ClearConnect

Automate Through Outsourcing

18/10/2022

Your presenter today...

Ed Owen

Strategic Account Director,

ClearCourse Membership Services

What we'll be covering today...

+ The Automation Challenge

+ Memberwise Focus Group - Key Findings & Insights

+ Introducing 'ClearConnect'

+ Real-World Examples of Membership Outsourcing

+ Summary & Key Takeaways

+ Q&A

ClearConnect

Managing Your Membership Workload

Deciding how to manage your membership activities

1

2

3

4

You Do It

You **Delegate** It

You **Automate** It

You **Don't** Do It

ClearConnect

Why does this matter?

Effective management of activities leads to better results against your strategic priorities

1 Member Engagement

2 New Member Acquisition

3 Member Retention

4 Member Value

5 Member Satisfaction

6 Member Participation

ClearConnect+

The Automation Challenge

Can You Automate It?

+ Is there a technical solution available?

+ Could members self-serve?

+ How long would it take to achieve?

Should You Automate It?

+ What is the investment required?

+ Does this deliver more value for members?

+ Does the solution make sense for us?

+ Is there an alternative solution?

ClearConnect+

Automation vs. Outsourcing

+ Could you get someone else to carry out this work instead?

+ Would this activity benefit from 'the human touch'?

+ Does the investment and time to automate outweigh the benefit for you and your members?

+ Is this work being neglected due to other work priorities?

ClearConnect+

Poll Questions

Are you proactively looking to 'automate' more of our membership activities over the next 12 months?

| Strongly Disagree | Disagree | Neither | Agree | Strongly Agree |

ClearConnect

Focus Group: Customer Service Example

Member

Agent

Membership

Database

Stats over 3-month annual renewal period:

- 1,610 Calls Handled
- 1,660 Emails Processed
- 1,560 Outgoing Post
- 835 Hours Logged

ClearConnect

Focus Group: Key Findings

Fluctuating workloads is a known challenge

Concern outsourcing may result in more work

Potentially, better results when managed internally

When outsourcing, clear KPIs are key to success

Remote working has presented certain challenges

Ambitions to automate & streamline where possible

ClearConnect

Takeaways

+ Definable activities (processes) with clear KPIs is key to understanding success for both parties

+ Dedicated agent(s) with relevant membership experience to instil confidence in capabilities

+ Flexible resource would help with fluctuating work demands

+ Helping to identify the return-on-investment (ROI) based on factors like membership lifetime value

+ There is good experience in the market in terms of trying similar outsourcing avenues before

ClearConnect+

Poll Questions

Have you had a good previous (or current) experience with 'outsourcing' membership activities before?
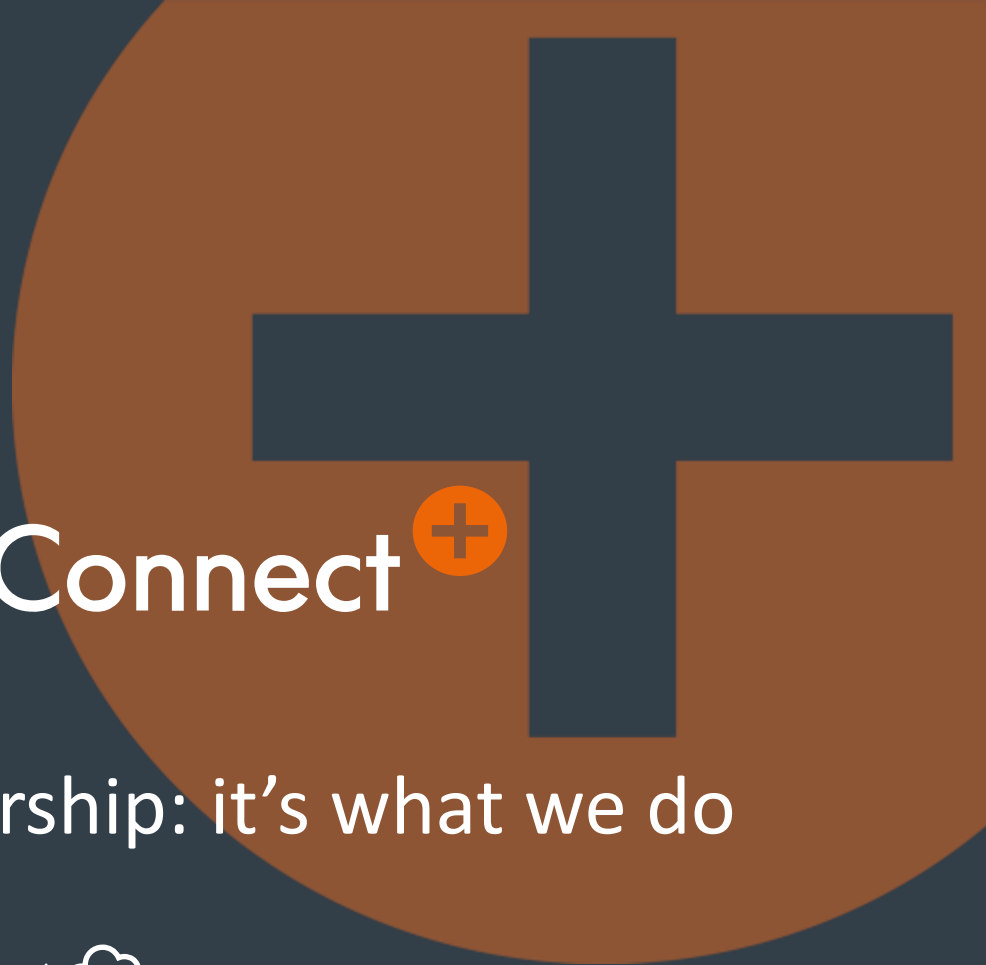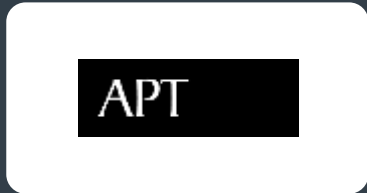
No, bad experience

No, haven't tired it

Neutral

Yes, good experience

Yes, very good experience

ClearConnect

ClearConnect ⊕

Membership: it's what we do

ClearConnect+

Service Offerings

Acquire	Engage	Retain

- **Call prospective members**

- **Recruitment campaign**

- **Follow-up content**

- **New Member Calls**

- **Member Check-ins**

- **Calls tied to Campaign**

- **Member Surveys**

- **Collecting Subs**

- **Call Lapsed Members**

- **Pre-renewal contact**

Call Campaign Considerations

+ Phone calls do still work

+ Calling times do matter – time of day & time in relation to membership cycle

+ A good voicemail can drive engagement

+ Keeping records updated is key

Membership: it's what we do

ClearConnect+

Poll Questions

Are call campaigns likely to figure in your member engagement/retention strategy?

Very Unlikely

Unlikely

Neutral

Likely

Very Likely

Re-cap & Key Takeaways

+ How consistent and repeatable is the process?

+ Don't forget the human touch

+ Every interaction is an opportunity to deliver value and further build the relationship
(answering questions, checking-in, asking their feedback, providing direct assistance or value)

+ Do you specifically need to do this activity and/or process, could someone else do it?

+ Can you afford not to be doing it at all?

ClearConnect✚

ClearConnect+

Thank You

Please let us know if you any questions.

✈ ed.owen@clearcourse-membership.com