



MemberWise

Best Practice Webinar Series

Webinar

How We Make Personalisation Happen

Facilitated with
Official Network Partner:





MemberWise

Best Practice Webinar Series

Today's Agenda

- **Introductions & Presentation**
 - *Richard Gott, Membership Champion, MemberWise Network*
- **How We Make Personalisation Happen**
 - *Jonathan McLellan, Digital Consultant, Pixl8 Group*
 - *Laura Scherf, Marketing Strategist, Pixl8 Group*
- **Interactive Questions and Answers (Q&A)**
 - *Kerrie Fuller, Associate Director of Engagement, MemberWise Network*



MemberWise

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Today's Learning Objectives

- How to develop a strategic personalisation plan
- Identify information silos and the available data to personalize
- Considerations to create inspiring - not creepy - member experiences
- Gain confidence to find the right systems

Interact



One Size Doesn't Fit All



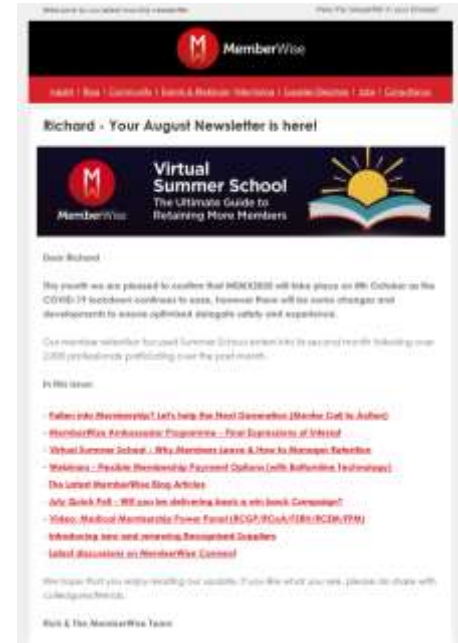
- 43% of membership bodies not yet personalising content
- Multiple Channels of Communication available
- Increased member value expectations
- An assumption of a personalised experience (online and offline)
- More thought/time required versus more basic generic offerings
- More personalised approaches may be more difficult to copy (competition)
- A requirement to use appropriate platforms (online and offline)
- A real opportunity to engage more deeply with members



Basic Personalisation



- Rendering basic information
- Name / Organisation
- 57% of membership bodies doing this
- Using basic analytics to measure success
- Most information gained via online joining, preference centres, web analytics
- Some membership bodies still manually entering this information
- Too many still using systems and processes that are either outdated or not fit for purpose



More advanced approaches



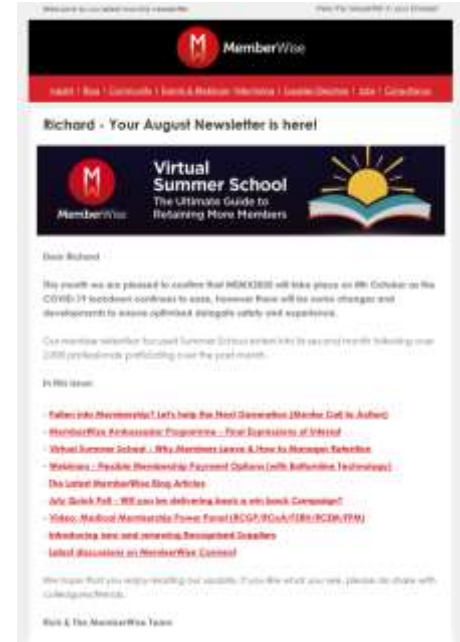
● Content rendered by knowledge (43%)

- Location
- Special Interest
- Membership Grade/Category
- Length of membership

● Status – Recently lapsed (within 30 days) ● Content rendered by behaviour/Interaction (11%)

- Visits to specific content on website
- Opens/click-throughs and subsequent journeys
- Downloads of specific materials
- Online Purchases

● The vast majority are rendering via behaviour
Linked to tool functionality available. E.g. MailChimp V dotdigital



The Right Time. The Right Place. The Right Personalised Content



- Content needs to be clear, contextualised and targeted
- Lengthy text heavy content is not good
- Use of images/illustrations to complement personalised content – Powerful!
- Test, Test, Test – Dear [First Name]
- If segmenting, don't go to mad – Think 'Key Segments'
- Create 4 or 5 Member Personas and consider key journeys (online/offline)
- Regularly review any templates if automation is in place
- Lets look at some personalisation examples...

**RIGHT RIGHT
TIME PLACE**

Digital Welcome Packs



MemberWise

- The Chartered Governance Institute
- Replacement of the traditional personalised membership Pack
- Personalised content
 - Member Details
 - Image in header
 - Virtual Membership Card
- View this on MemberWise Connect
- Thanks to Jane Galbraith for letting us share this with you.



Personalisation Example

- It may be that you have more than one audience.
 - Different types of members
 - Donors
 - General Public
- Personalising their online experience will help to engage
- Twins Trust Website
- Different calls-to-action linked to status:
 - Non-Members – Join! (Nick)
 - Members – Donate (Sarah)
 - Membership Due – Renew Membership (Emma)



Twins trust.

Welcome Nick [Donate now](#) [Become a member](#)

Welcome Sarah [Donate now](#)

Welcome Emma [Donate now](#) [Renew membership](#)

How we personalise the member experience



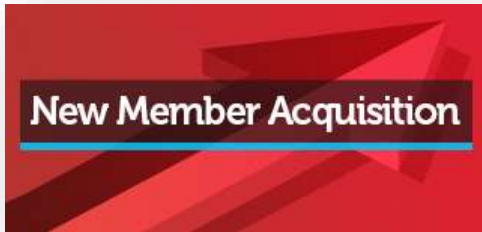
- Community – Professional profile / polls
- Enabling self personalisation of professional profiles
- Ability to join sub-groups relevant to you
- Content is linked to activity/non-activity
- Automation rules make the experience feel more personal
- Only 5% of membership bodies are currently doing this
- This type of activity generates immediate value



How we personalise the member experience



- We record membership body type
- We provide content recommendations linked to this
- We will shortly be launching 12 segmented Hubs



A screenshot of a MemberWise webpage. The page has a white background with a red header. The main content area is titled 'Introduction' and 'Don't take our word for it'. It features a video player with a red 'M' logo and the text 'ARE YOU READY to experience MemberWise?'. Below the video player is a sidebar with a list of navigation items: Home, Introduction, New Member, Member Body, Tools, Member Experience, About MemberWise, Contact Us, Services, MemberWise Partners, MemberWise Events, and MemberWise. The main content area also includes a section titled 'Membership - Giving Membership Meaning, Together.' and a large graphic titled 'MEMBERSHIP EXCELLENCE' with various icons and text.

Powering Up Personalisation



- Focus on the positive outcomes (member value drivers)
- Link these to personalised experiences (web/email/community)
- If new to this consider focusing on a segment at a time
- Ensure the right systems and processes are in place
- Make sure adequate resource is available (human/tech)
- Be clear on how you are going to measure success?
- Consider linking member engagement scoring



Don't Forget Hard Copy



- Personalisation of letters/envelopes
- Web to print enabling easier personalisation of actual literature
- Membership cards still valued – IF they have a purpose
- Rise above the 'digital noise'
- Even Google gets this
- Over to Jonathan to find out more about online personalisation...



How we make personalisation happen

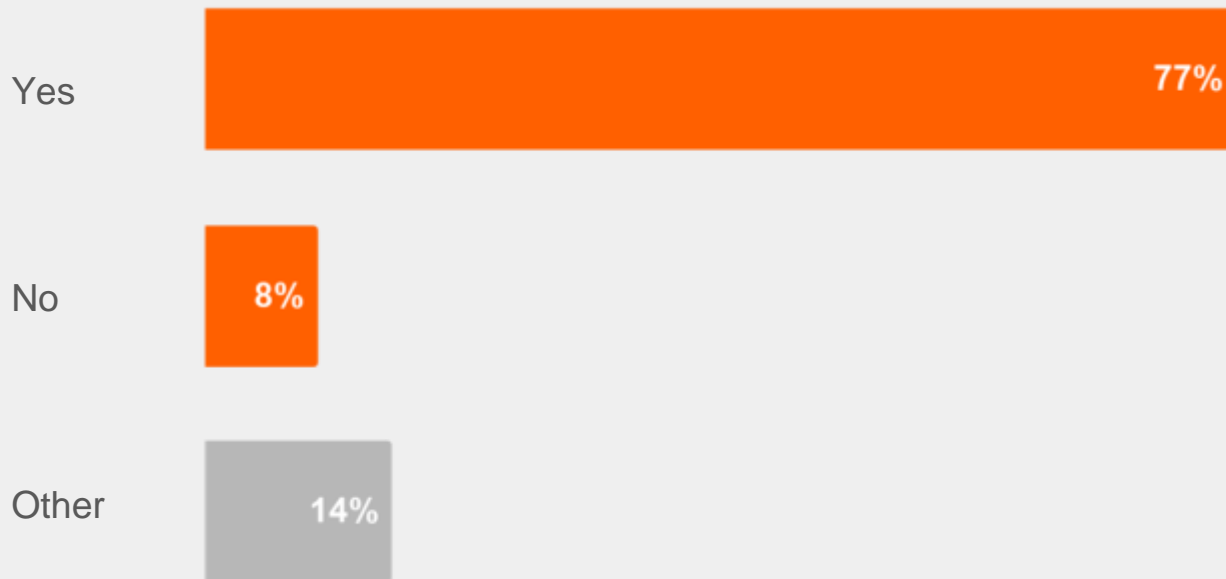
Laura Scherf | Jonny McLellan

Tweet: @pixl8 Visit: www.pixl8.co.uk

Agenda

1. What is personalisation?
2. Why is it important?
3. Planning framework
4. Quick-wins
5. Systems
6. What good looks like

Do you wish to start or enhance your levels of personalisation and automation?



71 respondents

The background features a solid orange color with several overlapping, semi-transparent geometric shapes in shades of yellow and light orange. These shapes are primarily triangles and squares, some pointing towards the corners of the frame, creating a dynamic, abstract pattern.

**What is
personalisation?**

Understanding terminology

What is personalisation in the context of websites and email?

Personalisation

vs

Segmentation

vs

Customisation

Who makes it happen?

Strategy

- Setting personalisation priorities
- Personalisation plan
- Objectives & KPIs

Delivery

- Established or dynamic segment set up
- Content production
- Email or website production

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**Why is it
important?**

Why use personalisation for your website and email?

Engagement

Retention

Conversion

UX

Loyalty

Empathy

Efficiency

Longevity

Focus

Insights

Recent research into personalisation

91%

of consumers are more likely to shop with brands who recognise, remember, and provide relevant offers and recommendations.

74%

of respondents said they would find “living profiles” valuable if they could be used to curate the experiences, offers, and products they receive.

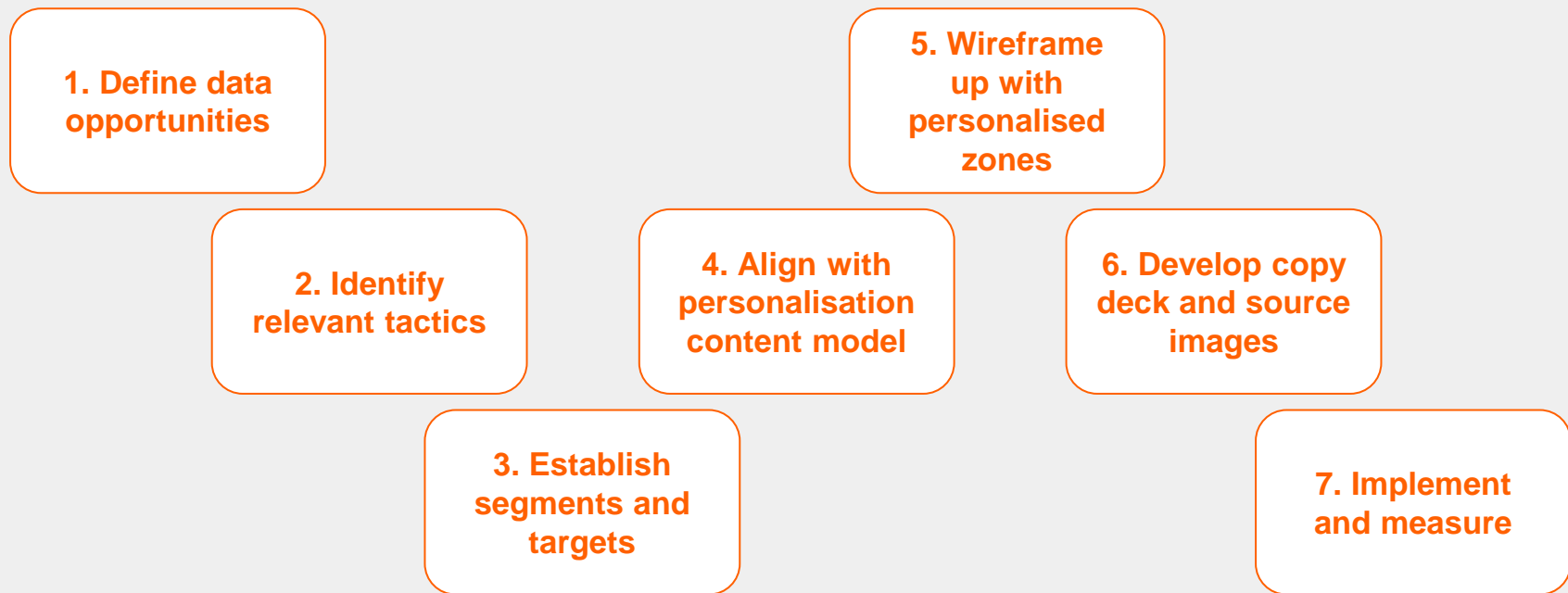
83%

of consumers are willing to share their data to enable a personalised experience.

The background features a solid orange color with several overlapping diamond-shaped polygons in various shades of orange and yellow, creating a geometric pattern.

Planning framework

Personalisation planning framework



1. Define data opportunities

Interests

Please tell us what topics are relevant to you.

- Corporate governance
- Fair competition
- Human rights
- Speak Up
- Technology

Update personal details

Title*	First name*	Middle name
Mr	John	
Surname*	Honours title	
Smith		
Address		
[Redacted]		
Email name		Known as - Surname
		Smith
Gender*		
MM	YYYY	Male

Current CPD activity

12 results

Attended online webinar (live delivery)
5 Dec 2019

2. Identify relevant tactics

- Geolocation
- Campaign based
- Time based
- Account profile
- Related content



3. Establish segments and targets

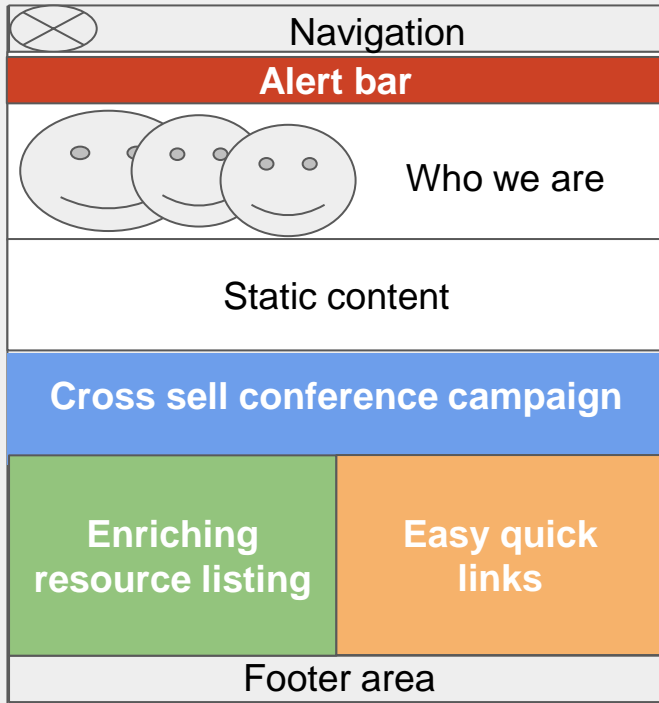
Segment	Identifier	Goal	Strategy
Non-member	Not logged in	Increase membership applications by 5%	Enhance and better promote member benefits.
Existing Student member	Logged in, student subscription grade	Increase student event sign-ups by 20%	Increase local events and offer early-bird discounts.
Soon to lapse Associate member	Logged in, associate subscription grade	Increase retention rates of Associate members by 10%	Introduce monthly payment options to help spread costs.

4. Align with personalisation content model

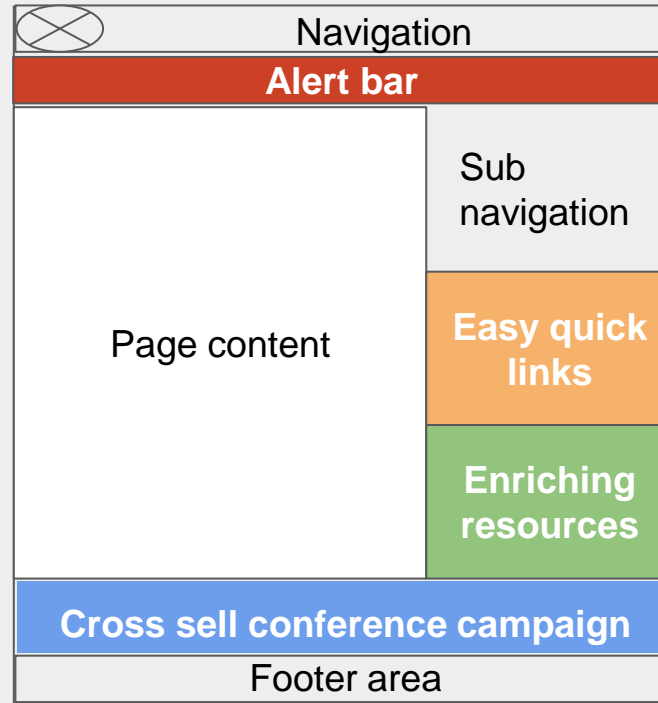
Segment	Alert	Make easier	Cross-sell	Enrich
Non-member	Newsletter registration Sign-up to emails	Quick links Taking user to sign-up pages	Annual conference campaign Tailor message and key benefits by audience	Member benefits Clearly list out all member benefits
Existing Student member	Geolocation events banner Display to any student member with region details	Quick links When logged in, taking user to manage their region details / complete renewals		Testimonials Highlight networking benefits at local events
Soon to lapse Associate member	Renewal reminder Display to any member due to renew in <30 days			Case studies Showing what other associate members have gained in long run

5. Wireframe personalised zones


Homepage



Subpage



6. Develop copy deck and source images

Element	Content	Asset
<p>Conference campaign Student members</p>	<p>Headline Accelerate your employment prospects</p> <p>Copy Next year's member only conference is taking place in the vibrant city of Dublin, featuring invaluable networking opportunities and an exciting social programme - an event that no member should miss out on.</p> <p>CTA Book my discounted spot now!</p>	 <p>Source: Student-attendee.jpg Full-size: 900×450 Thumbnail: 300×200</p>
<p>Etc</p>	<p>Etc</p>	<p>Etc</p>

7. Implement and measure



Watch outs

- Blindly trusting technology
- Out of date user data
- Over-restricting content
- Stretching yourself too thin
- Not providing an 'out'
- Assign roles carefully



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Quick wins

First things first: information source

Logged in users

Build up a 360-view of your members in your CRM



Inbound link

Understand what people are looking for



Analytics data

Capitalise on Google's audience profiles



Quick wins

Data you need

Available where

Personalised outcome

New user?



CMS, App



First visit experience

Event attendance



Email,
CMS, App



Post event experience

Previous member status



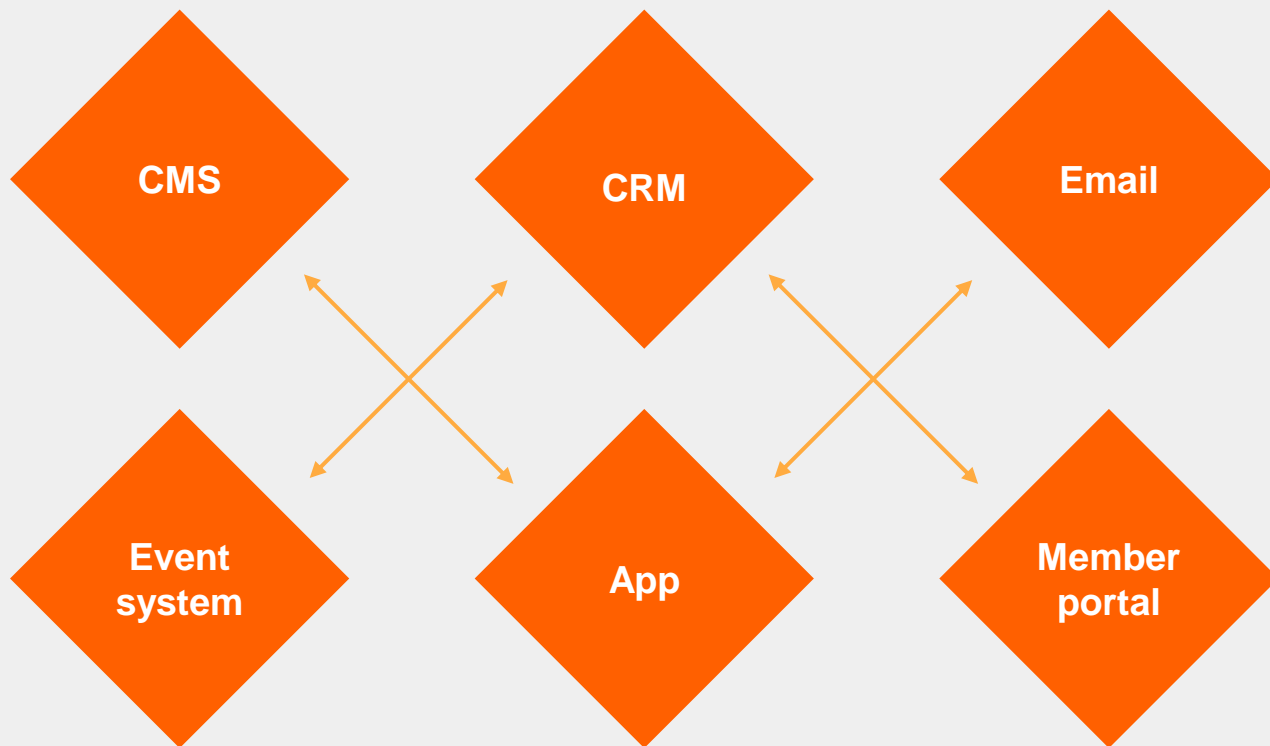
CMS, Email



Welcome back
experience

Systems

Integrating data sources



Systems

As a content producer, you will benefit from:

- Conditional content widgets
- Selection of rules
- Content tagging
- A/B testing
- Google Optimise
- Google Analytics goals

Edit condition

User **is** logged in

(and)

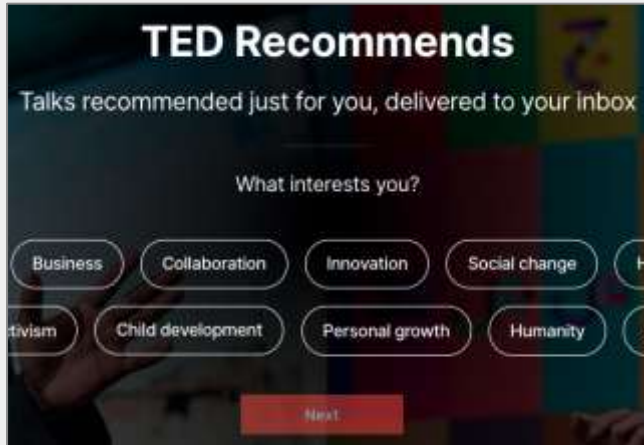
User last visited **Events** **within the last 10 days**

(and)

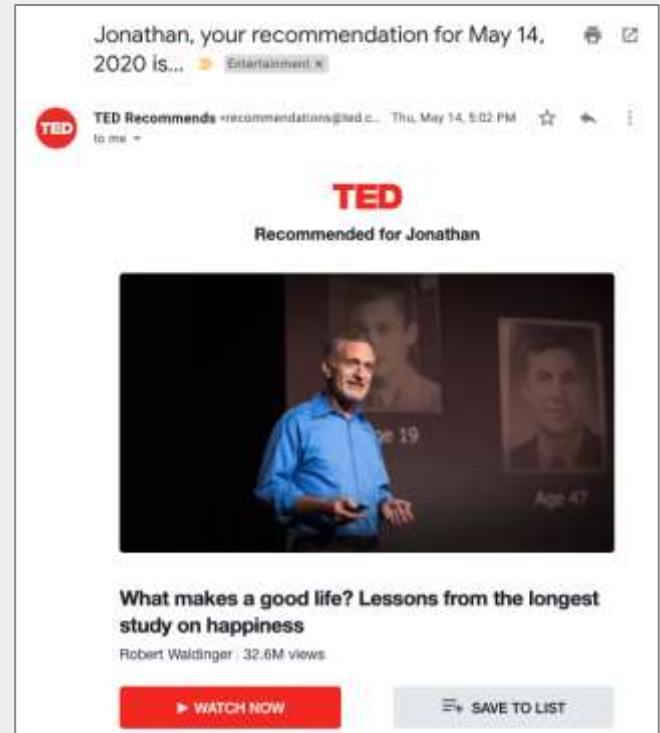
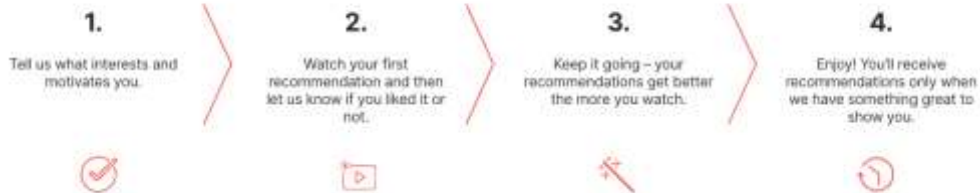
Date created is **within the last 1 years**

What good looks like

TED case study




How it works



A 'free' webinar follow up

We have plenty more to offer.



GO FURTHER.


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inst8leaders.com

Sam, we hope you enjoyed our webinar!

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Each webinar is centered around a different topic related to leadership, everything from the Unlocking Happiness at Work to Mindful Leadership.



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NEXT STEP.

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Early access to latest report



You have priority access to a new report published by Ready Membership. Get your copy now.



Invite a friend to membership



Save a friend 15% in membership by referring them today.

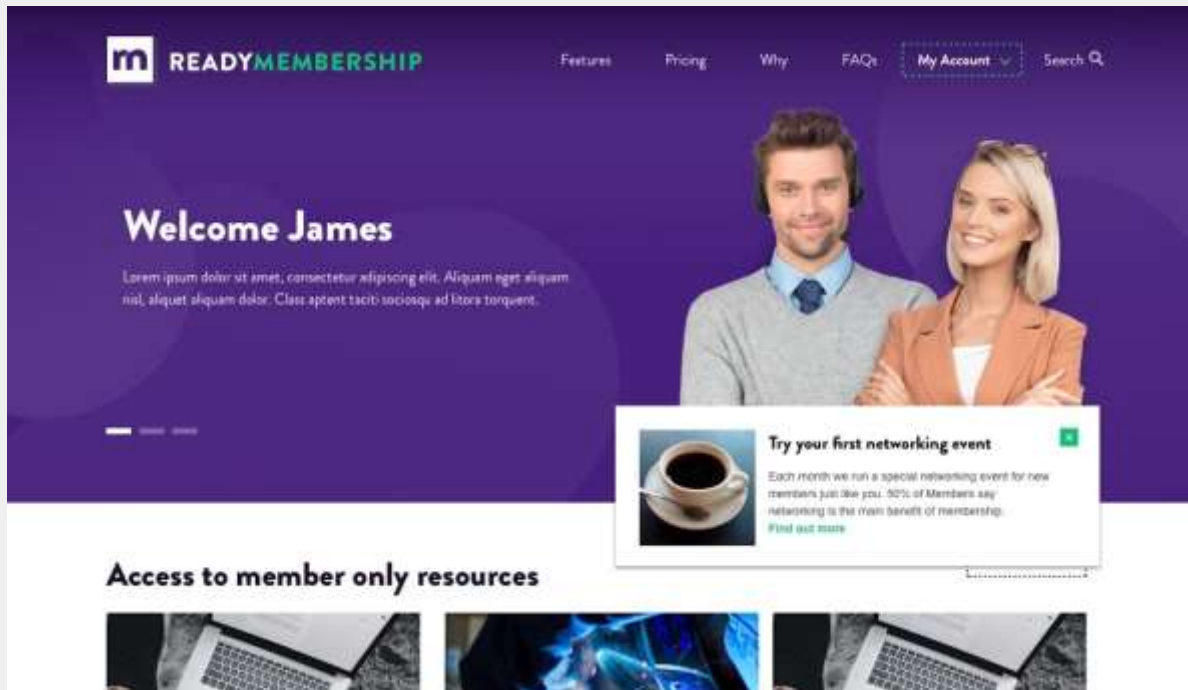


Free member only webinar



Sign up now and reserve your place for one of the upcoming member only webinars

ReadyMembership



*ReadyMembership
can accelerate your
digital setup*

Top 3 takeouts

1. Understand where data comes from and how it can be used
2. Start simple
3. Align with org goals, don't do it just because you can



Membership Forecast: July 2020

Insights, statistics and recommendations

Guiding membership organisations to business and digital opportunities in times of flux.

What we think

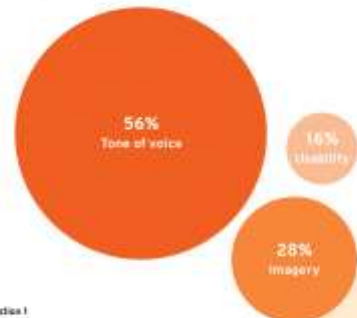
The more you know about your members and prospects, the easier it is to make sure your communications resonate.

We all appreciate that it's important to assess what works and what doesn't in order to improve. However, we have found that sometimes due to time pressure or resourcing challenges, digital projects are based on assumptions that have yet to be verified.

As a first step, platform inclusion, customer view, value opportunities

'Why' trump
Linking your objectives with

Of those who told us they were actively trying to increase their online conversion, which areas did they focus on?



* Question 1

Making change happen



How we make conversion happen
September 10th

How we make effective reporting happen
October 15th

How we create great member experiences
November 12th

Want to hear more?



The Forward

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Packed full of digital tips, tricks, and insight



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