RICOCHET
ASSOCIATION TRANSFORMATION

THE FIRST 90 DAYS OF MEMBERSHIP WITH NEXT-GEN CPAS

Hook, Engage, Retain

PRESENTER

Chris Gloede, CAE — Ricochet Chief Consultant

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Let's go

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<60%

BIG LOSSES

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

Source: MGI, 2025 Membership Marketing Benchmarking Report.

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EARLY IMPACT

The renewal decision is mostly made in the first 90 days. Onboarding IS the renewal campaign.

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Hello



CAE CERTIFIED ASSOCIATION EXECUTIVE

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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.

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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.

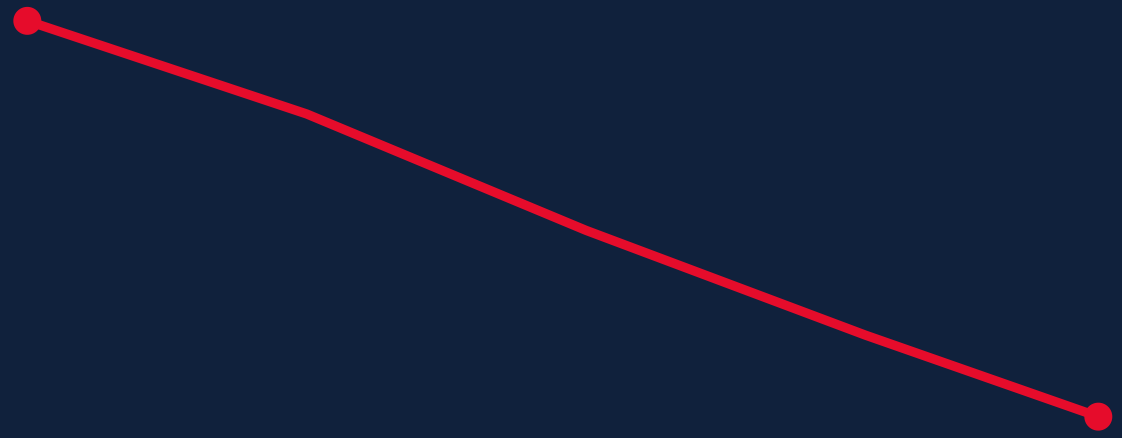
Source: Kasasa, "Boomers, Gen X, Gen Y, Gen Z, Gen A and Gen B explained," 2025 (birth years, current age, U.S. population, media consumption, key shaping events).

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SHIFT 1

A shrinking pipeline + a different generation

The next generation relates to institutions and belonging differently.

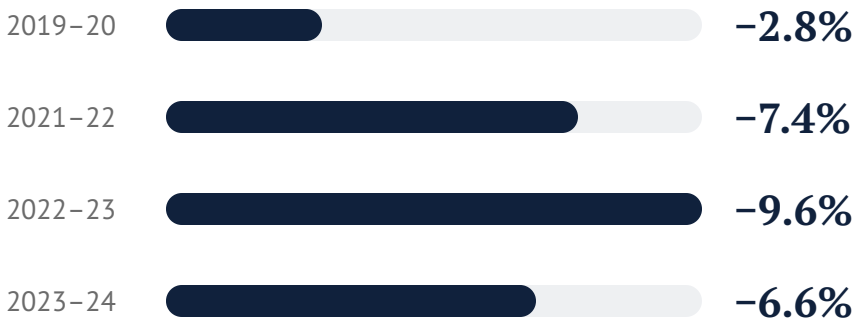


> *“Survival… no idea how we’ll replace them.”*

Source: AICPA Trends report; MGI, 2025 (exec quote).

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.

Source: AICPA Trends Reports (accounting degrees conferred, bachelor's + master's; 2019–20 shown at bachelor's level); enrollment rebound via National Student Clearinghouse Research Center, 2024–25.

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.

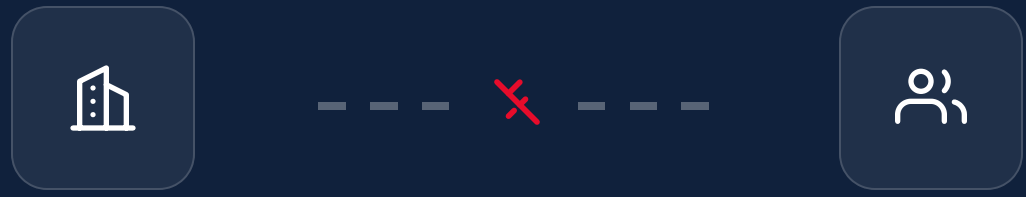
"AI is not going to disrupt the accounting profession, but it will change what an accountant does."

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

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SHIFT 2

The apprenticeship is breaking — and taking belonging with it.



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.

Source: Emanuel, Harrington & Pallais, "The Power of Proximity"; NY Fed (2026); Deloitte 2025 Gen Z & Millennial Survey.

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.

Source: Major, Lindsey & Africa; NALP Foundation; Illinois CPA Society, "Righting Retention."

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SHIFT 3

Social is now their first place to search.



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

Source: Sprout Social 2025; YouGov 2025.

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.

Source: CFA Institute, "The Finfluencer Appeal" (2024); Edelman-LinkedIn B2B Thought Leadership, 2025.

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

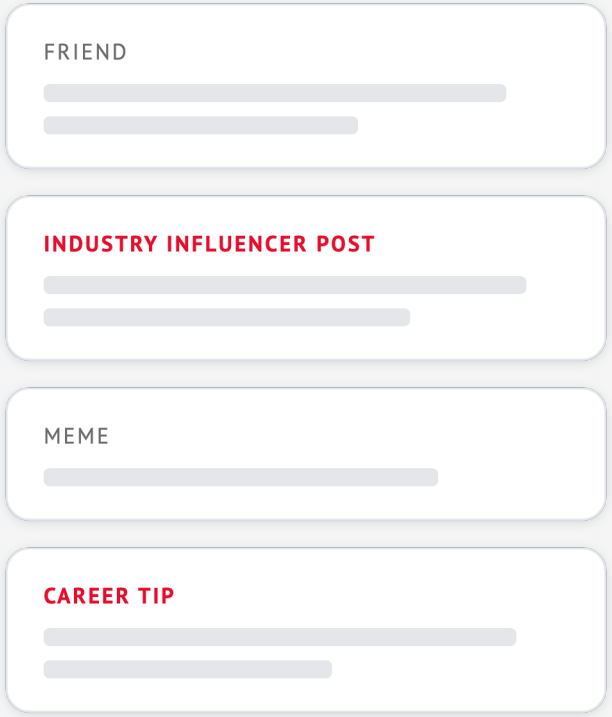


Source: Zety, 2025 Gen Z at Work / social-media survey.

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.



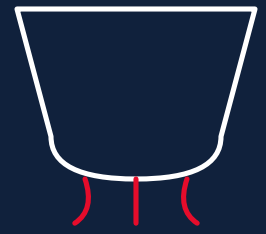
Source: MGI, 2025 Membership Marketing Benchmarking Report.

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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

Source: MGI, 2025 Membership Marketing Benchmarking Report.

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.

Source: MGI, 2025 Membership Marketing Benchmarking Report; ASAE; Sequence Consulting.

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.**

Source: Sequence Consulting / ASAE; median first-year renewal 75% vs. 84% overall — MGI, 2025 Membership Marketing Benchmarking Report.

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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.

BENEFITS FIREHOSE

ONE CLEAR NEXT STEP

“Welcome, Jordan. Here’s your one thing this week.”

Do the one thing →

84% want role / career-stage personalization.

Source: Higher Logic, 2025–2026 benchmark.

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

TRACK THIS ONE



Join a cohort

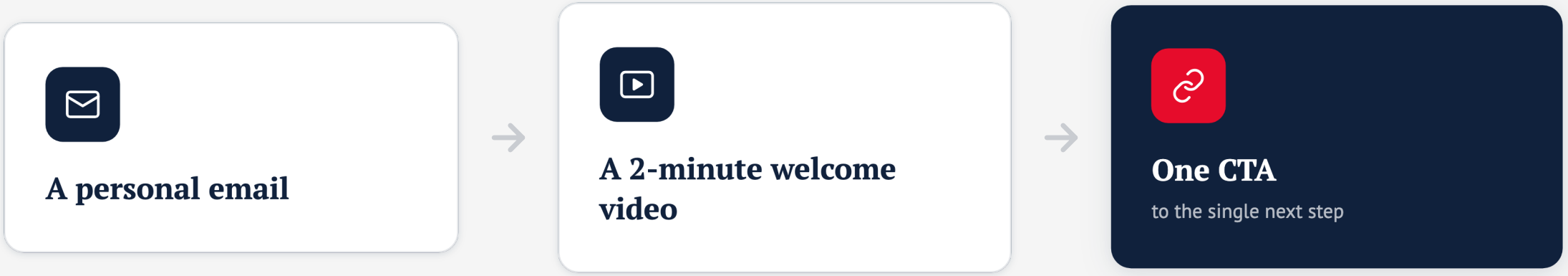


Update Profile



Register for Event

The no-tools version of Hook.



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.



#1 SATISFACTION DRIVER

Peer connection

#1 DISSATISFACTION DRIVER

CE

Only ~2 in 5
Gen Z feel confident networking

Source: Forj, 2025 State of Member Experience; Freeman, 2025.

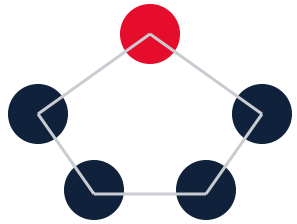
Replace the webinar with a cohort.

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

1 — Day 1

14 — Day 14

45 — Day 45

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

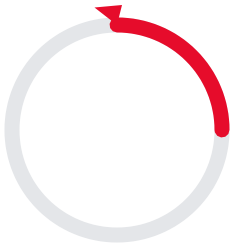
THE JOB OF RETAIN

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

Source: iMIS / ASI, 2026 Membership Performance Benchmark (win-back).

Simple risk scoring determines your call list.

Member A HEALTHY

- [x] First action done
- [x] Attended cohort
- [x] Updated profile
- [ ] Registered for event

CALL LIST

Member B AT RISK

- [x] 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% 

Figures illustrative.

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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

Source: GrowthZone, 2025 Association Survey Results.

“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.

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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



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ENROLL AT **ricochetadvice.com/academy**

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Let's Build A New Journey Together

Begin your transformation.

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