



DUES BILLING COMMUNICATION SCHEDULE

Minimum Total Direct Communications to Full Audience:

Note: Deliverability depends on availability and accuracy of contact data.

- Emails:
- Mailings:
- Texts:

Short link: bit.ly/txcpadues

Pre-billing:

- Group billing promotions – **February – March**
 - Original outreach
 - Follow up on outstanding invoices for payments by end of March
- Member update requests in Viewpoint and with postcard
- Review email schedule and plan for BLACK OUT for three days around dues email
- Check in with Free Members – email
- Preview in *Today's CPA* – **March/April** issue
- Compare list of saved credit cards with auto renewal registrants, offer auto renewal – **March**
- Send pre-billing message to members in the auto renewal program – **mid March**
- Share communications timeline and templates with chapters for coordinated timing of reminders to avoid duplication of efforts/emails – **February**
- Update HRS dues billing query – **April**
- Contact Faculty Ambassadors to confirm continuation and commitment – **March**
- Send initial outreach to current students for verification, May 31 response deadline – **March**
 - Grad date passed, please verify date. If passed, no longer eligible. Share other membership options. If no response, drop 8/31/22.
 - No grad date, please supply. If no response, drop 8/31/22.
 - No grad date or school, please supply. If no response, drop 8/31/22.
 - No school, please supply. If no response, drop 8/31/22.
 - Still eligible based on data. Confirm interest in continuing and request data review. If respond to end membership, resign in June. If no response, extend to 5/31/23.

April:

- Apply group billing and auto renewal payments prior to mass billing – **April 18**



- Staggered emails by chapter with personalized link – **April 19-21**
- Mail invoice to no email and those who don't accept email
- Email to dropped CPAs from 2020-2021 – **week of April 25**
- Send initial billing lists to all chapters
- Begin weekly updates to chapters (remind chapters of June 30 CPE discount cut off)
- Mentions in e-communications and on social media
- Reconcile bounce email list and returned mail for membership team outreach
- Follow-up direct emails to members with bounced emails from initial billing email

May:

- Email to non-renewals – **May 4**
- First mailed invoice to all non-renewals – **second week of May**
- Reminder outreach to students
- Mentions in e-communications and on social media
- Special e-blast to billed free members to encourage renewal
- Mention in *Today's CPA*
- Reconcile bounce email list and returned mail for membership team outreach
- Calling campaign – reminders of expiration

June:

- Remove CPE discount for online registrations if member has not yet renewed by June 30
- Add an online alert upon log in for members who have not yet renewed
- Email series to non-renewals – **Prop Fuel Campaign**
- Mentions in e-communications and on social media
- Outreach to 2022-23 TXCPA volunteers who have not renewed
- Reminder outreach to students
- Reconcile bounce email list and returned mail for membership team outreach
- Mailed invoice to non-renewals – **third week of June**
- Viewpoint conditional content renewal reminder with notice of benefits ending

July:

- Continue PropFuel campaign
- Mailed invoice to non-renewals (drop notice)– **land by last day of July**
- Group billing and auto renewal contribution email
- Special e-blast to billed free members to encourage renewal
- Staff send messages to non-renewals from Outlook with personalized links
- Reminder outreach to students
- Continue mentions in e-communications and on social media
- Reconcile bounce email list and returned mail for membership team outreach
- Calling campaign
- Text campaign focused on frees and students
- Run conditional content reminder in Viewpoint

August:

- Begin **weekly** email reminders
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- Send a renewal postcard by mail to opposite of preferred address – **second week of August**
- Continue weekly email reminders
- Send second staff email
- Text to students
- Text to nonrenewed CPAs
- Continue mentions in e-communications and on social media
- Reconcile bounce email list and returned mail for membership team outreach
- Run conditional content reminders in *Viewpoint*
- Cross check list with peer review firms
- Cross check list with ethics and PIU attendees
- Personal outreach by audience (frees, academics, big 4)

September

- Drop September 2
- Pull drop statistics
- Send data review and update plea
- Plot win-back campaign