

Membership Upgrade! Tricks of the Trade

Methods of Upgrading Members

- Mail: Renewals, stand alone upgrade solicitations, event invitations
- Telemarketing
- Online
- Personal asks: visits by staff, during member service calls, membership desks, events

When to Upgrade

- Renewals: during renewal cycle, after renewal
- End of year
- In advance of a special event or museum milestone
- When the opportunity strikes

Who to Upgrade

- The method and timing of your upgrade can influence which members are solicited for an upgrade.
- Review your data to see who has upgraded in the past and model for new data selects.
- Sample data selects that have worked for Friends of the Smithsonian and James Smithson Society
 - Cumulative giving
 - Longevity
 - Members with appeal gifts
 - Event attendees
 - Wealth overlays and data modeling
 - Members who pay through stock transactions or foundations
- Look for the unexpected upgrade responders (AKA Jennifer's favorite level) to reach more audiences.

What to Offer

- Focus the upgrade on what is in it for the member: additional benefits, special access, greater involvement with the museum.
- Focus on the needs of the museum, base the offer on an appeal to the member's sense of philanthropy.
- Focus on timeliness: recent gift, special discount expiring, special event taking place.

Things to Think About

- Consider preparing your members for the upgrade ask before the actual solicitation. Ex. Provide them information about the higher levels of membership without an ask.
- Have procedures in place for how to handle mid-term upgrades.
- Consider upgrades for not just the immediate revenue generation, but as part of cultivation efforts. Members may not immediately respond, but upgrade at a later time or after a number of asks.
- Try to make the ask as specific and as personal as possible, especially in a conversation.

For further questions or information:

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