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THE ULTIMATE GUIDE TO MEMBER ENGAGEMENT

A MemberWise Network Best Practice Guide

1: Introduction

With the realisation it is more cost effective to engage and retain existing members than to recruit new members, member engagement has become a top priority for many membership organisations. The Ultimate Guide to Member Engagement is the free resource for membership professionals who are keen to improve and optimise this critical element of membership.

Increasing Member Engagement has been the membership sector's key priority since 2016

It's a practical resource that will provide you with a clear understanding of what member engagement is, why it is important, how to manage and measure engagement, and how to effectively plan, review and deliver successful member engagement.



All membership organisations are at different stages when it comes to their member engagement activity, so this guide covers everything from the fundamentals up. While each section builds on the last, you can jump ahead to the aspects most applicable to where your organisation is at.

When we refer to members, we are talking both about individual members and corporate members. Although corporate membership involves a company or organisation being the member, there are still individual people making the decisions about membership, and so any factors concerning individual choice are still as applicable.

This guide is complemented by a suite of online tools and resources hosted on MemberWise Learn (our online learning portal) that includes this guide in PDF format plus member engagement focused templates, checklists, videos and further resources.

Visit: <https://learn.memberwise.org.uk/>

We'll also touch on a range of other topics in this guide that affect or relate to member engagement, including new member recruitment, member retention, member value and member participation. The topics are addressed in more detail via MemberWise Learn.

Throughout this guide we will signpost additional resources  and prompt you to complete tasks  to apply the theory and learning to your circumstances.

If you require further help or support, the MemberWise Network provides a range of consulting services that can help you optimise member engagement, as well as other core membership activity. For more information contact info@memberwise.org.uk

On behalf of the MemberWise Network we would like to thank Advanced Solutions International (ASI) for sponsoring this resource. Their support has meant this toolkit is available to everyone completely free of charge.

2: What is Member Engagement?

The membership sector is a relative latecomer to the idea of engagement. In the commercial sector, Customer Engagement is nothing new and can be described as the interactions between a customer and an organisation through various online and offline channels. Ultimately, this engagement leads to customer loyalty and customer spending.

More recently, the world of human resources and staff communication has evolved into Employee Engagement; the effort to understand and describe the nature of the relationship between an organisation and its employees. This leads to helping employees perform at their best, retain good staff, and ultimately deliver on the purpose of the organisation.

It makes sense then to define Member Engagement as the interactions between a membership organisation and its members, or the relationship members have with their membership organisation. It relates to other notions of member value, and member experience. If Member Value is the positive outcomes delivered via member benefits, then Member Engagement is the relationship to achieve those outcomes.

While Member Engagement includes the activities through which member interact with us, it is not merely participation (although participation can be part of how we measure engagement, see Section 4) Engagement drives participation, but also retention, advocacy, and many other aspects. The operative word here is “drives”. Member Engagement has the intention of leading to something, just as Customer Engagement has the intention of leading to sales and loyalty (thereby more sales).

As membership organisations, we each have a distinct purpose and set of objectives, such as raising the profile of a profession, protecting a natural environment, expanding participation in a sport or activity, raising quality standards, or raising public awareness of a particular issue.

The intention of increasing member engagement is to lead to increased:

- new member acquisition
- existing member retention
- member value
- frequency of interactions
- quality and depth of interactions
- likelihood of advocates
- additional spend (via cross/upsell of products/services)

Each of these aspects can help us further achieve our purpose as an organisation. By improving engagement with our members, we can gain a deeper understanding of them and what they need from us, which in turn improves the quality of the service we provide, which in turn increases the potential for sustainable long-term growth.

Member Engagement leads to increased member loyalty, or retention, as when members are engaged then they are more likely to stay. It aims to take the relationship beyond the

transactional and into the emotional or meaningful. This is explored further in relation to Member Experience in Section 7, in that the relationship with the organisation can be described as either a positive or negative experience of being a member.

In the past, being a member of an organisation was often due to it simply being “the done thing”, the only option to access an activity or service where there wasn’t a wide range of providers, or just a way to save money.

Now, we live in an “on demand” society where we consume as and when, rather than pay up front, and the idea of being tied in without knowing exactly what future value we’ll get is more challenging. Career paths are changing, there is more choice in the market for anything and everything, digital engagement and expectations have advanced, and there has been a generational change in attitudes about what people will commit their time and effort to.

So, the reasons why someone would choose to remain, or even become, a member of your organisation are far less straightforward. We have a whole resource dedicated to Member Value, and you should take a look at it if you haven’t already, but for this guide we’ll just focus on why Member Value is so important when it comes to engaging members.

MEMBER VALUE = MEMBER BENEFITS - THE COST

(time / effort / financial / opportunity cost)

The value members get from being a member is evident in the positive outcomes they achieve as a result of their membership and the benefits they receive. In other words, it isn’t just the “stuff” they get but what that “stuff” helps them to go on to achieve.

If member value can be clearly articulated, communicated and demonstrated to members there is a stronger likelihood of engagement. This leads to more participation, increased product or service cross-selling, increased loyalty, retention and advocacy, and more sustainable medium to long term growth.

The converse is also true. If member value is low, or is not delivered, this will almost certainly lead to members being less engaged. This is likely to result in reduced member retention or at the very least a limiting of future growth.

Over the past decade we’ve seen many organisations review their member benefits (outputs) in an attempt to increase member engagement. However, it’s the core value drivers (desired outcomes) behind the actual member benefits and engagement motivations that should be evaluated first. Ordinarily this is addressed via a formal Member Engagement Review, which will be explored later in this guide.

Membership organisations are great at starting new member focused initiatives, but not so great at stopping initiatives that no longer engage members as they no longer deliver value. Don’t be afraid to close down activities and initiatives if they are providing little or no value to members and members don’t want or need to engage. This is an important part of reviewing what you do and taking a more formal and structured approach to planning your member engagement work.

3: Member Engagement Strategy and Plan

Formalised Member Engagement Strategy and Planning is key to optimising member engagement yet it may surprise you to learn that only half of all membership organisations have a formal strategy/plan in place and more so have never conducted a Member Engagement Review.

Member Engagement must be a key part of your strategy, which should contain a member-focused vision, mission and objectives, and a detailed membership plan for the year ahead, while also scoping for years two and three. This strategy should be linked to, if not a substantial part of, the wider corporate strategy. It is also important that your wider strategy acknowledges why you have membership, the value it brings to the organisation, and how growing membership helps you achieve your organisation's objectives.

A structured approach brings with it numerous advantages, including:

- Ensuring strategic and operational priorities are addressed and met
- A more informed and member-centric delivery
- Membership focused aims that are aligned with corporate aims
- Unique Selling Points (USPs) are fully realised
- Areas for development are more accurately identified and addressed
- Member facing staff are clear about their role and responsibilities

Typically, this approach aligns with the formal allocation of resource allocation (human/financial), member communication planning (via an omni-channel approach) and value delivery via a mixture of face-to-face and virtual offerings. Measurement and reporting play a key role and this area is covered in Section 4.

Your strategy, and in particular your planned engagement activity, should be based on facts gathered from research with members and not just your assumptions (or those of your board or just your highly engaged members).

Key member engagement related strategic actions and content should include:

- The link between engagement and the wider corporate strategy, vision and mission
- SWOT (internal) & PESTEL (external) analysis of member engagement factors
- Specific member engagement plans, objectives and activity
- Historic member engagement data and trends
- Data showing engagement by membership type
- Regular monitoring of member engagement at Board level (or equivalent)
- Appointment of nominated leads at Board level (or equivalent)
- Member Engagement Groups/Committees
- Engagement responsibility being given to a nominated member of staff
- A dedicated Member Engagement post being employed (if the whole team is not focused on engagement)

Once the strategy and plan have been agreed by your Board (or equivalent) we recommend that the key membership objectives are translated directly into the annual objectives and annual review process for member facing staff. Many forward-thinking membership organisations include key membership objectives as part of the objectives for all staff, even non-member facing teams.

Resource Signposting:

You can find our Member Engagement Strategy and Plan templates in our Best Practice Hubs on the MemberWise website:

www.memberwise.org.uk/hubs



Many UK membership organisations currently only have formal plans that span one to three years. This should be increased to a five-year flexible plan. Flexibility should be built into all strategies and plans as “the wonderful world of membership” is always subject to unforeseeable changes and developments.

Tip:

Ask an Office Holder, Council Member, or Board Member to become a Member Engagement Champion and ensure your members are aware of this activity. It shows you are taking member engagement seriously.

Your approach to member engagement should be implicit in all member-focused activity. Conducting formalised member engagement improvement activity will help to ensure this critical topic is at the forefront of everyone’s minds (including staff, members and key stakeholders). It will ensure a clear view through a member engagement lens.

In order to achieve improved member engagement in a structured way, the first step is to conduct a Member Engagement Review to inform the creation of a formalised member engagement plan.

The above approach will ensure activity is conducted in an informed, aligned (across teams/departments), robust and structured manner to ensure accountability and improve the chances of medium to long term membership related success.

Conducting a Member Engagement Review

A Member Engagement Review is a formal review of member engagement related activity to establish the current situation, i.e., what is being done and what is not being done from a member engagement perspective. The review will therefore ensure positive member outcomes are being generated now and in the future.

There is no strict formula or template that you need to adhere to. However, key member facing activities and materials will need to be reviewed, and it is useful to evaluate these by looking at the entire membership journey as well as key member segments.

Aspects to examine as part of the review include:

- Member journey intervention points & solutions offered
- Member benefits
- Member communication channels and content
- Participation at events
- Feedback from members (annual survey, quick polls, feedback forms)
- Feedback from non-members (e.g., lapsed members/never members/resigned members)
- Marketing/membership literature
- Website analytics
- Social media analytics
- Responses to previous PR campaigns/advertisements
- Member recruitment and renewals literature
- Related governance roles/responsibilities
- Volunteering opportunities

A Member Engagement Review can either be conducted internally or with the help of a third party. This can be helpful if your membership team is small or has limited capacity. The benefit of having an external review is that it will be independent, and the findings can be quickly benchmarked against similar organisations. While the review is the responsibility of the Membership Engagement team, or most senior member of staff responsible for membership, the review should involve colleagues in and across other teams and departments to ensure a joined-up approach across your organisation, and to include all aspects of engagement and interaction with members.

Task:

Conduct a Member Engagement Review. We suggest that this activity includes a dedicated workshop/seminar with all member-facing staff.



4: Measuring and Reporting Engagement

Measuring Engagement

How we assess what is “good” member engagement will depend on many internal and external factors, as well as the specific circumstances of your organisation, your members, and your potential members.

Many organisations are looking for the magic formula that will allow them to effectively measure engagement. However, there is a need for each organisation to compile its own formula, one that is specific to them and relates to its strategies and objectives. Because the requirements of membership organisations and members vary immensely and our ability to deliver is different and variable, a certain amount of trial and error may be needed to arrive at the best measurement metrics for your organisation.

FACT: 53% of membership organisations measure member engagement
 (Source: MemberWise Digital Excellence 2021/22 Report)

Typical measures may include:

- Member retention rate
- Number of Membership upgrades in a period
- Attendance at conferences and events
- Member Survey response rate and comparisons to previous surveys
- Net Promoter Score (NPS) and comparisons to previous scores
- Member Engagement Scoring (MES)
- Website analytics linked to page views/behaviour

Other feedback mechanisms/channels

- Collect and review member satisfaction ratings via your website
- Customer call analysis and a review of member touch points
- Focus group feedback and suggestions
- Review of feedback linked to specific benefits
- Use of benefits over a period of time

Remember, measures such as Net Promoter Scores, where members rate on a scale of 0 to 10 how likely they are to recommend membership to someone else, are not just about the numerical result you get. You need to ask follow-up questions about why members gave the score they did and what you would need to do for them to give a higher score. Similarly, you can adapt this methodology to give a numerical score on more emotional aspects (More on emotions in Section 7, Principle 6) but the important thing is to unpack and understand the drivers behind the score and how to improve.

Low engagement can be an indicator that a member is going to resign, or not renew, their membership. This awareness forms the basis of good risk management. You can be as detailed as a full RAG rating report, using red, amber and green indicators to identify the severity and likelihood of the risk from low or decreasing engagement against different aspects. It is also useful to identify and set thresholds for concern, ie if numbers drop below a certain point, or at a certain rate each month for more than two consecutive months. You will know best the peaks and troughs of the external factors influencing your members, and how and when they interact with you, and from this be able to set these thresholds that shouldn't be ignored.

Another factor to bear in mind is that while participation can be part of a measure of engagement, it doesn't in and of itself mean someone is positively engaged. For example, a member may feel very engaged and positive about their membership experience but quite happy to passively receive the monthly journal and not attend any events, open emails or volunteer to do outreach work. Many members will read what goes on in an online member forum, but the majority won't actively post anything. The lack of active participation doesn't mean they are not engaged. Conversely, someone may always attend a particular committee meeting or the annual conference, but they don't really contribute to discussions or decisions. They participate by attending but there isn't any real or deep engagement there.

Organisations need to proactively use these measures ideally before a member becomes disengaged, however if a member has already become disengaged specific action is required to bring them back on-board. This is typically done via a dedicated re-engagement campaign that may be initiated electronically and followed up via telephone if individual members remain unresponsive.

Task:

Consider the Measures you have in place. Could you become more sophisticated with your approach? Do these measures accurately capture accurate levels of engagement?



Reporting Engagement

In order to manage your member engagement effectively you will need to be able to report accurately and regularly for different aspects, and to analyse and understand the data and what it is telling you about what's going on with member engagement. Increasingly, membership organisations are using appropriate technology to create live dashboards and reports to monitor data.

Whatever form they take, you will want to establish a set of core reports. For reporting to be effective it is essential that you agree the measures to be used in advance, and do not change any aspects, measures or dimensions on an ad-hoc basis. Otherwise, you will end up trying to compare apples with oranges.

Key reports might include:

- New members recruitment analytics
- Value of new members by type or level
- Details of lapsed, cancelled, resigned, retired, deceased members
- Trend analysis cross referencing the data from the reports
- Member satisfaction or engagement scores
- Exit interview analysis
- Product/Service purchases
- Online Member Area login frequency
- Online Community participation/scoring

FACT:

Only 13% of membership organisations have confidence in the accuracy of available member data (Source: MemberWise Digital Excellence 2021/22 Report)

Your reporting and data analysis is only as good as the data you hold. This doesn't necessarily mean you need a new CRM or AMS, but you need to make sure you are using your system to its potential, and that you are collecting the data you need in order to carry out the analysis and reporting you want.

Reporting is also only effective if the right people have the information and frequently enough. The greatest formal written report is worthless if it sits in a file and isn't discussed or acted upon. As well as having written reports and spreadsheets with the data, you also need regular discussion about the information. This ranges from weekly operation team meetings and updates, through monthly departmental and senior team meetings, to monthly or quarterly Board meetings.

These discussions ensure the right decision makers and operational staff have the information they need to plan activities, predict growth or set targets, identify opportunities or risks, and adapt the flexible longer-term plan for the wider corporate strategy as necessary. It is therefore important that reports are easy to digest and understand.

Task:

Make a list of all the types of regular reporting relating to member engagement you currently have. For each item make a note of how often these reports are generated and also who sees them, or how they are used. Are there areas that you don't have reports on and is this because you don't have the data? Are reports going to the right people?



5: The Member Journey

The Member Journey is the complete sum of experiences that members go through when interacting with your organisation and brand.

Rather than considering each interaction in isolation, the member journey is about considering all interactions collectively and also with a sense of progression, moving along a path of these interactions over time. The member journey documents the full experience of being a member.

While the journey is about the collective mass of interactions, it is nevertheless made up of individual interactions. We call these Touchpoints – attending an event, opening an email, making a phone call, viewing the website, a date something happens, making a purchase, a change in membership tier.

Touchpoints can be online or offline, proactive or reactive, they can range from simple to complex interactions, and they can be functional transactions or deeper, meaningful and relational. Increasing the quantity, quality and frequency of touchpoints can all lead to greater engagement, provided they are part of a positive member experience.

The notion of the journey as a path of touchpoints is important when considering the purpose of each touchpoint. Although they may all be unrelated, each one can still aim to move the member along their journey with you in a positive manner. By mapping out the member journey you can see where and how one thing can lead to another and you can build upon and reinforce the positive outcomes of being a member.

Member Journey Mapping is an important tool that helps you understand how, when and why your members interact with you. It provides a visual representation of the collection of touchpoints which enables you to spot gaps, plan activity or communication to be most effective, and identify interactions that may hinder progression to a further step in the journey.

Member journeys have evolved massively over the past decade and there is now an expectation that members will have access to online self-service functionality when they need it and that this will be available 24 hours a day, 7 days a week. Membership organisations looking to increase online self-service functionality tend to do so as part of digital transformation focused activities, so it can be helpful to map member journeys to ensure self-service journeys are optimised. The use of automation is also an increasing factor in how membership organisations seek to deliver member journeys that improve engagement.

You can see the journey of your members at a top-level overview, applicable to all members and with less specific detail, as well as having multiple sub-journeys focusing in on particular member types, or particular stages of their time with you, or even for particular activities.

For example, you can map a different member journey for your members who have a digital-only membership compared to those who have a full or in-person membership. Members in different regions or locations may have different journeys depending on the different options for interacting and engaging with you.

You can create a specific member journey around recruiting and onboarding new members, or for going through an update of their profile information online, or even for how they find out about, participate in, and then feedback about a conference.

By mapping out each of these activities or aspects as part of a journey, we can work out the experience we want members to have and guide them through the relevant processes or activities to achieve a positive outcome. You can measure the success of different steps along the journey, and that of different combinations of the various aspects, possibly with split testing. For example, do reminder emails between booking an event and attending an event improve the experience for members and the satisfaction score they give in post-event feedback?

Mapping out member journeys allows you to anticipate multiple options and eventualities, for example with a career path related journey where a member takes time off, or changes career direction. You can plan ahead for what series of touchpoints will best deliver value to the member or bring them back “on track” within the wider, life-long, member journey.

You can engage, and re-engage, members you might otherwise lose due to low engagement or a bump in the road of their member journey by

At the very least, you want to find out how and why members leave and this forms part of measuring and understanding why a particular member journey has come to an end. Messaging to former members should focus on how the organisation or membership has changed and the positive outcomes returning to membership will provide. As part of the exit process, you may want to capture whether or not the member wants to maintain communications with the organisation. We cover this in more detail in *The Ultimate Guide to Retaining More Members*.

Task:

Review your various membership journeys and ensure touch points are clearly mapped, member value is clearly offered, positive member engagement outcomes are optimised, and awareness is maximised via targeted promotional messages.



The MemberWise Network facilitates Member Journey Workshops. For more information contact info@memberwise.org.uk

6: Personalisation

Personalisation has increasingly become a driver when it comes to membership strategies. As a sector we have long been working with segmentation with membership grades, categories, special interest groups, local regions, etc. This may not have always been in a conscious way, and we may not have always adequately differentiated what we do for each of these segments.

As the rest of the world offers more and more personalisation, and the concept of “one size fits all” becomes redundant, the membership sector needs to keep up. It means more than just using standard technology to insert “Dear @FirstName” fields into emails. Personalisation is about considering each member as an individual, even though we group them into segments for the application of much of the personalised activity.

We need to take a more sophisticated approach to online and offline personalisation and, in an ideal world, many talk about the “Amazon experience” i.e. when a member is on your website they see recommendations for books based on the type of events they’ve attended, or different feature content based on the emails they’ve previously opened. We should be cautious, however, that this doesn’t result in a “Big Brother” situation where members feel you know too much about them

Relevance, along with choice, is a key consideration in successful personalisation. If the benefits, products, services, communication and value you provide to a member is truly relevant to them, then that member has a more positive experience of membership and is more likely to be engaged. Anything that makes a member see how content or activities are more personal and relevant to them, addressing their needs and delivering the value to them, will help improve member engagement.

Conversely, if you send emails about student discounts to your retired members, or invite members in Scotland to events that are only ever in London, or promote participation in campaigns to members who are only interested in reading blogs on a subject, all of these members are going to feel you don’t understand them as these are all irrelevant to them, which in turn decreases the likelihood they will engage.

FACT:

Only 39% of membership organisations currently offer a personalised online member experience. This figure rises to 46% among large organisations with a subscription income of more than £1.5m. (Source: MemberWise Digital Excellence 2021/22 Report)

Task:

Consider all of the member benefits, interactions, and communications you have with your members. How many of them currently allow for personalisation; either by grouping members into personas or by providing choice to the member to shape their membership? In how many of these aspects could you allow for more personalisation, and what are the mechanisms needed to deliver this (technology, staff knowledge, processes etc)?



Recognising different member types, needs and expectations

We should recognise that, whilst engagement opportunities will align to common journeys, our members are all different with varied expectations and requirements linked to interaction. A useful way to evaluate member value drivers and desired engagement outcomes in key membership segments is by using member personas.

Member Personas are a great way of creating a character that sums up the aspects of a particular group of your members and allows you to consider the needs and expectations of a "real individual" and how they might respond, which in turn applies to the wider group that fit this persona. In this way, you can create personalised engagement (communication, activities, access, etc) relevant to each persona that delivers for a whole group of members.

These personas need to go beyond just the demographics you can identify from your member data, such as age, location, type of members, size of company, etc. However, some of these demographic aspects might still collectively make up a significant part of each persona. There can also be a broader engagement and emotional aspect in how a persona (or group of members) feels about membership and their emotional drivers. (More on this in Principle 6)

Start with fewer personas and build from there. Usually, just four to six personas are enough. Any more than this and you risk the benefit of having them being lost to the cost and effort of creating them. If you know similar segments will react in the same way to a particular campaign, there is no need to segment them in the first place. Some example segments or personas could look something like this:

- 1) Consumers:** Keen members who frequently interact with you, attending events, reading newsletters, etc.
- 2) Leaders:** Active on committees, often help out at events, and share your values.
- 3) Disengaged:** Doing very little with your organisation, not feeling they get value, maybe don't feel adequately represented as members.
- 4) 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. May be quite vocal in their disapproval.

Even the small steps on the way to this level of personalisation require appropriate time and resources, such as industry standard Content Management Systems (CMS), Customer Relationship Management (CRM) / Association Management System (AMS) integration, and professional email marketing tools and integrations.

What is certain about member personalisation is that, if done effectively (and in the right tone), it can contribute towards improving overall member engagement levels. If personalised templates are created, ensure these are shared with all member-facing staff so a consistent approach (brand and style) is applied across your organisation. There is a need to roll out online personalisation in a staged manner as 'big bang' approaches carry increased risk of initial failure (that can again contribute towards disengagement).

Task:

Create member personas for key membership segments and establish whether you are optimising engagement with each group. Consider motivations for joining, career stage, value drivers, demographics, attitudes, typical behaviours and add an image to bring each persona to life. Ensure the personas are regularly revisited to ensure relevance when considering future member engagement activity.



The MemberWise Network facilitates Member Journey Workshops. For more information contact

info@memberwise.org.uk

Automation

Membership organisations could save up to a third of the time and resource allocated to administering membership if systems and processes were automated. However, there is a requirement for key membership systems to be integrated. Systems that are regularly integrated by membership organisations include:

- Association Management System (AMS/CRM/Database)
- Website Content Management System (CMS)
- Email Marketing Platform
- Learning Management System (LMS)
- Event Booking System

Based on the findings of the Digital Excellence 2021 Report we estimate that a lack of system integration is currently holding back 45% of membership organisations from reaching their full member personalisation potential.

Good quality member data is critical for automations to serve up accurate and meaningful personalised content/meaningful analytics, however only 13% of membership bodies consider their staff to have confidence in the accuracy of available member data. Cost is also identified as a blocker.

Task:

Consider what membership related tasks could be automated and explore the functionality of current and proposed future systems.



7: Engagement through Member Experience

Making engagement relevant to the individual member through personalisation is a key part of delivering a positive member experience. This section explains five other principles of how to improve member engagement by delivering a positive experience of being a member.

Principle 1) Focus on emotions, not transactions

Remember, Member Engagement, and the experience of being a member, is a relationship. If a member has a positive experience of being a member, they are more likely to engage. If they have a negative experience, they are less likely to engage. This is fairly obvious but worth articulating since membership organisations rarely consider the emotional aspect of the experience their members have. Understanding what the data tells us is important, but so too is really understanding the perspective of our members on an emotional level. We need to ask ourselves how do our members feel?

This means focusing on the emotional relationship and moving away from something that is just transactional. The personal, relevant, tailored approach to membership, along with regular, year-round engagement, are key components to being able to take an emotions-focused approach and deliver a positive member experience. Clearly articulating member value can often be linked to the emotional aspect.

For some membership organisations, taking account of members' emotions can be quite a departure, for example professional bodies, trade associations, and commercial subscriptions. Whereas for others it comes more naturally, such as campaigning organisations, arts and heritage bodies, or donation-based charity membership organisations. It is a significant factor in why members engage with us.

Quantifying and measuring emotions is the most challenging aspect. How do you accurately measure how much of a sense of belonging a member has? How do you quantify how positive an impact something has?

A good starting point is to be consciously aware of what activity is transactional and what is emotional. A transactional relationship with members boils down to the concept of "I pay £X, and in return I get stuff". So, paying subscription fees, buying a product or service, paying to attend an event or a course. Functional activity is also usually only transactional, filling in a form or survey, opening an email but not engaging, voting without knowing anything about the candidates.

Transactional activities and benefits are much easier to talk about, as they are often the most tangible, and it's not to say that there is no value in that for members. The point is that if you can deliver an emotional relationship for members then you can increase the positive experience they have of being a member, and they will feel more strongly part of the community of members, which strengthens loyalty and increases their engagement.

Delivering a positive member experience through an emotional relationship with members can help turn passive members into active participants, advocates, or volunteers. As explained in Section 2, these are all outcomes that member engagement intends to achieve.

Task:

Make a list of your key member benefits. How many of them are emotional? Is there an emotional outcome or benefit to any of the transactional benefits?



Principle 2) Make engagement easier

One of the most overlooked aspects of our relationship with our members is how much effort we require of them to engage with us. The more we can reduce the effort, and make things easier, the more positively members will see their relationship with the organisation and the more value they'll see in the outcomes of their member benefits.

Make it easier to engage by:

- Automating and simplifying more processes, or taking them online
- Enabling self-serve options wherever possible
- Providing a centralised contact centre to answer, or triage, any member enquiry
- Integrating new technologies such as LiveChat or ChatBots for quicker responses
- Ensuring you have effective navigation and search on your website
- Making it simple to log in, reset forgotten passwords, update personal details (with single sign-on)
- Pre-populating forms in an email or a linked online form, reducing the steps a member has to take
- Setting default options to the things members use most

Task:

Make a list of ways your organisation may be creating more effort for members than is necessary, and how you could make it easier for them to engage



Principle 3) Make engagement habitual

For your highly engaged members, the idea of being a member is second nature; it's almost an alien concept to them that someone who could be a member wouldn't be a member. It's just the done thing.

If you can articulate that life, work or play without membership would be wholly unimaginable, incomprehensible and certainly not a place someone would want to be, then you can begin to grow this perception in more of your members. Some of the techniques for this include communication, personalisation, and the emotional relationship with members, but achieving this sense of "membership is second nature" isn't easy and doesn't happen overnight.

It's all about making being a member "the norm" by demonstrating the value members get from being a part of your organisation and making engaging with the organisation the obvious answer

Resource Signposting:

There are some great books out there on the concept of choice architecture, nudging, motivation, and 'stickiness' in habit forming that are well worth a read including:

- Contagious; Jonah Berger
- Nudge; Thaler & Sunstein
- The Tipping Point; Malcolm Gladwell
- Atomic Habits; James Clear
- Drive; Daniel H Pink



Task:

Think of as many activities or actions that your members carry out on a regular basis that you might be able to link to ways of engaging with you and their membership.



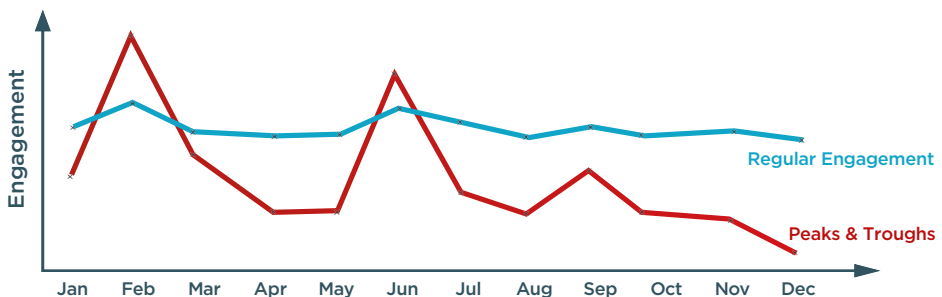
to their problem or challenge. In the more immediate term, you can make elements of interacting with your organisation more habitual for members. In other words, as well as making things easier to do (as discussed previously) you also make interactions as a member, and remaining a member, the obvious choice.

Essentially, if you can bring your members back to your website to find useful information every day, or get the answer they need when they call you, then it becomes a habit for them to engage with you as their first port of call. If the aspects of whatever activities your member is engaged in (be they work, business, social, sport, political) can be tied in to how they engage with your organisation, it becomes second nature to associate their membership with these things; linking their existing habitual behaviour to actions they take as members.

Principle 4) Make engagement more frequent

Forming habits among members isn't a "once and done" activity. It requires ongoing attention. This principle of engaging with members routinely could also be described as "little and often". Our relationship with members needs to be a constant in their lives; peaks and troughs of engagement make it hard to build a meaningful relationship. Successful member engagement is only as good as the average trough, not the highest peaks. More frequent and regular interactions over a sustained period of time will help members keep you in mind, which also helps make membership more habitual.

The diagram below illustrates how two different membership organisations engage through a typical year, with the vertical axis showing the level or depth of engagement (ie opening an email has a lower level of engagement, attending an event has a higher one, volunteering for the organisation even more so). These aren't exact mathematical depictions, rather they can help you evaluate how often and how deeply you engage with your members. The goal is a flatter line but at a higher level.



Task:

Map out your existing touch points during the membership year, and key member journeys. How “smooth” is your relationship with members? Are there ways to raise the troughs, or even spread out the peaks, to create more ongoing, consistent engagement? Are there any gaps?



Principle 5) Communicate appropriately to engage

Communication is a key aspect to get right in your ongoing engagement with members and there are two main things to consider in this context Communicating member value, and regular communication.

Communicating value

You need to be able to articulate the value members gain from being a member. This should ideally take the form of a Member Value Proposition; your elevator pitch to clearly and concisely sum up the rationale for being a member. Beyond this, you need to communicate the tangible benefits (products and services) provided to members that help them achieve the positive outcomes that deliver that value, ie a Member Benefit Statement. If you can't communicate the value members get from engaging with you then it becomes much harder to convince or entice them to engage. Communication about member value is something to do frequently and consistently throughout the year.

To do this you need to have a 360-degree view of your members and all their interactions and engagement with the organisation, and appropriate systems that can hold, measure and report on all that data. A step towards this, without such a high level of data gathering and management, is to create more generic Member Value Statements for all members, or for specific types or grades, i.e. you can talk about the value trainees or retired members got “in general”, or the value members in different regions or locations received. Similarly, you can create Member Engagement Statements, that review or demonstrate how a member (or group of members) has engaged with the organisation.

Regular communication

As with engagement more broadly, little and often is a successful formula for member communication generally, and especially to reinforce messaging that encourages members to engage, participate, renew, or take action. Unprompted, most members will only recall three or four key member benefits, so it is important to deliver targeted and regular member benefits campaigns.

It is important to get the right message to the right member, at the right time, and using the right channel. This is the essence of personalisation in communication and something you should be doing as a bare minimum, using industry standard tools, platforms and systems and with robust processes in place.

8: Next Steps

As we have seen, membership organisations are at different stages regarding the depth of member engagement they are achieving. The member engagement maturity model on the next page will enable you to quickly identify the stage your organisation is at with different aspects of member engagement, and to identify the elements that need to develop in order to improve.

This guide goes into detail in a lot of areas, and there are even more resources on our website. However, to know where to start you can ask yourself the following questions:

- Do you have a clear strategy for member engagement?
- Do you have a solid Member Value Proposition?
- Can you articulate the value of membership?
- Are you making it easy for members to engage with you?
- Is it second nature or habitual to be a member?
- Are you engaging routinely throughout the year?
- Are you delivering personalisation and relevance for members?
- Do you have an emotional relationship with members?

If the answer to any of the above is “No” then those are the things you need to tackle first.

We hope you've found this guide both interesting and useful, whether you've discovered completely new concepts, or found reassurance about work you're already doing, or just sparked some ideas for things you'd like to try.

This guide is one of a series on the fundamentals of managing a membership scheme, and part of a much wider set of ever-growing resources via MemberWise Learn (our online learning portal):

<https://learn.memberwise.org.uk>

On behalf of the MemberWise Network we would like to thank Advanced Solutions International (ASI) for sponsoring this best practice guide.

Member Engagement Maturity Level			
	SUBOPTIMAL	DEVELOPING	OPTIMISING
Member Value proposition	Focus is on products, benefits and "stuff". Value isn't communicated to members	More positive member outcome focus but not easily articulated or communicated to members	Focused on positive member outcomes, clearly articulated and communicated to members
Engagement Planning & Strategy	Forward planning is limited to a single year and largely only for budgeting purposes	Generalised aims, limited documentation or uncoordinated activity planning. Limited link to purpose	Formal strategy planning and documentation, understood at all levels, flexibility built in, and with clear buy-in at all levels.
Engagement Measurement & Reporting	Non-existent. Data either isn't available or isn't consistently captured	Variable approach to measurement and key indicators with some reporting in place	Regular measurement (using a variety of indicators/ weightings), review and engagement improvement programme in place.
Participation	Members only participate in the essentials. "Same old faces" at key conferences/events	Variety of members participating in different activity at different types of online/offline opportunities	High levels of participation (online and offline) and a good proportion of members are active advocates for membership
Interaction Type	Transactional activity. Just the basics to pay member fees, or purchase benefits	A mix of transactional and some relational activity, but the relational aspect isn't realised	Plenty of relational activity and a clear understanding of the emotional membership experience
Member Journeys	No formal overview or mapping of the journey members take and a low level of insight into actual member journeys taking place.	Basic "typical" member journey understood but no variation by grade or segment. Some gap analysis taking place.	Full suite of journeys mapped across different member types and for different activities. Gap analysis regularly conducted with regular improvements/optimisation.
Personalisation	Limited (e.g., email name) and based on transactional demographics (e.g. non-renewal reminders)	Members can make choices of preferences for communication content or find different options for different groups.	Dynamic content based on detailed profiles and on passed behaviours, and segmented by emotional relationship not just demographics
Process Automation	Non-existent	Basic Automation	Sophisticated
Member Experience	No consideration from a member perspective. Processes set up to suit organisation needs	Considers the member perspective but the experience isn't as effortless or relevant as it could be	The emotional relationship with members is centred in all membership focused activity
Communication Style	Broadcast. Focus on what the organisations wants to say. One size fits all	Combination of broadcast and conversational. Some segmented messaging	Conversational. Focus is on what members want to hear and tailored to different segments or personas
System Integration	Non-existent	Core system integration	Highly integrated systems. No data silos



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