

**Enterprise Member Management**  
**Talking Points**  
**REC November 2019**

The chapters are seeking clarification on what their role is with Enterprise. They are looking to engage individual members from Enterprise organization. Redefine the role of chapters – support the goal of each Enterprise organization.

**Chapter Role:**

Understanding Enterprise Client Goals – each client is unique

Certification, Volunteer Engagement, Onsite education or no engagement

Support Enterprise Client Goals

Chapters to work with regional leads (communicate with HFMA if contact is difficult)

Future Onboarding Calls with Enterprise Clients and Chapters

(Enterprise Clients provided summary of chapter benefits prior to the call)

- Introductions
- Understand Enterprise Clients Goals
- Identify Opportunities for Chapters to Support Goals
- Agree on Next Steps

Key Individuals to be included: President, President Elect and/or Membership Chair from each chapter  
HFMA will coordinate the calls for each Enterprise Client, we will consolidate chapter calls – each Enterprise Client (calls ranging from 30-45 minutes up to 6-7 chapters on each call as needed to cover all chapters/regions)

**Association Role:**

Continue to Sell Enterprise Membership to Organizations

Provide Summary of Chapter Benefits to Enterprise Client

Distribute Enterprise Goals to Chapters during Onboarding efforts

Communicate, set up and facilitate Onboarding Calls with Enterprise Client/Chapters

Quarter/Annual Utilization review with Enterprise Clients

Retention Efforts

Communicate effectively to support the chapter role

**Regional Executive Council Role:**

Communicate to Chapter Leaders

OWN IT!!!