

## WBA Prospective Member Referral Process

- 1.) Prospect fills out join now form on [WBA why join page](#)
- 2.) Automatic email is generated to [member@wisbuild.org](mailto:member@wisbuild.org) – subject line “RE: Form Submission – Join the WBA”
- 3.) WBA responds to email with local EO or local membership staff introduced and cc'd. If local has online application, a link is provided to it. If local has a paper application, PDF is attached to email.\*
  - NOTE: important for all locals to let WBA know of any changes to paper applications
  - NOTE: WBA staff needs to know who is preferred contact for these referral emails

### PROSPECT TEMPLATE:

Good Morning/Afternoon [First Name],

Thank you for your interest in a [builder/associate/affiliate] membership with the Wisconsin Builders Association through [local association-underlined hyperlink].

The next step of this process is to have you fill out an application through [local association.] The application is attached to this email / The application is available online-underlined hyperlink.

You have indicated that you would like to communicate by [email/phone at phone #]. I have included [local hba staff position/name] in this email, and [she/he] will soon reach out to you by [email/phone] to make introductions and answer any questions you have about the application.

Please don't hesitate to reach out to me as well if you have any other questions about membership moving forward. Looking forward to welcoming you aboard!

- 4.) WBA staff records prospect in prospective member log (WBA/Permanent Files/Marketing Communications).
- 5.) EO responds to prospect, cc'ing WBA staff so WBA staff can confirm connection made.
  - If prospect indicated that he/she preferred to be contacted by phone, EO replies to WBA staff only to confirm connection made.
- 6.) WBA staff will check WMS new member list for 3 months before reaching out directly to prospect again with a follow-up\*\*
  - Optional: Local EO or local membership staff lets WBA staff know if referred member joined

\*Application information stored on local info master list (WBA/Permanent Files/Governance/Executive Officers). PDF applications stored under WBA/Permanent Files/Library/Local Association Applications.

\*\*follow-up: Likely a “We need you” template email sent out to all prospects who did not join, precise content TBD