

**Advanced Webinar  
January 2022**

**Going digital ..**

**...How is that working out for your members?**



# AGENDA

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Introductions

Session - Technology the enabler - James

Session - Digital - how is that working for your members?

Case Study - BSDHT - Charles and Sharon

Demonstration - Hari

Q&A

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**January 2021**

**Technology becomes an  
enabler...finally!**

**James Whitney**

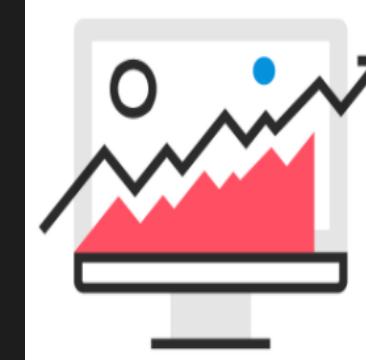


# Advanced Trends Survey Report



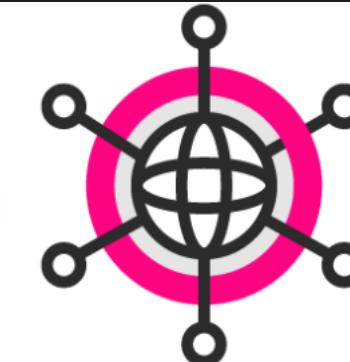
**54%**

say business survival during and post Covid-19 will be their spending priority in the next 12 months



**98%**

agree technology will play a major role in global economic recovery

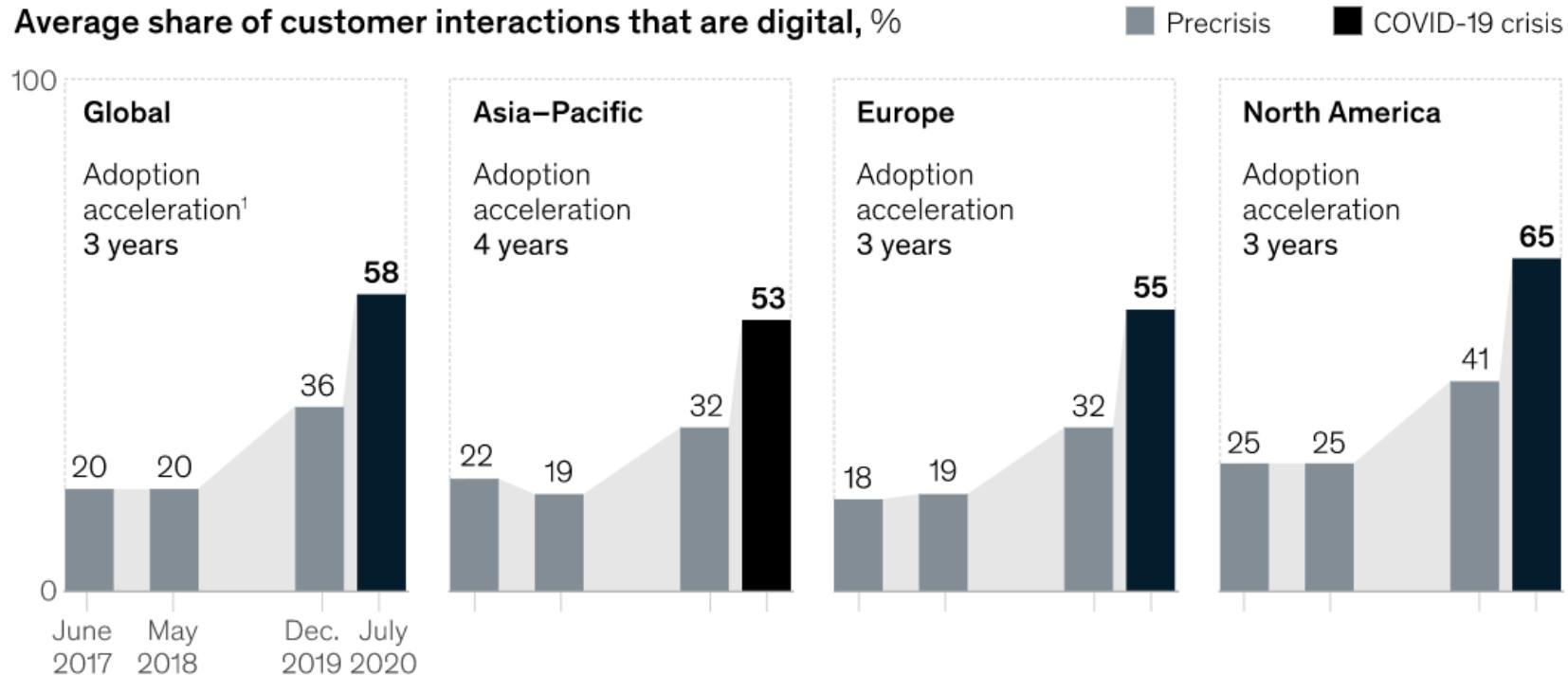


**77%**

think one of the legacies of Covid-19 will be for their organisation to shift to a digital-first mindset

# Mckinsey Global Survey on Digital Transformation

**The COVID-19 crisis has accelerated the digitization of customer interactions by several years.**



**McKinsey  
& Company**

# Engaging with Members and Automating Processes

Navigation: Login, Home, What We Do, Membership, Mailing Lists, About Us, Events

Home / Learning Details 'Chartered Institute of Advanced Membership' / Membership Checkout

## Become a member

With our membership totalling over 47,000 – and growing fast – Advanced is a focal point for professionals working in a diverse range of industrial, commercial and public sector organisations. Our comprehensive approach to career development, as well as our unrivalled industry pedigree, means that our members are the most trusted and sought after people.

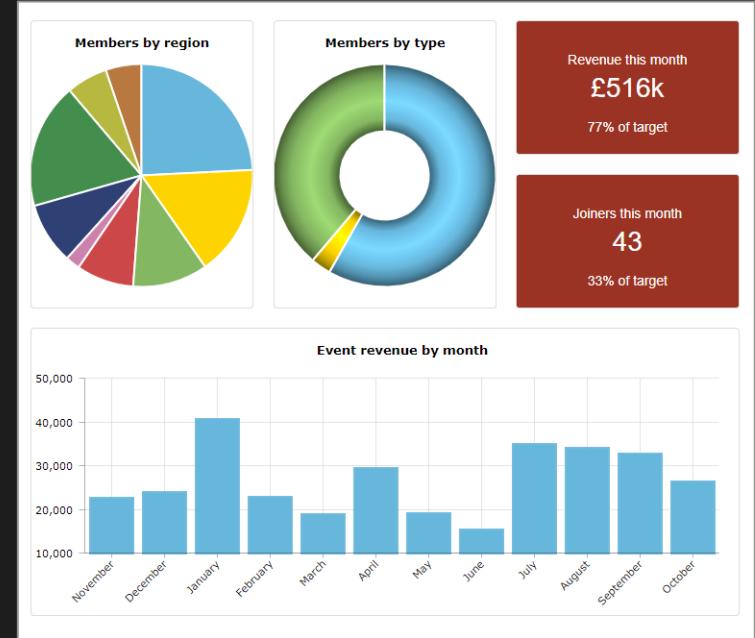
### Membership Information

|            |  |          |                      |
|------------|--|----------|----------------------|
| Membership | Chartered Institute of Advanced Membership | Price    | £50.00               |
| Reference  | ATMEM                                      | Type     | Membership           |
| Length     | 12 month(s)                                | Category | Voluntary Membership |

[Cancel](#) [Next](#)

### Personal Information

### Payment Information



MyWorkplace

FAVOURITES

My Desk

Item 2

Item 3

Item 4

SUBHEADING

Item 5

Item 6

Item 7

My Workplace

MEMBERSHIPS or EVENTS MANAGER

My Desk

Owned by

Upcoming Events Live Feed

This applet shows live feed for upcoming events

Climb for Cats - 15th January, 2021

Delegates Booked: 12

Booking Income: 420

Target Income: 595

Booking Percent: 72%

Spaces Left: 7

Book Now

Contact Details

Show contact (GDPR)

Search Contact

Please type first name/last name/mobile number/email

Search contact by contact number, first name, last name or label name

Contact Information

Charles Bagnall

Head of Product Management  
92 Ditton Park ●  
Slough, SL3 7JF

tel: 079 4789 2268 ●  
mob: +44 7911 234678 ●  
email: charles.bagnall@oneadvanced.com ●  
web: www.oneadvanced.com

Volunteers

Martha Lopez

Event Co-ordinator

Sebastian Klein

Marshall

Name

Job title

Latest Twitter

The Scouts @UKScouting · 21h

If your section's looking for something to get stuck into over the Easter Weekend, take a look at these virtual events from our friends at @WonderEventsUK – there's a Scouts discount up for grabs too! [bit.ly/3spbm2s](http://bit.ly/3spbm2s)

Expenses

Pending

Approved (2)

Rejected (1)

Other (0)

Pending (0)

No actions

webexpenses

Gift Aid Portal

View latest

View

As an Events Manager, I'm able to create a desk with applets that help me focus on our membership growth goals and targets whilst also supporting & managing my team

I can see all of the key metrics relating to my next event to ensure we're driving the right level of activity to hit our targets, or I'm able to search for a member/prospect and update their details or status.

I'm able to see and undertake HR related tasks such as volunteer recruitment, or setting Event-related goals and targets for members of my team via the **Cloud HR & Clear Review** applets

I'm able to easily submit as well as approve my teams expenses, via integrated **Partner** software applets, all with the same log-in credentials

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# Digital – How is that working out for your members?

Charles Bagnall



What's changed that makes digital so important?

EVERYTHING!



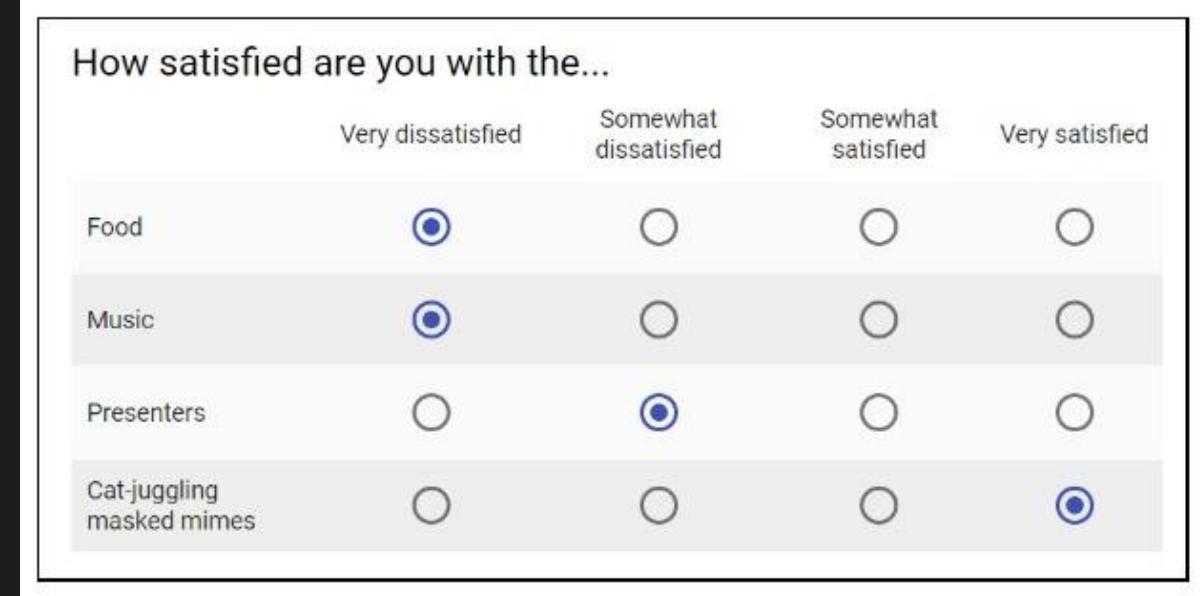
# Attendee Survey No 1

What is your leading source of recruitment?

POLL:

Is it in response to:

- a) Email marketing
- b) Online sign ups
- c) Personal referrals
- d) Event attendance
- e) Member Get Member



*Make sure you capture your event satisfaction survey data back into your database.*

# Continuous Partial Attention



While listening to this talk you might be:

- On your laptop: checking emails and swapping messages on Teams
- On your phone: checking Twitter and adding some Whatsapp banter

We have so much more CHOICE:

900+ TV channels, 20+ utility suppliers, 120+ mobile tariffs  
limitless songs, movies, news sources etc

Linda Stone of Microsoft and Apple describes **CPA** as a behaviour we have learned to help us cope with an information rich and digitally driven environment:

*"In this sleep-deprived, interruption-driven, always-on world, our ability to focus is compromised. In trying to process a never-ending and ever-widening stream of incoming data, we can put off decisions indefinitely or even burn out."*

# What should you do about CPA?

Q: Does it mean you should stop emailing, broadcasting, writing, calling, texting, posting?

A: No – because we are all skilled at managing our CPA now - as your current multi-tasking demonstrates!!



*Keep going with the multi-channel communications*



*Make sure all the outbound and inbound engagements are stored in one place to give that Single Member View*

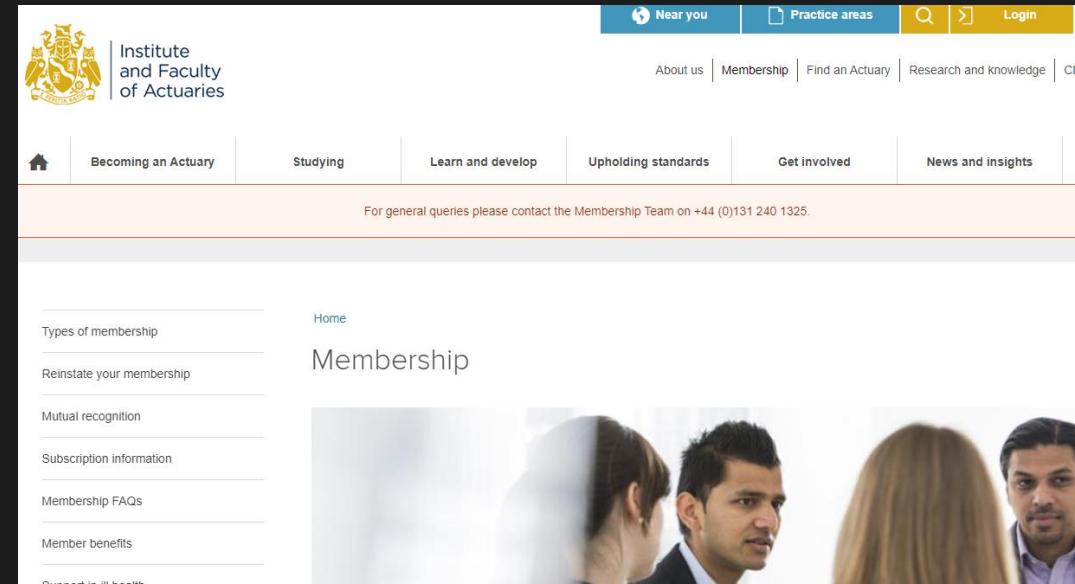


*Make it EASY for your members to engage where and when they want to*

# Attendee Survey No 2

Question: What is your dominant channel for membership renewals?

- a) Telephone - inbound
- b) Telephone - outbound
- c) Website - no link from direct email
- d) Website - direct link from email
- e) Post with Cheque

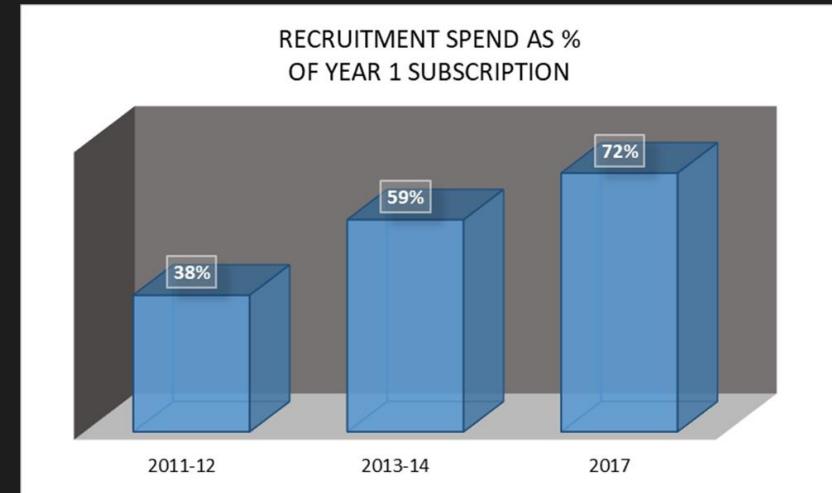


*Make sure your Join and Renew buttons are easily visible on your website and are linked directly to your back office*

# Recruitment

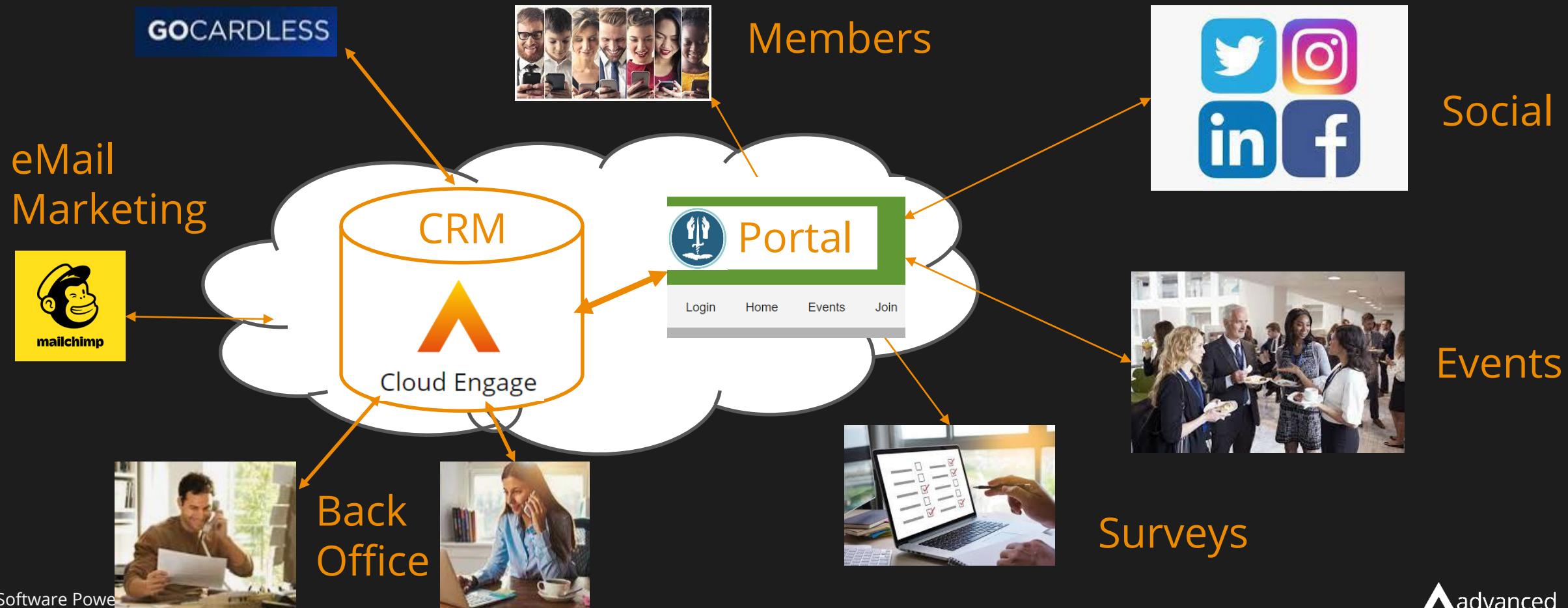
## Top 10 challenges to successful recruitment

1. Clearly communicating the benefits of membership – so they are easy to understand\*
2. Creating a powerful/compelling/appealing membership package
3. Getting prospective members to discover/find us \*
4. Making membership good value for money
5. Offering benefits that are unique and difficult for others to copy
6. Making the journey into membership a great experience \*
7. Making joining easy and effortless \*
8. Getting members to recommend membership
9. Finding partners and influencers who can recommend membership
10. Competition



# CRM System Design

So, taking the above into account, how should you be using digital technology to support member engagement?



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## Case Study



# CASE Study - BSDHT's Digital Journey

Sharon Broom – Director of Operations

The **British Society of Dental Hygiene and Therapy** (BSDHT) is the largest representation of the profession in the UK. With hundreds of members across the nation, the Society allows every professional to have their voice heard while simultaneously providing the support, resources and knowledge they need to succeed in their chosen path.



# CASE Study - BSDHT's Digital Journey

## Where we are – where we are going

| Advanced MEMBER STRATEGY     | Advanced CLOUD ENGAGE       |
|------------------------------|-----------------------------|
| ✗ On premise                 | ✓ In the Cloud              |
| ✗ Client application         | ✓ Pure Browser application  |
| ✗ No 'out of the box' Portal | ✓ Cloud Engage Portal       |
| ✓ Membership                 | ✓ Membership                |
| ✗ Events – on spreadsheets   | ✓ Events                    |
| ✗ No automations             | ✓ Automations               |
| ✗ No Training Records        | ✓ Training                  |
| ✗ No integrated surveys      | ✓ Integrated Surveys        |
| ✗ No Mailchimp integration   | ✓ Mailchimp Integration     |
| ✗ Manual Direct debits       | ✓ Go Cardless Direct Debits |

# Key Take aways

- 💡 Your website is key – ensure all your membership marketing leads back there so you can capture the data and understand why they engaged
- 💡 Keep the social media posting going – and use links back to your website
- 💡 Automate! Use the capabilities of your database to personalise, segment, and above all automate repetitive processes
- 💡 Think about exploiting web and social media campaigns to run member get member incentive schemes.



For more information ...

💡 <https://www.oneadvanced.com/solutions/solutions-by-sector/3rd-sector/>

💡 <https://www.oneadvanced.com/contact-us/>





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# DEMONSTRATION

# Advanced Webinar

## January 2021

### Q & A

