

This **Strategic Planning summary** for the National Association of Benefits and Insurance Professionals New Mexico (NABIP NM) chapter covers the **2025-2026 fiscal year** (pp. 11, 33). It outlines key objectives across various board positions to drive growth, engagement, and professional excellence.

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**Core Objectives by Leadership Role**

<b>Position</b>	<b>Primary Goals &amp; Action Steps</b>
<b>President</b>	<p><b>Expand Membership:</b> Focus on corporate memberships and assisting with member claims. (p. 11)</p> <p><b>Regional Growth:</b> Expand events into Las Cruces and Santa Fe. (p. 11)</p> <p><b>Sponsorships:</b> Target community sponsors like banks and local businesses. (p. 11)</p>
<b>Membership &amp; Experience</b>	<p><b>Retention &amp; Growth:</b> Utilize "winback" lists and create a new agent program. (p. 29)</p> <p><b>Outreach:</b> Increase social media content and conduct member surveys. (p. 29)</p>
<b>Professional Development</b>	<p><b>CE Opportunities:</b> Host "Lunch and Learns" and a dedicated 2-CE credit workshop/event. (p. 33)</p> <p><b>New Media:</b> Develop podcasts during the legislative session for CE credit. (p. 33)</p>
<b>Legislative</b>	<p><b>Committee Building:</b> Create and maintain a team of six for the Legislative Committee. (p. 25)</p> <p><b>Engagement:</b> Reach out to 10 people personally to join the committee. (p. 25)</p>
<b>Communications &amp; Media</b>	<p><b>Public Presence:</b> Update media contact lists and distribute a quarterly newsletter. (p. 15)</p>

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**Outreach:** Write and send articles highlighting NABIP NM activities.  
(p. 15)

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**PAC & Past President**      **Fundraising:** Achieve 75% board contribution to PAC by asking for \$12/month or \$150/year. (p. 19)  
**Growth:** Target a 20% increase in total membership by June 30, 2026. (p. 21)

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**Awards**      **Documentation:** Track and document chapter successes to submit a complete award package. (p. 13)  
**Advisory:** Review the status of each chair to ensure award criteria are met. (p. 13)

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## Success Metrics & Landmarks

The plan aligns with the **Landmark Award** criteria, focusing on:

- **Governance:** Maintaining bylaws, strategic plans, and a transparent budget (p. 35).
- **Engagement:** High attendance at national conventions and regional leadership conferences (p. 35).
- **Legislation:** Active lobbying programs and "Operation Shout" participation (p. 36).
- **Education:** Promoting REBC designations and hosting state-wide sales congresses (p. 36).

Would you like me to break down the **specific budget or cost obstacles** mentioned for any of these individual departments?

AI responses may include mistakes. Information may vary depending on location or individual circumstances. [Learn more](#)

Create word document for download

As an AI, I cannot directly generate a physical file (like a

.docx) for you to download. However, I have formatted the **NABIP NM Strategic Plan Summary** below in a way that you can easily **copy and paste** into Microsoft Word or Google Docs to create your document.

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## Strategic Plan Summary: 2025-2026 Fiscal Year

### NABIP New Mexico (NABIP NM)

#### I. Overview

This strategic plan outlines the mission-critical objectives for the National Association of Benefits and Insurance Professionals New Mexico chapter. The primary focus for the 2025-2026 fiscal year is on membership expansion, legislative advocacy, and professional excellence through educational programming.

#### II. Key Leadership Objectives

Position	Primary Goals & Action Steps
President	<ul style="list-style-type: none"><li>• <b>Expand Membership:</b> Target corporate accounts and assist with claims.</li><li>• <b>Regional Growth:</b> Launch events in Las Cruces and Santa Fe.</li><li>• <b>Sponsorships:</b> Secure community partners (e.g., local banks).</li></ul>
Membership & Experience	<ul style="list-style-type: none"><li>• <b>Retention:</b> Utilize "winback" lists and new agent programs.</li><li>• <b>Surveys:</b> Conduct member needs assessments to improve value.</li></ul>
Professional Development	<ul style="list-style-type: none"><li>• <b>CE Credits:</b> Host monthly "Lunch and Learns" and semi-annual workshops.</li><li>• <b>Innovation:</b> Produce podcasts during the legislative session.</li></ul>
Legislative	<ul style="list-style-type: none"><li>• <b>Committee:</b> Build and maintain a team of 6 core members.</li><li>• <b>Engagement:</b> Personally invite 10 members to legislative activities.</li></ul>
Communications/Media	<ul style="list-style-type: none"><li>• <b>Visibility:</b> Distribute a quarterly newsletter and maintain an updated media list.</li><li>• <b>Public Relations:</b> Send regular articles to local press outlets.</li></ul>

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**PAC & Past President**

- **PAC Contributions:** Aim for 75% board participation (\$150/year per member).
- **Growth Target:** Increase total membership by 20% by June 30, 2026.

**III. Success Benchmarks (Landmark Award Criteria)**

The chapter will track its progress against the national **Landmark Award** standards:

- **Management:** Maintenance of state bylaws, strategic plans, and tax-exempt status.
- **Events:** Representation at the Annual Convention and Regional Leadership Conferences.
- **Legislation:** Active lobbying programs and regular legislative communications to members.
- **Media:** Use of social media to increase public presence and press hits.