



WINTER 2023 RECRUITMENT CAMPAIGN: CHAPTER TOOLKIT

TXCPA is launching a winter membership recruitment campaign to help achieve budgeted revenue and membership goals for 2022-2023. With advocacy efforts at the forefront, this is a perfect time to remind all Texas CPAs that we are advocating on their behalf and their voice and support make us stronger.

We have identified two audiences to receive an offer for bonus months of membership for the annual dues rate (membership through May 31, 2024). Additionally, we are inviting recently dropped new licensee members the opportunity for bonus months of membership at a significantly reduced rate.

Below you will find additional details about the campaign, as well as links to resources for your use for chapter outreach.

CAMPAIGN TIMELINE AND PLANNED OUTREACH

The campaign will begin on **Tuesday, Jan. 17 and will end on Friday, March 31**. Dues collected will be reflected in the 2022-2023 year, and membership will commence at the time of joining and expire on May 31, 2024.

TXCPA will send email messages in the following weeks:

- January 16
- February 6
- February 28

TXCPA staff will also be making phone calls following each email outreach.

TXCPA requests chapter support with local outreach throughout the campaign as membership recruitment supports both TXCPA and the chapter in boosting our membership numbers and collecting revenue. Links to outreach resources are included in this toolkit.

TARGET AUDIENCES AND OFFERS

Select CPA members who dropped between 2017 and 2021:

- Those 60 and under, living in Texas, with a non-retired license.
- Focused on individuals who did not provide a reason for dropping their membership.
- Dues rate will be the 2022-2023 full CPA dues rate. Membership will be activated through May 31, 2024.
- Promo code to be used at the time of application: **winback2023**

Select non-member CPAs who have either never joined or dropped prior to 2017:

- Those 60 and under, living in Texas, with a non-retired license.
- Dues rate will be the 2022-2023 full CPA dues rate. Membership will be activated through May 31, 2024.
- Promo code to be used at the time of application: **bonusmonths2023**

New Licensee (free) members who were dropped in Sept. 2022 for nonpayment of dues:

- Those living in Texas.
- Dues rate will be \$195 (\$145 state/\$50 chapter). Membership will be activated through May 31, 2024.
- Promo code to be used at the time of application: **nlwinback23**

CHAPTER RESOURCES AND HELPFUL LINKS

Outreach Lists

- To receive a list of individuals in your chapter who dropped in 2017-2021, or dropped new licensees from 2022, [contact Kristie Estrada](#).
- To access a list of all CPAs in your chapter area who have an issued license, you may use the Nonmember CPAs by chapter query in NetForum (CRM->Individuals->Query Central->Nonmember CPAs by chapter->click Go. Select your chapter and run the report.) If you need assistance access this query in NetForum, [contact Kristie Estrada](#). As a reminder, all 20 chapters have access to utilize NetForum to find and pull member data for those in your chapter.

Sample Messages and Scripts

If you need assistance drafting email or phone scripts for your staff or volunteers, please use the samples provided at these links. Please note the timing above that TXCPA will follow for our outreach messages and plan yours to fall in the week after, when possible. This will help us prevent emailing the same people at the same time.

- [Sample first email from chapter](#).
- [Sample reminder email from chapter](#).
- [Sample chapter call script](#).



Helpful Links

- General details about membership, as well as a table explaining member types and benefits and a link to a page with chapter dues: <https://www.tx.cpa/membership/become-a-member>
- TXCPA's Maximize Your Membership page with more about the benefits: <https://www.tx.cpa/membership/maximize-your-membership>
- Texas Legislative Session page with advocacy priorities and updates: <https://www.tx.cpa/advocacy/texas-legislative-session>
- Link to a preview of TXCPA Exchange where they can see recent discussions but cannot open to view the full threads: <https://exchange.tx.cpa>
- Details about TXCPA's FREE CPE offered with membership: <https://www.tx.cpa/education/free-cpe-for-members>
- If while doing chapter outreach you learn there is an update needed to an individual's record, please submit that update using the [Member Service smartsheet](#) or email membership@tx.cpa.

Campaign questions can be directed to [Kristie Estrada](#).