



hfma

# AUTOMATION STRENGTHENS NEW MEMBER RECRUITMENT

An overhead photograph of two people working at a large wooden desk. The person at the top is a man in a dark suit and glasses, looking at a computer monitor. The person at the bottom is a woman in a red sweater, typing on a keyboard. The desk is cluttered with various items including keyboards, mice, papers, and a coffee cup. A teal overlay covers the left side of the image, containing white text.

# HFMA: Automation Strengthens New Member Recruitment

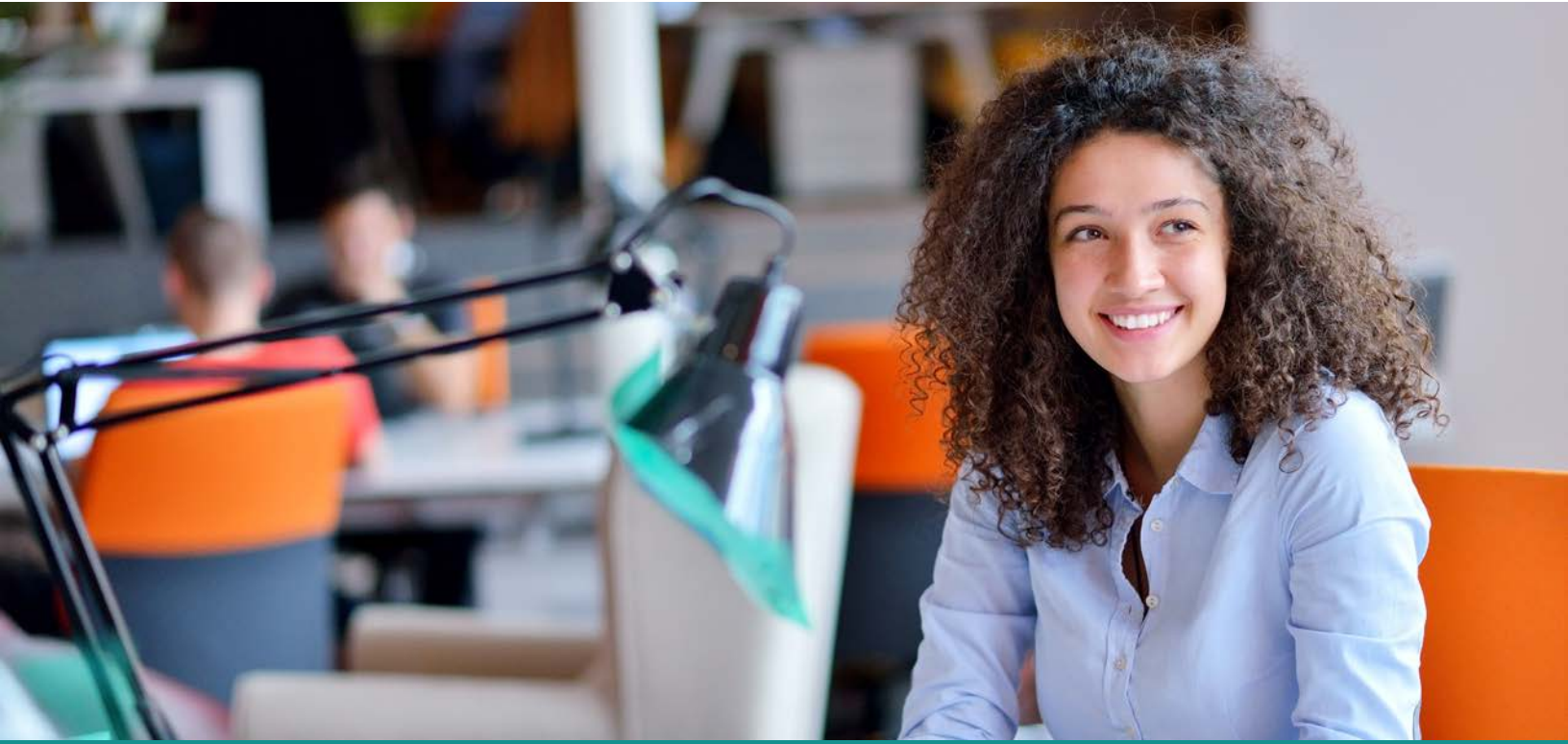


The more than 40,000 members of the Healthcare Financial Management Association (HFMA) are healthcare finance leaders working in physician practices, hospitals, health systems, and health plans. As the nation's premier membership organization for healthcare finance, HFMA identifies gaps throughout the healthcare delivery system and bridges them through the establishment and sharing of knowledge and best practices.

HFMA sends a broad range of regular email communications – including publications, newsletters, and membership updates – to its members and non-members.

## HFMA: at-a-glance

- ✓ 40,000+ Members
- ✓ Over 1 million emails sent monthly
- ✓ 10+ mailings per week
- ✓ AMS system: In transition to Salesforce



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The organization upgraded its email system to include marketing automation in June of 2015. Not long after, HFMA wanted a better way to track its recruitment effort based on referrals by existing members. “The IT team was focused on implementing our new AMS and had limited resources for assisting with the recruitment program,” said Sarah Armand, HFMA’s Marketing Operations Specialist. “As an alternative, we realized it would be quick and easy to set up the whole effort using marketing automation.”

“HFMA’s Member-Get-A-Member (MGAM) program has been a longstanding part of our membership strategy,” said Kirk Manley, Marketing Manager “We

offer prizes for our members who refer new members. We communicate the details of the program to members via emails, a print brochure, print ads in our publications, and web ads. We’ve added the landing page link to our emails as well as our MGAM webpage, referenced in all of our ads.”

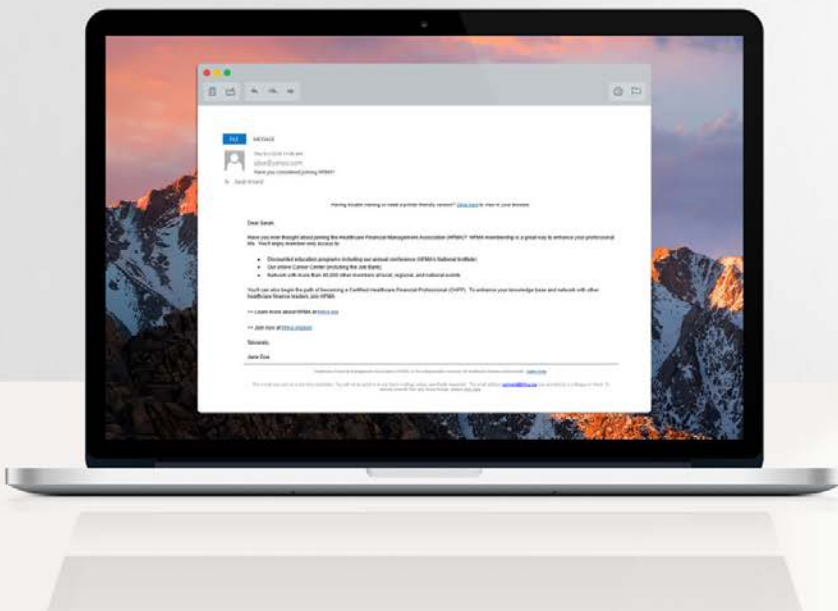
The MGAM marketing automation campaign involves existing members completing a landing page form, which triggers an email from the referring member to the prospective member highlighting the benefits of joining HFMA. The email comes from the member’s email address and the member’s name is referenced in the email signature.

The MGAM campaign has been incredibly successful with a conversion rate of 25 percent. The MGAM program generates a significant proportion of HFMA's new members.

That's not the only success HFMA has had. They've also set up a nurturing campaign to encourage those who

create an account on their site to become members. The campaign sends four emails.

"The first email is delivered three days after they register on our site," said Armand. "The second email is sent seven days later, the third email 14 days after that, and the fourth email seven days after that."





setting up the recruitment campaign in the marketing automation system was straightforward.

### 3 | Select Messages and Send Interval ⓘ

Select campaign messages. If you have not yet created all messages click [here](#).

How many messages do you want to send?

Wait  full day(s) to send the first message

Send Registered User Email 1 at

Wait 7 days to send next message.

If the recipient has not reached the goal, send Registered User Email 2

Wait 14 days to send next message.

If the recipient has not reached the goal, send Registered User Email 3

Wait 7 days to send next message.

If the recipient has not reached the goal, send Registered User Email 4

Wait 3 days before transitioning the recipient to the campaign "End Stage".

If the recipient has not reached the goal, they will be transitioned to the campaign "End Stage" and they will not receive any more campaign messages.



The emails highlight the value of an HFMA membership and encourage registrants to join. In most cases, it takes about three messages to trigger a registrant to join. "Automating this program has saved us a lot of time, since we don't have to pull lists," says Armand.

Automating new member recruitment has been very successful for the HFMA, with new members up over 5% in FY16 compared to FY15.

HFMA has also performed A/B testing to help optimize their membership renewal emails. Personalized subject lines (using recipient's first name) and different incentives were tested (e.g., "Renew early and win a free registration

to our Annual Conference," vs. "Renew early and win an iPad" vs. no incentive). Personalized subject lines received a 5 percent higher open rate in the initial test campaign.

When it came time to promote their annual conference, HFMA decided to use first name personalization in their email invitations, due to the results they had with membership renewals.

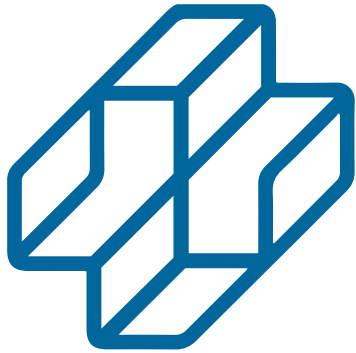
For its annual conference, HFMA also used Real Magnet's integrated abandonment capabilities to capture those potential attendees who visited the registration site, but didn't complete the registration process. The combination of these efforts helped increase HFMA's

annual conference registration by 6% over the prior year.

They are also using the same abandonment capabilities within its membership dues renewal process to capture more on-time renewals.

HFMA is planning to develop drip campaigns to use for lead follow-ups, continue to conduct A/B tests to optimize email messages, and consistently use abandonment messages to increase event registrations.





# hfma

## About HFMA

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establishment and sharing of knowledge and best practices. The organization helps healthcare stakeholders achieve optimal results by creating and providing education, analysis, and practical tools and solutions. HFMA also focuses on building and supporting coalitions with other healthcare associations and industry groups to address the challenges facing the U.S. healthcare system.





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