

The Key Elements of an Effective Membership Strategy



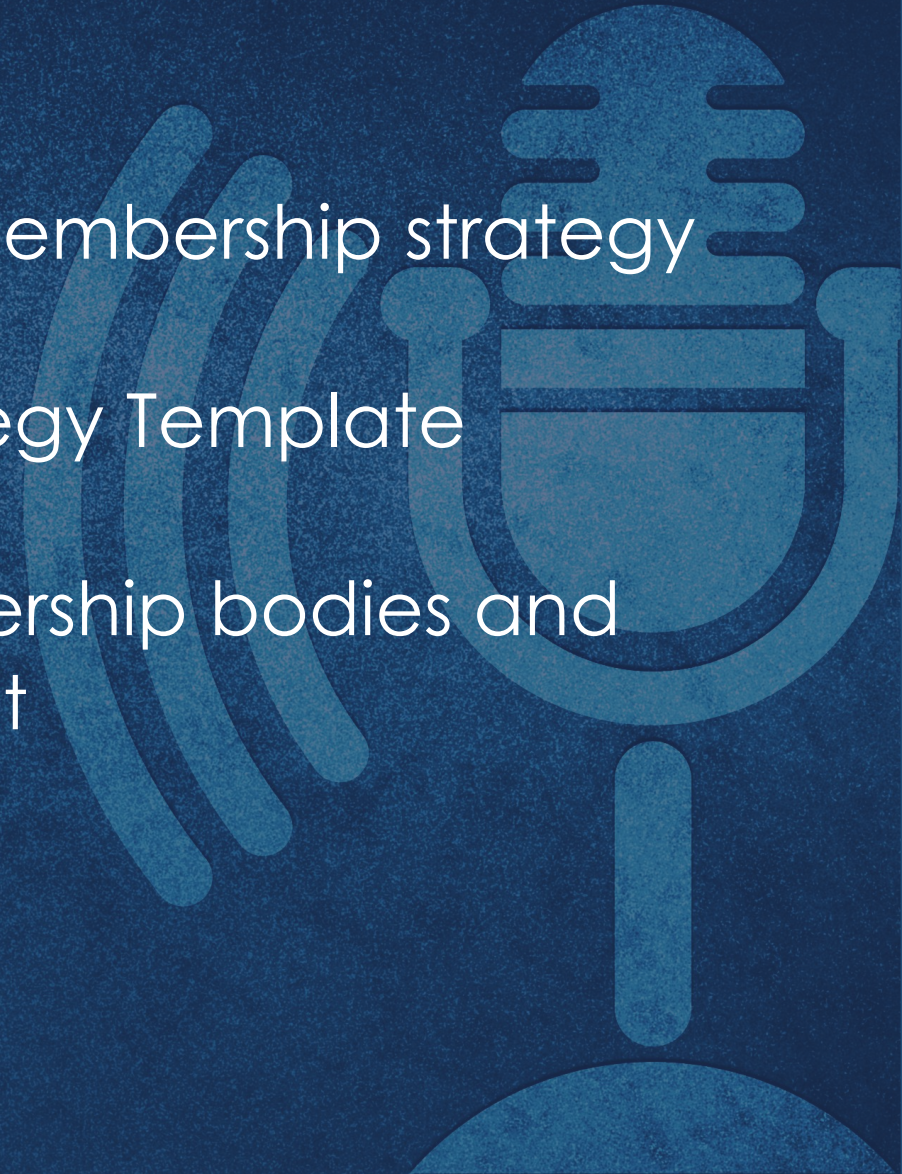
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Learning objectives

- Understand the key components of a membership strategy
- Review our Member Engagement Strategy Template
- Hear some examples from other membership bodies and their approach to strategy development
- Questions and Answers



Value Proposition

Membership Value Proposition (MVP) answers the big questions:

- How does membership add value against OTHER income streams that you offer?
- Who is the audience(s) for membership? *hint: needs based*
- Which categories of membership best classifies members according to their needs/career stage/qual level/usage?
- Which membership benefits (tangible and intangible value) will each category offer?
- How much will the membership fee charge per category?

Retention Strategy FIRST

Strategy example = Increase retention rate from 70% to 75% by improving retention communications

Set the target > improve retention or at the very least maintain its current level. Use retention rate (%) as the KPI

Research: why didn't members renew? Can you do anything to fix this?

Typical actions to improve retention:

- Sending more timely communications via different channels
- Improving the messaging and design of communications
- Presenting the member offer in a better way that addresses needs
- Personalising and tailoring renewal communications
- Improving the membership benefits on offer/value proposition

Engagement Strategy SECOND

Strategy example = Improve engagement by actively targeting members throughout the year with tailored communications about the benefits of membership.

Targets > How do you measure engagement? Different across the organisation (open rates, event attendance, votes at AGM).

Research: what are ALL the ways that members engage with you across the organisation? How can we measure it? How can we start collecting this engagement data?

Typical actions to improve engagement:

- Improvement to individual benefits/VP to increase uptake
- Remove barriers to engagement e.g. events; digital.
- Communications plan through the year promoting benefits

A word on KPIs

Total membership = % of renewed members + % of recruited members

So $100\% = 85\% + 15\%$

2,500 total members = 2,125 retained + 375 new members

If you want to grow, you have to increase recruitment as well as retention
so let's say you want to grow the total membership by 5%

5% of 2,500 is 125 + 2,500 =

2,625 total members - 2,125 retained = 500 new members needed

Recruitment Strategy

Strategy example = Increase recruitment to 10% by improving marketing

Set the target > increase recruitment or at the very least maintain its current level. Use recruitment rate (%) as the KPI

Research: how do your members hear about you? should be asking them in the joining journey!

Typical actions to improve recruitment:

- A structure marketing plan aimed at specific target audiences
- Improving the branding, design and message of marketing
- Presenting the member offer in a better way that addresses needs
- Personalising and tailoring recruitment communications
- Improving the membership benefits on offer/value proposition

Strategy Adoption in the UK

- Digital Excellence 2021/22 Results
- Most will have a corporate strategy
- Not enough have Engagement Strategies
- Creates a real disconnect
- Lack of Digital and Data Strategies
- Those with also unlikely to have linked/actionable plans



The Format of a great Member Engagement Strategy

1. An Executive Summary
2. Your Approach
3. Proposed Member Engagement Strategy
4. Member Engagement Measurement/Scoring
5. Membership Segmentation and Personalisation
6. Membership Targets
7. Member Engagement Improvement



The Format of a great Member Engagement Strategy

1. An Executive Summary

- High Level Overview
- Link to Corporate Strategy

2. Your Approach

- You may want to define key terms like 'Engagement'
- Include your Member Value Proposition and Member Benefit Statement



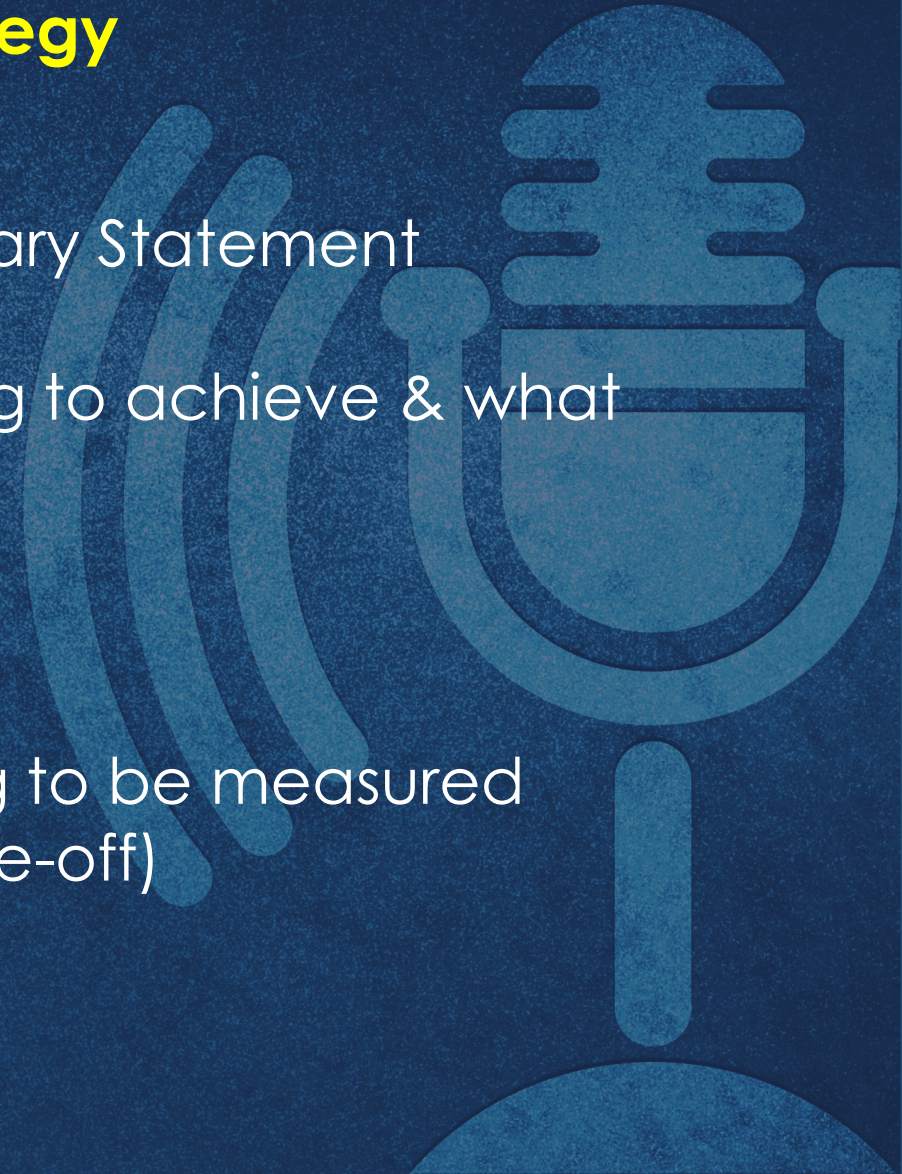
The Format of a great Member Engagement Strategy

3. Proposed Member Engagement Strategy Summary Statement

- An summary of exactly what you are going to achieve & what needs to be done

4. Member Engagement Measurement/Scoring

- A clear view on how engagement is going to be measured
- This should be a continual process (Not one-off)



The Format of a great Member Engagement Strategy

5. Membership Segmentation and Personalisation

- Capture the Key Member Segments targeted & the related activity that will be undertaken
- Specifically outline how you are going to make these activities timely/relevant for each segment

6. Membership Targets

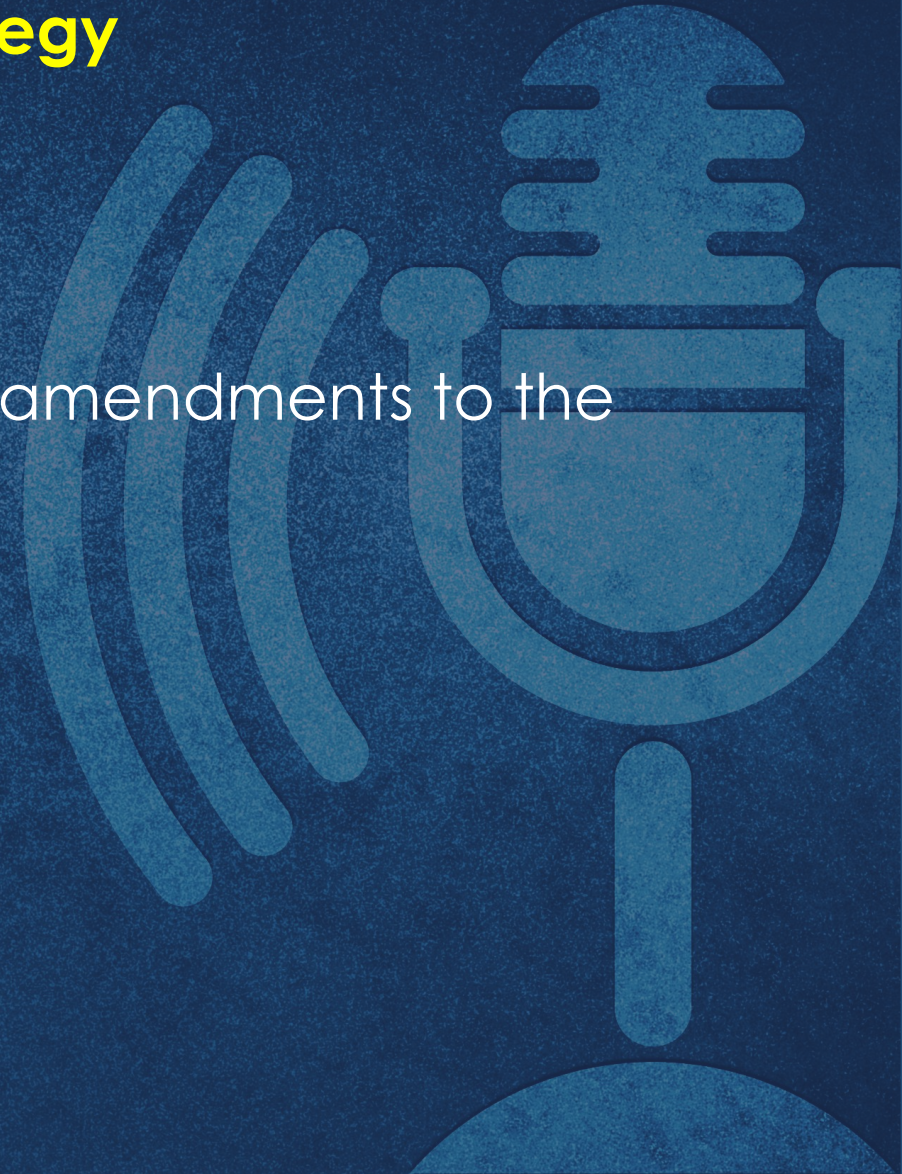
- As Kerrie advises communicate clear targets
- Retention / Recruitment / Engagement / Product Sales



The Format of a great Member Engagement Strategy

7. Member Engagement Improvement

- As an iterative process capture the changes/amendments to the strategy to help inform the next period



The Member Engagement Plan

- This is where the 'action' happens
 - What
 - Where
 - When
 - How



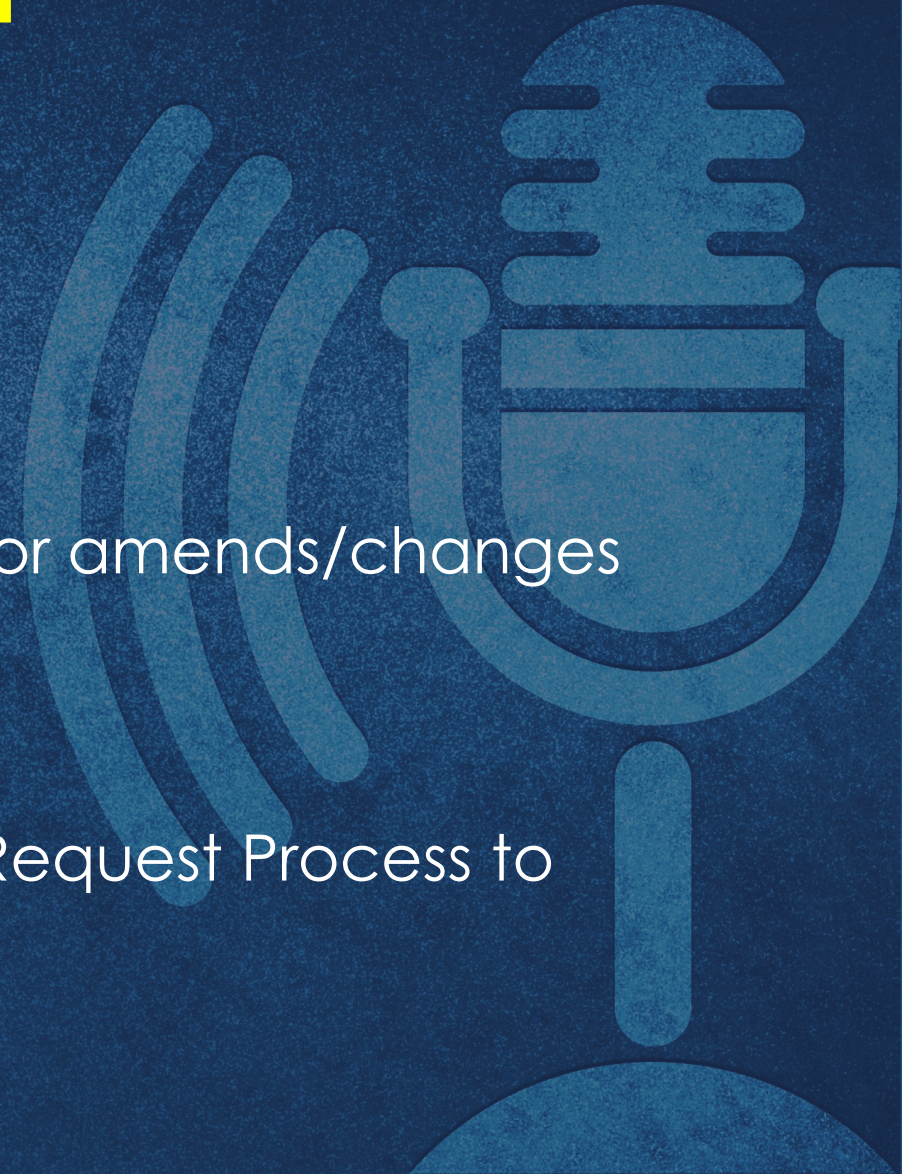
Supplementary Items

- An outline of Budget and proposed allocation of spend linked to activities
- A Risk Register
- Consider Scenario Analysis for critical activity



The Duration of the Strategy & Plan

- Typically One Year in detail (month by month)
- Helpful to have years 2 and 3 scoped/outlined
- As a working document there should be scope for amends/changes
- Regular meetings to review progress
- Any key changes should go through a Change Request Process to ensure scope creep does not occur



Member Engagement Strategy Template

<p>[Membership Body Logo]</p> <p>Member Engagement Strategy [YEAR] to [YEAR]</p> <ol style="list-style-type: none">1) Executive Summary2) Our Approach3) Proposed Member Engagement Strategy4) Member Engagement Measurement/Scoring5) Membership Segmentation and Personalisation6) Membership Targets7) Member Engagement Improvement <p>1) Executive Summary</p> <p>This Member Engagement Strategy is fully aligned and compliments the [MEMBERSHIP ORG NAME] Corporate Strategy/Priorities/Goals by outlining the organisations structured approach to member retention, engagement, and recruitment for the year ahead and beyond.</p> <p>Key features include key projects/initiatives that encompass member personalisation, measurement and automation (where appropriate) aligned to member need and sector trends. The strategy is complimented by a Member Engagement Plan which enables the organisation to deliver the strategy. Targets, Key Performance Indicators, targets and a risk register feature.</p> <p>Our key Recruitment and Retention Targets for the year ahead:</p> <table border="1"><thead><tr><th></th><th>YEAR</th><th>YEAR</th></tr></thead><tbody><tr><td>Member Retention</td><td>X</td><td>X (+X)</td></tr><tr><td>New Member Acquisition</td><td>X</td><td>X (+X)</td></tr></tbody></table> <p>2) Our Approach</p> <p>Our definition of member engagement:</p> <p><i>EXAMPLE - "True member engagement aligns members' hearts and minds with the purpose of the organisation and directly influences state of mind, thoughts, feelings and current/future actions"</i></p> <p>Our aim is to fully realise the potential of deeper member engagement. The cornerstone to this is clearly articulating and communicating the value of membership.</p>		YEAR	YEAR	Member Retention	X	X (+X)	New Member Acquisition	X	X (+X)	<p>[Membership Body Logo]</p> <p><u>Our Member Value Proposition (MVP):</u> [STATEMENT]</p> <p>Value is delivered via our growing portfolio of member benefits.</p> <p><u>Our Member Benefit Statement:</u> [STATEMENT]</p> <p>3) Proposed Member Engagement Strategy Summary</p> <p>From [YEAR] we will focus our attention on providing a deeper and more value driven member experience as one size no longer fits all from a membership perspective.</p> <p>Our strategy will focus on the retention, recruitment and engagement of X core member segments.</p> <p>Each segment has a mixture of similar and unique needs/requirements, so retention and recruitment activity will focus on providing practical solutions in response.</p> <p>Activity will include a mixture of more targeted communication of existing member benefits, repackaging existing member benefits and delivering completely new benefits.</p> <p>This approach will be more targeted than ever before.</p> <p>The result of this activity (in terms of increases in member retention/recruitment) is outlined in the Snap Shot and Future Proposed Target tables on the following pages.</p> <p>[CORE ELEMENTS TO BE OUTLINED HERE]</p> <p>4) Member Engagement Measurement/Scoring</p> <p>It is important to ensure we optimise member engagement/participation to ensure effective member retention. The following measures will be used on an ongoing basis throughout the year:</p> <ol style="list-style-type: none">1) Measure X2) Measure Y <p>In response to these measures the following engagement/re-engagement activity will take place in response:</p> <ol style="list-style-type: none">1) Disengaged to Engaged
	YEAR	YEAR								
Member Retention	X	X (+X)								
New Member Acquisition	X	X (+X)								

Member Engagement Strategy Template

[Membership Body Logo]

- 2) Passive to Active
- 3) Active to Advocate

More detailed information on the planned activities/campaigns are located in the Member Engagement Plan

5) Membership Segmentation & Personalisation

We have identified the following X core segments to target:

- 1) Grade/Category
- 2) Grade/Category

The proposed personalised benefits/activity with these segments is outlined in the following Member Engagement Plan.

In tandem with this activity membership development focused work will be conducted with the following developmental segments:

- 3) Grade/Category
- 4) Grade/Category

6) Membership Targets

Member Retention Snap Shot and Future Proposed Targets

Member Retention is currently X% and by [YEAR] we will improve this rate to X% (an increase of X%). Outlined below is a segmented view of current and proposed future member retention levels:

Audience	Current Retention Rate (YEAR)	Target Retention Rate (YEAR)	Target Retention Rate (YEAR)	Target Retention Rate (YEAR)	Target Retention Rate (YEAR)	Target Retention Rate (YEAR)
GRADE/CATEGORY	X	X	X	X	X	X
GRADE/CATEGORY	X	X	X	X	X	X
GRADE/CATEGORY	X	X	X	X	X	X
GRADE/CATEGORY	X	X	X	X	X	X

Commentary:

New Member Acquisition Snap Shot and Future Proposed Targets

New Member Acquisition is currently X% and by [YEAR] we will increase this rate to X% (an increase of X%). Outlined below is a segmented view of current and proposed future new member acquisition levels:

[Membership Body Logo]

Audience	Current Acquisition Rate (YEAR)	Target Acquisition Recruitment (YEAR)	Target Acquisition Recruitment (YEAR)	Target Acquisition Recruitment (YEAR)	Target Acquisition Recruitment (YEAR)	Target Acquisition Recruitment (YEAR)
SEGMENT	X	X	X	X	X	X
SEGMENT	X	X	X	X	X	X
SEGMENT	X	X	X	X	X	X
SEGMENT	X	X	X	X	X	X

Commentary:

Subscription Income Snap Shot and Future Proposed Targets

Total membership income in [YEAR] will be approximately £X (X% of total income). By [YEAR] it is projected that membership income will be approximately £X (X% of total income).

Audience	Current Membership Subscription Income (YEAR)	Target Membership Subscription Income (YEAR)	Target Membership Subscription Income (YEAR)	Target Membership Subscription Income (YEAR)	Target Membership Subscription Income (YEAR)	Target Membership Subscription Income (YEAR)
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X

Commentary:

Membership Grade Composition Snap Shot and Future Proposed Composition

Audience	% of Total Membership (YEAR)	Target % of Total Membership (YEAR)	Target % of Total Membership (YEAR)	Target % of Total Membership (YEAR)	Target % of Total Membership (YEAR)	Target % of Total Membership (YEAR)
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X

7) Member Engagement Improvement (Member Engagement Scoring)

Audience	Measure	Current MES	Target MES (YEAR)	Target % of Total Membership (YEAR)	Target % of Total Membership (YEAR)	Target % of Total Membership (YEAR)
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X
GRADE	X	X	X	X	X	X

Member Engagement Plan Template

[Membership Body Logo]

Member Engagement Plan

The overarching approach of our proposed Member Engagement Strategy is to take a more personalised (segmented) approach to membership. It therefore follows that planned activity should be aligned the 4 core member segments:

1) AUDIENCE/GRADE X

INTRODUCTION

Recruitment Activity (YEAR)

- Key activity 1 (Deadline / Success Measure)
- Key activity 2 (Deadline / Success Measure)
- Key activity 3 (Deadline / Success Measure)
- Key activity 4 (Deadline / Success Measure)

Recruitment Activity (Beyond YEAR)

CONTENT

Retention/Engagement Activity (YEAR)

- Key activity 1 (Deadline / Success Measure)
- Key activity 2 (Deadline / Success Measure)
- Key activity 3 (Deadline / Success Measure)
- Key activity 4 (Deadline / Success Measure)

Retention Activity (Beyond YEAR)

CONTENT

2) AUDIENCE Y

INTRODUCTION

Recruitment Activity (YEAR)

- Key activity 1 (Deadline / Success Measure)
- Key activity 2 (Deadline / Success Measure)
- Key activity 3 (Deadline / Success Measure)
- Key activity 4 (Deadline / Success Measure)

Recruitment Activity (Beyond YEAR)

[Membership Body Logo]

CONTENT

Retention/Engagement Activity (YEAR)

- Key activity 1 (Deadline / Success Measure)
- Key activity 2 (Deadline / Success Measure)
- Key activity 3 (Deadline / Success Measure)
- Key activity 4 (Deadline / Success Measure)

Retention Activity (Beyond YEAR)

CONTENT

3) AUDIENCE Z

INTRODUCTION

Recruitment Activity (YEAR)

- Key activity 1 (Deadline / Success Measure)
- Key activity 2 (Deadline / Success Measure)
- Key activity 3 (Deadline / Success Measure)
- Key activity 4 (Deadline / Success Measure)

Recruitment Activity (Beyond YEAR)

CONTENT

Retention/Engagement Activity (YEAR)

- Key activity 1 (Deadline / Success Measure)
- Key activity 2 (Deadline / Success Measure)
- Key activity 3 (Deadline / Success Measure)
- Key activity 4 (Deadline / Success Measure)

Retention Activity (Beyond YEAR)

CONTENT

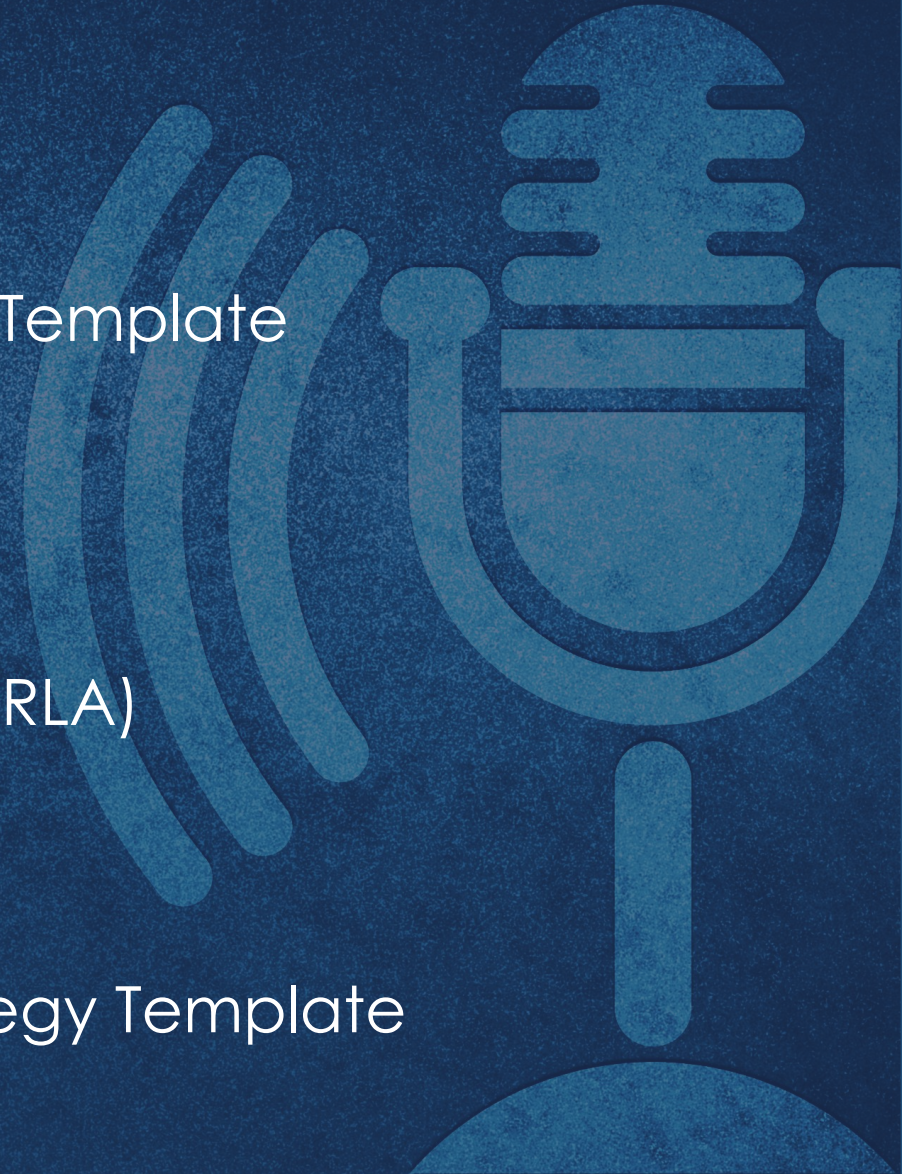
Resource Implications

Budget

Risk Register

Case Studies

- Society of Immunologists (Sol)
 - Member Engagement Review & Strategy Template
- Royal College of Anaesthetists (RCoA)
 - Transition from Admin to Engagement
- National Residential Landlords Association (NRLA)
 - New Member Acquisition Focus
- National Women's Register (NWR)
 - Member Engagement Ingredients & Strategy Template



How We Can Help

- A Suite of Structured of Membership Focused Advisory Services
- Focus – Member Retention / New Member Acq / Value / Engagement
- Member Engagement Strategy Creation / Optimisation
- **Light Touch**
 - Facilitation to ‘Get Organisations Off the Blocks’
 - Typically via Virtual or Face-to-Face Workshops
- **Consultancy**
 - More in-depth
 - Conducted Virtual or Face-to-Face Delivery/Reporting



Coming up in November

2nd November

- **Leading Membership Bodies**
- A Coaching Masterclass With Kerrie Fuller

9th November

- **How to successfully manage membership income**
- Sponsored by Millertech

16th November

- **Boosting member retention through quantifiable engagement**
- Sponsored by APT Solutions

