



2023-2024 DUES BILLING COMMUNICATIONS TIMELINE

Pre-billing:

- Professional Group Membership (PGM) outreach and follow up – launched Feb. 1
- Member update requests in *Viewpoint* and with postcard – mailed March 7
- Schedule email launch dates and clear all other communications
- Preview in March/April *Today's CPA*
- Promote auto renewal to those with a saved card who have not yet opted in – March 13
- Send pre-billing notice to members in the auto renewal program – mid March
- Contact Faculty and Student Ambassadors to confirm continuation and commitment – March
- First outreach to current students for verification of eligibility – March

April:

- Apply auto renewal payments prior to individual billing – April 19
- Send first email notice with personalized links – April 25-27
- Send mail invoice to those with no email and those who don't accept email – April 25
- Provide final initial billing lists to all chapters – April 28
- Promote early renewals in TXCPA e-communications and on social media

May:

- Send reinstate invoice to dropped CPAs from 2022-2023 – week of May 1
- Begin weekly updates to chapters – May 2
- Send second outreach to current students for verification of eligibility – week of May 8
- Send second email notice to all non-renewals – May 9
- Review email bounce list and do personal outreach for current emails – May 11 – 21
- Send mail invoice to all non-renewals – week of May 15
- Request for chapter email outreach to non-renewals – week of May 22
- Special personal email to billed free members to encourage renewal – week of May
- Mention in May/June *Today's CPA*
- Review returned mail and NCOA list from mailer – week of May 22
- Continue reminders in e-communications and on social media

June:

- Add an online pop up upon log in for members who have not yet renewed – June 1
- Send third outreach to current students for verification of eligibility – June 6
- Launch three-email series to non-renewals – bi-weekly beginning June 6
- Weekly *Viewpoint* conditional content renewal reminder – begins June 9
- Outreach to 2023-24 TXCPA volunteers who have not renewed – June 27
- Second mailed invoice to non-renewals – week of June 19
- Continue reminders in e-communications and on social media

July:

- Member CPE discount no longer available for online registrations if member has not yet renewed – July 1
- Third email in three-email series sent to non-renewals - July 5
- Send fourth reminder outreach to current students for verification of eligibility – July 10



- Send list of non-responding students to faculty ambassadors for review – July 10
- Request chapter calling campaign (excluding new licensees)– July 12 – August 11
- TXCPA staff calls to billed free members to encourage renewal – July 10 – 21
- TXCPA staff leadership sends personal emails to non-renewals – July 17
- Send third mailed invoice with 30-day drop notice to non-renewals – land by July 31
- Launch text campaign to student members – July 18
- Continue weekly *Viewpoint* conditional content renewal reminder
- Continue reminders in e-communications and on social media

August:

- Text campaign to new licensees – August 2
- Begin *weekly* email reminders – August 8
- Mail renewal postcard to opposite of preferred address –week of August 8
- Review email bounce list and do personal outreach for current emails – August 10 - 18
- Review drop list for opportunities to send personal outreach by audience (frees, academics, big 4) – week of August 14
- Continue weekly *Viewpoint* conditional content renewal reminder
- Continue mentions in e-communications and on social media

September

- Drop nonrenewed members by September 5
- Send drop lists to chapters by September 8
- Draft fall win-back campaigns