



NMD EVENT CHECKLIST

BEFORE New Member Day

What do I need to do to host an event?

- ☐ **Helpers/Co-Hosts:** Ask a few other members to help you plan your event. People to take the lead on: volunteer recruitment, member prospect lists, bringing refreshments, etc.
- ☐ **Finalize the event details (time and location)**
- ☐ **Send EF National the event details to be posted on the New Member Day webpage.**
- ☐ **Recruit volunteers** (you can send them the event link to keep track of who signs up for your event).
- ☐ **Develop your prospect call list:** EF National will provide location-based call lists to hosted volunteer sites, but the more you leverage your connections, the better the event will be. Encourage volunteers to prepare a prospect call list of approximately 10 prospective members drawn from among their professional network of contacts and submit to EF National by Jan 6.
- ☐ **Attend 12-19-13 NMD Training Webinar (9:30am to 10 PST):** Webinar details will be provided by email.
- ☐ **Tell your contact list about NMD:** Let your call list know that you will be in contact with them on NMD and encourage them to attend the "What is EF?" webinar.
- ☐ **Create a fun atmosphere for your event:** Food is always a good motivator! Have a volunteer in charge of bringing snacks, and perhaps even offer small prizes each time a volunteer gets a new member to join!

DURING New Member Day

What should I bring to the event?

- ☐ **Call tracking instructions** (in NMD Materials Packet)
- ☐ **Call script and member benefits outline** (in NMD Materials Packet)
- ☐ **Sign-in sheet for volunteers to complete** (in NMD Materials Packet)
- ☐ **Prospect lists and membership forms**
- ☐ **Pens**
- ☐ **Phones:** While you might have some landlines for use, volunteers should bring their own cell phones to make calls from.
- ☐ **Computers/ internet access (and the password if needed):** Volunteers should bring their laptops so they can track their call progress on our supplied Efficiency First Online Form.
- ☐ **Snacks/prizes for volunteers**



Sample Timeline for a 2.5 Hour Hosted NMD Event

Before volunteers arrive, give yourself about 30 minutes to set up tables, chairs, snacks, and any phones and computers you have ready for use.

30 Minutes: Introductions, Review, Q&A

- ☐ Have volunteers sign in and do a quick round of introductions
- ☐ Provide a quick training on how to talk about EF and NMD to prospective members
- ☐ Make sure everyone knows how to use the EF National Membership Day Online Form to track calls (guide in NMD Materials Packet)
- ☐ Answer any questions volunteers might have

2 Hours: Make Calls

- ☐ Make your own calls, check in with volunteers, and remind volunteers throughout the two hours to use the call tracking form online
- ☐ With 20 minutes remaining, ask volunteers to enter the contact information for the prospects they weren't able to reach. Mark them as "Not Available"

Wrap it Up

- ☐ Thank everyone for participating and remind folks to follow up with their prospects

AFTER New Member Day

What do I need to do after NMD?

- ☐ With help from your event volunteers, contact people who are still on the fence and ask them to join by January 31 to qualify for the new member discount (page 7 of Planning Guide)
- ☐ EF National will send out a "thank you for joining" email to all new members who join through NMD efforts, but if you would like to send out any additional emails, please do so
- ☐ **Send any photos of your team in action to EF National (info@efficiencyfirst.org)**
- ☐ Send a quick thank you note to volunteers that joined you at your location
- ☐ Join other hosts and EF National on 2/11/14 for a re-group conference call to share your feedback and lessons learned on National Membership Day