

An RMA Portland Metro Chapter Case Study

Can the RMA Portland Metro Chapter grow members, prospects, sponsors and monthly paid event attendance with a new mobile website, targeted, professional email and consistent data outputs?



Communications Outcomes 2016-2017

- In October, 2016, RMA Portland Metro Chapter approved a strategic communications proposal by Ideagility to establish new and innovative communication processes and methods to reach members and prospective members; key initiatives included a new mobile website design and execution, email marketing and event registration, database list management and monthly reporting.
- Outcomes already achieved include a 40% increase in event attendance (compared with three years ago) and deeper, more meaningful engagement with members, sponsors and the banking community. At the same time, the non-member database grew by 21%, adding nearly 100 prospective members who have registered for at least one event.
- Creating event registration and calendaring in Event Brite delivered a simplified, mobile registration experience and dependable credit card billing for the chapter.
- Outcomes are expected to positively impact future years too as we deepen sponsor relationships and leverage our process, contact database and statistical understanding of member preferences to efficiently plan the most desired events, market them and further our reach even more.
- On June 23rd, 2017 the RMA Portland Metro Chapter received the national **RMA Chapter Excellence Award in Communications** at the Chapter Leaders Conference in Scottsdale, Arizona.
- As a result of our hard work and success in strategically executing on the Board's goals, the Ideagility role as Chapter Communications Partner has been continued and expanded to include social marketing beginning in September, 2017.



Last year the Board determined that as professionals they needed to present the Chapter more professionally.

The chapter had no web site and no web presence. There were no tools to manage data or volunteers trained to do so.

Members received no calendar of upcoming events. There was no repeatable process for event notification, registration and management. We had nowhere to store member attendance records or preferences. Important new initiatives like the

Developing Professionals Group, the Education Committee or any other RMA program could not be located or viewed by members. The Board's process was not transparent. Members or sponsors interested in getting involved or asking a question had no tools to do so.

Prior to this year, we were sharing traditional Board Liaison communications two months in advance of events to work with banks, professional firms and other service providers individually. It was a lot of work to register, communicate, and engage our banking community.

The Board knew they needed the right strategy and dependable marketing and administration.

To market the Chapter effectively we needed a mobile website and calendar, newsletters, emails, and a payment process that was coordinated and timely. Most of all, we needed a database of contacts, consistent data collection and storage methods.

Board leaders envisioned a process that could serve as a learning experience for a rotating roster of board members and volunteers that serve or join the chapter over time. They were willing to test their belief that they could engage the community and build a sustainable chapter with enhanced communications.



Late last summer we made a proposal to the Board and received their approval.

Ideagility worked closely with Board leadership on goals, we then suggested development of a responsive web presence linking with the national site. We outlined our communications strategy and process for notification of events and management of information for our membership. We committed to developing process, support and training for our board, editors and contributors.

We created an executional plan that finalized the live website within 45 days. The Board vetted preferred marketing partner, Ideagility, with references and by testing our services pro bono in September. Beginning in November, Ideagility began reporting to the board and managing the website development and execution of approved messaging with professionally developed invitational emails and event sign up pages that linked to payment portals.

And, even as our beautiful new tools helped us to spread the message more efficiently, the Board continued to rely on our volunteers' support with Board Liaisons communicating with key partners two months in advance of events.



The budget needed to hire a professional marketing organization was viewed as significant.



Join us in celebrating our honoree
Karen Whitman

She who gets things done...
One of Portland's most prolific advocates, Karen Whitman has helped define local and statewide communities for more than three decades. Well known for her community vision and focus on economic development, Ms. Whitman was instrumental in the development of Pioneer Courthouse Square, Art Quake and the Transit Mall expansion.

The Founder and Chair of Capital Pacific Bank, Ms. Whitman also organized the Association for Portland Progress (now Economic Alliance), Board memberships have included leadership positions with Travel Portland, the Oregon Sports Authority, All Hands Raised and the Friends of Astoria Column. Karen remains committed to communities in Oregon where she can make a difference and currently serves as Board Member for Pacific Continental Bank.

The up front investment in Ideagility included a

new mobile website for \$3,000. First year costs were planned to not exceed \$15,000 including the website development. The chapter continued to pay for QuickBooks, tax preparation and volunteer gifts; these totaled approximately \$2,500 per year. Budget thereafter depended on utilization of Ideagility services, but at a minimum QuickBooks, tax preparation and the website hosting charges were budgeted.

RMA Portland Metro Chapter funded the budget and began generating positive results quickly.

The Board established a sponsorship program to help fund marketing. In the first year, they raised \$13,000 very quickly.

Today sponsor firms are fully engaged partners planning on renewing their sponsorships. The Board has planned a sponsor appreciation event this summer and anticipates an increase in receipts from these and a few other firms that have expressed interest. These opportunities are appreciated by sponsor banks and finance partners, who are promoted on our website and in email. At our events, sponsors receive valuable public exposure and opportunities to engage our community of members and guests.

Don't miss this intimate conversation. Joining Karen on stage will be her friend **Cindy Tortorici**, CEO of The Link for Women. Cindy has a long history of social entrepreneurship advocating for nonprofit leaders and organizations with a focus on the arts, women and community growth.



Cindy Tortorici

You are Invited

Wednesday, April 19th
11:30am - 1:30pm
at the
Multnomah Athletic Club

1849 SW Salmon St.
Portland, OR 97205
(driving directions available at www.themac.com)

Register Here

In honor of Karen Whitman's long service to economic development and community building in Portland, RMA Portland Metro is pleased to donate a portion of the day's proceeds to Karen's charity of choice, [Girls Inc. of the Pacific Northwest](#).

**girls
inc.**

of the Pacific Northwest

Support for our communications strategy has been overwhelmingly positive.

Members, speakers and sponsors comment positively on the website and emails. Our email open and registration rates far exceed industry averages. Guest speakers have ample opportunity to review our communications and provide feedback. Even better, they frequently express delight at our ability to present them professionally.

We chose online vendor Event Brite for registration and calendaring to help members and guests register easily and stay informed. Our calendar is available for all to see and easy to use. Registration for events is quick and easy and the board has a dependable process to make changes, collect payment or present special offers.

Watching event attendance and guest registration increase dramatically is both gratifying and good for the chapter as crowded events share a professional 'buzz' that is contagious in our community. Our board and Ideagility is committed and ready for more.