

Power Member Support:



Sample ATD Resources Request Form Job Aid

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OVERVIEW OF THE FORM

Membership with the Association for Talent Development (ATD) includes access to the most essential talent development resources including hands-on tools, analysis, and cutting-edge insights. To support your chapter's Power membership efforts and to connect interested prospects with a taste of the ATD experience, ATD chapter services created an online request form for prospects to request samples of ATD benefits that chapters can host on their websites.

The request form has multiple benefits for your local chapter and ATD National including that it:

- Provides an opportunity for your chapter to support the professional development journey of your members and prospects at no cost
- Identifies prospects with an interest in ATD National membership, which allows ATD National and the local chapter to facilitate meaningful conversations around the value of membership
- Reiterates the difference between national and local membership while underscoring the complementary nature of both memberships
- Generates a list of prospects who may be interested in chapter membership, national membership, or a combination of both (Power Membership)
- Counts as one of the 10 required joint membership activities the chapter is required to complete annually as a part of the [Chapter Affiliation Requirements](#) (CARE)
- Offers a relatively hands-off approach to supporting your chapter's Power membership efforts

Hosting the Form

The chapter hosts the ATD Sample Resources Request Form on its chapter website either by embedding the form on the chapter's site, creating a new page, or [linking directly to the form](#). (Refer to [Appendix A](#) for a detailed job aid on how to embed the form on your chapter's site.) It is recommended that the chapter include the form on a high-traffic or relevant webpage, for instance your chapter's home page or Power Member webpage. Additionally, the chapter is not limited to one mode of sharing. The chapter can embed the form on its site *and* include the link in an email announcing the form's availability. The form will function in the same manner regardless of how it is shared.

If your chapter does not have a dedicated Power Member webpage, consider leveraging our template by copying and pasting the following [HTML code](#) to your chapter's site.

The Process

Once the form is added to the chapter's site, it is ready for completion by the public. Anyone can complete the form and receive access to sample resources regardless of whether they are a member of the chapter, national, or neither. Customers will be asked to select the name of the chapter through which they gained access to the form. Through filters placed on this field, the chapter will only receive customer information for those who completed the form via its site or communications.

Upon completion of the form, the customer will be directed to a landing page hosted on td.org to download the sample resources. Resources will be updated on a quarterly basis to ensure the content of

these sample resources remains relevant and actionable. Likewise, customers may only complete the form once; duplicate submissions with the same email address are prohibited.

Chapter Points of Contact for the Form

Vice presidents of membership are listed as the point of contact for their chapter's form submissions. If the membership position for your chapter is vacant, chapter services will include the chapter president as the point of contact. To update your form's point of contact to another board role, contact chapters@td.org with the preferred email destination for this information.

As the customer is directed to the resources landing page, the chapter's point of contact will receive a copy of the form submitted, which includes the customer's contact information. The form will include two hidden fields (hidden to the customer during form completion but not to the point of contact) that will provide information regarding the customer's chapter and national membership status. Please use this information to support your follow-up messaging. For instance, if someone is a member of ATD National but not the chapter, your outreach should focus on encouraging the customer to join locally and perhaps even highlight your chapter's presence on the ATD Store, if applicable.

Please note: Customers using a different email address than the one associated with their chapter or national membership will affect the accuracy of their membership status. Should you encounter this scenario, you may reach out to your [chapter relations manager](#) (CRM) to confirm membership details.

Customer Follow-Up

ATD will also receive the contact information for those customers requesting sample resources and will follow up with any non-national contacts through email marketing to ensure we address any questions they have and provide instructions on how to sign up for membership. Chapters are also encouraged to follow up with the prospects completing the form. Template messages are included in [Appendix B](#) for your reference, customization, and use.

For reference and to coordinate our outreach, ATD will use the below schedule for messaging prospects:

- Email #1: Sent within one week of form completion.
- Email #2: Sent on a Wednesday, two weeks following the distribution of the first email.
- Email #3: Sent on a Wednesday, one week following the distribution of the second email.

Questions

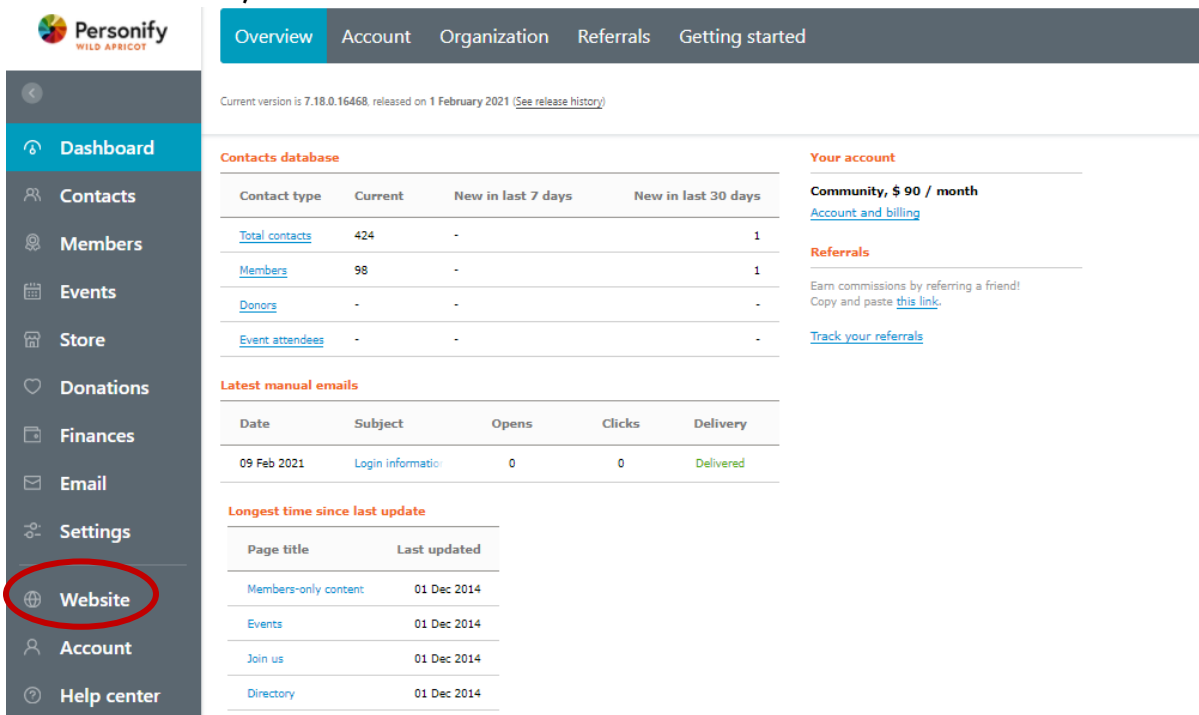
For questions about the process or for additional assistance, please reach out to your [CRM](#).

APPENDIX A: EMBEDDING A FORM IN WILD APRICOT

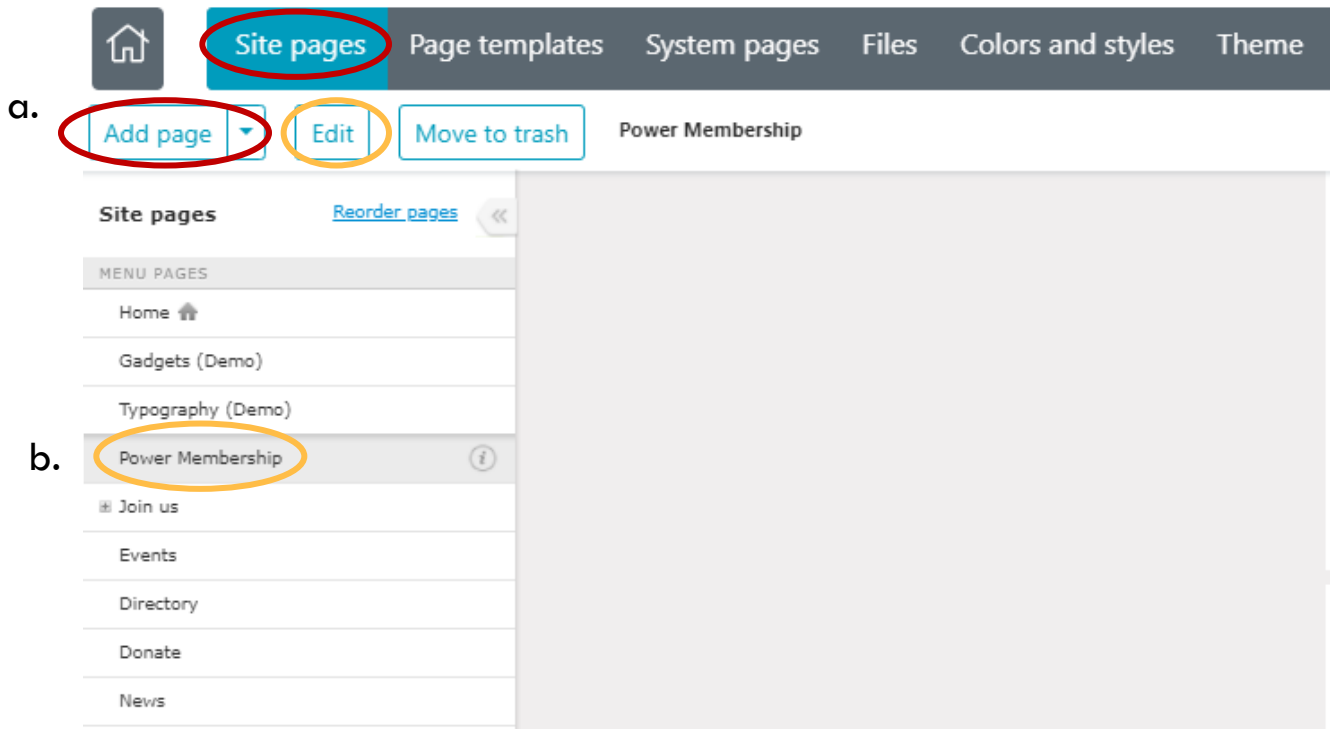
1. Log in to your Wild Apricot account and select **Admin View** to access the back end of the website.



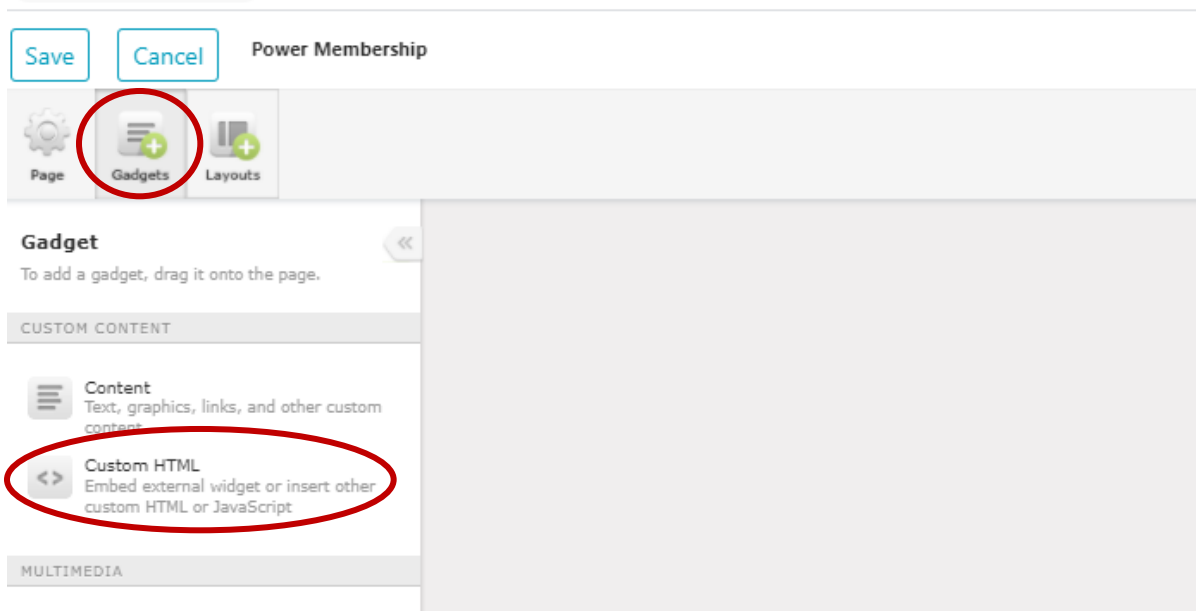
2. From the back end, click on **Website** on the main toolbar.



3. Select **Site pages** from the top toolbar.
 - a. If the chapter wants to create a new webpage, click **Add page**.
 - b. If the chapter is working off an existing page, like a Power Membership page, select it from the list of pages on the **left-hand menu**, and click **Edit**.



4. On the top toolbar, select **Gadgets**.
 - a. If you are creating a new page or adding a section to new page, select **Custom HTML**.



- b. If you would like to insert the form into an existing gadget, click on the gadget then select **Edit code**.

The screenshot shows a web page editor interface. On the left, the 'Custom HTML gadget' configuration panel is visible. The 'Edit code' button is circled in red. The main preview area shows a page titled 'Home > Power Membership'. The page features a red banner with the text 'BECOME AN ATD POWER MEMBER!' and the ATD logo. Below the banner, there is a section titled 'What is Power Membership?' followed by a paragraph of text. Below that is a section titled 'Why Join?' followed by another paragraph. Finally, there is a section titled 'How to join?' followed by two options for joining.

5. Copy and paste the HTML code below into the box and remove any previous code. Click **Save**. (Note: You may adjust the size of the form and the view by adjusting the numbers corresponding to width and height.)

```
<center><iframe src="https://atdorg.formstack.com/forms/atdsampleresources" title="ATD Member Resources Request Form " width="100%" height="1000"></iframe></center>
```

6. For chapters creating a new page to host the form, choose where the page will be housed on your site by returning to **Page**. Name the page, select its position in your site menu, and ensure the page is granted public access.

Page settings

Page name
ATD Sample Resources Request Form

Page URL
ATD-Sample-Resources-Request-Form
https://testatdchapter.wildapricot.org/ATD-Sample-Resources-Request-Form

Page template
Standard template

POSITION IN MENU

- Home page
- After selected page
Power Membership
- Child of selected page
- Not in menu

ACCESS LEVEL

- Public
- Admin only

Formerly ASTD

Some errors occurred due to theme override. [See log](#)

HOME VOLUNTEER OPPORTUNITIES GADGETS (DEMO) TYPOGRAPHY (DEMO) POWER MEMBERSHIP ATD SAMPLE RESOURCES REQUEST FORM

Home > ATD Sample Resources Request Form

atd Association for Talent Development

Through ATD National membership, you receive practical tools and templates to make your job easier, best practices from leading training experts and top companies to take your organization to the next level, much, much more.

Could you benefit from taking advantage of all ATD membership offers? Find out by completing the below form to receive a few sample ATD National's most popular resources.

Name*

7. Select **Save** at the top of the page to preserve your changes. Return to public view to ensure your page is visible and the links and the form is functioning properly.

Save Cancel ATD Sample Resources Request Form

Page settings

Provides basic layout and shared content. To modify templates, click Templates under Website. [Learn more](#)

Page ID: 18072

POSITION IN MENU

- Home page
- After selected page
Power Membership
- Child of selected page
- Not in menu

ACCESS LEVEL

- Public
Anyone can view
- Admin only

APPENDIX B: EMAIL TEMPLATES FOR PROSPECT FOLLOW-UP

Form Promotion Template

Subject Line: Sample the Difference ATD National Resources Can Make

As a member of [Chapter Name], you understand the value of membership on a local level, but have you considered powering up your membership with ATD National? ATD National has unlocked three sample resources to give you a feel for the member-only resources they provide. You'll see that they've unlocked at *TD at Work* guide, which provides actionable tools and insights and is produced on a monthly basis to keep members current.

To learn more about ATD National membership, and to download your free sample, visit td.org/SampleResources today!

[Learn More]

Form Promotion: Sample Social Media/Language for Hosting on Your Website

- Download your sample *TD at Work* guide at td.org/SampleResources to learn more about the resources exclusively available to ATD members!
 - Sneak a peek at ATD member-only resources and learn more about ATD Power membership at td.org/SampleResources.
 - Free ATD member-only download! Sample the members-only resources available through ATD at td.org/SampleResources.
-

Form Follow-Up: Template 1

Subject Line: How Can Power Membership Support You?

Thank you for requesting a sample resource from ATD National! Through ATD National membership, you receive practical tools and templates to make your job easier, best practices from leading training experts and top companies to take your organization to the next level, and much more. When you pair that with a membership to [Chapter Name], you'll be considered an ATD Power Member and will have local and global resources at your fingertips.

What can a Power membership do for you?

- **Local connections you can rely on.** This network will support you in finding a job, nailing down the fundamentals, and growing in your role. There is no better support than local professionals who have been in your shoes.
 - **Programming designed for you.** The [Chapter Name] hosts various programming on a [weekly/daily/monthly] basis to keep your skills sharp and your ideas fresh.
 - **Tools to support your work.** ATD National membership provides open access to more than 300 *TD at Work* guides, a growing library of templates and tools, access to 10-Minute Case Studies, whitepapers, and a video library featuring hundreds of webinars and conference recordings.
-

There is no better time to put the power of ATD on your side. Power Members save \$30 off ATD National membership dues and have double the resources through their membership.

[\[Join Today\]](#)

Form Follow-Up: Template 2

Subject Line: Join ATD for Full Access to Essential Resources

Thank you for requesting a sample resource from ATD National! Those were just a few examples of the many practical tools and templates you'll have access to as an ATD member. ATD has membership options at the national and local level, which can be combined for a Power membership like no other. Joining ATD National and [\[Chapter Name\]](#) gives you local and global resources at your fingertips and the status of ATD Power Member.

As an ATD member, you have immediate access to benefits including:

- 300+ *TD at Work* guides
- Webinar and conference session recordings
- A growing library of essential checklists, tools, and templates
- Industry-leading insights from *TD* magazine, whitepapers, and member-only newsletters
- A network of nearly 30,000 members from more than 125 countries and local connections from [\[Chapter Name\]](#)
- Regionally relevant programming for chapter members

Not sure how membership has benefited professionals in our area? Reach out to [<<VP of Membership>>](#), the chapter's vice president of membership, to learn more or [watch this video](#).

There is no better time to put the power of ATD on your side. Power Members save \$30 off ATD National membership dues and have double the resources through their membership.

[\[Join Today\]](#)