is limited. **Register for this webinar now.**

Non-member registration includes full NARFE membership. If you are unable to attend the webinar online or are unable to attend, we will provide a full hour of the webinar.

Register today for this one-hour webinar on May 11 at 2 p.m. ET. Stay online for a 30-MINUTE one-hour Q&A session.



Mark Keen, CFP® is a financial planner with years of experience helping Feds prepare for retirement. As the expert behind our webinars, "Managing Money" column, Mark provides knowledgeable and targeted saving strategies for the federal community.

Register today for this hour-long webinar PLUS Special Q&A session exclusively for NARFE members from the NARFE Federal Benefits Institute.

Register Today!



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Bridget has spoken about the Federal Benefit Institute webinars. We advertise in online media for registration and send targeted emails to our prospect lists. The offer is register for the webinar at \$39.95 and receive a full year of membership.

These emails are the most responsive to the webinar registrations.

Notes:



Recruitment & Retention Field Support

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Notes:



Local Recruiting's Unique Value

Local recruiters can engage with potential members one-on-one

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In our work with chapters we hope to strengthen their abilities as THE LOCAL Connection.

Chapter recruiters and any member, really has the ability to catch people in social settings, while you are standing in line at the grocery store or bank, in the waiting room at the doctor, dentist, veterinarian, or at booth at a local event or health and wellness fair, they have an opportunity, through conversation to promote NARFE.

And what how one approaches the conversation is key to engaging the prospect

Here's the key...

Notes:



Keys To Successful Recruiting

- ✓ **Know What NARFE Offers**
- ✓ **Understand the Prospect's Needs**
- ✓ **Match NARFE Benefits to Prospect's Needs**

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NARFE's mission and benefits are our best selling points. Knowing them inside and out and being able to articulate them will help you engage with a prospect.

The reasons YOU joined NARFE are likely different from many potential members.

Anyone managing a booth at a health fair or a county fair or even in line at the bank or grocery store be able to express what NARFE's value to the individual.

What is of value to them? Is it information? Is it legislation? Is it local connections?

Notes:



NARFE Staff Support Local Recruiters

- ✓ **Tips**
- ✓ **Tools**
- ✓ **Guidance**

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Notes:

Officer Resources

- ▶ OAM - Online Activities Module (including the F-7 and F-7A)
- ▶ Online Reports & Forms
- ▶ Membership Materials

OFFICER RESOURCES

- » Forms By Form Number
- » Newsletters
- » Member Applications
- » Member Recruitment
- » Recruiter Poles
- » Chapters
- » Dues Withholding
- » Federations
- » Manuals & Guidebooks
- » Legislation Pamphlets
- » NARFE Programs Information
- » Order Forms Supplies
- » Financial
- » Tips, Tools & Templates
- » Local Lists

RESOURCE LIBRARY

- » Newsletters
- » Be Prepared
- » Dues Withholding
- » Write Papers
- » Conventions
- » General Store
- » History of NARFE Video

Tips & Tools

Note: An Adobe Acrobat Reader is required to fill out certain forms. Please click here to download it.

RECRUITMENT AND RETENTION

Strategic Planning

- SMART Goals and Worksheet (NEW)
- Brainstorm for Membership
- 10 Tips for Successful Recruiting
- Recruiting & Retention Resources
 - The Rule of Seven and How it Relates to NARFE Chapters
 - Avoiding Lapsed Memberships
 - The NARFE Display Table
 - Overcoming "No"
 - Recruiting and Retention Journal

Recruiting Tools

- Posters
- Print Ads
- Sample Letter and Email to Prospect
- Elevator Speech
- Tips for Recruiters
- FAQs for Recruiters
- Facebook Quick Start Guide

Retention

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NARFE has resources available to help recruiters. Look under "Officer Resources" at narfe.org.

Notes:



? Federal Benefit Questions? NARFE Answered Mine!

The *National Active and Retired Federal Employees Association* unravels complex federal benefits and helps members get the most out of their retirement and protect their families.



Learn how NARFE can help you.
www.narfe.org
National Active and Retired Federal Employees Association

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NARFE WEBINARS
Answers for the Federal Community

FREE
with NARFE membership!

NARFE WEBINAR PRESENTERS




AVAILABLE NOW!

Pre- and Post-Retirement Planning

- What's Your Best Retirement Date?
- Speeding the Retirement Journey
- Social Security Made Simple

Financial Planning

- Estate Planning
- TSP: Love It or Leave It
- Exploring TSP Withdrawal Options

Health Benefits

- Alphabet Soup of Health Plans
- FEHBP and Medicare

Join NARFE to access these resources and more!

 NARFE Federal Benefits Institute www.NARFE.org/institute

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Ads and posters available in several standard sizes for immediate download

NARFE makes it easy to print materials for any exhibit or advertising opportunity. You can download pdfs of posters and have them printed and mounted on foam board at Kinko's or other local source.

The generic "Webinar" poster is new and needs to be displayed at all events.

We encourage you to use the NARFE products rather than create your own. By doing so, we maintain our brand standards and make it easy for the public to associate the NARFE they saw at a health fair with the NARFE information they receive in the mail.

NARFE has created a "print-on demand" webinar flyer that promotes upcoming webinars. We send it out with any requests that we receive for event material. They are not on the current F-18, but will be included in any order that goes out.

Notes:



**National Active and Retired
Federal Employees Association**

NARFE works with you to:

- ✓ Protect Your Earned Benefits
- ✓ Ensure a Safe and Secure Retirement
- ✓ Guarantee Answers to Questions on Retirement and Benefits

Learn more at www.narfe.org or call 800-627-3394

Local Contact
Phone
Email

Local NARFE Chapter Number
Day and Hour
Location



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Notes:



NARFE's Recruiting & Retention Journal

A publication for NARFE leaders to advance recruitment, retention and pro-retirement members.

December 2016

www.narfe.org

HQ MEMBERSHIP NEWS

December Is the Last Month of the 2016 Membership Drive! Will You Win the GRAND PRIZE?

— By Monica Williams, Deputy Director, Membership Marketing, mwilliams@narfe.org

We are coming down to the wire. December is the last month of the Fall 2016 Membership campaign - and it will soon be time to select the GRAND PRIZE winner from the pool of recruiters. Remember, as well as \$10 for every new member you recruit, your name is entered one time for each member. So the more members you recruit, the better your chances are for winning an Apple iPad Air 2.



After a bit of a slow start, recruiting picked up in November. From September through November, 448 NARFE members have recruited 678 new members. December is typically our largest month for new member submissions from the field, and we are looking forward to breaking a record this year! ❗

Congratulate Our \$25 Amazon Gift Card WINNERS!

- ➔ September: Frank C. Impinna, Chapter 81, Denver Capital City, CO
- ➔ October: Dominick Liccardi, Chapter 1308, St. Bernard, LA
- ➔ November: Carla Koty, Chapter 2197, East Side Indianapolis, IN

Webinars Are a Great Hook! Use Them to Reel in Members

— By Monica Williams, Deputy Director, Membership Marketing, mwilliams@narfe.org

HQ MEMBERSHIP NEWS

2016 Membership Drive

Congratulate Our Gift Card WINNERS

Webinars Are a Great Hook! Use Them to Reel in Members

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The Recruiting and Retention Journal is published quarterly. Each issue has a wealth of interesting ideas and suggestions from HQ and the field. The most recent issue and archived issues are available online.

If you don't get it and want it you can find it on the website. Please click on "Newsletters" under Office Resources in the OAM, or under "What You Can Do Online" on the homepage

Notes:



Optional Chapter Membership The Renewal Form

Thank you for your membership. Without your support we would not have been able to thwart the many attacks from Congress that threatened to cut your earned pay and benefits.

NARFE remains focused on defeating proposals attacking the federal community to ensure that the benefits you were promised remain intact. And we believe that this year will be one for the record books. We hope you will renew your support so that NARFE's voice resonates loud and strong with Congress and the new administration that the federal community is a force to be reckoned with and will not allow its benefits and financial security to be stripped away.

Please take this opportunity to renew your commitment to protecting your future by renewing your NARFE membership.

Note: The renewal form has changed. Please indicate below whether you are renewing NARFE National Membership or NARFE National and your local chapter.

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Notes:



Optional Chapter Membership The Renewal Form

NARFE MEMBERSHIP

Please renew my NARFE membership as indicated below:

Choose your Membership Option

	NARFE OR	NARFE & Chapter 1414
1 Year	<input type="checkbox"/> \$40	<input type="checkbox"/> \$45.00
2 Years	<input type="checkbox"/> \$72	<input type="checkbox"/> \$82.00
3 Years	<input type="checkbox"/> \$102	<input type="checkbox"/> \$117.00

↓ Or save 15% on NARFE dues! Pay nothing now!
Annuity and Survivor Annuity can sign up for Dues Withholding by completing the form on the back of this letter

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