



## RENEWAL DUES BILLING PREP AND COMMUNICATIONS SCHEDULE

### **Pre-billing Verification Processes (completed by 3/31/2024):**

- Primary Address – ensure one is available for all active members.
- Chapter verifications – ensure assignments are accurate based on employer address and any preference notes.
- Transitions in CPA Member Type Due to Tenure or Status
- CPA Members – review license status for eligibility and ensure data is accurate.
- CPA Waivers – update renewal packages for 24/25
- Renewal Packages – verify packages match types and journey.
- Affiliate eligibility – review each affiliate member to ensure they still meet the requirements of their category and move any who need changes.
- Ambassadors – extend or update renewal packages as needed.

### **Pre-billing Communications:**

- Professional Group Membership (PGM) – February – March
- Member update requests in *Viewpoint*– 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 – March
- Send outreach to current students for verification, 5/31 response deadline – March

### **April:**

- Staggered emails by chapter with personalized link – April 23-25
- Mail invoice to no email and those who don't accept email – April 25
- Send initial billing lists to all chapters – April 26
- Mentions in e-communications and on social media

### **May:**

- Email to dropped CPAs from 2023-2024 – week of May 6
- Begin weekly updates to chapters – May 7
- Reminder outreach to students – week of May 6
- Email to non-renewals – May 9
- Email bounce list to Membership team – May 13
- First mailed invoice to all non-renewals – week of May 13
- Request for chapter email – week of May 20
- Mentions in e-communications and on social media
- Special personal email to billed free members to encourage renewal – week of May 20
- Mention in *Today's CPA* – May/June issue
- Review returned mail and NCOA list from mailer – week of May 22

### **June:**

- Add an online alert upon log in for members who have not yet renewed – June 3
- Launch Feathr campaign – June 17
- Reminder outreach to students – June 10



- Launch email PropFuel series to non-renewals – bi-weekly starting June 17
- Mentions in e-communications and on social media
- Mailed invoice to non-renewals – week of June 24
- Weekly *Viewpoint* conditional content renewal reminder – begins June 7

### **July:**

- Remove CPE discount for online registrations if member has not yet renewed – July 1
- Continue PropFuel campaign – bi-weekly
- Follow-up personal outreach to PF campaign responders (MBR)
- Review list of registrants for future programs for nonmember registrants – July 16
- Reminder outreach to students – July 25
- Student lists to faculty ambassadors for review – July 24
- Chapter Calling campaign – July 15 – August 9
- Calls to billed free members to encourage renewal – July 10 – 21
- Staff send messages to non-renewals from Outlook with personalized links – July 16
- Continue mentions in e-communications and on social media
- Mailed invoice to non-renewals (drop notice)– land by last day of July
- Update Feathr ads and list – July 24
- Outreach to 2024-25 TXCPA volunteers who have not renewed – July 25
- Continue weekly *Viewpoint* conditional content renewal reminder

### **August:**

- Begin *weekly* email reminders
- Text campaign to student members – August 7
- Text campaign to new licensees – August 9
- Send a renewal postcard by mail to opposite of preferred address – second week of August
- Continue mentions in e-communications and on social media
- Email bounce list to Membership team – August 12
- Continue weekly *Viewpoint* conditional content renewal reminder

### **September**

- Drop September 5
- Pull drop statistics