MEMBERSHIP PROGRAM CHECKLIST
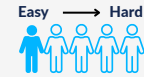
Use the resources and check list below to help you start your in-house membership program.

1 — CREATE YOUR PLANS

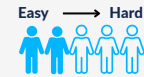| 1 Week	2 Weeks	3 Weeks	4 Weeks	5 Weeks	6 Weeks

Easy ⟶ Hard

Creating your plans is the foundation for your membership program. Figure out all the benefits and discounts you will offer for your program. Next calculate your expense for each benefit then figure out what you will charge. Do a break even analysis.

2 — ORGANIZE AGREEMENT

1 Week	2 Weeks	3 Weeks	4 Weeks	5 Weeks	6 Weeks

Easy ⟶ Hard

You will need to have an agreement between the practice and patient to keep on file. We provide an example agreement when you sign up for BoomCloud. make sure you figure out your terms, conditions and policies for your membership program.

3 — SET UP YOUR SYSTEM

1 Week	2 Weeks	3 Weeks	4 Weeks	5 Weeks	6 Weeks

Easy ⟶ Hard

CSystems are very important. BoomCloud is your system. Before you begin to market your program sign up for BoomCloud for: Automating payments, tracking metrics, tracking benefits, online enrollment, contract management & member management.

4 — TRAIN YOUR STAFF

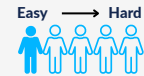| 1 Week	2 Weeks	3 Weeks	4 Weeks	5 Weeks	6 Weeks

Easy ⟶ Hard

A well trained staff will allow your program to fluorish! Make sure your staff understands the following: Plan structure, terms ano conditions, policies and how to use BoomCloud to enroll and manage member patients. Watch The BoomCloud University!

5 — INTERNAL MARKETING

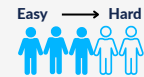| 1 Week	2 Weeks	3 Weeks	4 Weeks	5 Weeks	6 Weeks

Easy ⟶ Hard

Marketing is your growth engine. Start communicating to your existing members, run a report a figure out how many uninsured patients you have. Send emails, text messages, flyers and brochures to your patients. Train every team member to educate.

6 — EXTERNAL MARKETING

1 Week	2 Weeks	3 Weeks	4 Weeks	5 Weeks	6 Weeks

Easy ⟶ Hard

Exteral marketing will help your membership grow beyond your existing patient base. Direct mail, social media ads, google search ads, SEO, email marketing are all great ways to get the word out about your program.

7 — INCENTIVIZE YOUR TEAM

1 Week	2 Weeks	3 Weeks	4 Weeks	5 Weeks	6 Weeks

Easy ⟶ Hard

Your team can make or break your membership program. Be sure to incentivize them by paying them small bonuses (eg: $20 gift card) when patients sign up or rewarding the whole team with a fun staff party or vacation.