Member Engagement Toolkit 2021

C J ASSOCIATION MANAGEMENT

Who we are

CJAM is a 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?

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.

2021 and beyond

How COVID-19 has changed the membership sector

We've been on a journey together, and at once experienced untold isolation. For our members, some have lost, few have gained, and most have re evaluated what's important to them personally and professionally.

For many industries, professional membership has been crucial to business survival and prosperity, but for others feeling stronger financial implications from forced closures, membership renewals and fees have been one expense too many, resulting in a growth of lapsed or paused memberships.

As we move into a post-Covid era, what more can we do to ensure that those who need and would benefit from our offering, are first aware of its importance, and secondly presented with an offer that they cannot refuse?

Reengaging lapsed members and talking to current ones Consider your proposition. What does it offer as true value? Can it be stripped back to a more affordable, entry level option for those hesitant to spend, with the chance to upsell and upgrade as recovery continues? Could you even offer a free trial period with limited access to teaser offers, training and membership benefits to begin to entice members back?

Covid-19 may well have devalued your flagship features, and whilst your association retains great pride and protectiveness over schemes and initiatives that were once attractive pre-Covid, it is crucial via member feedback and objective assessment to consider how these features and benefits can be adjusted to cater for the new needs and priorities of lapsed members.

It may be that your training and CPD offerings need to offer both online and offline options, with flexible pricing. That your annual conference now needs to provide a digital ticketing option for those no longer able to justify travel. Or it may be a simple change in how and why you contact current and potential members and the methods and language you choose to use that make your association more approachable and more appealing.

Engaging with Gen Z

Generation Z is fast approaching a series of defining eras within their professional journey. Hot on the heels of the Millennial job market, Gen Z is now experiencing an unprecedented economic climate and uncertainty resulting from the COVID-19 pandemic. According to LinkedIn "Born roughly between 1995 and 2015, Gen Z accounts for 32% of the global population in 2019. By 2020, they'll make up 24% of the workforce." With this emerging workforce comes a rising responsibility to ensure the membership offering caters for the preferences and behaviours that typify Gen Z, and the new challenges they may face.

Digital natives

Gen Z have grown up concurrently with the insurmountable rise and rise of social media, digital engagement and are more tech savvy than any other generation. Which means your digital owned assets, including your website and social media channels need to be in pristine condition and updated regularly. Your messaging and accessibility across social media and your website will also need to be a high priority, with Gen Z accustomed to round-the-clock contact, mobile-ready communication and visually engaging and entertaining messaging. With Snapchat and Instagram their preferred channels, where appropriate consider how your organisation could better leverage video and imagery to engage with potential members.

Negating risk

Gen Z is typically risk averse, growing up during a period of extreme economic unrest and hardship that ensued after the 2008 global economic crisis. Developing an outlook during this period which saw them watch their families and working adults potentially struggle and experience job loss and professional downturn means that they are a generation in search of security and stability. Your membership offering needs to reflect this sentiment, particularly in light of the current climate, offering them tools to ensure their job security, development and place within their industry. They will be fighting hard for positions and progression in what is now an extremely competitive market place, so your membership offering needs to provide those early in their career with tools that will set them apart from other candidates in search of similar roles. This may be additional training, mentoring opportunities or accreditation.

Work/life balance

The emerging focus on a healthy and productive work/life balance is of high importance to Gen Z. Entering the workplace in an era of greater flexibility and mutually beneficial working arrangements means that your membership offering needs to accommodate this approach to professional life. The notion of a 9–5.30 working day is rapidly becoming less prevalent and with this, the drive for autonomy and independence in working arrangements and priorities is important. It is worth considering how your membership offering can empower the early careers and younger membership to manage their own workload and instil confidence in their skills and professional qualifications. This will help them assert themselves in a competitive workspace without feeling patronised or spoon fed as part of a fledgling and inexperienced workforce.

Diversity and inclusion

Your Gen Z membership is extremely open-minded, raised to embrace equality and diversity, so it's worth revisiting your relevant policies, procedures and even your marketing collateral to ensure you are adequately demonstrating that you are a forward-thinking and inclusive organisation. Authenticity surrounding these issues is imperative, avoiding cliché and stereotypes, instead ensuring the needs of all potential members can be met in your offering. Publishing case studies that demonstrate the inclusivity of your organisation by positively reinforcing the diversity of your membership and their achievements will build trust and keep your offering progressive.

Healthy competition

Whilst their predecessors place great emphasis on teamwork, Gen Z is a more competitive bunch, driven by personal achievement, feedback and accolade. Raised in an era of vanity metrics, peer gratification and with the ability to freely and readily publish personal successes, it's worth exploring ways and means of channelling this quality to drive your membership forward. Highlighting key achievements of your younger, early careers members on your website, social channels and in any membership communications will not only inspire other new and potential members to seek similar accolade, but also communicate to your members that this generation should be celebrated and nurtured.

Work hard, play hard

It may no longer be enough to provide sufficient membership value through professional resources and accreditation to a generation who have a strong awareness of their work/life balance. Why not consider investing in partnerships and affiliations with resources that can support and sustain personal and leisure ventures, enabling members to associate how investing in their professional development can also enhance their personal wellbeing? Initiatives that provide discounts, incentives and lifestyle support and 'perks' are increasingly popular and are a great way to market your membership offering to both early careers members and established professionals. Providing opportunities for members to make savings and enjoy additional treats during a challenging economic period will also reinforce the notion that your association or membership organisation places importance on personal wellbeing.

Despite being on track to be the most well-educated generation to date, the pandemic has placed their training and potential at risk. Which means the membership sector needs to work even harder to cater for the demands and needs of this crucial demographic.

Digital Trends 2021 - Users at the Centre

At the beginning of 2020, we'd never have predicted the total overhaul of working and living that the year has delivered and no sector or lifestyle has been left unturned, which is why now, more than ever, digital marketing trends and online presence have never been more important. Digital connections and virtual meetings have been the centrepiece of most major business and personal online use, with further unprecedented reliance on online retail, conferencing and a shift in social media usage and patterns.

Google and UX

UX (user experience) has been a rising buzzword amongst digital marketers for years and is traditionally applied to website and app design to deliver seamless user journeys that keep visitors returning, interacting and transacting. However, Google has now (and characteristically) upped its game to factor 'UX ranking' into its algorithm to favour those sites with a higher UX score. Which means ahead of the new year, it may be worth addressing your UX on your site as part of your wider SEO strategy to make sure your page is ranking at or near the top of Google for your relevant search terms.

Semantic Search

The way users interact with search engines is changing. The rise and rise of voice search means that when optimising your site and considering any paid search you may be investing in, your long-tailed keyword choices and SEO strategy will need to incorporate these new ways of phrasing searches.

According to Think With Google:

There has been an **85% increase** in mobile searches starting with **"can I"**

There has been an **65% increase** in mobile searches starting with **"do I need"**

There has been an **65% increase** in mobile searches starting with **"should I"**

Increasingly, people are treating search engine experiences, whether they are web-based, mobile, or voice-activated, as conversational. They use normal language, not Google keyword speak, which leaves it up to search engines to interpret this language, piece together meaning, and bring back the most relevant content.

Optimising for semantic search is an ongoing effort. As you plan, execute, and update your content for 2021, keep a few questions in mind. First and foremost, how and why do your users search for your content? What answers, information, content, or even experience are your target audiences likely looking for?

Google My Business

Despite social distancing and online retail, the demand for local search remains significant, with more than a billion people using Google Maps every month. Google has responded to this demand by releasing new features, such as posts, new service and product options, COVID-19 updates and options for black-owned businesses, and even a website builder.

This of course creates yet another opportunity to rank and access local markets and levels the playing field for smaller enterprises. If local search is part of your digital marketing strategy, you'll want to keep your Google My Business listing complete, detailed, and updated on an ongoing basis.

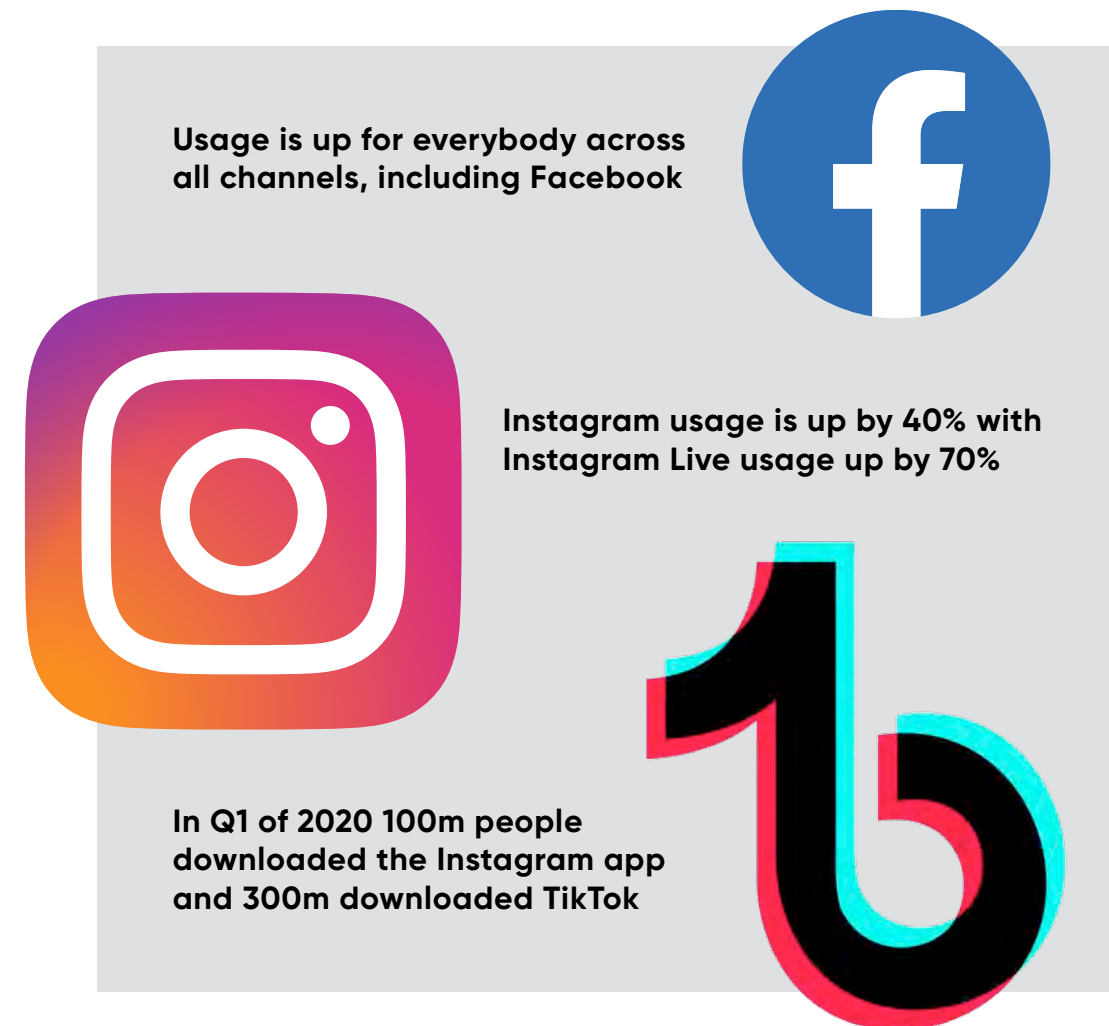**Update service availability**

Post COVID-19 latest information

Turn on and share your review form

Share regular content
(recommended at least once a week)

Publish your FAQs

Social Media

The COVID-19 pandemic has changed the face of social media usage, driving more Gen Z, Gen X and Baby Boomers online to address concerns directly related to coronavirus. With an increased time at home and more erratic and flexible working patterns, insights are beginning to emerge about how people are using social media.

Usage is up for everybody across all channels, including Facebook

Instagram usage is up by 40% with Instagram Live usage up by 70%

In Q1 of 2020 100m people downloaded the Instagram app and 300m downloaded TikTok

These statistics, particular the latter, must prompt businesses to readdress which channels they are prioritising, and more importantly to ensure that their content is timely and sensitive to the evolving pandemic, with a rise in 'cancel culture' (the shaming en masse of companies who miss the mark or publish inappropriate content) and the unquestionable need for video and live content.

Video Marketing

We've reached the point where marketers cannot fallibly compete in the digital space without incorporating and prioritising video in their strategy. YouTube continues to dominate, and 2020 saw a 20-30% increase in content consumption on YouTube. Across all other key channels, video continues to rise in popularity and prevalence – namely Facebook and Instagram (with the introduction of reels) and the latest guest to the party – TikTok. Video will also help to bolster and in fact could dominate your SEO strategy, with Google serving video content as a 'one-click' solution to search queries, placing your video content, if optimised correctly, at the top of the search engine results page.

Virtual Events

2020 has decimated the events industry, with the biggest beneficiary being the new face of conference calls – Zoom. With 30 times more users in April 2020 than in March and with sales anticipated to approach 2bn by the end of the year, Zoom has left Skype and Teams in its wake. For digital marketers comes the added opportunity to offer a new, instant and valuable level of content marketing, in the form of webinars, training and product assistance and demonstrations. The shift online will require those marketing departments who are usually reliant on face to face networking, events and conferences to adjust their offering to provide a suitable and effective digital equivalent.

Another New Era

Unlike no other year, 2021 will present new opportunities and challenges for marketers, particularly off the back of a disrupted and game-changing 2020. With social media interaction, however, increasing and with the rise of interactive media including video and digital conferencing, there are many accessible and exciting ways that businesses can ramp up their digital marketing efforts. However, the most important factor to consider is the ongoing shift to 'users first'. Looking at ways to optimise content to demonstrate to Google and its counterparts how your offering addresses human problems, needs and desires.

The 7-Step Membership Engagement Plan

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 3
Conduct a Member Engagement Review and map out Key Membership Journeys

STEP 4
Create a Member Engagement Plan

STEP 5
Ensure regular and proactive review of your Member Engagement Plan

STEP 6
Consider a personalised/ contextualised approach

STEP 7
Ensure member engagement feedback/ measurement takes place regularly

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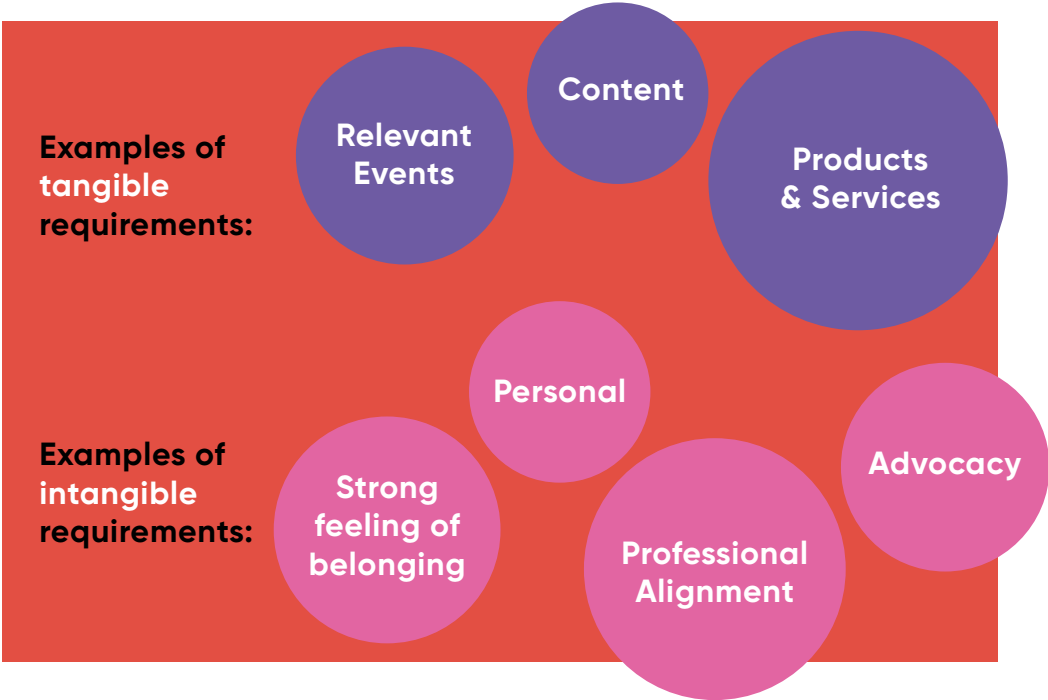
Needless to say - member engagement goes beyond staff or customer engagement due to the level of expectation and value required to keep transactions worthwhile and meaningful.

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.

Examples of tangible requirements:

- Relevant Events
- Content
- Products & Services

Examples of intangible requirements:

- Personal
- Strong feeling of belonging
- Professional Alignment
- Advocacy

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

Improvement in member engagement **+** A positive output*
*For either the member or the organisation **=** **Positive Member Output**

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 undertstanding 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 committes? 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

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.

The Advocate
A member who will advocate membership and actively participate and volunteer

The Responder
A member who will respond to a direct call to action

The Networker
A member who derives great value from networking with their peers

The Onlooker
A member who derives membership value without participating

The Cherry Picker
A member who will engage and respond if the opportunity is relevant

The Activist
A member who proactively champions development and change

The Resistor
A member (typically long-standing) who does not advocate change

The Professional Developer
A member who derives most value from upskilling and increasing industry knowledge

The Bystander
A member who chooses not to engage

The Politician
A member who participates to build political/ social presence

This tapestry of individuals and groups means than 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 behaviourial 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@cjam.co.uk

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