



Membership Program Checklist

- ___ **Set your membership program goals**
 - Monthly income from membership fees?*
 - Total number of members?*
 - Number of weekly/monthly member appointments?*
- ___ **Get input and buy in from your team**
- ___ **Appoint a Membership Concierge**
 - A team member responsible for the operation and success of the program*
- ___ **Plan to include a variety of service options**
 - Include a variety of services as “membership benefits,” one or more included as part of the membership privilege*
 - Include both facial and body contouring services*
 - Select other services to apply a “membership discount;” we discounted 15% for our members*
 - Omit other services from the discount or set a lower discount, if needed*
- ___ **Plan to discount products & set your discount rate**
 - We discounted products by 10%*
- ___ **Plan monthly ‘Member Only’ Specials**
 - Makes members feel special and appreciated*
 - Announce the specials by emails and signage*
- ___ **Name your Membership Program**
 - Give it a branded identity that aligns with your brand*
- ___ **Design must-have components**
 - Membership Brochure*
 - Dedicated web page or landing page on your website*
 - E-blast announcing the program or changes in the program as they occur*
 - Tabletop signs for your treatment rooms and lobby*
- ___ **Consider optional marketing materials**
 - “Ask me” buttons*
 - Events to feature your Membership Program*
 - Branded tools to show benefits/savings*
 - Digital or Hard Copy signage*
- ___ **Train your team to suggest (and sell) your membership program**
 - Only when it benefits the client - it may not be for everyone*
 - Only when it makes sense for the business - i.e., maybe not for difficult clients*
- ___ **Evaluate and enhance your Membership Program on a regular basis**
 - Add/adjust services based on feedback*

Add/adjust benefits based on feedback
Tweak it to make it more fun or as giving more value
Quarterly reviews
Remember everyone loves new things

The Membership Agreement, the Legal Contract Checklist

- ___ **Set the 'Term' of the Agreement**
 - Choose from terms of 3 months, 6 months, 1 year*
 - Choose just one term*
 - Or you could set different monthly fees for different terms*
- ___ **Decide on the monthly fee for the membership**
 - Consider your costs*
 - Consider the monthly and lifetime value of a member*
 - Set it high enough to allow for discounting*
- ___ **Get input and buy-in from your team**
- ___ **Educate and train your team to explain the Agreement to clients**
- ___ **Determine your cancellation policies**
 - Will you allow early cancellation*
 - You may have a strict policy*
 - You may have a strict policy, but know you'll make exceptions*
 - Determine how exceptions will be handled*
 - Will you require cancellation notice be in writing*
 - Determine how cancellations will be handled, i.e. thank you's for being a member, a system to reach out in 3 months, etc.*
- ___ **Determine if you'll allow missed monthly benefits to be carried over**
- ___ **Determine which team members have the authority to obtain the client's signature**
- ___ **Task your Membership Concierge with management of these issues**

Protocols and Processes Checklist

- ___ **After you've completed both checklists and completed design of your Membership Program, write your protocols and processes for your Membership Program**
 - Detailed and step-by-step*
 - Get each team member to sign off*
 - Use when onboarding new team members*
 - Revise when changes are made*