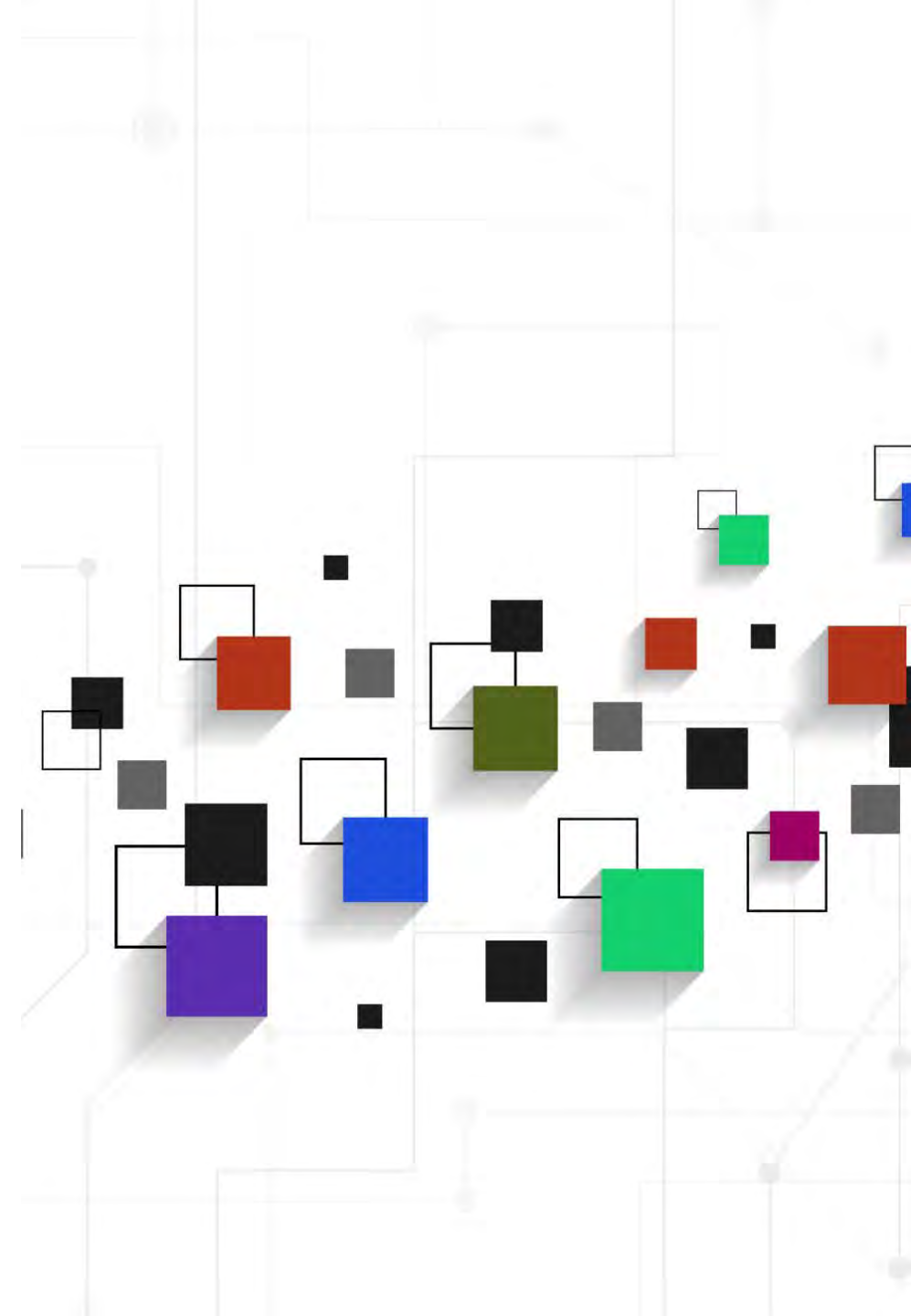


A Guide to Creating A Practical and Realistic Membership Strategy

PRESENTER: BELINDA MOORE



About Belinda Moore

- Involved in association sector since 1993.
- Books: *Association Annie: Herding Cats*, *The Membership Manager's Handbook*, *Membership Fundamentals*, and *The Membership Machine*.
- Whitepapers: *Associations Evolve*, *COVID-19 and Beyond*, *Rise!*, *Association Apocalypse*, and *Membership is Dead?*
- Editor: *Associations Evolve: 2022 & Beyond Journal*.



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Who attended
my session last
year?



Agenda

- **Part 1**: Membership Trends
(take notes for your strategy)
- **Part 2**: Steps to Create Your Strategy
(start drafting your strategy - note questions for Part 3!)
- **Part 3**: Q&A ... your questions answered.
(don't be shy or this will be a short session 😊)

FYI - I'm happy to share the slides and the session will be recorded. Feel free to ask questions in the chat.



A close-up photograph of several people's hands stacked together in a circle, creating a sense of unity and teamwork. The hands are of various skin tones and are positioned in a way that suggests a group huddle or a shared commitment. The background is blurred, focusing attention on the hands. The text "Part 1: Membership Trends" is overlaid in white, sans-serif font across the center of the image.

Part 1: Membership Trends

Why do associations exist?

- Associations do not exist to recruit or retain members.
- Associations exist to make a positive impact on those they serve.
- Membership is just one of many tools' associations can use to deliver value.





The Operating
Landscape of
Associations is
Changing.

Rapid Technological Innovation

- Machine-thinking, marketing automation, and artificial intelligence are enabling associations to mass personalise membership and streamline internal operations.
- Associations need to be able to identify and implement innovative technological solutions – faster than competitors.



Competition eroding value of associations.

- Where associations fail to capitalise on opportunities' competitors have emerged.
- Competitors come in many forms. Often it is indirect - competing with a single product line.
- Many associations are suffering a slow "death of a thousand cuts".



Significant Generational Shifts

- Baby Boomers built the Associations of today. They built the products, services, publications, events, and decision-making processes to their own taste.
- Younger members – and those of a younger mindset - engage differently.



Changes in cultural, work, & lifestyle norms

- The massive shift in work, and lifestyle norms impacts associations at all levels. Eg: the casualisation of the workforce, remote work, online marketplaces, and the integration of the internet into our daily lives.
- This create opportunities that competitors will capitalise on if associations don't adapt.



Transformations in the way people connect

- The ability to connect people has long been a key association value proposition.
- Yet, people can connect without an association via technology.
- It's about the ease and value of connection.



Transformations in how we communicate

- Many associations still broadcast all messages to all people with little segmentation.
- Members are constantly bombarded via a multitude of channels.
- Need the right message going to the right people, at the right time, via the right channels.



Shift to communities, tribes, and groups

- Competitors can easily compete with your products, services, communications, events, and advocacy.
- A strong community is an excellent defense.
- Personalised experience, targeted offerings, and nurture tribes to strengthen community.



There's a fine line
between a
COMMUNITY and a
CLIQUE

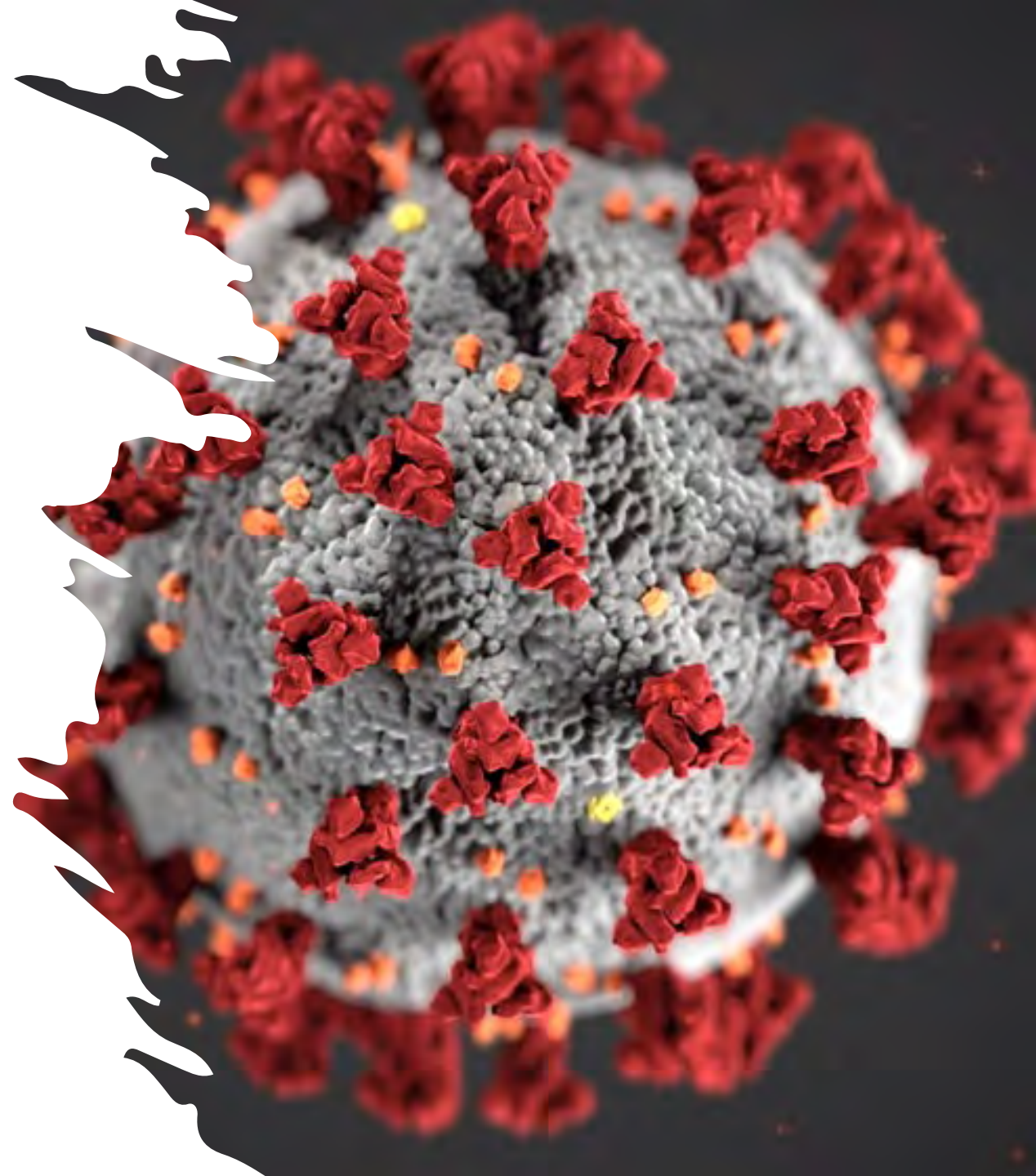


The decision to
JOIN is *NOT* the
decision to *BELONG*



COVID as a catalyst for change.

- Forced many associations to implement long overdue change.
- Research show many association professionals believe medium to long term impact will be positive.
- Proved associations can adapt – and overcome internal barriers – quickly.





11 characteristics
of high
performing
associations.

1. A visionary leadership team united by a shared vision of the future and passion for the purpose



2. The ability to execute the shared vision operationally.



3. Robust and nimble governance structures that support dynamic leadership.



4. Technology that delivers internal efficiencies and an exceptional member experience.



5. A personalised
value proposition
that delivers
powerful impact.



MEMBER VALUE FRAMEWORK

SEGMENT	ORGANISATIONAL			INDIVIDUAL	VENDOR	SUBSCRIBER
	Leader	Manager	Doer			
VALUE	For those wanting to start, grow or develop a business.	For those needing to successfully manage a team.	For those who want to execute tasks effectively.	For those wanting to start, grow and develop their career.	For those wanting to promote useful products and services.	For those wanting to keep up to date with the sector.
FEE	\$50pm			\$10pm	\$50pm	Free
ELIGIBILITY	Organisations in the sector.			Individuals in sector.	Suppliers of relevant products.	Individuals in sector.
DATA – ORGANISATION	Number staff, location, capabilities,				Type of product/service,	
DATA – INDIVIDUALS	Special Interests, location, Career Stage, Communication preferences, Qualifications,					
ACCESS THE MARKETPLACE (Find Suppliers / Sell Product)						
Find suppliers or vendors	YES	YES	YES	YES	YES	YES
List business in the directory.	X	X	X	X	YES	X
ACCESS THE WORKFORCE (Find Staff / Find a Job)						
Search job listings	YES	YES	YES	YES	YES	YES
Promote a vacant role.	YES	YES	YES	X	X	X
ACCESS RESOURCES						
Access general resources	YES	YES	YES	YES	YES	YES
Access specialist resources	YES	YES	YES	YES	YES	X
List your resources	YES	YES	YES	YES	YES	YES
Sell resources via the site.	YES	YES	YES	YES	YES	X
ACCESS FUNDING						
Receive funding updates	YES	YES	YES	YES	X	X
Access grant writing services	YES – At a discount	YES – At a discount	YES – At a discount	YES – At a fee	YES – At a fee	YES – At a fee
CONNECT WITH YOUR COMMUNITY						
Post questions to the community	YES	YES	YES	YES	YES	X
Respond to questions	YES	YES	YES	YES	YES	YES
Join special interest groups.	YES	YES	YES	YES	YES	YES
Create special interest groups	YES	YES	YES	YES	YES	X

6. A passionate,
purpose-driven,
organisational
culture.



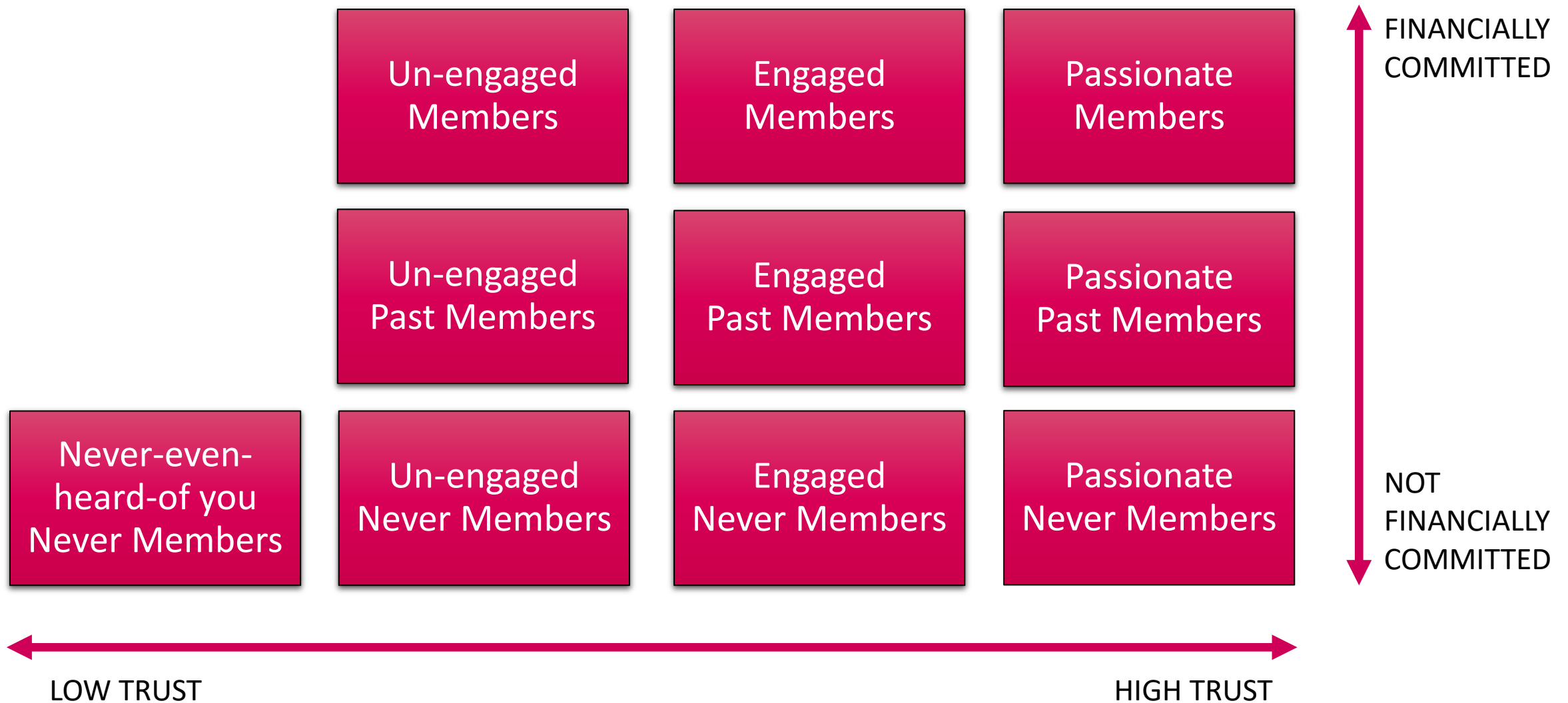
7. Membership processes that nurture an active and engaged community.



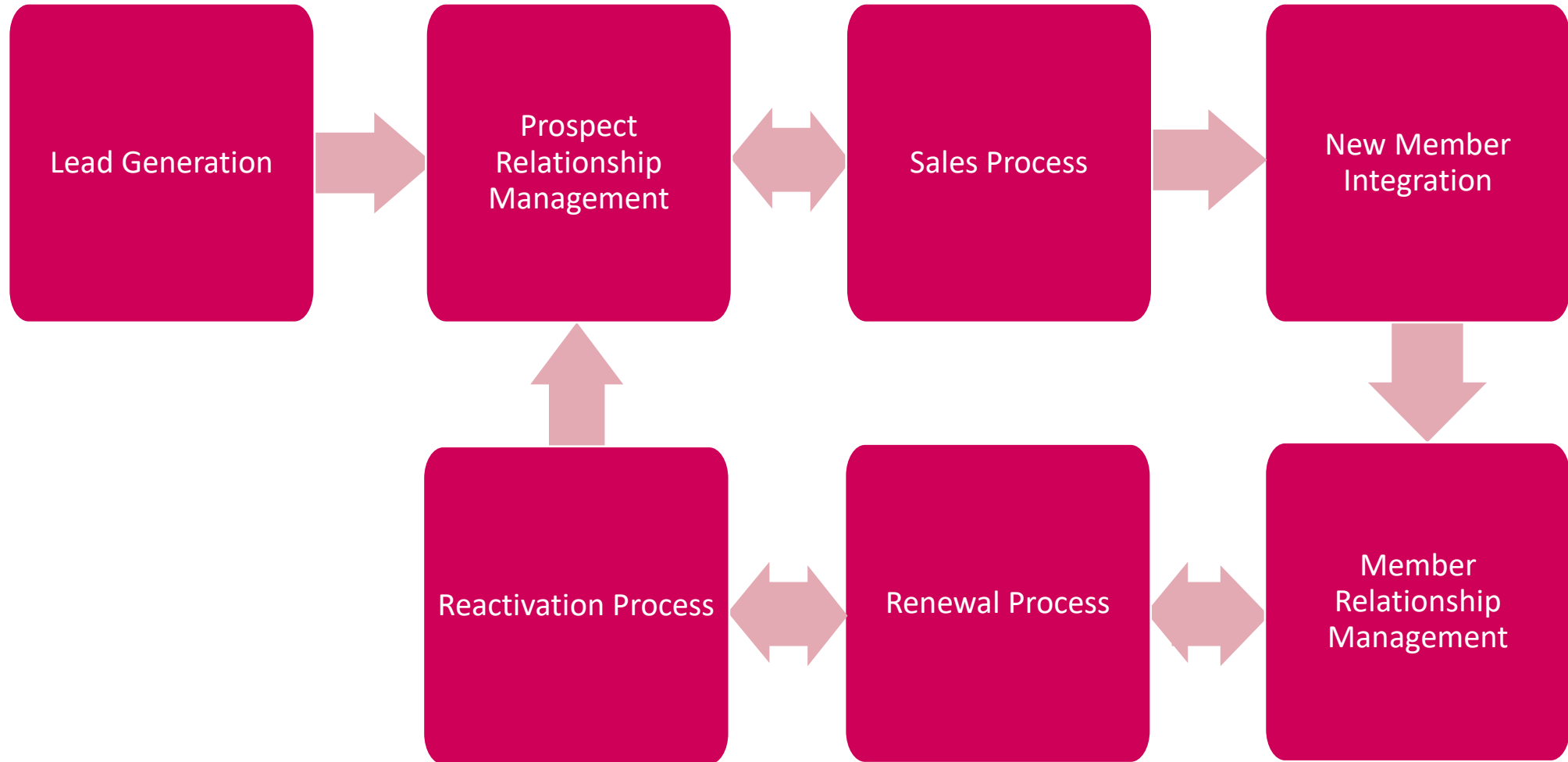
Key Member Journeys

Life Stage	Business Owner	Career Journey	Association Related	Other Journeys
<ul style="list-style-type: none">• Child• Pre-Teen• Teenager• Young Adult• Student• Young Family• Single Parent• Older Family• Childless Couple• Single, No kids• Empty Nesters• Retired	<ul style="list-style-type: none">• Viability Assessment• Pre-Opening• New Business• Growth and Build• Consolidation• Maintenance• Succession Planning• Retirement/Sale	<ul style="list-style-type: none">• Student• New Graduate• Career Starter• Career Builder• Mid-Career• Career Break• Consolidator• Pre-Retirement• Retired	<ul style="list-style-type: none">• Non-Member• New Member• Uninvolved Member• Speaker• Ad-Hoc Volunteer• Committee Member• Board Member• Resigned Member	<ul style="list-style-type: none">• Medical condition• Hobby or Interest• Sporting• Cause• Pet Ownership• And many more

Mapping the Member Relationship



The Member Recruitment & Retention Process



8. Engaging,
personalised, and
create communications
and branding.



Perception is reality.



Humour is a
powerful tool
when used
effectively.

ELEMENTARY PTA

ALTERNATIVE FUNDRAISER

This fundraiser is in lieu of sending students home with the task of selling door-to-door, collecting money and delivering goods. Please help us avoid that by supporting our PTA with your donation, and helping achieve our goals to support our students and faculty.

Thank you in advance for your support!

___ **\$10** I do not want to bake, so here is the money I would have spent on cupcakes.

___ **\$25** I do not want to hit up friends, family and co-workers, so here is the money I would have spent on wrapping paper.

___ **\$50** I do not want to walk, swim or run in any activity that has the word "thon" in it. Here is the money I would have spent on my child's "FREE" t-shirt.

___ **\$100** I really wouldn't have helped anyway, so here is \$100 to forget my name.

___ **\$** I am making this donation to express my appreciation for having nothing to buy, sell, or do except fill out this form.

Name _____ Phone _____

Student(s) _____ Grade ____

9. Partnerships that positively impact purpose and support organisational sustainability.



10. Multi-channel,
relationship-driven,
proactive sales activity.

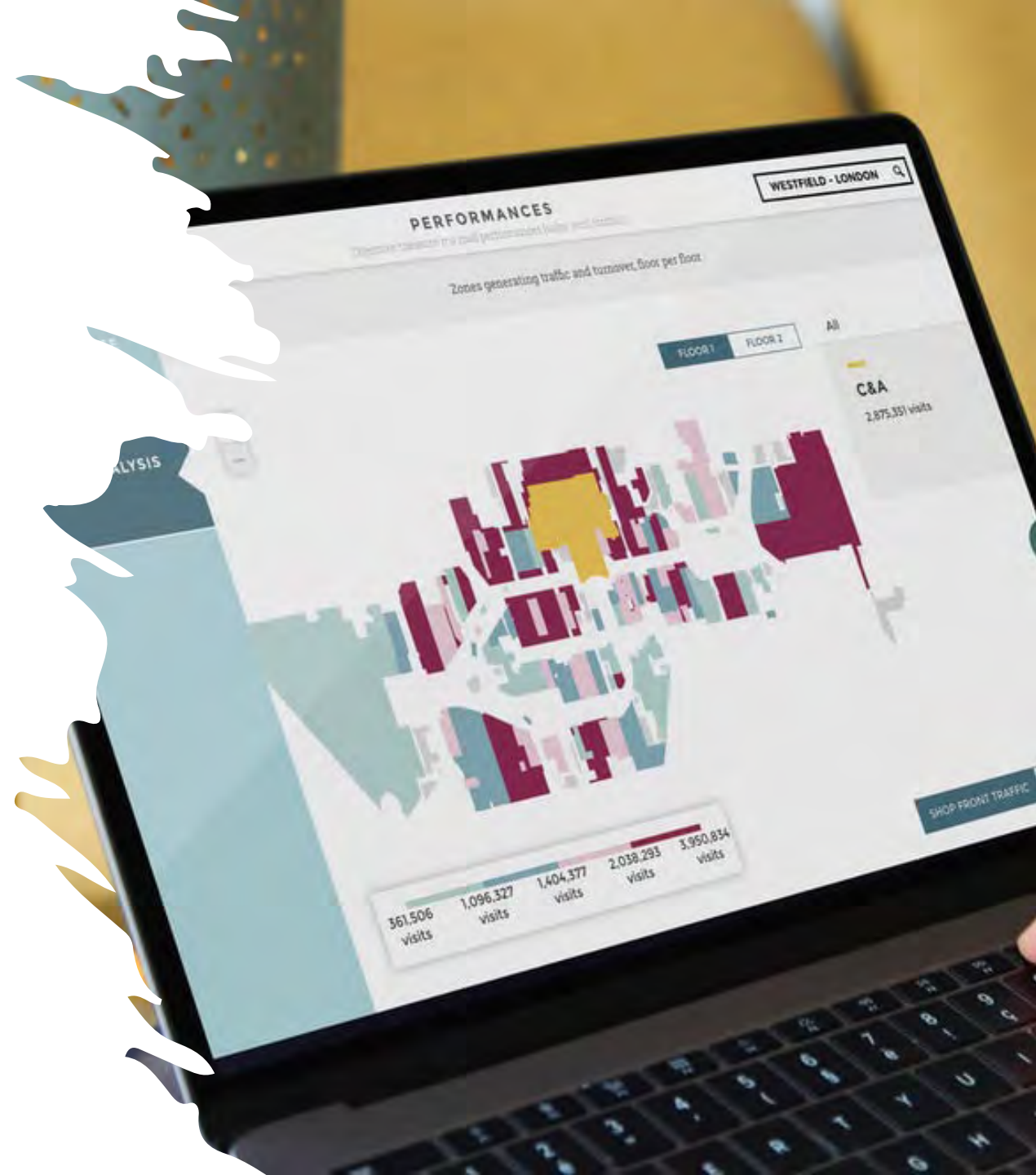


Sales process inclusions

- Marketing Automation
- Electronic Campaigns
- Hard Copy Campaigns
- Outsourced Transactional (eg: call center)
- In-House Transactional (eg: outbound calls)
- In-House High Value (eg: partnerships).
- In-House Structural (eg: data analyst)



11. Robust financial management and reporting that usefully informs decision making and oversight.



Use data to ensure realistic goal setting

QUESTION

If we have 3,795 members now, can we achieve a goal of 5,000 members within three years?

TEST

What if we matched our best performance in the past three years in retention (77%) and new members (859) every year?

WORKING

Year 1:3,781 members
 $((3795 * 77\%) + 859)$

Year 2:3770 members
 $((3781 * 77\%) + 859)$

Year 3:3762 members
 $((3770 * 77\%) + 859)$

ANSWER

No, you would have 33 less members than you have now. Growth is only possible through fundamentally changing the way you recruit, retain, and/or engage members.

ASSOCIATION ANNIE







Part 2: Creating Your Membership Strategy

Alignment with Organisational Strategy.

A great membership strategy needs to be built on strong foundations.

- What is the purpose of your organisation?
- Who do you serve?
- Why do you have members? How does having members benefit your purpose and help those you serve?
- What elements of your organisational strategy relate to membership?

Set REALISTIC Goals.

What does membership “success” look like?

- Retention Rate (Overall) per annum.
- Retention Rate (1st Year) per annum.
- # New Members by Date per annum.
- # Revenue from Membership per annum.

Determine Objectives & Strategies.

These are some of the most common objectives. You can't do all at once so figure out a logical order. Then start at the beginning ...

1. Build strong operational foundations.
2. Deliver powerful value.
3. Increase retention.
4. Build a thriving [online/offline] member community.
5. Increase new member numbers.

Objective #1.

Build Strong Operational Foundations

- Use technology to create operational efficiencies & enhance the member experience.
- Foster a staff and volunteer team with the skills and passion to fulfil our purpose.
- Refine our communications to ensure we are sending the right message, to the right person, at the right time.
- Ensure our revenue streams are sustainable and aligned to our purpose.
- Implement reporting that usefully informs decision making.

Objective #2.

Deliver Powerful Value

- Understand who we serve and the value they require (*Stakeholder value framework – session running next week*).
- Align our membership model to our purpose.
- Ensure a strong value proposition by aligning our products, services, events, and publications to deliver the value to those we serve.
- Communicate compelling value.

Objective #3.

Increase Retention

- Build strong new member integration (member onboarding) processes.
- Set up processes for passive member engagement.
- Run targeted campaigns to engage members.
- Improve renewal outcomes.

Objective #4.

Build a Thriving Community

- Foster connectiveness and collaboration via a strong online community.
- Help members to usefully connect with each other.

Objective #5.

Increase New Member Numbers

- Generate leads for new members.
- Build a relationship with prospective members.
- Establish processes for passive membership sales.
- Run targeted campaigns to acquire new members.
- Ensure robust sales processes.

MEMBERSHIP STRATEGY FOR JUL 1 2022 – JUN 30 2025				
Retention 90%	1st Year Retention: 80%	New # : 50	Revenue \$: \$15K	
Build Strong Foundations	Deliver Powerful Value	Increase Retention	Build a thriving community	Increase New Member #s
<p>Use technology to create operational efficiencies & enhance the member experience.</p> <p>Foster a staff and volunteer team with the skills and passion to fulfil our purpose.</p> <p>Ensure our revenue streams are sustainable and aligned to our purpose.</p> <p>Refine our communications to ensure we are sending the right message, to the right person, at the right time.</p> <p>Ensure reporting that usefully informs decision making.</p>	<p>Understand who we serve and the value they require.</p> <p>Align our membership model to our purpose.</p> <p>Ensure a strong value proposition</p>	<p>Build strong new member integration processes.</p> <p>Set up processes for passive member engagement.</p> <p>Run targeted campaigns to engage members.</p> <p>Improve renewal outcomes.</p>	<p>Foster connectiveness and collaboration via a strong online community.</p> <p>Help members to meaningfully and usefully connect with each other.</p>	<p>Generate leads for new members</p> <p>Build a relationship with prospective members.</p> <p>Establish processes for passive membership sales</p> <p>Run targeted campaigns to acquire new members.</p> <p>Ensure robust sales processes.</p>

Next Steps ...

- ✓ You've set your goals
- ✓ You've set your objectives
- ✓ You've set your strategies.

- Now its time to work out the specific tasks and projects you need to undertake to deliver each strategy.
- You should end up with a longer version of this...

MEMBERSHIP STRATEGY FOR JUL 1 2022 – JUN 30 2025

Retention 90%		1st Year Retention: 80%	New # : 50	Revenue \$: \$15K
Build Strong Foundations	Deliver Powerful Value	Increase Retention	Build a thriving community	Increase New Member Numbers
<p>Use technology to create operational efficiencies & enhance the member experience.</p> <ul style="list-style-type: none"> Determine data needs. Clean existing data. Map processes for automation. Implement CRM solution. <p>Foster a staff and volunteer team with the skills and passion to fulfil our purpose.</p> <ul style="list-style-type: none"> Determine and allocate staff resourcing. Establish and promote volunteering pathways. Embed the culture and values into all aspects of our organisation. <p>Ensure our revenue streams are sustainable and aligned to our purpose.</p> <ul style="list-style-type: none"> Enhance funding streams. <p>Refine our communications to ensure we are sending the right message, to the right person, at the right time.</p> <ul style="list-style-type: none"> Define a positioning and branding strategy aligned with purpose. Build communication processes, mediums, style and content. <p>Ensure reporting that usefully informs decision making.</p> <ul style="list-style-type: none"> Determine reporting needs at all levels 	<p>Understand who we serve and the value they require.</p> <ul style="list-style-type: none"> Create stakeholder value framework. <p>Align our membership model to our purpose.</p> <ul style="list-style-type: none"> What membership model align with our purpose? Do we need to change? If so, how? <p>Ensure a strong value proposition</p> <ul style="list-style-type: none"> Review our products, services, events, and publications against the stakeholder value framework to determine which offerings to add, eliminate or improve. 	<p>Build strong new member integration processes.</p> <ul style="list-style-type: none"> Welcome call that focuses on quick engagement. Event ambassador program. Drip feed campaign. <p>Establish processes for passive member engagement.</p> <ul style="list-style-type: none"> Set up marketing automation that will promote members to connect to community building initiatives. <p>Run targeted campaigns to engage members.</p> <ul style="list-style-type: none"> Member survey to target inactive members (eg: non-responders or poor feedback). Goal to get inactive members doing 1 thing. <p>Maximise renewal outcomes.</p> <ul style="list-style-type: none"> Double hit early renewals. Phone follow up after lapsed. Implement direct debit Reduce grace period. 	<p>Foster connectiveness and collaboration via a strong online community.</p> <ul style="list-style-type: none"> What type of community are we building (online/offline/hybrid)? What is the purpose of our community? What will “drive” the community? (eg: technology) Who are the influencers we need to engage? What is our plan to build momentum, engage and grow the community? <p>Help members to meaningfully and usefully connect with each other.</p> <ul style="list-style-type: none"> Create pathways for members to connect (eg: running local events) Build specific interest group network. Create program to support the creation and sharing of useful content and resources. Develop pathways that enable members to run collaborative projects and resources. 	<p>Generate leads for new members</p> <ul style="list-style-type: none"> Implement process for generating, qualifying, capturing, and qualifying prospective member leads. <p>Build a relationship with prospective members.</p> <ul style="list-style-type: none"> Launch monthly e-news targeted at non-members. Promote events with a strong pricing differential. <p>Establish processes for passive membership sales</p> <ul style="list-style-type: none"> Create segmented “join” section on website that clearly conveys benefits. Implement recruitment processes around online and offline events. <p>Run targeted campaigns to acquire new members.</p> <ul style="list-style-type: none"> Campaign to past event registrants. Campaign to new people entering the area Campaign to non-renewers from past 5 years. <p>Ensure robust sales processes.</p> <ul style="list-style-type: none"> Ensure we are asking people to join w membership via all appropriate channels.

Moving from planning to action ...

- Make a list of all the tasks and projects (excel is great).
- Break them into small, bite-sized pieces.
- Put them in a logical order they need to be undertaken.
- Ask for assistance with specific tasks (don't be general).
- Set realistic deadlines for tasks.
- Determine a reporting schedule to follow up on tasks and track how you are going against your goals.
- *And most importantly of all ...*

Don't stress!

Not even the largest associations in the world are getting this 100% right (and some not even 50%).

Just keep working towards your purpose with passion and enthusiasm. Accept that mistakes happen and are valuable learning experiences. You will get there.

The background of the slide is a teal color with a repeating pattern of speech bubbles. Each bubble is a different color (yellow, red, purple, and grey) and contains a dark blue question mark. The bubbles are scattered across the entire slide, creating a textured, patterned effect.

Part 3: Q&A

Next week ... A Practical Guide to Ensuring Your Membership Model Delivers Powerful Value.



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