

— THE FIRST 90 DAYS OF MEMBERSHIP WITH NEXT-GEN CPAS

Hook, Engage, Retain

PRESENTER

Chris Gloede, CAE — Ricochet Chief Consultant



Let's go

<60%

 BIG LOSSES

About half of professional associations renew under 60% of their first-year members.

 EARLY IMPACT

**The renewal decision is mostly
made in the first 90 days.**

**Onboarding IS the renewal
campaign.**



Hello



Chris Gloede

MBA, CAE · Chief Consultant, Ricochet

Chris was the first-ever Chief Marketing Officer of the American Bar Association, where he grew membership to its largest in 137 years, making it one of the largest voluntary associations in the world.

Chris now helps associations build modern membership strategies, value propositions, technology stacks, and marketing campaigns that drive growth.



Next-gen shifts

Four generations, four life experiences, four viewpoints.

NEXT GENERATION



Baby Boomers

BORN	1946–1964
AGE TODAY	62–80
U.S. SIZE	~73M
EVENTS	Post-WWII, Cold War

Heaviest users of TV, radio and print – though most now keep a Facebook account to stay in touch with family.



Gen X

BORN	1965–1980
AGE TODAY	46–61
U.S. SIZE	~65M
EVENTS	Fall of Berlin Wall, Dot-com bubble

Still reads print and watches cable, but logs the most weekly hours on Facebook of any generation.



Gen Y (Millennials)

BORN	1981–1996
AGE TODAY	30–45
U.S. SIZE	~74M
EVENTS	9/11, Great Recession

Cut the cable cord for streaming and carry multiple social accounts across every device.



Gen Z

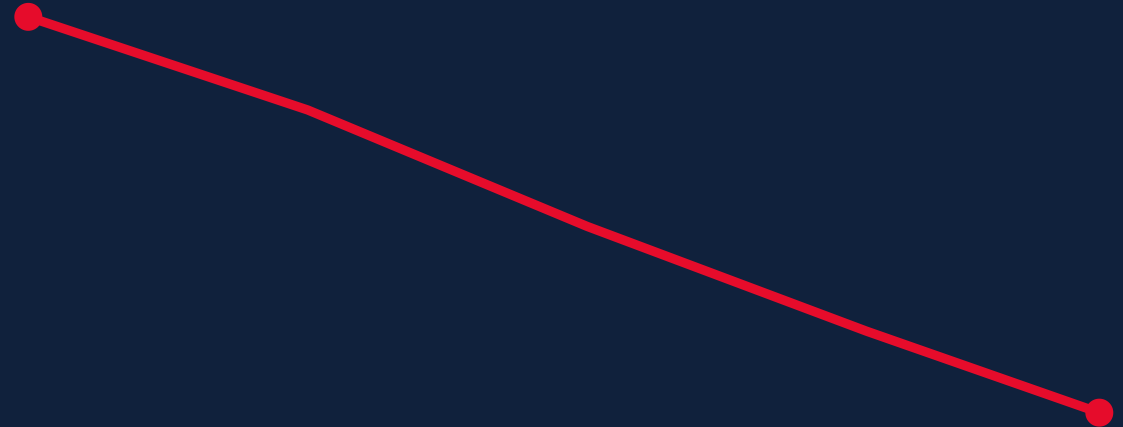
BORN	1997–2012
AGE TODAY	14–29
U.S. SIZE	~69M
EVENTS	Social media boom, COVID-19

Mobile-first and always on – the smartphone is their primary channel for communication, search and news.

 SHIFT 1

A shrinking pipeline + a different generation

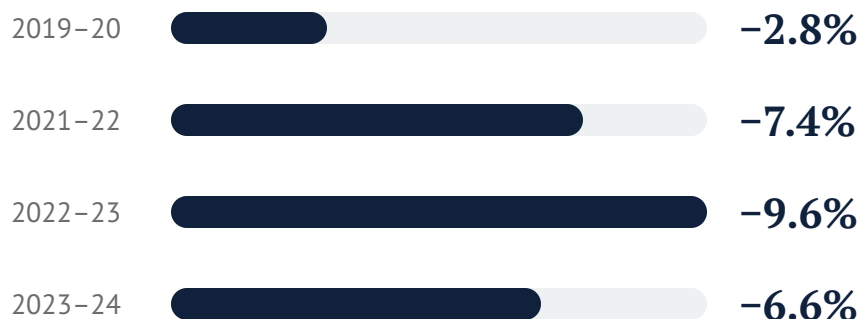
The next generation relates to institutions and
belonging differently.



“Survival... no idea how we’ll replace them.”

The talent pipeline shrank for years — is it turning?

ACCOUNTING GRADUATES • YEAR-OVER-YEAR CHANGE



+12%

year-over-year accounting-enrollment growth for **two straight semesters** in 2024-25 — the pipeline might be refilling.

AI is rewriting entry-level demand.

95%

say technology has cut the time they spend on compliance work.

93%

already use AI to support advisory services.

+38%

the growth accountants expect in strategic advisory work this year.

“AI is not going to disrupt the accounting profession, but it will change what an accountant does.”

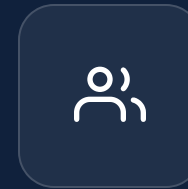
Mark Koziel, President & CEO, AICPA & CIMA · Source: 2025 Intuit QuickBooks Accountant Technology Report; CPA.com 2025 AI in Accounting Report.

 SHIFT 2

The apprenticeship is breaking — and taking belonging with it.



Office proximity



Mentorship & belonging

Young workers lose the most mentorship when remote.



22%

more feedback for co-located junior workers than their remote peers.



86%

of Gen Z primarily want mentorship – only 6% want a title.

The impact is real for next-gen accountants.

LAW

82%

of associates leave within 5 years. Informal mentorship works; formal underperforms.

ACCOUNTING

43% 48%

of employers offer no mentorship; 48% don't communicate advancement paths.

SHIFT 3

Social is now their first place to search.



Daily reach: YouTube 62% of Gen Z · Instagram 56% · TikTok 41%.

Gen Z trusts people, not institutions.

5x

more likely than people 40+ to get financial advice from social.

8x

the engagement for people-shared content vs. brand-channel content.

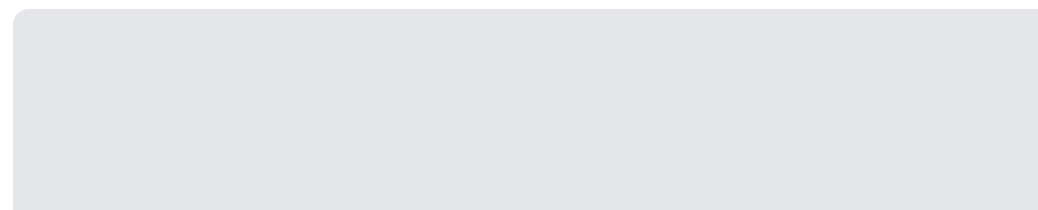
76% of Gen Z use Instagram for career content — more than double LinkedIn.

76%



Instagram

34%



LinkedIn

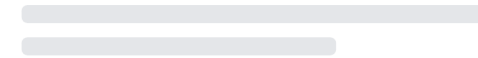
Business and life are one feed.

Younger members don't separate "professional" and "personal" channels.

Email isn't dead – only **~4%** of associations plan to cut it; **37%** plan to add channels around it.

Source: MGI, 2025 Membership Marketing Benchmarking Report.

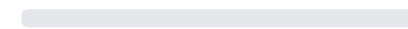
FRIEND



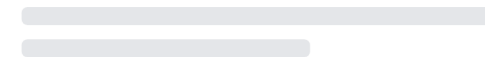
INDUSTRY INFLUENCER POST



MEME



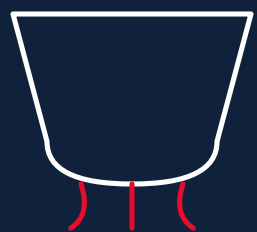
CAREER TIP



 SHIFT 4

First-year renewal is the leak

Introductory member offers are weakest — and only a quarter of associations run any onboarding program at all.


25%
run any onboarding program

Keeping a member is worth far more than winning one.

5–7×

cheaper to keep a member than to acquire a new one.

+18%

first-year renewal lift from a single orientation webinar.

50%

larger in ten years – 80% vs. 75% retention, compounding.

The first 90 days decide the first year.

50%

renew after
year one



80%

renew after
year two

Clear year one and members stabilize. That 30-point jump is the onboarding program – or the lack of one.

Engagement in the first 90 days predicts long-term retention **better than any other factor.**



90 day map

 THE FRAMEWORK

Three jobs across ninety days.

DAYS 0-14

Hook

DAYS 15-60

Engage

DAYS 61-90

Retain

Day 0

Day 90

— THE JOB OF HOOK

Drive one valuable first action, fast.

DAYS 0-14

Hook

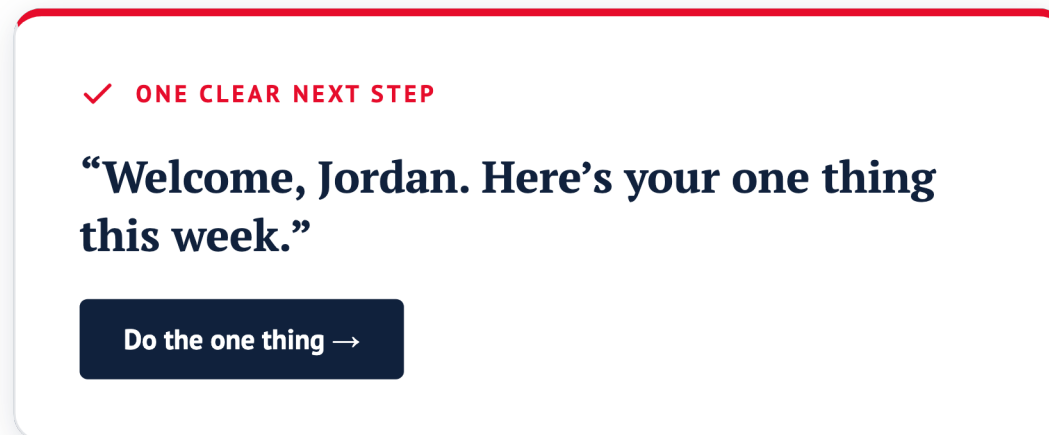
DAYS 15-60

Engage

DAYS 61-90

Retain

Human, role-aware, one clear next step — not a benefits firehose.



84% want role / career-stage personalization.

Choose the single early action that best predicts who stays — and track who does it.

TRACK THIS ONE



Join a cohort



Update Profile



Register for Event

The no-tools version of Hook.



A personal email



**A 2-minute welcome
video**



One CTA

to the single next step

— THE JOB OF ENGAGE

Turn a member into a connected member.

DAYS 0–14

Hook

DAYS 15–60

Engage

DAYS 61–90

Retain

Connection out-renews content.

86.5%



Engaged
community

74%



Everyone
else

#1 SATISFACTION DRIVER

Peer connection

#1 DISSATISFACTION DRIVER

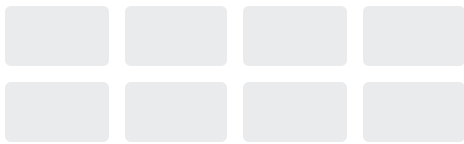
CE

Only ~2 in 5

Gen Z feel confident networking

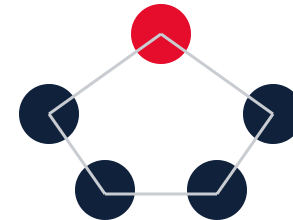
Replace the webinar with a cohort.

A recurring, time-bound moment where everyone who recently joined goes through an entry experience together – and meets peers.



The webinar slide-wall

A firehose nobody remembers



A circle of peers

Recurring, time-bound, together

Stand up a monthly Newcomer Welcome.



EVERGREEN TRIGGER PATH



Anatomy of a Newcomer Welcome.

-
- | | | |
|---|---|---------|
| 1 | Human welcome – a real person, not a slide | 5 mins |
| 2 | Peer intros – names, roles, aspirations | 30 mins |
| 3 | Member spotlight – a second-year's short “what I wish I'd known” | 10 mins |
| 4 | One real question – “What do you want from us this year?” | 10 mins |
| 5 | One clear next action – the single thing to do this week | 5 mins |
-

Make the connection outlast the call.



A buddy pairing

Near-peer, matched on day one.



A cohort community

Where relationships continue.



Member ambassadors

Faces who host — not the logo.

Start simple. Upgrade later.

START SIMPLE

- ✓ Recurring monthly Zoom
- ✓ A “reply-all and introduce yourself” thread
- ✓ One host
- ✓ A spreadsheet tracking each month’s cohort

UPGRADE LATER

- + Community cohort group
- + Automated welcome journey
- + Mentorship matching

— THE JOB OF RETAIN

Catch the quiet driftaways before they lapse.

DAYS 0-14

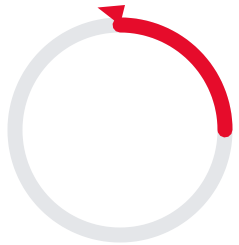
Hook

DAYS 15-60

Engage

DAYS 61-90

Retain



Not a transaction —
“you’re one of us now.”

At the edge, a human beats a workflow.

 AUTOMATED EMAIL

Ignored



 HUMAN CALL OR TEXT

From a peer or board member

Simple risk scoring determines your call list.

Member A

HEALTHY

- ☒ First action done
- ☒ Attended cohort
- ☒ Updated profile
- ☐ Registered for event

Member B

CALL LIST

AT RISK

- ☒ First action done
- ☐ Attended cohort
- ☐ Updated profile
- ☐ Registered for event

Four numbers, not forty.

FIRST-ACTION RATE

61% 

COHORT ATTENDANCE

48 

DAY-45 RISK COUNT

17 on the call list

FIRST-YEAR RENEWAL

73% 



Reasonable transformation

One framework, three jobs.



DAYS 0–14

Hook

Drive one valuable first action, fast.



DAYS 15–60

Engage

Turn a mailbox member into a connected member.



DAYS 61–90

Retain

Catch the quiet drift-aways before they lapse.

Focus on improvement, not perfection.

27%

want to innovate but don't know
where to start

HOOK

One hook action

ENGAGE

One cohort touch

RETAIN

One risk trigger

“We don’t get clean cohorts.”

Most societies have rolling joins.

- ✓ A regular New Member Welcome
- ✓ A standing monthly cohort discussion



“We don’t have the data or the tech.”

“We don’t have the data.”



A monthly export + a highlighter still makes a call list.

“We need a fancy platform.”



None of the core efforts require one.

“We’ll can’t watch the replies.”



One person in charge of all social comments, sms replies, + email responses.

When you return to the office.

01



Rewrite the
welcome email

02



Pick one first
action – and
track it

03



Schedule first
three monthly
cohort sessions

04



Line up hosts
and a
storyteller

05



Define
milestones and
pull the call list

06



Ask one
question and
assign the reply

07



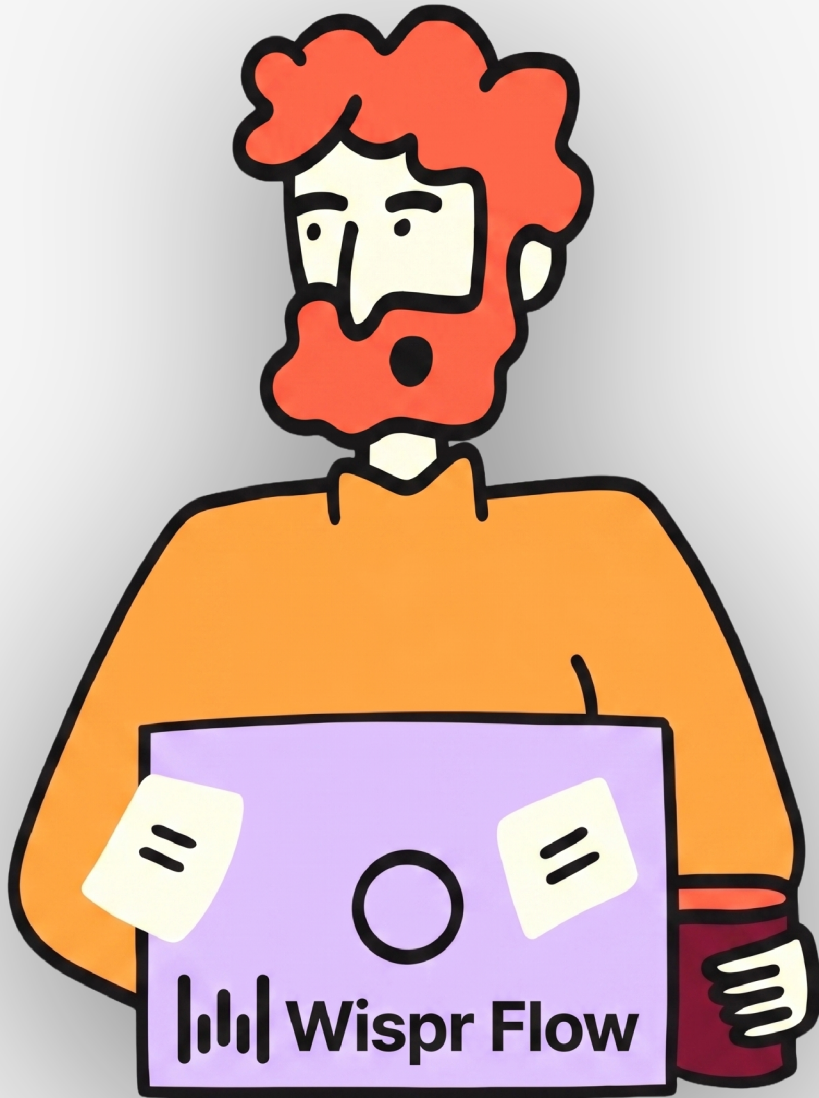
Add one
channel and
watch for
numbers

You are the connective tissue the hybrid workplace no longer provides.

The first 90 days are where you prove it.



Practical Tools



Wispr Flow makes typing short work.

- Encourages **stream-of-consciousness** AI engagement
- Dictate up to **3× faster** than you type
- Works in every app – email, docs, chat
- AI cleans up filler, punctuation & tone as you speak
- wisprflow.ai/r?CHRIS38281

Association AI Accelerator Certificate Course

Live course, 10 weeks, 10 CAE credits



Association Academy turbocharges your AI skills.

The **Association AI Accelerator Certificate Course** — live, 10 weeks, 10 CAE credits.

AICPAFREE

First seat — **free.**

ACADEMY

Additional seats — **\$100 off.**

ENROLL AT **ricochetadvice.com/academy**

Let's Build A New Journey Together

Begin your transformation.

Chris Gloede, MBA, CAE

Chief Consultant, Ricochet

PHONE

773-510-6066

MEET WITH US

ricochetadvice.com/meet-with-us

WEB

ricochetadvice.com

LINKEDIN

linkedin.com/in/chrisgloede

BOOK A CALL

ricochetadvice.com/meet-with-us

— Sources

- 01 Marketing General Inc. (MGI), 2025 Membership Marketing Benchmarking Report.
- 02 AICPA, 2025 Trends Report (accounting degrees conferred).
- 03 National Student Clearinghouse Research Center, 2024–25 (enrollment rebound).
- 04 Intuit QuickBooks, 2025 Accountant Technology Report.
- 05 CPA.com, 2025 AI in Accounting Report.
- 06 Emanuel, Harrington & Pallais, “The Power of Proximity to Coworkers”; Federal Reserve Bank of New York, 2026.
- 07 Deloitte, 2025 Gen Z and Millennial Survey.
- 08 Major, Lindsey & Africa; NALP Foundation (associate attrition).
- 09 Illinois CPA Society, “Righting Retention” (insight series).
- 10 Sprout Social, 2025 Social Media Content Strategy / Index data.
- 11 YouGov, 2025 Gen Z platform usage.

- 12 CFA Institute, “The Finfluencer Appeal” (2024).
- 13 Edelman-LinkedIn, 2025 B2B Thought Leadership Impact Report.
- 14 Zety, 2025 Gen Z at Work / social-media survey.
- 15 ASAE, association performance benchmarks.
- 16 Sequence Consulting, first-year renewal research.
- 17 Freeman / Harris Poll, 2025 Gen Z research.
- 18 Higher Logic, 2025–2026 Association Email & Engagement Benchmark.
- 19 Forj, 2025 State of Member Experience Report.
- 20 iMIS / Advanced Solutions International, 2026 Membership Performance Benchmark Report.
- 21 GrowthZone, 2025 Association Survey Results.