



The Ultimate Guide to Membership Management

Managing your organization is no easy feat.



First, you have to recruit new members. Then you have to engage them. Then you have to convince them to renew — year after year after year after year. The cycle is exhausting.

And that's not even getting into what it takes to keep your organization running. Oy vey!

We understand the challenges associated with managing an organization. So to help you out, we've put together this Ultimate Guide to Membership Management. In it, we'll cover best practices for online member acquisition, new member onboarding, membership engagement, non-dues revenue, and membership renewals and retention.

Ready? Let's dive in!

Member acquisition

Membership management all starts with member acquisition. But where do you even begin with that? Well, many organizations rely on events and the personal connections of their members.

But while both of those tactics are important, with recent shifts in technology, many organizations can now recruit more members online. Here's how:

1

Define your audience

If you're looking to recruit more members online, you first need to attract the right kinds of people — people who would actually have some interest in joining your association. These “types” of people are what we like to refer to as member personas.

Member personas are semi-fictional representations of your ideal members based on market research and real data about your existing members. They represent the goals, challenges, and pain points of your different member types. More importantly, member personas are the KEY to online member acquisition. If you know what your personas are

trying to achieve, you can create content that will attract them to your organization's website and, ultimately, showcase your association's true value.

In order to create accurate member personas, you need to start by talking to as many existing members as you can. Ask them questions about their occupation, family, career, etc. Find out what a typical day in their life looks like, as well as why they joined your organization. Remember, the point here is not to guess; it's to get an accurate understanding of who your members really are. Once you have that information, be sure to then format it into a generalized profile that you can reference over time.

2

Create good content

Once you have your personas built out, you then need to attract them to your organization's website. The best way to do this is by creating compelling content. To save yourself time, start by creating one big content piece, such as a white paper or an eBook.

Then use that content piece to create several smaller pieces, such as a series of blog posts, videos, or infographics. The more content you have, the better. After all, this is what's going to attract people to your organization's website.

3

Collect information

Now don't worry, you don't have to give away all of your good content for free. (Insert sigh of relief here.) Rather, what you should do is put that content behind a form and have people fill out that form before they can access it.

Your forms don't have to be anything long — and in fact, they shouldn't be. They can be as simple as asking for someone's name and email address. But the real benefit here is this: Once you have their name and email address, you can then follow up with them periodically. (More on this later.)



4 Master the right platforms (and share, share, share!)

Once you have your content built out, it's important to share it. You can do this via your organization's website and social media platforms. Now you don't have to be on every social media site possible, but do focus on two or three that really make sense for your organization. (Facebook, Twitter, and LinkedIn are typically the most popular.)

5 Stay in contact with your prospects

We touched a little on this earlier, but it's worth going into a little more detail here. Once you have someone's name and email address (after they've filled out a form), you then need to stay in touch with them. After all, someone may be interested in your organization, but may not be ready to join just yet. When that happens, try sending them a series of well-crafted emails. Send them a few valuable content pieces or invite them to an upcoming event. Who knows, this may be the trigger that gets them to join your organization.



New member onboarding

Onboarding new members is an essential, yet often overlooked, part of the association management process. The likelihood that a new member will engage with your organization — and thus, remain a member of your organization — drops significantly over time. That's why it's so important to engage with them upfront.

If your organization lacks an official new member onboarding process, check out these quick tips for successfully onboarding new members:

1

Send out a warm welcome message

While this step might seem obvious, you'd be surprised at how many associations get it wrong. Don't just send new members a standard email welcoming them to your organization. Personalize it. Or better yet, have someone give them a call. New members like to be acknowledged, and they'll appreciate the extra effort.

2

Create content that caters to newcomers

Sure, members join your association because they believe in your mission. But that doesn't mean they're familiar with all of the resources you have to offer. Put together some collateral pieces specifically for new members. These can be brochures, fact sheets, infographics, or even blog posts. No matter what they are, just make sure they're informative, and more importantly, valuable.

3

Create a new member community

Creating a social community page exclusively for new members is a great way to get newcomers involved in your organization. Not only that, but social communities allow new members to get to know each other. And the more friends a member has in your organization, the more likely they are to stay.

4

Utilize brand ambassadors

Every organization has brand ambassadors. These are the members that know your organization better than anyone else. They're your champions. So why not utilize these champions to inspire new members?

Sounds great, you're thinking. But how? Well, make sure you have brand ambassadors present at every meeting and event. You want your new members to see just how involved other members are, not to mention, passionate about your cause.

It's also not a bad idea to consider putting together a new member mentoring program. By pairing your brand ambassadors with your organization's new members, your new members will see other people's enthusiasm and be more likely to get involved.

5

Check in

Don't just welcome new members and send them on their way. Check in with them periodically to make sure everything is ok. For example, two or three months after welcoming a new member, send them an email asking for feedback on your organization. That way, if they have any problems, you can fix them upfront rather than losing that member.

Membership engagement

Yay! You have new members on board and active! Now the question is, how do you keep them on board and active? Well it all goes back to membership engagement.

There are multiple ways to engage your organization's members. In fact, here's a full breakdown of membership engagement tactics:

1 **Membership websites**

Your website is the mothership of online member engagement. This is where members go for information, event registration, and ultimately, membership value. But it takes more than just having a website to encourage member engagement. A little extra TLC is needed. Specifically:

- **An interactive design**
- **Fresh content**
- **Built-in forms**





An interactive design

Your website should be easily searchable with clean lines of information. And with more and more people accessing the Internet via tablets and mobile devices, it's imperative to utilize responsive templates that are favorable to both desktop and mobile users.



Fresh content

The primary goal for any membership website is to get members to the site and keep them coming back for more. This means offering fresh, up-to-date content that your members will find valuable. Not sure where to begin? Try incorporating a blog on your site or adding an image gallery to keep pages active.



Built-in forms

Using forms throughout your website is a great way to collect important information about your members. For example, if you have valuable content on your site, such as fact sheets or white papers, you can require visitors to answer a few pre-determined questions (such as name, job title, email address, etc.) in order to receive those materials. If you don't have much content to offer, consider posting a survey on your site to collect similar information. The more information you have, the more you can tailor your website to your members' wants and needs.

2

Email marketing

If done right, email marketing can be your secret weapon to successful online member engagement. But in order for your emails to be effective, you need to...



Create a compelling subject line

When creating a subject line, think of it like a headline on a newspaper. It should be relevant, interesting, and accurate without being too over the top. After all, you don't want your email coming across as spam. You may even want to include your organization's name to make it easily identifiable.

Personalize your message

Without personalization, your email may come across as junk mail. Now before you panic and think this has to be done manually, consider this: An association management system can integrate with your organization's database, allowing you to pull any of the member data you're tracking into a clean and personalized email. (Yup, it really is that easy!)

Provide a call-to-action

You can't expect your members to do something if you never ask. That's why calls-to-action are so important. CTAs are words or phrases that try to provoke an immediate response, such as "click here" or "call today." To make your CTAs stand out, try making them bigger, using a different color, or outlining them with extra white space.

Stay in compliance

If you live in the United States, your emails must be CAN-SPAM compliant. The CAN-SPAM Act is a federal law that sets the rules for commercial email and spells out tough penalties for violations. As a best practice, you should ask your AMS or email provider if their system generates CAN-SPAM compliant emails. For a list of CAN-SPAM requirements, please visit the **Federal Trade Commission's website.**

3

Social media

Ah yes, social media. Another great way to generate online member engagement. Now as we mentioned earlier, you don't have to be on every social media site possible, but do focus on two or three that really make sense for your organization. Facebook, Twitter, and LinkedIn are typically the most popular.

If you decide to start with those three platforms, check out these tips and best practices:



Facebook

- Facebook is very conversational in nature, so keep the tone of your posts casual and relaxed.
- You're not limited by characters here, so feel free to make your posts a little longer. (One to three sentences is good.)
- Photos are great, but don't worry too much about hashtags. They were added to Facebook a while back but are rarely used.



Twitter

- You're limited to 140 characters here, so keep your tweets short and concise. (Pro-tip: If you have any interesting statistics on hand, tweet them! Stats typically get the most retweets.)
- Include an image or video to make your tweets stand out. (Tweets with images are 35 percent more likely to get retweeted than those with text only. Similarly, tweets with videos get a 28 percent boost.)
- Unlike Facebook, Twitter hashtags are very valuable because they expose your organization to an even larger audience. That being said, be sure to include a well-chosen, industry-related hashtag in your posts.



LinkedIn

- LinkedIn is more professional in nature, so keep the tone of your posts professional as well. (It's really not the place for humor.)
- Respond to any and all posts and questions. People are looking at you for professional advice and assistance, so always keep an eye on your organization's page.
- LinkedIn is a place for industry experts to gather, so share industry-related content and encourage online discussion.

4 Social communities

Social communities are another great way to encourage membership engagement. It's important to note that social communities do not try to compete with traditional social media like Facebook and Twitter, but rather they often offer a members-only forum for discussions, pictures, and sharing.

Some common components of social communities include:

Member profiles

Just like traditional social media, social communities allow members to create personalized profiles with pictures and bios.

Messaging capabilities

In the spirit of networking, social communities typically allow for one-on-one messaging between members.

Online forums

Think of online forums as a members-only discussion page. Again, these allow for members to easily communicate and share information with each other.

User-created circles

Circles are the shining star of social communities. They allow for members to quickly and easily share pictures and information related to a particular topic.

In order to get your social community up and running, consider selecting a few people from within your organization to act as Engagement Ambassadors. These individuals should post several times per day within your social community and seed various questions to get members talking. Using Engagement Ambassadors to populate your social community will create a lively vibe to entice hesitant members.

5

Events

Last but not least, there are events. Events are another great way to engage your organization's membership.

Now don't let the fear of planning an event hold you back. If you're interested in hosting an event, check out these simple steps to event planning success:

Step 1

Assemble a team

You know what they say, teamwork makes the dream work, and that's particularly true of event planning. To prep for your next big event, start by assembling a committee and/or team of volunteers.

Step 2

Determine a budget

When putting together a budget, there are several factors to consider. For example:

- **Venue:** This goes beyond just a meeting space and hotel room blocks. It includes insurance, permits, parking, staff, etc. — basically anything that's needed to utilize a certain location.
- **Food and drinks:** This includes snacks, meals, catering assistance, and so on.
- **Speakers and entertainment:** Think equipment rentals, microphones, A/V hookups, etc.
- **Publicity and promotions:** Some promo items, such as signage and printed programs, cost extra. Be mindful of that when preparing your budget.

Step 3

Select a venue and date

When it comes to selecting a venue, you'll want to pick a location that's local, convenient, and within your budget. Consider locations you've used before as well as locations used by others. And don't be afraid to think outside the box! Wouldn't you rather attend a meeting in a fun venue or city?

Now let's talk time. In general, it's best to give yourself about four to six months of planning time. This, of course, varies by event, but give yourself a little wiggle room in case anything goes astray.

Step 4

Promote, promote, promote!

Even with the best speaker or entertainment line-up, you still need publicity to get people in the door. Consider promoting your event by:

- Featuring it in your organization's newsletter
- Sending out email blasts to your membership database
- Posting it on your website's event calendar
- Promoting it on social media



Non-dues revenue

Ok, we've talked about online member acquisition, new member onboarding, and membership engagement. Now let's talk about non-dues revenue.

Every association knows the importance of generating non-dues revenue. But knowing doesn't make coming up with ideas any easier.

We understand your hands are full. So to help you out, here are a few ideas for raising extra funds:

1 Education

Educational programs come in many forms — webinars, user groups, workshops, etc. — and can be a great source of non-dues revenue for your association. With the job market becoming increasingly competitive, members want to ensure they have the latest knowledge combined with the best credentials after their name. Generally, members don't mind paying a small fee for these types of programs as long as there's some level of educational value associated with them.

2 Live events

Association-hosted events are the ultimate win-win — members can network and receive value while associations can generate revenue on the back-end. Events can be anything from auctions and galas to conferences and lunch and learns. They don't have to be anything fancy, but they do need to provide members with value. That being said, be sure to give your events some thought before executing.

3

Advertising

You put a lot of time and energy into your organization's collateral — your website, your newsletter, your new member packets, etc. — so why not leverage those pieces to generate additional revenue?

That sounds great, you're probably thinking. But how? Well, consider a little advertising!

To capitalize on the full potential of advertising, try some of the following techniques:

- Utilize online banner ads on your organization's website
- Offer ad space in your organization's newsletter
- Allow flyers to be placed in your new member packets
- Offer ad space on your organization's mobile app (if you have one)
- Sell Buyer's Guide Advertising, both print and online

4

Sponsorships

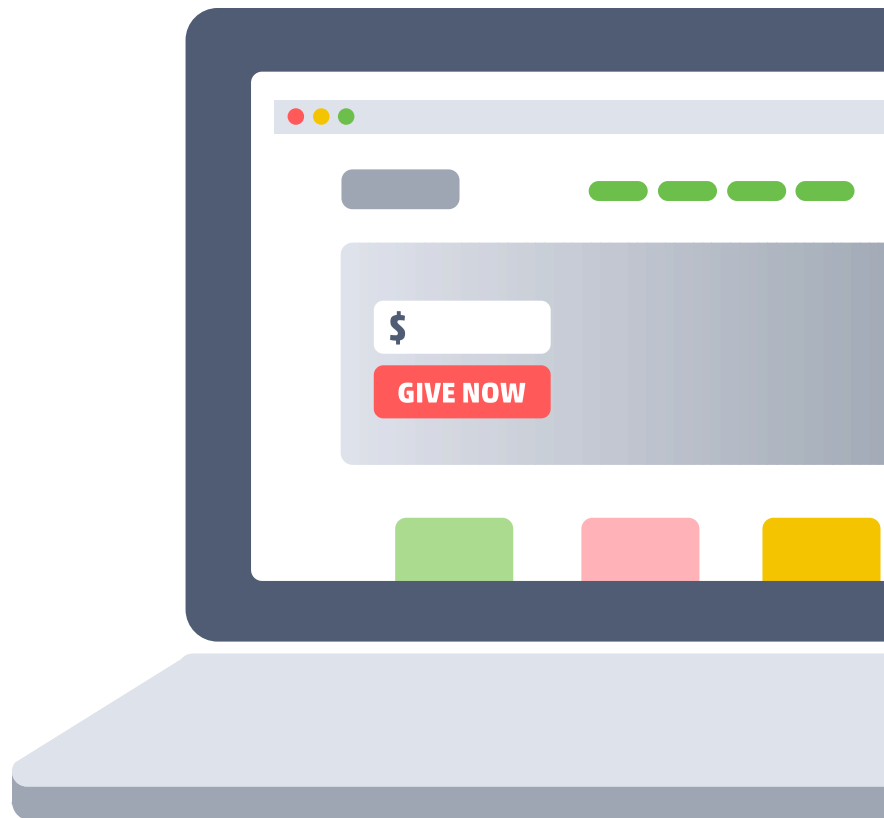
Another great way to generate non-dues revenue is by asking companies within your industry if they'd be willing to sponsor your organization or event. Associations, like your own, provide industries with value, so many companies are willing to form a partnership.

To generate interest in a corporate sponsorship, why not:

- Put together a comprehensive sponsorship package
- Provide a list of sponsor benefits
- Post information on your association's website
- Ask members to assist with recruiting

5 Donations

If your organization has any kind of charitable component, donations can be a great source of non-dues revenue. If you have a donation page on your website, be sure to include several calls-to-action throughout your site to guide people directly to that page. It's also not a bad idea to add a donation section to your organization's sign-up forms. For example, when a member signs up for an event, give them an opportunity to donate as well. They might be more inclined to donate if they're already making one transaction.



Membership renewals and retention

As an association professional, you put your heart and soul into recruiting new members — and for good reason. Memberships are the lifeblood of your organization. So when a member decides not to renew, it can be heartbreaking for your association, and not to mention, a bit of a setback.

If your organization is struggling with membership renewals, let us help. Check out these tips for boosting membership renewal rates:

1

Emphasize value

Members renew based on the perceived value of your organization. Keep in mind, however, that value isn't a "one size fits all" type of offering. What one member finds valuable might be meaningless to another.

If you're at a loss for ideas, consider offering members-only content on your association's website. It's a great way to encourage prospective members to sign up, and more importantly, convince current members to renew. You can also provide value by offering exclusive networking opportunities or tackling legislative issues that are important to your members.

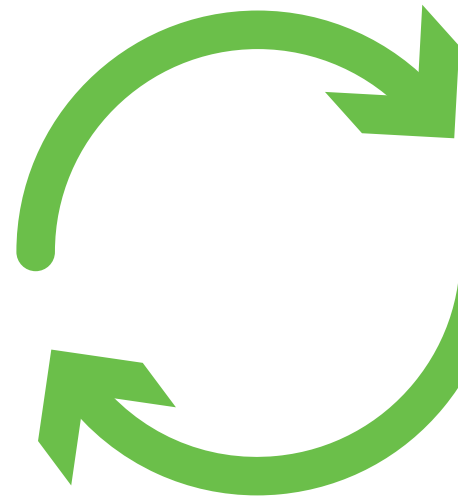
2 **Begin your renewal efforts early**

Put simply, the sooner you begin your renewal efforts, the better. If possible, shoot for at least three months prior to expiration. According to Marketing General Incorporated's (MGI) **2015 Membership Marketing Benchmark Report**, associations that start their renewal efforts three or more months prior to expiration are significantly more likely to have an 80 percent or higher renewal rate. That alone is reason enough to start your renewal efforts early.

If you're unsure about what types of efforts to employ, consider this: According to that same MGI report, email marketing is one of the most effective channels for generating membership renewals. So if you're looking to boost your membership renewal rates (and who isn't?), consider launching an email marketing campaign a few months prior to membership expiration.

3 **Make renewals easy**

The more complicated your renewal process, the less likely members are to complete it. If you're using paper form renewals, provide members with a pre-addressed envelope to simplify the return process. However, if you're looking for an easier way to manage membership renewals, consider utilizing an association management system. An AMS will pre-populate online renewal fields with information from the year before, making it easier for members to complete all of the forms they need. Some association management systems will even skip the forms altogether and generate member invoices automatically.



4 Offer a grace period

Members don't pay dues for a variety of reasons, but sometimes it's because they're just plain busy. So before you deny them their benefits altogether, consider offering a grace period of some sort. According to MGI's 2015 Marketing Benchmark Report, the most common grace period for associations is two to three months. This time frame is a fairly good balance between trying to bring back lapsed members and ensuring paying members aren't being short-changed.

In order for grace periods to be effective, it's important to remain in contact with your lapsed members. Consider using an AMS to send out automated emails reminding your members that they need to renew. An even better practice, however, is to be proactive with your communication efforts. Try creating customized messages for your members and displaying them on their profiles and throughout their online communities. That way, whenever users interact with your site, they'll be reminded that they need to renew.

5 Review analytics

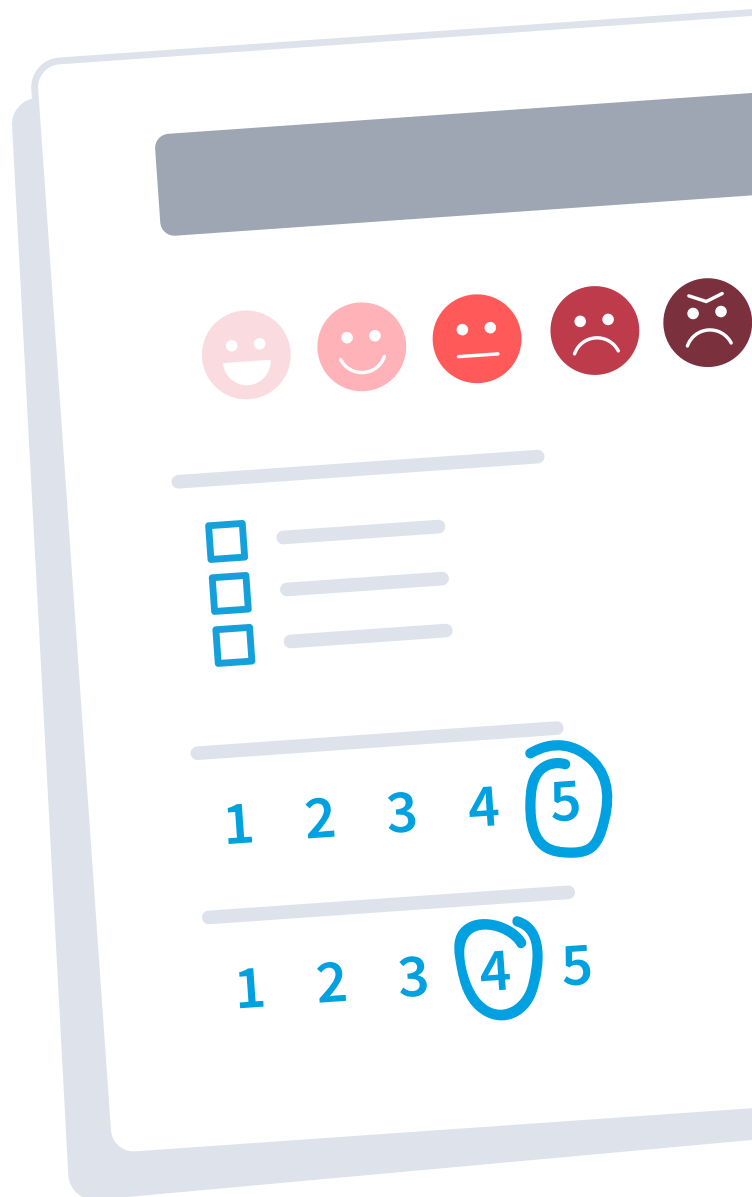
One of the best ways to ensure member retention is to continue doing what already works. Are people coming to your association's website? Are any of your web pages generating more renewals than others? If so, consider why that might be. Maybe it's the content on those pages or a particular call-to-action. Whatever it is, consider duplicating it on other pages to maximize membership renewals.

In addition to your website, pay close attention to other analytics as well. For example, are people opening your emails? Are they even receiving your emails? Asking members to renew via email is pointless if they aren't getting your emails to begin with. It's these types of insights can be invaluable for your association.



6 Survey former members

Despite even the best renewal strategies, there will always be members that choose not to renew. When a member decides to leave your organization, send them a short survey to find out why they left, what offerings they liked, and what areas of your organization could be improved upon. Take time to read through these responses and then use them to better your organization's offerings and retention rates over time.



Ok, now that was a LOT of information covered. But that's because membership management is complex. You've got membership recruitment, new member onboarding, membership engagement, non-dues revenue, and last but certainly not least, membership renewals and retention to worry about.

That's a lot to keep track of! Now as we mentioned, an association management system can help you with all of these tasks.

Not sure where to begin when it comes to software evaluation?

Check out our free **Buyer's Guide to Selecting the Right AMS** for your association here!



◀ **Click here to check it out!**

More about MemberClicks

MemberClicks offers all the tools that membership organizations need to make the most of the web. From online databases and event registrations to custom-designed websites and member communities, our products are tailor-made for small-staff organizations.

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