Advanced Webinar
January 2022

Going digital ..

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

Software Powered Possibility

AGENDA

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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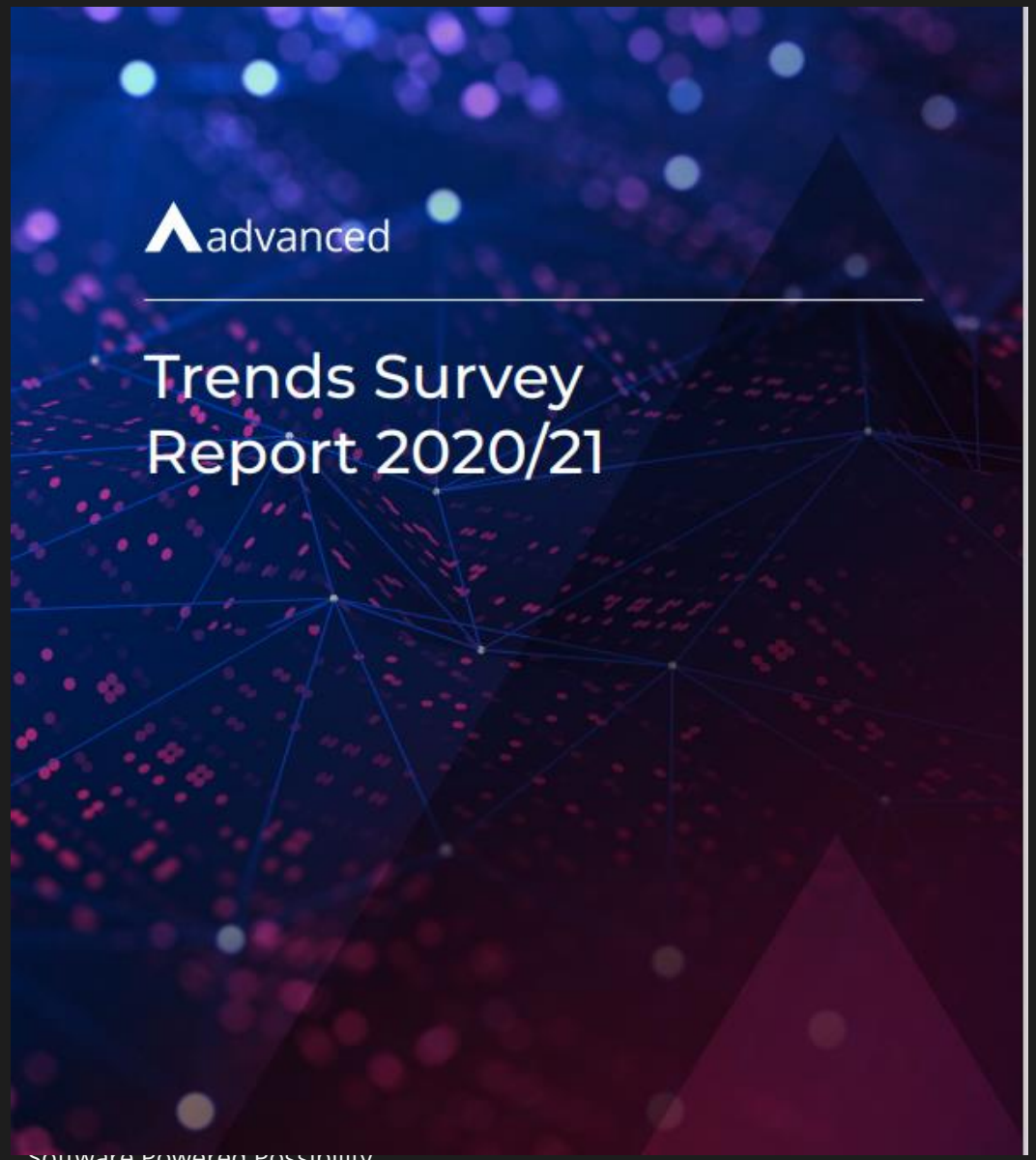
Technology becomes an enabler...finally!

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

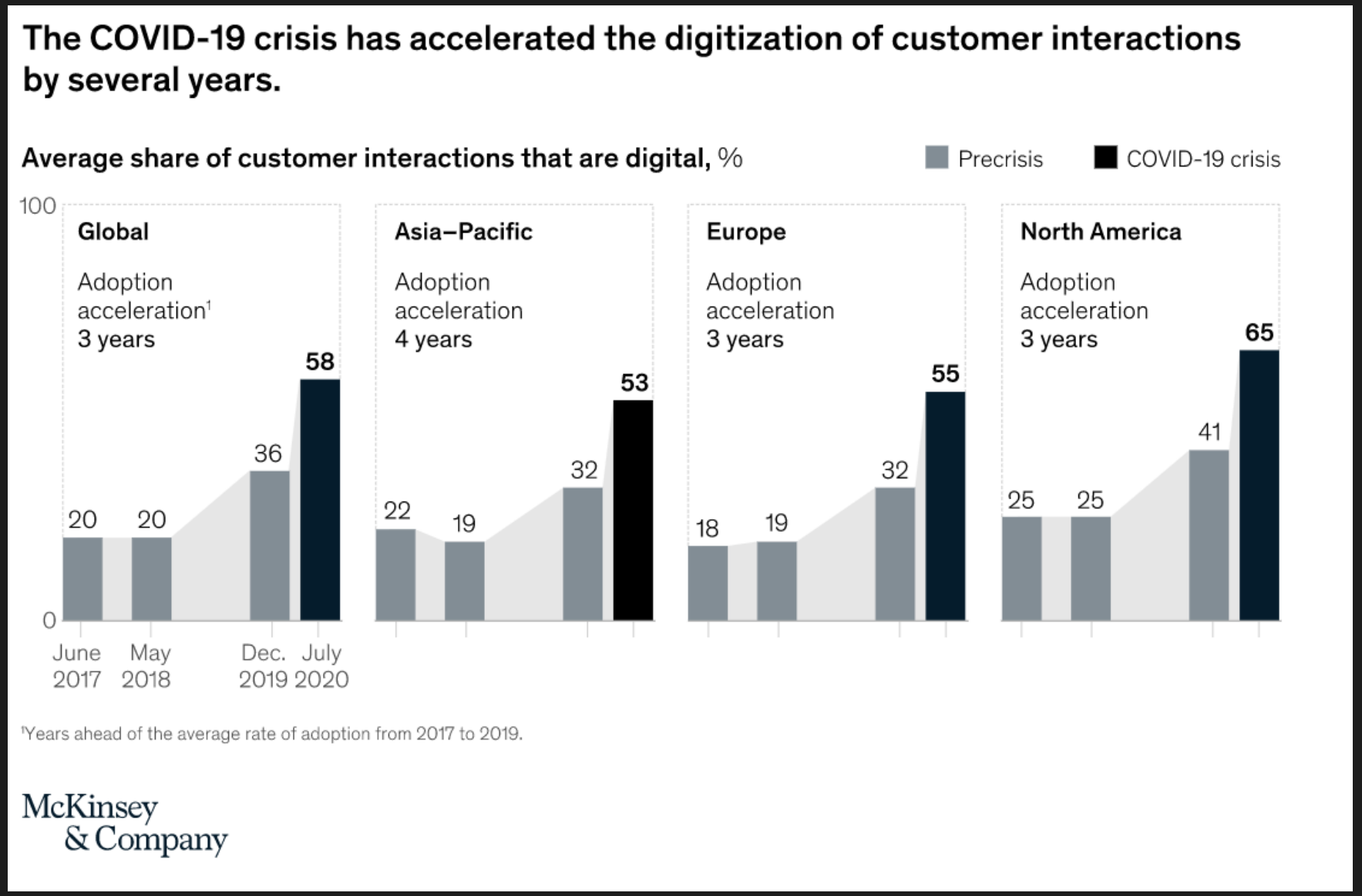
98%

agree technology will play a major role in global economic recovery

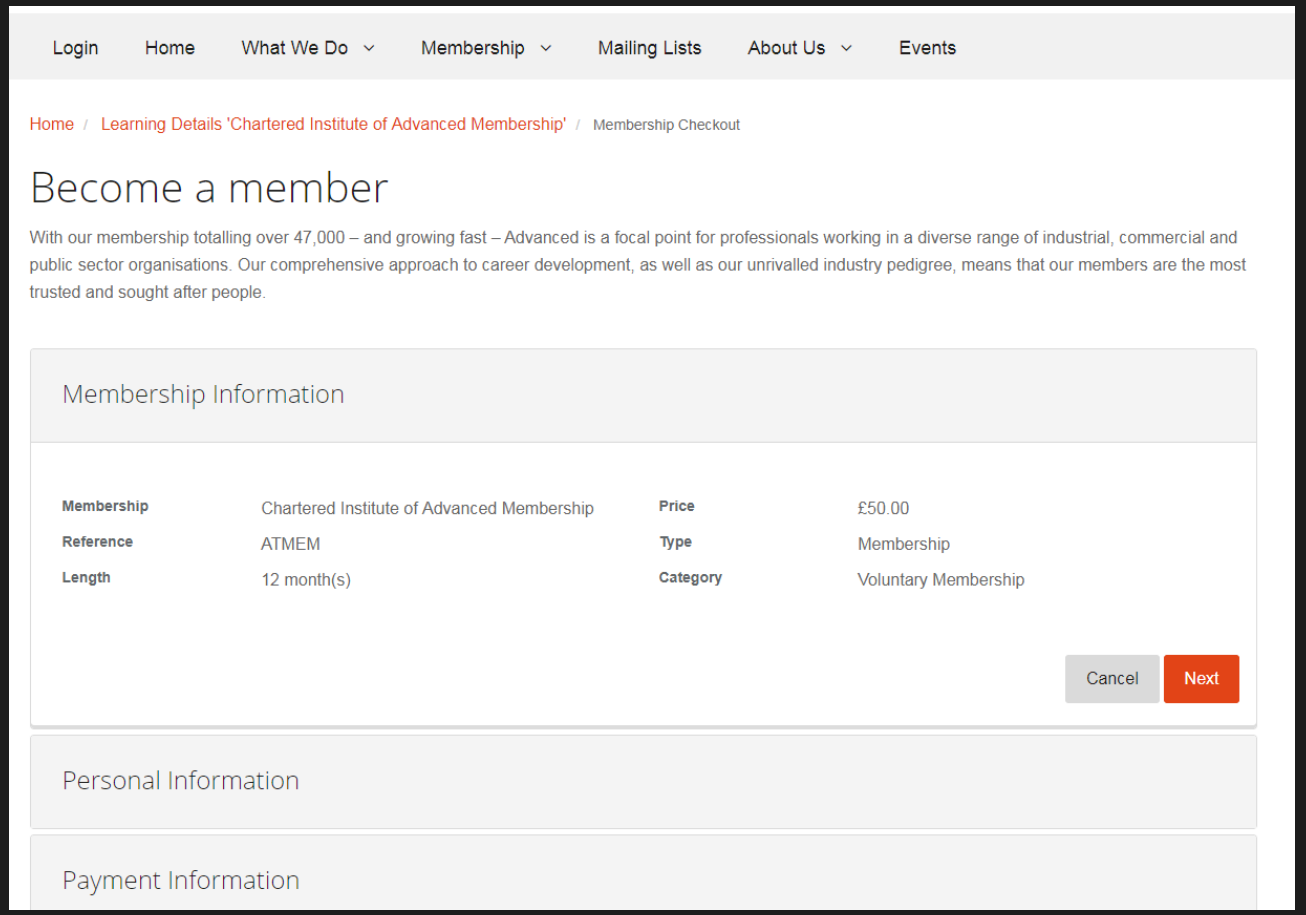
77%

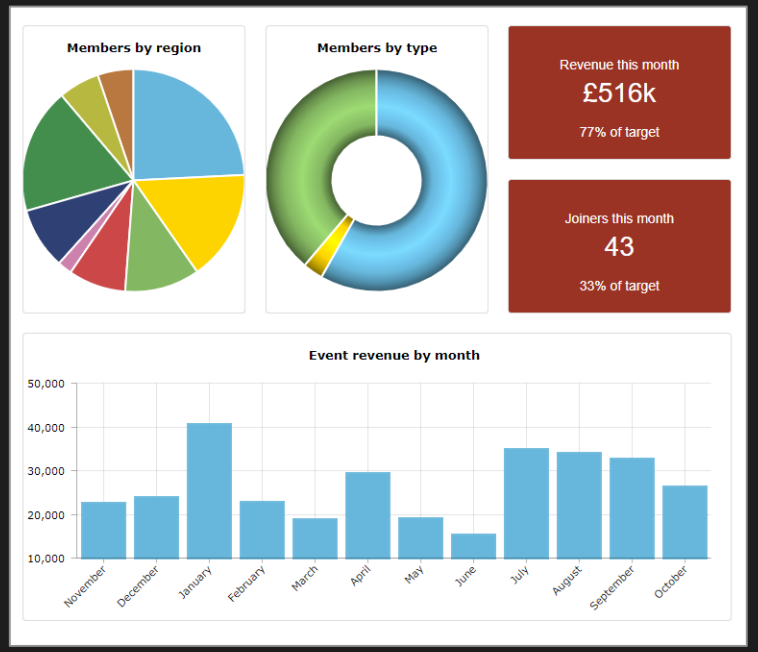
think one of the legacies of Covid-19 will be for their organisation to shift to a digital-first mindset

Mckinsey Global Survey on Digital Transformation



Engaging with Members and Automating Processes





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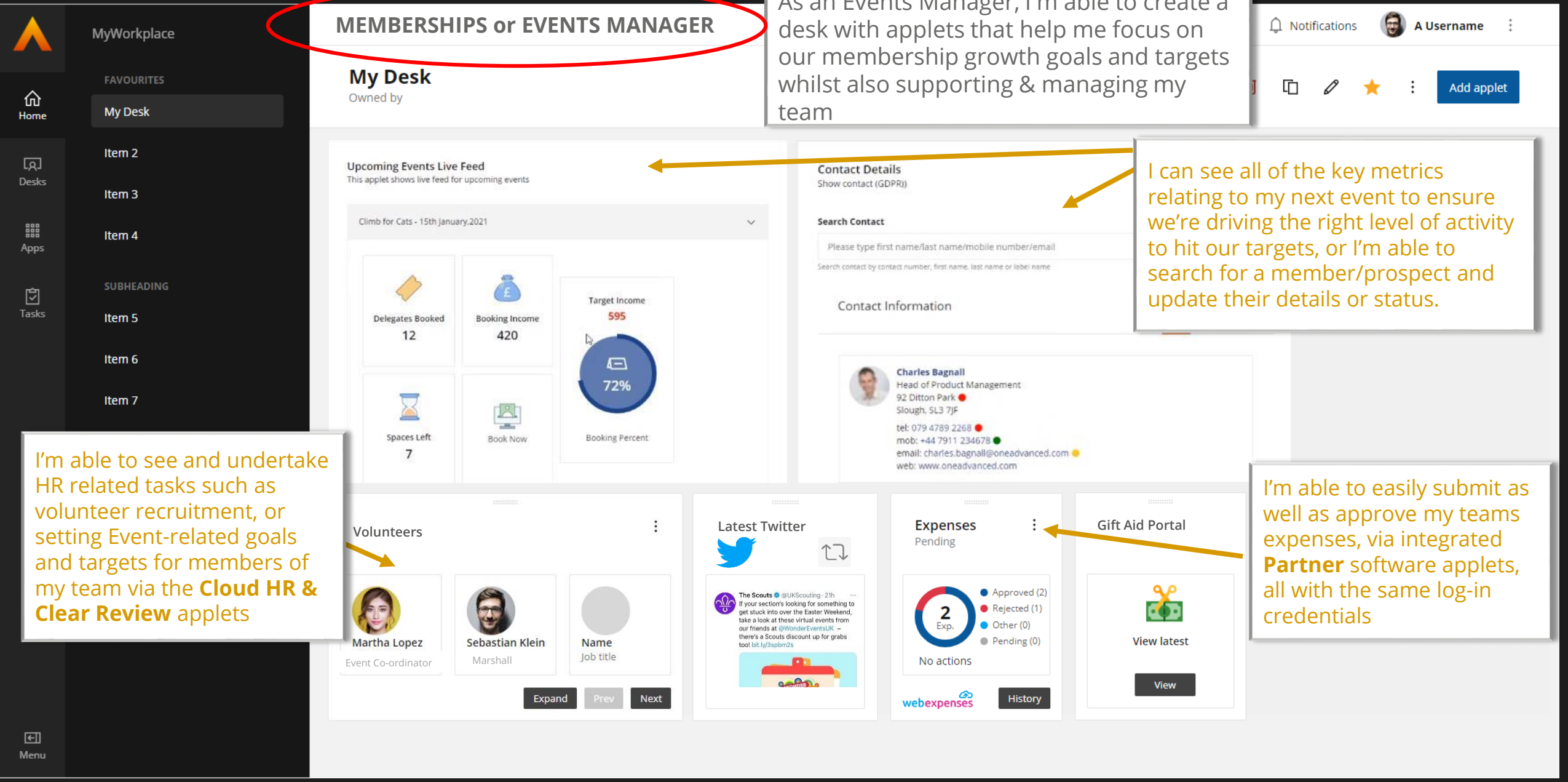
MEMBERSHIPS or EVENTS MANAGER

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!

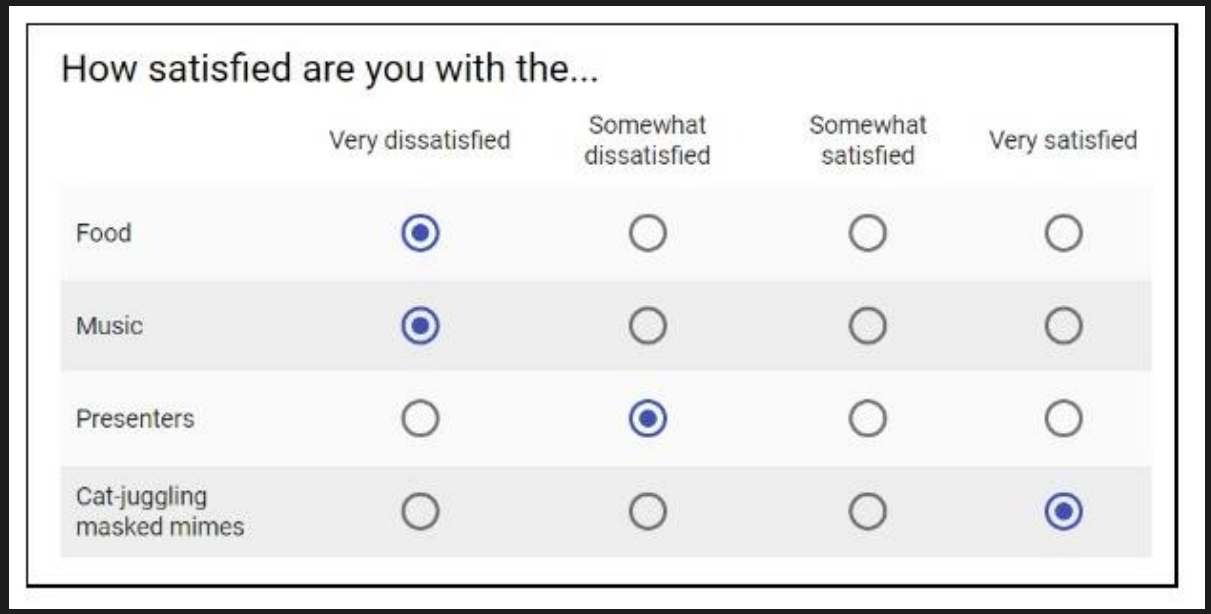
Attendee Survey No 1

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:

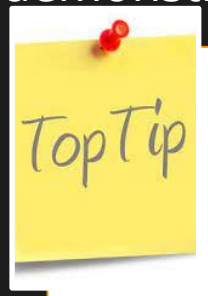
- 900+ TV channels, 20+ utility suppliers, 120+ mobile tariffs
  limitless songs, movies, news sources etc

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*."

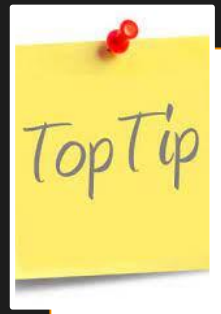
What should you do about CPA?

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

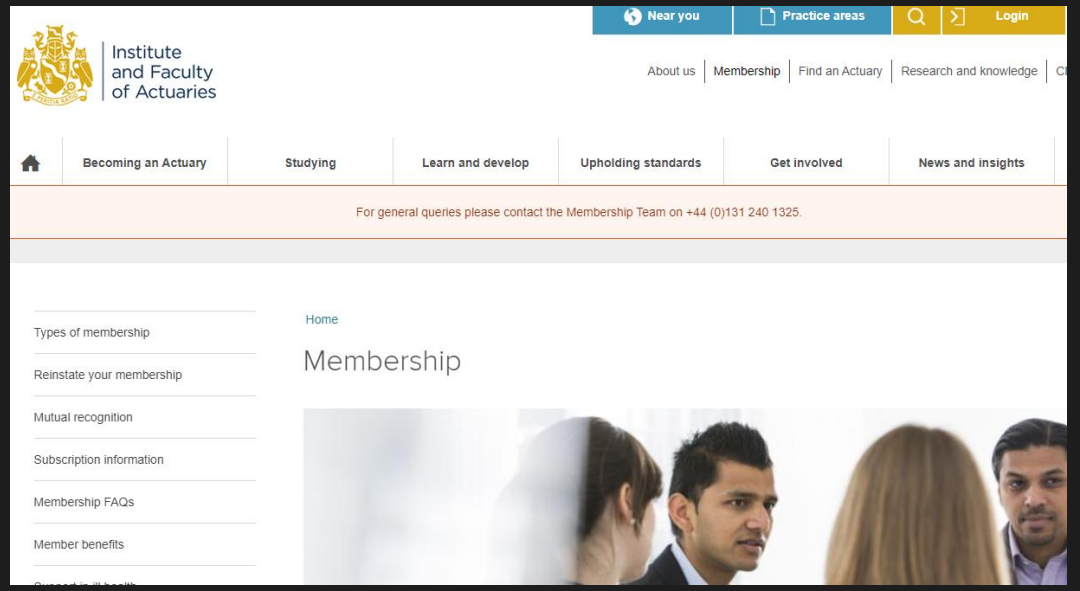


Make sure all the outbound and inbound engagements are stored in one place to give that Single Member View

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

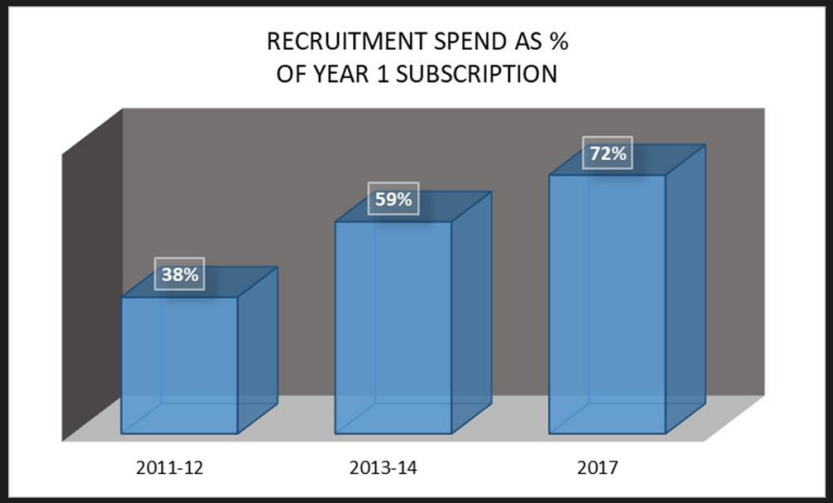


Make sure your Join and Renew buttons are easily visible on your website and are linked directly to your back office

Recruitment

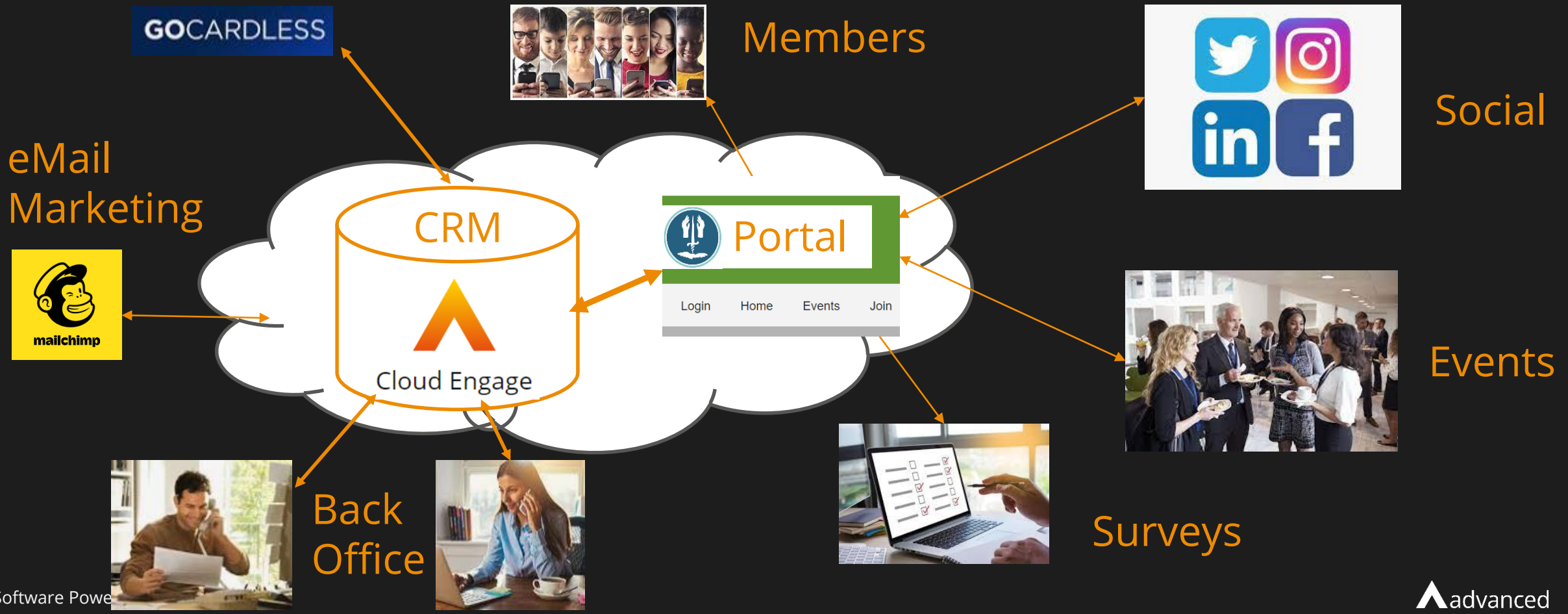
Top 10 challenges to successful recruitment

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

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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/

DEMONSTRATION

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Q & A

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