

Sharing Our Success (SOS) Submission Form

Chapter Name:	Nebraska
Chapter Membership Size:	Medium (101-299)
Chapter Contact Person:	Kristina Pohlmann
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Phone Number:	(402) 983-0593
Chapter Board Position:	Director of Member Experience
Chapter Website URL:	https://atdnebraska.org/
Submission Title:	Automated Happy Birthday Message to Members
What did you do? (a 2-3 sentence summary of your effort):	Created and set-up an automated message to be sent to members that put a birthday in their profile. The message is sent the first day of their birthday month since we don't have any parameters around how it should be entered.
Who benefitted from this effort (Target Audience) Check all that apply:	Chapter Members
Why did you do it? What chapter needs were addressed?	I receive birthday message for myself and my kids from other places I have done business with, and thought it would be a small thing we could to to show we care about our members and enhance their member experience.
What were the measurable outcomes? (May include data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)	<p>So far they have gone out twice (April and May).</p> <p>In April, there were 5 sent and all were opened. We also received feedback from a member (Krishna Clay) that it was really nice to receive it.</p> <p>In May, there were 7 sent and as of today 5/16, 6 out of the 7 were opened.</p>

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)	<p>Created a Birthday email template. (Used Canva to customize/animate the gif used in the message to include a message from and picture of or board)</p> <p>Created member searches for each month that include all the different ways the date could have been entered by the member. These are the ones used for April.</p> <p>Member status is 'Active' AND Date of Birth begins with '04'</p> <p>Member status is 'Active' AND Date of Birth begins with '4'</p> <p>Member status is 'Active' AND Date of Birth begins with 'Apr'</p> <p>Member status is 'Active' AND Date of Birth begins with 'April'</p> <p>Scheduled the emails through March of 2025 and set a calendar reminder to will go back in March of 2025 to schedule for another year.</p>
Is there anything you would do differently?	Set up the birthday field to select a birthday month and day so it's set the same for everyone. If we did that we could personalize the message to include the date and maybe even send it on their birthday instead of at the beginning of the month.
When did you start working on this effort?	Mar 15, 2024
When did this effort go live?	Apr 01, 2024
Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	3
What resources did you use? Check all that apply:	<p>Board Members</p> <p>Other: VP of Communications</p>
Which board positions were involved in the effort?	VP of Communications and Myself
Do you have any additional insights to share with other chapters implementing this effort?	<p>Reach out if you'd like help getting it set up. It's a really easy thing to do and can make a pretty neat impact on your member experience.</p> <p>Attached is what the template looks like. The bottom image is the gif created in Canva.</p>
Please attach any documents that help support this submission. It is highly encouraged to submit editable files (ex. Word, Excel, etc): (additional documents and documents over 2MB should be sent to sos@td.org)	https://www.formstack.com/admin/download/file/16364503332

How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:	<div><div>Chapter Leader</div><div>National Advisors for Chapters (NAC)</div><div>NAC Area Call</div></div>
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Would you be willing to apply to present on this submission at the ATD Chapter Leaders Conference (ALC)? *Request for Proposals (RFPs) open in May of each year at td.org/alc . Selected session facilitators receive complimentary registration.	<div><div>Yes</div></div>
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email_consent	<div><div>true</div></div>
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