



# Member Engagement Toolkit 2020



**C J ASSOCIATION MANAGEMENT**



## Who we are

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CJAM is an established association management company, comprising over a decade's experience managing associations across the UK and Europe.

Our team have worked together to create this Member Engagement Toolkit to help membership organisations and associations take a proactive and practical approach to improving and measuring their membership offering.

## What is the purpose of the toolkit?

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The toolkit outlines the various strategies required and scenarios faced by associations in today's competitive and dynamic marketplace. The toolkit seeks to implement and advise on methods and strategies that transcend industry verticals, addressing the specialist and refined needs of the membership sector.

It provides insight and specialist knowledge across multiple areas including marketing, administration, communications and finance to establish core principles of ensuring your membership engagement strategy is robust. Building on our experience of working with many membership organisations we have combined research and theory with established methods that we have put into practice to devise a clear and measurable means of assessing and developing your membership engagement protocols and strategies.

# The 7-Step Membership Engagement Plan

## STEP 3

Conduct a Member Engagement Review and map out Key Membership Journeys

## STEP 5

Ensure regular and proactive review of your Member Engagement Plan

## STEP 7

Ensure member engagement feedback/ measurement takes place regularly

## STEP 1

Compile your Definition and appoint a Member Engagement Champion

## STEP 2

Consider if your Member Value Proposition is fit for the future

## STEP 4

Create a Member Engagement Plan

## STEP 6

Consider a personalised/ contextualised approach

## Definition of engagement and **WHY** it's important

What is member engagement? Aside from a term that is used A LOT in membership sector communications (and with good reason) member engagement is how we refer to the transactions, interactions and experiences organisations provide their members. It extends to account for how they respond, react and are enabled by the activities and resources provided, and how their responses formulate the association's plans for development and growth within a given sector.

Simply put, member engagement is the on-going interaction between a member and organization in exchange for meaningful value.

Member engagement is about building relationships with your members, adding value to their lives and capturing their attention just often enough to remind them of the role you play in it so there's never a doubt.

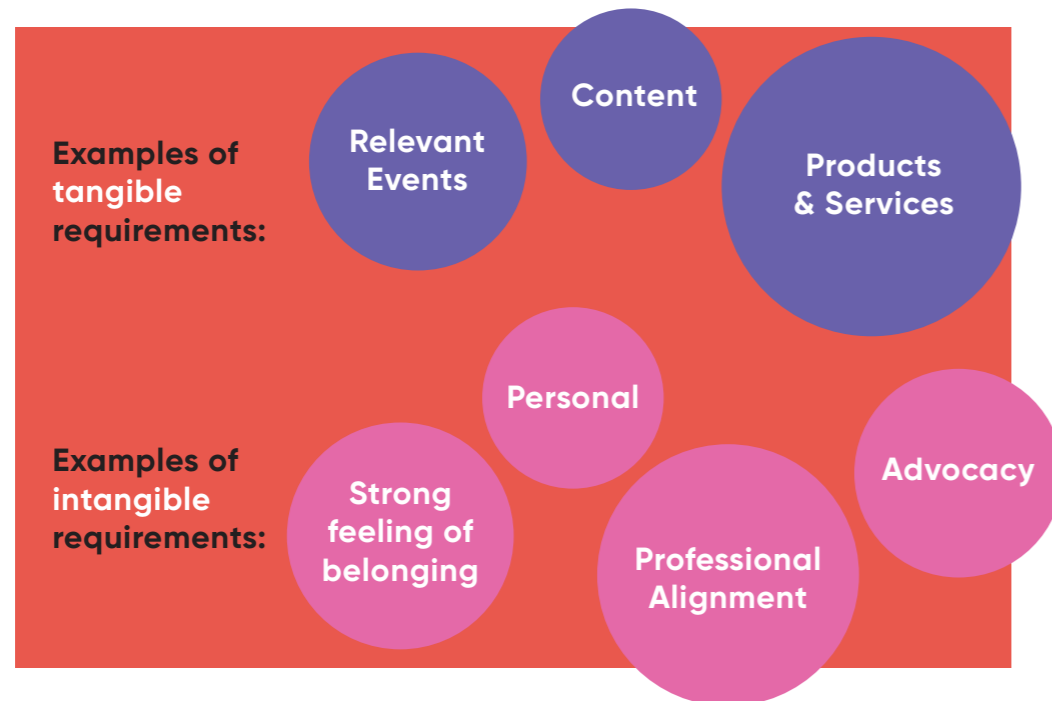
Needless to say - member engagement goes beyond staff or customer engagement due to the level of expectation and value required to keep transactions worthwhile and meaningful.

# How do we **measure** member engagement?

The required elements to drive increased membership engagement come in both tangible forms and intangible forms.

The tangible are those processes and offerings that visibly and materially increase membership value by bringing new resources to the table.

Intangible requirements stem from the overarching effect of improving and tailoring the membership offering to increase engagement over time.



Member engagement can best be measured by determining and identifying **Positive Member Output**:

Improvement in member engagement **+** A positive output\* **=** **Positive Member Output**

\*For either the member or the organisation

The higher the rate of positive member output, the more successful your member engagement strategy is likely to be.





# The membership journey

Engaging with your members at every stage of their journey with your association is the best way to ensure longstanding relationships and membership retention, the life-blood of successful associations. The needs of your members will change according to their professional experiences, working environment and lifestyle. Needless to say, your fledgling members, younger members or student members will have very different pain points and requirements from your retired, invested or committee members.

## Learn from your longstanding members

Map the journeys of your longstanding members understanding their member persona and member path. Examine and understand their personal data. Which events do they like to attend? What workshops have they signed-up for? Have they joined committees? This enables you to see their engagement over time, its peaks and troughs, and therefore understand what encourages their renewals and engagement.

Where possible, use this information to personalise their experience with your association. To do this you need to make sure that every piece of communication that is sent out contains information or resources that are valuable to each individual that receives it. You may also need to adapt the channels and platforms that you use to reach out to your members in accordance with where they are in their membership journey.

Whilst your values and mission statement need to remain consistent, your offering and how you provide it will need to adapt in accordance with every stage of your membership journey. For them to continue to invest in your association, you need to invest in them at every stage.

## Reviewing the current

To achieve improved member engagement in a structured manner, associations must first conduct a member engagement review and create a formalised member engagement plan.

A Member Engagement Review looks at all current member engagement activity and assesses its efficacy, and even necessity in the context of the current situation. The process identifies areas where targets can be created to ensure member engagement improves in future activity. Your review can help you tackle individual processes but also address your member engagement strategy as a whole package.

Reviews should take place across all channels implemented currently, including digital and social platforms, events, seminars, member feedback and retention information.

## Reviewing your digital assets

You will need to review your assets and determine the effectiveness of your website (or mobile apps), social platforms, business pages on directories and any other internal assets (such as; your email marketing, customer relationship management software (CRM) and customer databases). This will allow you to determine the levels of traffic, trust signals, usability, engagement, conversions and customer service.

This can be achieved by using a mix of:

- ▶ Visual assessments
- ▶ Quantitative analysis by using analytics packages (for your website), and within the dashboards of your advertising platforms and social media platforms
- ▶ Qualitative techniques, (such as surveys) often used to assess your creative messages and ads
- ▶ The use of specialist or channel-specific tools (both free and paid)



## Digital actions away from your site

Some actions/conversions can also happen away from your site, most commonly on your social media channels. Ensure you are providing members who follow you on social with the opportunity to respond to qualitative information gathering (including surveys and polls) in the same way your email list is.

Track, collate and generate a current status report across your social channels and flag up posts or trends that worked, and those that didn't, citing responses and engagement metrics and your reason.

You will need to review how easy it is for your members to communicate with you through your owned assets; such as your website and social media channels. This will include the features on your website, such as the prominence of phone numbers, socialshare buttons, online chat or chat bots etc. Many of these can be tagged and tracked using event tracking in Analytics, which will allow you to see how often they are used.



# Making a plan<sup>🌱</sup>

Your Member Engagement Plan will stem from the results of your member engagement review. The plan should be time sensitive, we recommend between 1 and 3 years (to enable you to see realistic, but measurable results and change) and needs to address members at all stages and levels of membership during their journey with your association. We list examples of these later in this document.

Your plan should build on improving the data derived from reviewing current activity across all channels, including digital and social platforms, events, seminars, member feedback and retention information.

You should include your key stakeholders, council members, trustees and (if you are working with one) representatives or account managers from your Association Management Company in creating your member engagement plan.

Working together across all relevant parties will ensure all are invested and in the event that a handover or new employment occurs, all are informed about the goals and targets within the plan.

Once you have signed off for your Member Engagement Plan it is important for everyone to champion the improvement of member engagement. It helps to assign the role of Member Engagement Champion to one individual who can take ownership of the plan and ensure your members are aware of this activity.

Your online team will need to be prepared to implement any changes or monitor any analytics packages in line with your plan, at key intervals, so they will need to be included in your discussion and work closely with your champion.

## Getting your member value proposition right

The basic recipe for the right member value proposition:

1. In the right context
2. At the right time (or stage of the member journey)
3. To the right member segment
4. Via the right communication/delivery channel
5. In the right place

will optimise the likelihood of perceived member value and thus increase the opportunity for a positive member engagement outcome/conversion.

## Recognising needs and expectations:

Every membership organisation has a rich pool of members, all providing different challenges have having different needs and requirements.

### Recognise any of these?

We suggest you take this list as a prompt to get you thinking about the type of members your association caters for, there will be many more recognisable characteristics and traits beyond this list.



This tapestry of individuals and groups means that personalisation and adaptive messaging is imperative in your member engagement strategy.



## Social media platforms and your members

Each of your member types are likely to use different social media platforms; so, you might need to improve or create profiles on the platforms preferred by your audience.

### To do this you must:

- ▶ Ensure that your imagery is consistent across your profiles
- ▶ Create closed groups (invite only) for members who may wish to keep a lower profile
- ▶ Where relevant, enable reviews and feedback

Once you have all your social media building blocks in place; you will be able to use various techniques to understand your audiences (fans and followers) and distribute content to them. This could be content from your website, as well as posts that you can distribute on the individual platforms.

This on-going communication should encourage user engagement and actions at different stages of the membership journey.





## Collating member types

Whilst the previous list had recognisable characters, it is more sensible to approach your Member Engagement Plan with fewer, slightly broader categories of member to be able to realistically engage online and offline.



### Learners:

These members are involved because they want access to learning materials, a competency framework or other resource to assist with passing exams and career progression.

### Consumers:

They are members who frequently interact with you, online, attending events, reading newsletters, etc. Their interest goes beyond learning materials into industry developments, updates and content.

### Leaders:

They are active on committees, they often help out at events, they are well read and they share your values. They are advocates of your membership benefits and champion your association.



### Disengaged:

They are doing very little with your organisation and certainly aren't getting value for money. They transact very little with you, they don't recognise or agree with your policy work and they don't think you adequately represent them as members.

### Unengaged:

They are members because they think they ought to be or it's the right thing to do. They keep meaning to read more from your organisation and attend events but never quite achieve.

### Disgruntled:

These members want to believe in you but are struggling due to the offer, policy or something else not being aligned to their needs

**Your Member Engagement Plan should seek to 'flip the funnel'** – using content and interaction from the top three more positive and active interactions to influence and change the behaviour of the bottom three.

**Lapsed Members or Non-Renewers** – These individuals or organisations may not have renewed their membership simply because the proposition was not sufficiently strong or relevant at the time. Messaging to this audience will need to be value driven and targeted in order to increase the chance of re-engagement.



## Personalising content & listening

Providing your members with a personalised experience with your association will not only show that you know them but also that you understand their needs.

According to a report by Smarter HQ 72% of consumers say they now only engage with messaging that is tailored specifically to their interests. It is therefore worth investing in creating segmented and tailored emails and social media posts that cater for different types of members on different channels. Members will quickly switch off from generic, featureless content, so within the remit of your brand guidelines, use relatable language and where possible, and data compliant, address individuals by name.

### Managing your membership engagement strategy online

#### BE READY

Good (or well managed) membership services can often generate good publicity, reviews and brand reputation. Poorly managed (or the lack of management) of membership complaints and concerns, is much more likely to negatively impact brand reputation and retention.

#### LISTEN

A dissatisfied member will often resort to social media as their preferred route to air complaints and issues. This so called 'naming and shaming' is designed to embarrass the association, with the motive of trying get a quicker response.

#### TAKE ACTION

Customers may use a diverse range of channels to contact you; so, you will need to have staff, processes, training, systems and policies in place to deal with customer service across multiple touchpoints. Therefore, it is essential to use software like Hootsuite or TweetDeck, to listen to social media channels for mentions of your association, and to proactively respond to queries (both good and bad).



## Measurement and reporting

There is no 'one size fits all' approach to membership engagement metrics, and as such each membership organisation, with or without the help of consultancy should compile its own engagement metrics and indicators based on the activity and channels implemented in the plan.

Measurement should be conducted regularly, we suggest (depending on the activity) quarterly, with an end report once the membership plan has reached its chronological target (initial recommendation was a 1-3 year strategy)

### Key principles apply:

- ▶ Assessment criteria for each channel needs to be consistent
- ▶ There should be a combination of qualitative and quantitative assessment
- ▶ Reporting should be at board level and directly refer to the Membership Engagement Plan that has already been agreed by this level

### Tools at your disposal include:

- ▶ Your membership database/CRM
- ▶ Content management system (CMS)
- ▶ Internal reports/spreadsheets
- ▶ Website analytics tool (e.g. Google Analytics)
- ▶ Online social media measurement tools

Furthermore, the membership sector requires a deeper understanding of the efficacy of an engagement strategy. This understanding delves deeper into the behavioural and cognitive changes made amidst your membership at all levels. Digital metrics and spreadsheets will not necessarily demonstrate a true developing pattern of change and progress when it comes to engagement, which is why each activity within your engagement strategy should look to identify areas and channels where engagement goes beyond likes, comments and response, but to further look at the level of response and the actions that proceed.

Member engagement strategy is changing in the developing needs of the sector. An increasing emphasis continues to be on value and personalisation. In order to truly provide a bespoke and valuable offering and service you need to have a strong and accountable understanding of your members' needs, aspirations, pain points and vices throughout their membership journey.

The toolkit provides many practical and theoretical suggestions to help you gain the most useful insight and derive the most effective strategy to help your engagement metrics and therefore your membership retention and growth statistics to go from strength to strength.

**For further expert advice and support or an informal chat, call us on 01787 226995 or contact the team at [hello@cjам.co.uk](mailto:hello@cjам.co.uk)**



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