

# Membership Health Check

UIA Workshop

FACILITATOR  
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# Workshop Objectives

- Understand key drivers for growth & retention of membership
- Learn about best practice & methods
- Have tools to develop your own plans
- Future proof your membership

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# Overview

## Rethinking Membership

- The Future of Membership
- Membership Essentials
- The 3 concentric circles

## Membership Essentials

- 7 Steps to Success
  - Recruitment
  - Renewals
  - Retention & Engagement
- Membership Strategy Development

# Introduction - who am I?

Advocate for Associations as pivotal players in development of civil society.

18 years experience working across the breadth and depth of membership, marketing & communications





# The role of associations in creating impact

“

The world doesn't change one person at a time. It changes as networks of relationships form among people who discover they share a common cause and vision of what's possible.

This is good news for those of us intent on changing the world and creating a positive future. Rather than worry about critical mass, our work is to foster critical connections

— Margaret Wheatley

”

# The Future of Membership

- Associations face increasing challenges to our value propositions
- We need to find ways to accentuate and invigorate our engagement with ALL our members and participants
- As impact driven organisations associations need to **develop both our networks and communities**
- Our role moves from traditional membership marketing to **community weavers**



# Strategy Essentials

Know the drivers for your members

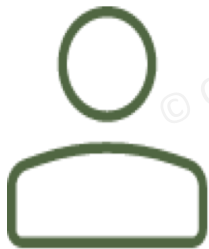
The 3 Circles of Engagement

The Fluidity of member engagement

# Value Proposition

- Paradigm shifts in how we learn, collaborate will impact our membership offerings & services
- Membership drivers will exist on 3 overlapping streams:
  - ❖ Personal Aspirations
  - ❖ Professional Development
  - ❖ Societal Impact

# Membership drivers



**Personal**

**Input**

**New connections  
Knowledge  
Seeking a tribe**



**Professional**

**Outcomes**

**Business development  
Enhanced profile  
Industry Reputation**



**Societal**

**Impact**

**Thought leadership  
Advocacy  
Policy change**



# Networks Vs Communities

## OUR NETWORKS

Accelerate career progression  
Accelerate business development

## OUR COMMUNITIES

Amplify engagement  
Accelerate collaboration  
Enhance impact

Membership Business Models and offerings need to evolve  
to reflect changing concepts of membership

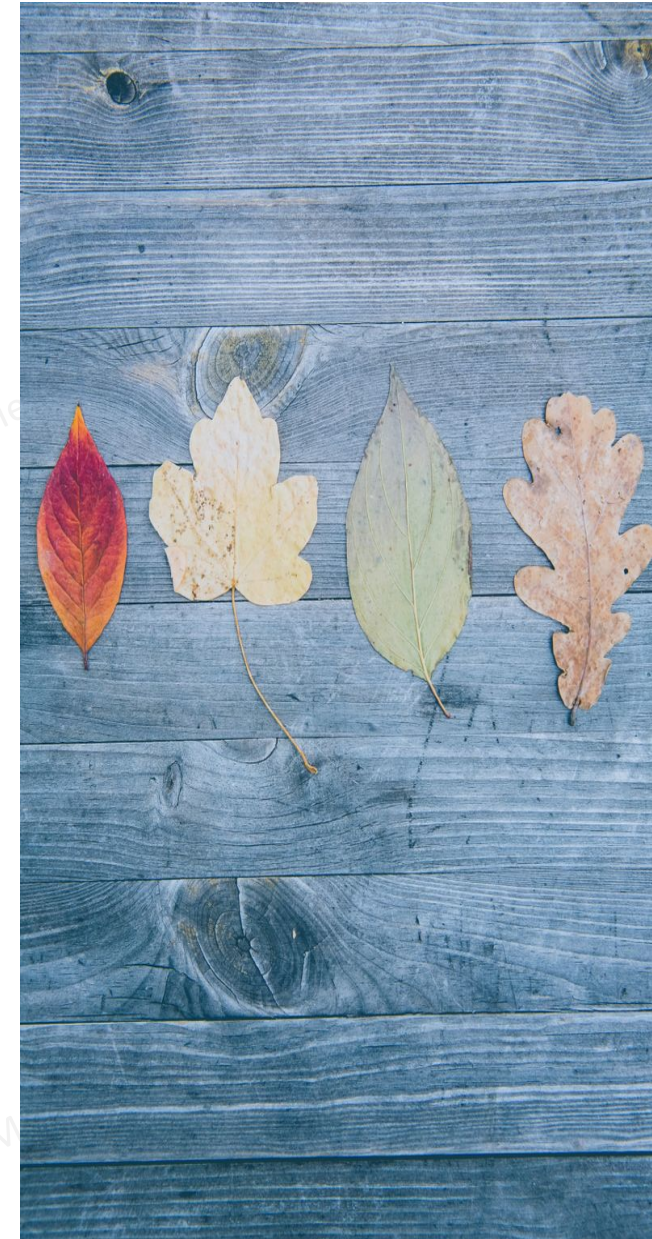


# Differentiate Your Strategy

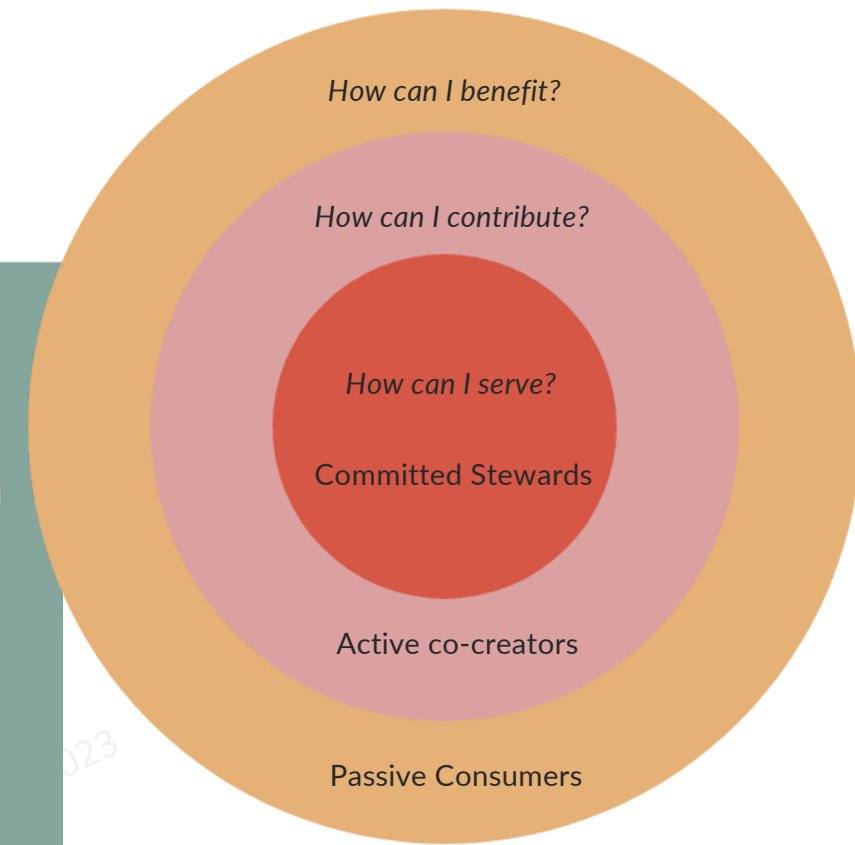
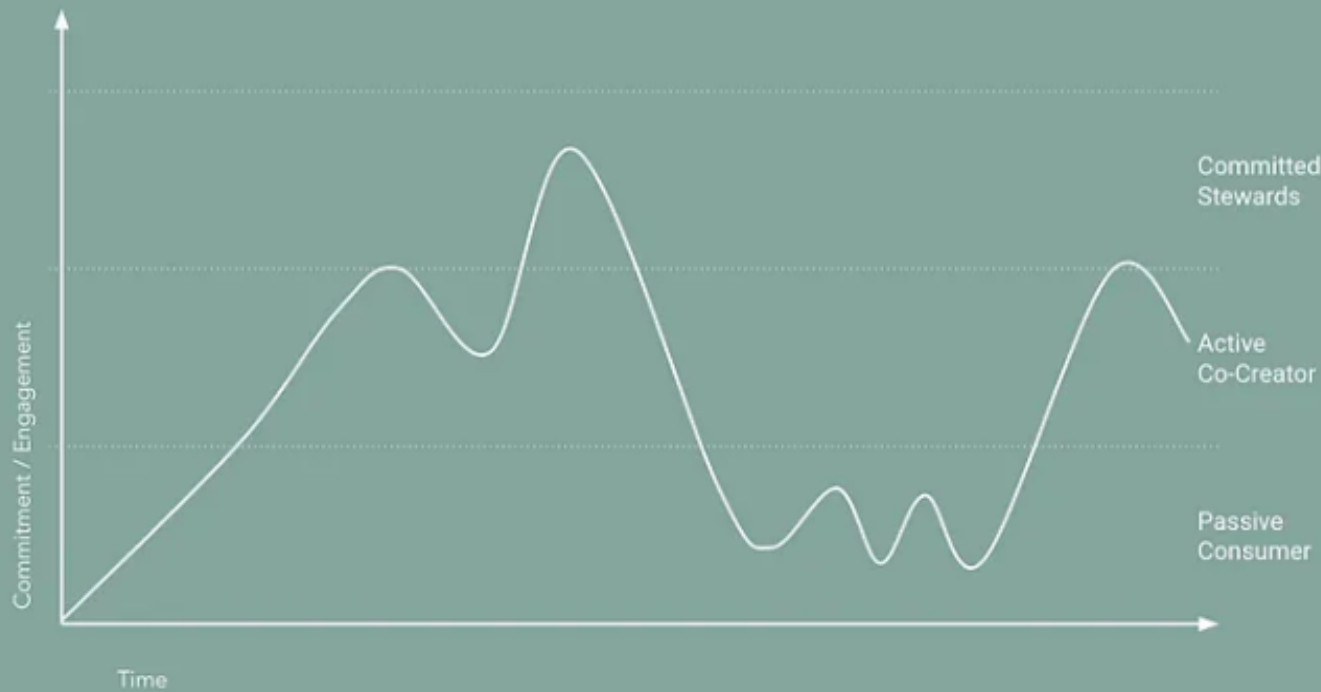
Replace Membership Marketing (member as a customer) with a Membership Development Mindset (member as a citizen)

Shift focus to a **community-oriented relationship-centered model** of membership:

- ❖ Inform members what it means to be citizens of their community
- ❖ Teach them how to navigate the association
- ❖ Leverage the membership community as a member benefit.



# The 3 Circles of Engagement & fluidity of engagement over time





# Membership Essentials

7 Steps to Success

Recruitment

Renewals

Retention & Engagement

# Membership 7 Steps to Success



## IDENTIFY

Who are your potential members?



## INTRODUCE

Develop information with: an introduction to the Association, Benefits, Activities & Programmes (apply the Golden Circle Principle),



## INVITE

Send a personalised invitation to your identified prospective members (phone call, letter, email, in person meeting)



## INDUCT

Induct new members in a meaningful way to ensure accelerated engagement- new members reception, announcement in member newsletter, certificate or card etc



## INFORM & ORIENT

Educate new members about opportunities for them to participate in. New Member Welcome Orientation (reception, phone call etc)



## INVOLVE

Regularly invite your members to participate in activities- working groups, surveys, events, speaking opportunities, leadership roles etc



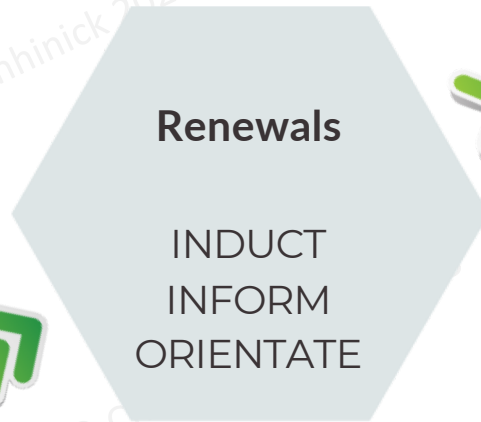
## EDUCATE

Nuture members through continual updates of your Association's activities, successes, developments



# Membership Steps to Success

Membership Value



Membership Over Time



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# Membership Retention & Engagement

Involve  
Educate

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# Why Focus On Engagement?

**Strong engagement will stimulate the health of your membership**

Enhanced loyalty

Reduce Attrition

Identify & nurture future leaders

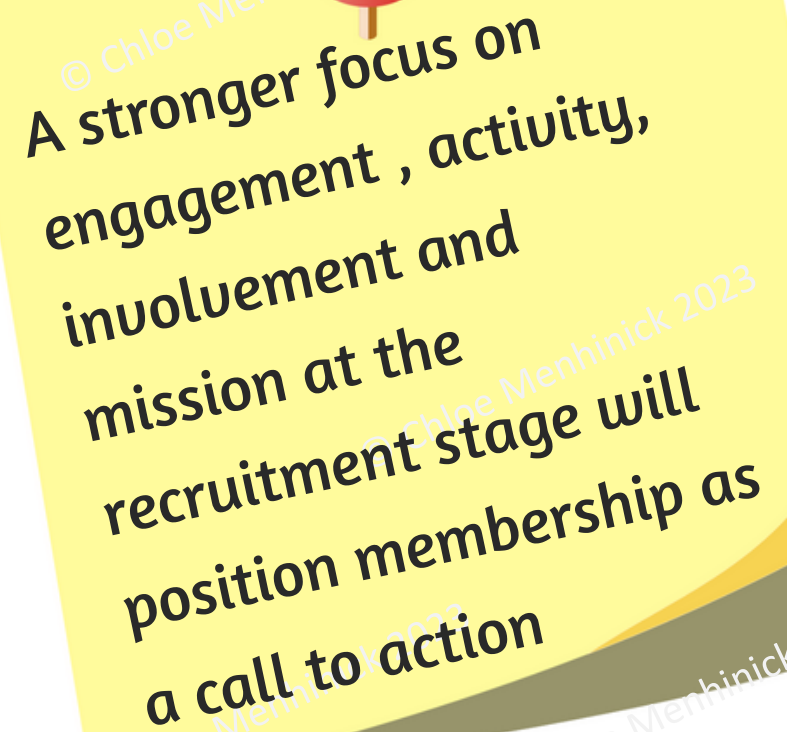
Encourage more activity in programmes

Energise the profession

Identify 'at-risk' supporters

Increase revenue

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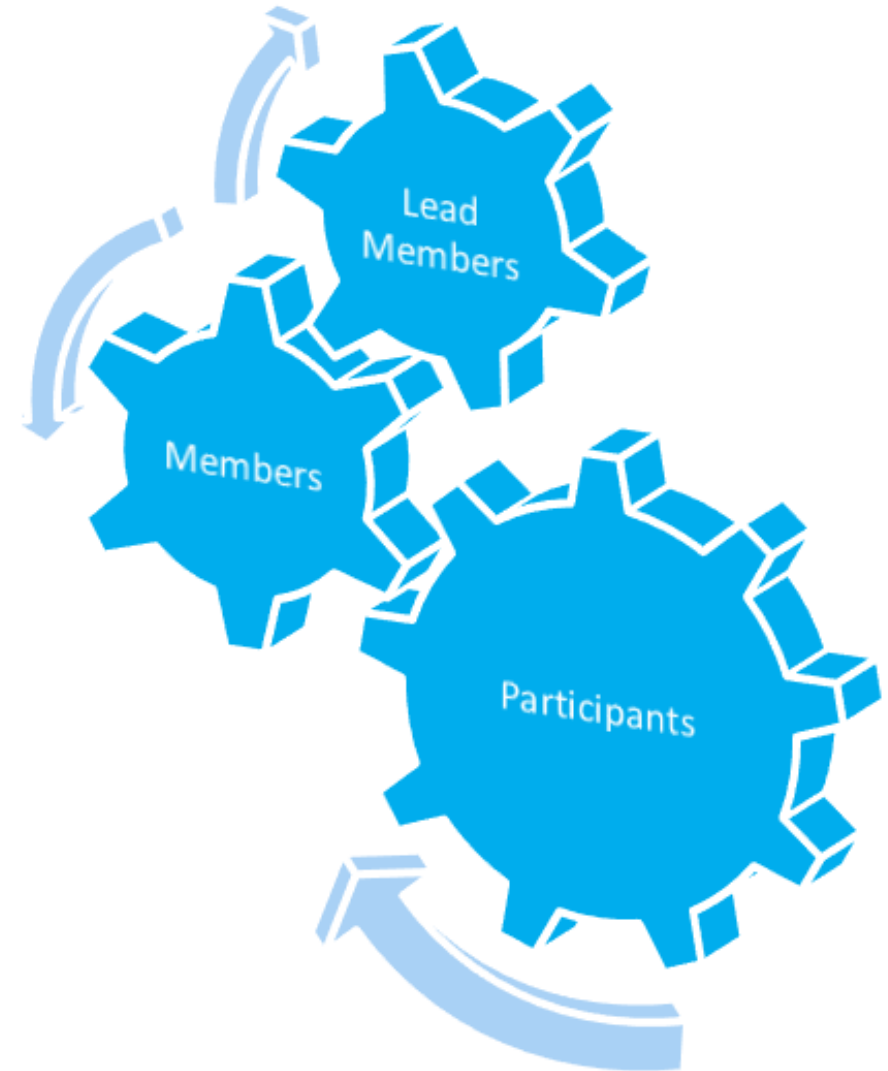


**A stronger focus on engagement, activity, involvement and mission at the recruitment stage will position membership as a call to action**

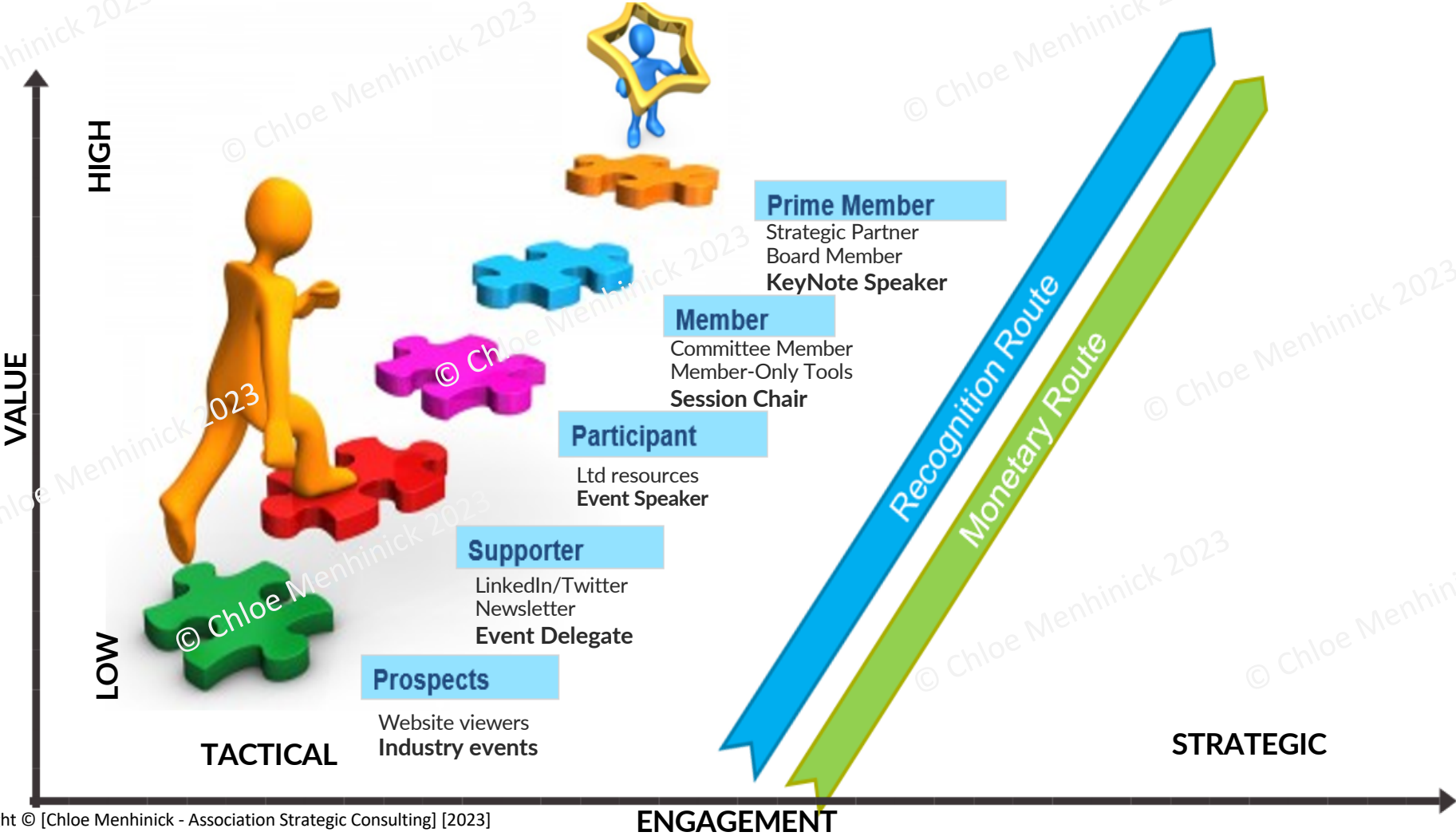
# Membership Engagement Value Continuum

How can you improve engagement across and within  
each dimension of the network?

This should be the overarching objective of your  
association's engagement strategy



# Establish an engagement hierarchy





# How to increase Engagement?

- Use member ambassadors
- Formalise engagement expectations and opportunities
- Recognise members – both in their industry but also for their work for the association
- Use your annual report – showcase impact, recognise members, interactive version

or are more **Structural** changes needed?

*Engage,  
Engage,  
Engage!*



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# Membership Recruitment & Acquisition

Identify  
Introduce  
Invite

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# Membership Recruitment & Acquisition

## 1. Look in your own back yard

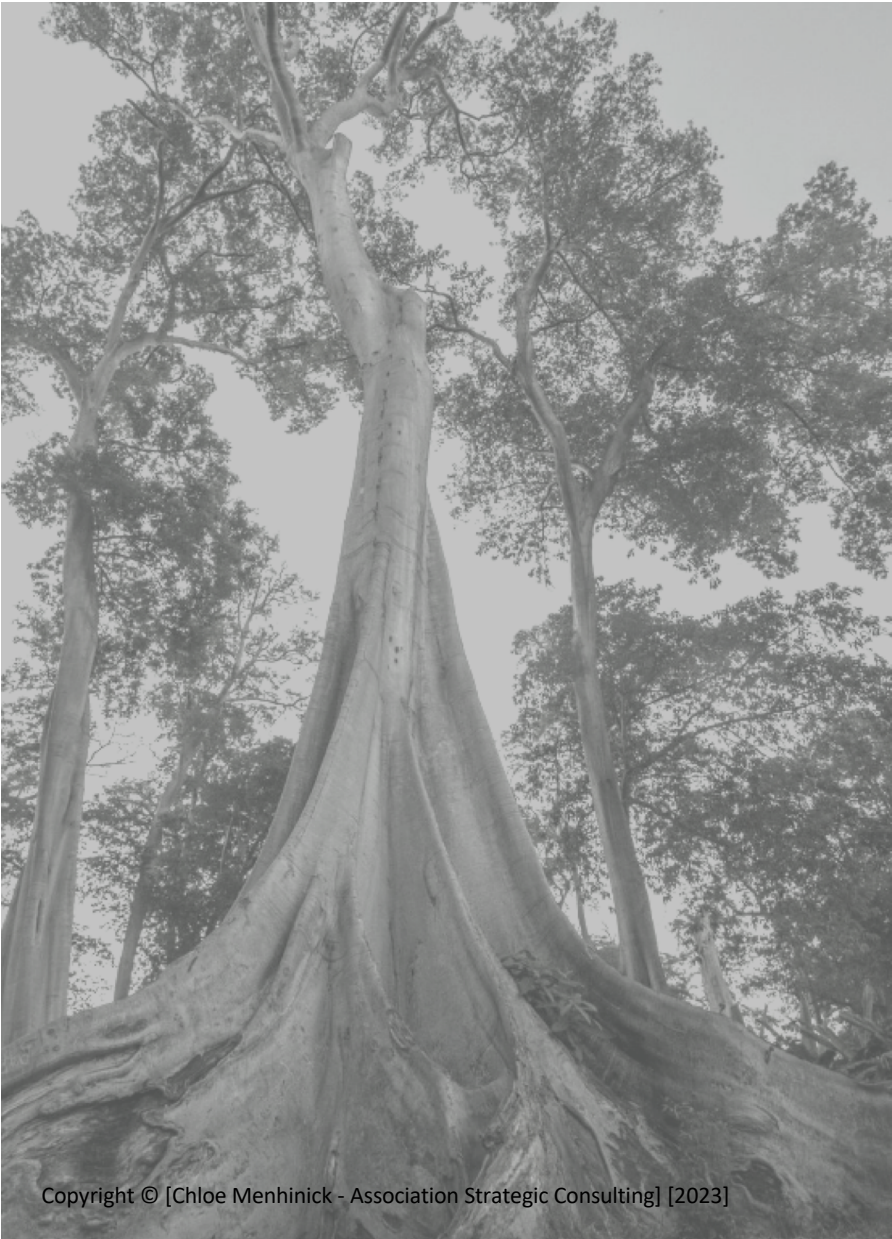
- Create a target list of your VIP target prospects – create a recruitment campaign to drive efforts
- Member Referrals- cultivate organic growth- through passion & commitment of existing members who spread that passion within their own circles
- Participants (events, magazine subscribers, social media followers etc)

## 2. Work on your messaging

- They want to know, “why join...now?”  
Answer them
- What makes your offering unique? What will they get out of joining?  
Personal, Professional, Societal

## 3. Create an association in a box

## 4. Frequently review the path to join



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# Membership Renewals

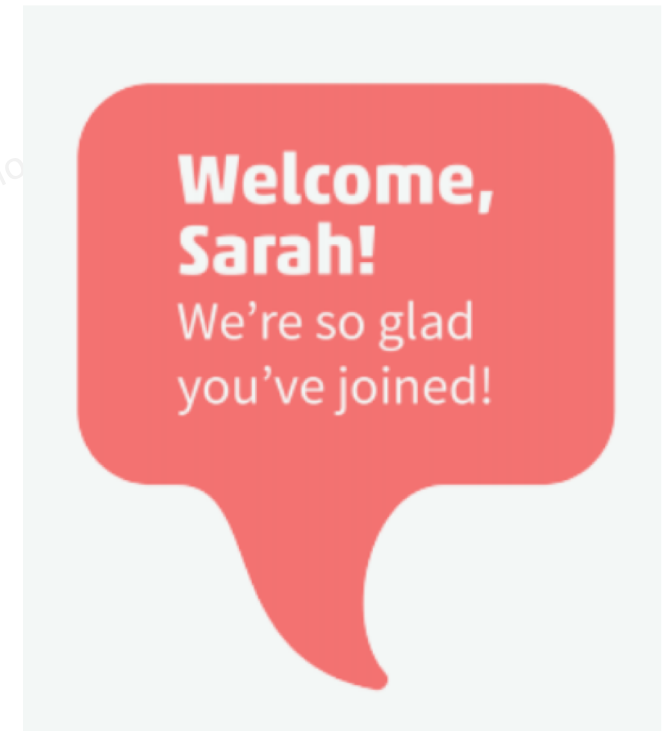
Induct  
Inform  
Orientate

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# From Urgh!! Renewals! to Ah! Renewals!

- Consider your renewal process as part of a continuum not just a once-a-year-task.
- First Impressions count
- Start Early
- Don't just send an invoice!
- Remind them of all they have benefited from in the past 12 months and give them a taste of whats to come
- Differentiate your renewal messages
- Optimise all your communication channels
- Make it as easy as possible to renew and give options
- Show your appreciation

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# Membership Renewals

**Avoid a one-size fits all approach**

Define your goals

Increase 1st year renewal rate

Increase multi year renewal rates

Increase number of YPs

Increase early renewals

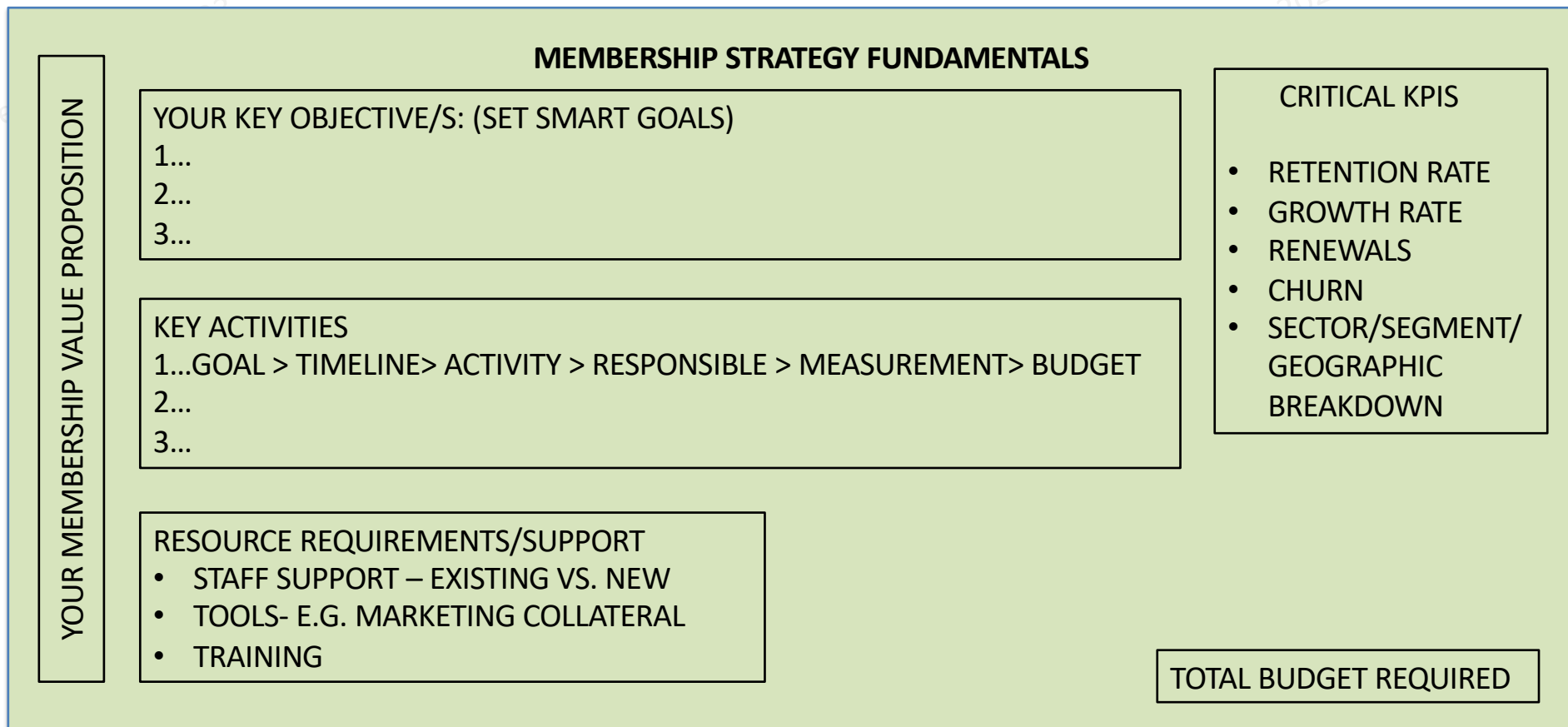
Improve CS ratings

Decrease time to complete renewal/ Ease renewal procedure

Increase % of cross-sells e.g. publications



# Developing your membership strategies



# Key Takeaways

## Recruitment

- Review your current marketing tactics and messaging. What makes your offering unique?
- What weakens your value proposition?
- Review your path to join

## Retention

- Consider your entire renewals process end-to-end.
- Are you delivering on your value proposition?

## Engagement

- Unequal participation is natural
- People's participation will continue to change over time
- Focus on those who want to engage, not trying to persuade people to show up.
- We can make these different levels of engagement explicit and let people choose the right role for themselves.
- Establish an engagement matrix for your association- are you offering enough opportunities for members to deepen their connections with each other and with the association?

# Thank you for participating!

For keynotes, internal workshops, staff training,  
strategic planning process support & guidance:

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