Membership Health Check

UIA Workshop

FACILITATOR
CHLOE MENHINICK
Strategy Consultant-Associations
24 November 2023
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

Copyright © [Chloe Menhinick - Association Strategic Consulting] [2023]
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 breath and depth of membership, marketing & communications
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

<table>
<thead>
<tr>
<th>OUR NETWORKS</th>
<th>OUR COMMUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accelerate career progression</td>
<td>Amplify engagement</td>
</tr>
<tr>
<td>Accelerate business development</td>
<td>Accelerate collaboration</td>
</tr>
<tr>
<td></td>
<td>Enhance impact</td>
</tr>
</tbody>
</table>

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

Copyright © [Chloe Menhinick - Association Strategic Consulting] [2023]
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

How can I benefit?

How can I serve?

How can I contribute?

Committed Stewards

Active co-creators

Passive Consumers

Ref: Michael Bachmann & Fabian Pfortmüller
Copyright © [Chloe Menhinick - Association Strategic Consulting] [2023]
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.

Copyright © [Chloe Menhinick - Association Strategic Consulting] [2023]
Membership Steps to Success

Recruitment
- IDENTIFY
- INTRODUCE
- INVITE

Renewals
- INDUCT
- INFORM
- ORIENTATE

Retention & Engagement
- INVOLVE
- EDUCATE

Membership Over Time

Membership Value
Membership Retention & Engagement

Involve
Educate
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

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

- **Prime Member**: Strategic Partner, Board Member, KeyNote Speaker
- **Member**: Committee Member, Member-Only Tools, Session Chair
- **Supporter**: LinkedIn/Twitter, Newsletter, Event Speaker
- **Participant**: Ltd resources, Event Delegate
- **Prospects**: Website viewers, Industry events

**ENGAGEMENT VALUE**

- **LOW**
- **HIGH**

**TACTICAL**

**STRATEGIC**

**Copyright © [Chloe Menhinick - Association Strategic Consulting] [2023]**
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?
Membership
Recruitment &
Acquisition

Identify
Introduce
Invite
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
Membership Renewals

Induct
Inform
Orientate
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 what's 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
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

MEMBERSHIP STRATEGY FUNDAMENTALS

YOUR KEY OBJECTIVE/S: (SET SMART GOALS)
1...
2...
3...

CRITICAL KPIS
- RETENTION RATE
- GROWTH RATE
- RENEWALS
- CHURN
- SECTOR/SEGMENT/ GEOGRAPHIC BREAKDOWN

YOUR MEMBERSHIP VALUE PROPOSITION

KEY ACTIVITIES
1...GOAL > TIMELINE> ACTIVITY > RESPONSIBLE > MEASUREMENT> BUDGET
2...
3...

RESOURCE REQUIREMENTS/SUPPORT
- STAFF SUPPORT – EXISTING VS. NEW
- TOOLS- E.G. MARKETING COLLATERAL
- TRAINING

TOTAL BUDGET REQUIRED

Copyright © [Chloe Menhinick - Association Strategic Consulting] [2023]
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:

Contact me:
Chloe Menhinick
+31628729479
Chloe.Menhinick@gmail.com
https://www.linkedin.com/in/chloemenhinick/