MemberWise

Member Engagement Toolkit 2017

In partnership with:

[Logos of MemberWise, ASI, and RBD]
Advanced Solutions International (ASI)

ASI is proud to sponsor the new Member Engagement Toolkit 2017 — a groundbreaking new resource that is destined to become a must-read for the association community.

Nothing is more important than ensuring your members are actively engaged in your organisation. But, like many associations, you may struggle to align your people, processes, and technology to achieve optimal engagement levels.

This is why ASI is so pleased to support the critical new Member Engagement Toolkit 2017. It provides the extensive information, insights, and sound advice you’ll need to reach your engagement objectives.

Congratulations to Richard Gott and the MemberWise Network on this exceptional new resource.

Bob Alves
Chairman and CEO
Advanced Solutions International (ASI)

Research by Design

It is widely acknowledged within the membership sector that increasing member engagement is key to raising member satisfaction, increasing advocacy and retaining members. However, how this might be achieved is much less clear.

In the Harnessing the Web survey 2016 three quarters of membership associations told us that measuring engagement is a challenge. This comes as no surprise to us given that there is generally little understanding of what member engagement actually means, let alone how it might be measured.

I am in no doubt that this Toolkit will help many membership associations structure their thinking around member engagement, and I thank MemberWise for all the hard work that has been invested in writing it. This document encourages the adoption of a definition of member engagement and its use to review current levels of engagement and plan for future improved engagement activities. It also covers measurement, an exercise very close to Research by Design’s heart!

It is our pleasure to sponsor this Toolkit and I hope you find it useful.

Heather Forrester
Managing Director
Research by Design
Welcome to the Member Engagement Toolkit (2017)
A Practical Resource Delivered by the MemberWise Network

This toolkit contains member engagement focused information, advice and insight to help you drive membership value and growth in your role as an association/membership professional.

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Section 1
Introducing the Member Engagement Toolkit (2017)

MemberWise - Member Engagement Toolkit 2017

Member engagement has become a critical issue within the association and membership sector and is now a strategic priority for many membership organisations and associations.

In 2016 our sector reached a tipping point. For the first time in recent years more of us rated member engagement a priority than new member acquisition*.

It is therefore important for the sector to take a more informed, robust and structured approach to ensure member engagement activity is truly optimised and embedded in organisations, both at a strategic and operational level.

In response to this critical and emerging topic we are pleased to publish the MemberWise Member Engagement Toolkit (2017) in partnership with ASI Europe and Research by Design.

What is the toolkit?
It’s a practical resource that will provide you with a clear understanding of what member engagement is, why it is important, when engagement opportunities can be truly optimised, and how it can be achieved/measured.

It doesn’t matter how advanced your current member engagement activity/thinking is because all associations and membership organisations are at different stages and levels of sophistication. We recommend that you take a pick and mix approach to the content and suggested actions in the toolkit.

The Toolkit is complimented by an Member Engagement Hub located on the MemberWise website - www.memberwise.org.uk/engage

The Member Engagement Hub contains practical member engagement focused lists, templates, blog articles, videos and research that will help you tackle this critical topic area.

What can I expect in return for reading this?
The toolkit will provide you with a clear understanding of member engagement as a topic area and unique insight that will enable you to action real change/improvement to increase membership value and growth in a structured, systemised and robust manner.
How is this insight/advice quality assured?
We have brought content and suggested actions to life via practical case studies showcasing what ‘good’ member engagement actually looks like. This has been achieved via the formation of a group of professionals, responsible for member engagement at leading membership organisations and associations, who have quality assured the content in this resource.

A huge thank you from me personally – we couldn’t have launched this without you!

As an evolving topic area advice/insight will advance over the coming years (in line with sector research and development). This evolution will be influenced by the changing needs of organisations as they develop and devise strategies and adapt these in light of experience. This is the concept of continuous performance improvement, and engagement strategies are part of this.

On behalf of the network I would like to thank Advanced Solutions International (ASI) and Research by Design for sponsoring this resource. Their support has meant this toolkit is available to everyone completely free of charge.

We welcome your feedback; it will enable us to further develop the toolkit in the future.

Richard Gott
MemberWise Founder and Chair
richard.gott@memberwise.org.uk

*Result taken from Harnessing the Web 2016 survey summary report.*
MemberWise - Member Engagement Toolkit 2017

Section 2
Member Engagement Actions

You will find suggested member engagement actions located throughout the toolkit to help you improve and enhance member engagement.

In this section we have provided a full action list and a seven step member engagement process that will help you to take a structured approach.

Supplementary resources are located in the Member Engagement Hub: www.memberwise.org.uk/engage

Action List

<table>
<thead>
<tr>
<th>Suggested Actions</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action 1</td>
<td>Member Engagement can mean different things to different people/organisations. We recommend that your organisation first creates a clear definition of member engagement and complement this with a member engagement statement. This should set out your member engagement focused aims/objectives (fully aligned with your organisation’s vision, mission, purpose and objects) and be signed off by your Board/Council or equivalent.</td>
</tr>
<tr>
<td>Action 2</td>
<td>Ask yourself the following question - Does membership of your organisation enable positive member engagement outcomes? If not, a review of your member value proposition (MVP) is required before initiating member engagement improvement. If you are simply guessing that these outcomes are being delivered that is not good enough.</td>
</tr>
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<td>Action 3</td>
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<td>Ensure your Member Engagement Plan is proactively reviewed! By including quarterly updates and asking your senior management team to review it you will ensure the document becomes forward facing and doesn’t simply become ‘another retrospective document’.</td>
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<td>Action 6</td>
<td>Once you have sign off for your Member Engagement Plan it is important for everyone to champion the improvement of member engagement. Consider asking an Office Holder/Council/Board Member to become a Member Engagement Champion and ensure your members are aware of this activity. It shows you are taking member engagement/value seriously!</td>
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<td>Action 7</td>
<td>Consider your involvement with student societies/clubs. Could you work together on a magazine, advice sheet, publication, discounts, a student financial support fund or sponsor an annual conference/event?</td>
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<td>Action 8</td>
<td>Consider implementing a buddy scheme, formal or informal. When new/prospective members volunteer (e.g. committee membership) match them with an existing or more experienced member to provide them with insight, help and support.</td>
</tr>
<tr>
<td>Action 9</td>
<td>Map out key membership journeys, identify key touch points and ensure opportunities are optimised and featured/reported on in your plans/strategies. Also consider mapping the ‘ultimate’ member journey in terms of upgrading/engaging and purchasing to establish where and when positive member engagement outcomes can be enabled via value driven activity.</td>
</tr>
<tr>
<td>Action 10</td>
<td>Create some key member personas and evaluate if you are optimising engagement with each group. Consider motivations for joining, career stage, value drivers, demographics, attitudes, typical behaviours and add an image to bring each persona ‘to life’. Regularly revisit the personas to ensure relevance.</td>
</tr>
<tr>
<td>Action 11</td>
<td>If we are to consider future activity based on member type and desire to interact, a first step to deeper engagement is to consider the number of members in each category and plan appropriate activity. This could form a key part of your member engagement review.</td>
</tr>
<tr>
<td>Action 12</td>
<td>Review your membership database for lapsed and cancelled members and establish why they have left. If a campaign is possible, consider different messaging for different audiences and/or consider including telephone calls as opposed to just email communication.</td>
</tr>
<tr>
<td>Action 13</td>
<td>Ensure a member exit survey is in place. It should be sent to all those who fail to renew, and the results should be regularly reviewed for potential member engagement issues/problems.</td>
</tr>
<tr>
<td>Action 14</td>
<td>Review your various membership journeys and ensure touch points are mapped, member value drivers are offered, positive member engagement outcomes are optimised and awareness is maximised via targeted promotional messages.</td>
</tr>
<tr>
<td>Action 15</td>
<td>When considering personalisation ensure any decision is linked to structured membership planning and/or planned digital delivery across the organisation.</td>
</tr>
<tr>
<td>Action 16</td>
<td>Consider the engagement indicators your organisation can use to measure member engagement and put in place appropriate and regular reporting.</td>
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<tr>
<td>Action 17</td>
<td>Consider member engagement in the context of the member engagement maturity model and establish how deeply you are engaging with members and what needs to change/develop in order to engage further.</td>
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Seven Step Member Engagement Process

**STEP 1**
Compile your Definition and appoint a Member Engagement Champion

**STEP 2**
Consider if your Member Value Proposition is fit for the future

**STEP 3**
Conduct a Member Engagement Review and map out Key Membership Journeys

**STEP 4**
Create a Member Engagement Plan

**STEP 5**
Ensure regular and proactive review of your Member Engagement Plan

**STEP 6**
Consider a personalised/contextualised approach

**STEP 7**
Ensure member engagement feedback/measurement takes place regularly
Section 3
Defining Member Engagement

There is a large number of diverse definitions of ‘engagement’. Some are relevant to membership and some are not. For example, a formal agreement to get married or a fight or battle between armed forces are certainly not the definitions we are after!

The main area where there seems to be more relevant definitions of engagement is within the commercial world. These tend to refer to engagement between organisations and their staff/stakeholders (employee engagement) or between organisations and their customers (consumer engagement).

“Customer engagement is the intensity of an individual’s participation in and connection with an organisation’s offerings and/or organisational activities, which either the customer or the organisation initiate. It is composed of cognitive, emotional, behavioural, and social elements.”
(Chartered Institute of Marketing)

“Engagement is turning on a prospect to a brand idea enhanced by the surrounding context.”
(Advertising Research Foundation)

“Staff engagement is a combination of attitudes, thoughts and behaviours that relate to satisfaction, advocacy, commitment, pride, loyalty and responsibility”.
(British Telecommunications Plc)

“An emotional attachment to the organisation, pride and a willingness to be an advocate of the organisation, a rational understanding of the organisation’s strategic goals, values, and how employees fit and motivation and willingness to invest discretionary effort to go above and beyond”.
(Nokia Siemens Networks)
The context of these definitions, being focused on consumer engagement and staff engagement, are clearly different to the member and membership organisation/association relationship. We therefore think there is a need to establish a definition for your organisation. Here are some examples:

“True member engagement aligns members’ hearts and minds with the purpose of a membership organisation or association and can directly influence state of mind, thoughts, feelings, and current/future actions”
Richard Gott, Chair, MemberWise Network

“Member engagement is a strong positive feeling generated by experiences that membership has facilitated. It is about how you make the member feel about themselves and it goes way beyond transactions”
Sue Froggatt, Membership Trainer and Consultant

“Member engagement represents the degree to which an individual is personally aligned with the aims, objectives and values of their membership body.”
Martin Fishman, Head of Member and Partner Engagement, Chartered Banker Institute

“Member engagement is the creation of a deep and meaningful relationship between the member and the organisation, that endures over time and drives renewal, upgrade decisions and advocacy. It goes beyond joining and includes member involvement and interactions as well as their connections with the organisation and its member community. Engaged members are aware and ‘get the bigger picture’; they are passionate and proud to be associated with the organisation.”
Heather Forrester, Managing Director, Research by Design
**Action 1**

*Member Engagement can mean different things to different people/organisations.* We recommend that your organisation first creates a clear definition of member engagement and complement this with a member engagement statement. This should set out your member engagement focused aims/objectives (fully aligned with your organisation’s vision, mission, purpose and objects) and be signed off by your Board/Council or equivalent.

Having read the commercial definitions of ‘Staff Engagement’ and the sector specific definitions of ‘Member Engagement’ you will see that if we are to engage with members more deeply (meaning we must go beyond transactions) there is a requirement first of all to understand the differences between tangible and intangible requirements:

**Examples of tangible requirements:**
Relevant Events / Content / Products & Services

**Examples of intangible requirements:**
Strong feeling of belonging / Personal / Professional Alignment / Advocacy

Although tangible requirements can be defined, met and measured, intangible requirements are not so straightforward to evaluate/measure and will vary across organisations. For example, a retired member may be 100% engaged but quite happy to passively receive the monthly journal and not volunteer to do outreach work. Just because he/she doesn’t attend the annual conference this year, does not mean he/she is not truly engaged.
Section 4
Reasons for Focusing on Member Engagement

As a sector we focus on member engagement because it is ultimately ‘the right thing to do’ for and with our members. Its fundamental.

We want to achieve the objectives of our organisations through a closer relationship with our members. For example, objectives may include raising the profile of a profession, increasing professionalism, raising quality/standards and/or raising public awareness of a particular topic.

Based on these core assumptions the desired outcome from deeper and wider member engagement should therefore be to:

- Optimise new member acquisition
- Increase existing member retention
- Improve member value (via a demonstrable member value proposition)
- Increase the quality/number of interactions (organisation with member and member with member)
- Increase the likelihood of member conversions (to advocates)
- Increase additional spend on non-subscription related fee products/services
- Ultimately improve the lives of members

As association and membership professionals we all face roughly the same challenge - the requirement to engage more deeply with more members in order to:

- Gain a deeper understanding of what members need
- Improve the quality of service we provide in a targeted manner
- Increase potential for sustainable long term growth

However, the way we approach this is currently variable based on a wide range of internal/external factors that include:

- Different definitions/understanding of the term ‘engagement’
- Organisational priorities/political will to improve or focus on this topic
- Internal strengths/areas for development (and the degree of understanding/insight)
- Severity of perceived opportunity/threat (competitors/alternatives)
- Resources available to improve/develop member engagement (human/financial)
- Channels available (e.g. email, events, social media)
- Online functionality (e.g. ability to personalise online content)
- Existing level of engagement
- Membership satisfaction
- Willingness of members to become more engaged
• Status of organisation (e.g. mandatory membership/regulator status)
• Type of organisation (e.g. representing the general public v profession/industry/trade)
• Unique selling points (USPs)/competence
• Current/desired future Member Value Propositions (MVPs)
• External environment (PEST)

These variables directly influence how and when we engage with members and the success of this. There will also be varying indicators/weightings to measure the effectiveness of the various activities.

In the past the association and membership sector has taken variable and unstructured approaches to member engagement management.

Engagement measurement has been measured via:

• Member retention
• Membership upgrades
• Attendance at conferences and events
• Survey response rates
• Net Promoter Score

As the sector’s leading professional network for association and membership professionals we believe this is not enough. In the current climate we need to take a more informed, structured, systemised and robust approach. We hope our toolkit can help!

Many of us agree that there is a direct correlation between increased positive member engagement and member loyalty. The more deeply engaged a member is, the more loyal they become. This increases the chances of the organisation achieving one or more positive member outputs.

Key Definition: Positive Member Output:
A positive output achieved (for either the member or the organisation) following an improvement in member engagement.

Positive member outputs include:

1. Better member support of core aims/objectives/values
2. Greater willingness to volunteer/donate/attend events (national/local)
3. Improved existing member retention
4. Increased new member acquisition
5. Increased likelihood of members accessing content/purchasing products/services
6. Increased likelihood of members upgrading membership
7. Increased likelihood of advocating/recommending membership to a colleague/friend
8. Increased cross/upselling of products/services to members
9. More understanding if/when fees go up and/or services reduced
10. More understanding/tolerance if quality issues/outcomes occur
These positive member outputs (or conversions as they are known in the commercial world) are only likely to be optimised if member value can be demonstrated. The outputs should lead to the delivery of one or more positive outcomes for the member (we will term this a **positive member outcome**).

### Key Definition: Positive Member Outcome
A positive outcome for the member that occurs following one or more positive member output(s).

A comprehensive list of positive member outcomes is located on the Member Engagement Hub: [www.memberwise.org.uk/engage](http://www.memberwise.org.uk/engage)

**Action 2**

_*Ask yourself the following question - Does membership of your organisation enable positive member engagement outcomes?*_

If not, a review of your member value proposition (MVP) is required before initiating member engagement improvement. If you are simply guessing that these outcomes are being delivered that is not good enough.
Section 5
A More Structured Approach to Membership Engagement

Your approach to member engagement should be implicit in all member focused activity. Conducting formalised member engagement improvement/measurement activity will help to ensure this critical topic is at the forefront of everyone’s minds (including staff, members and key stakeholders). It will ensure a clear view via a member engagement focused lens.

A number of leading membership organisations and associations are treating the improvement of member engagement as a formalised strategic priority. Commitment is evidenced via:

• Regular monitoring of member engagement at Board level (or equivalent)
• Appointment of nominated leads at Board level (or equivalent)
• Member Engagement Groups/Committees
• Engagement responsibility being given to a nominated member of staff
• A dedicated Member Engagement Coordinator/Manager being employed

Whilst we endorse these developments and acknowledge they offer it is a positive step forward, engagement should be everyone’s responsibility (not just your membership team/department!). It should also be consistent throughout the year and throughout the various membership journeys.

Key Definition: Membership Journey
The journey through membership, e.g. from non-member to member, from Student Member to Fellow, from Generalist to Specialist, from Corporate Affiliate to Accredited Corporate Member status.

In order to achieve improved member engagement in a structured manner the first step is to conduct a member engagement review and create a formalised member engagement plan. We will outline how to do this in the next section.

The 2016 Global Benchmark Report on Membership Performance survey (conducted by Advanced Solutions International) revealed that 69% of US based associations do not yet have a structured plan or method of engagement measurement in place. Of these organisations that do, 66% reported improvements in retention, 51% in attendance at events, and 51% in website traffic since implementation.
Member Engagement Review

A Member Engagement Review is a formal review of member engagement related activity to establish the current situation, i.e. what is being done and what is not being done from a member engagement perspective. The review will therefore ensure positive member outcomes are being generated now and in the future.

The aim of this process is to create SMART (specific/measurable/achievable/realtistic/time-bound) actions that will contribute directly towards improving and enhancing future member engagement.

There is no strict formula/template that you need to adhere to. However, key member facing activities/materials will need to be reviewed, and it is useful to evaluate these by looking at the entire membership journey/key member segments.

Key areas to review:

- Current member journey intervention points & solutions offered
- Current member benefits
- Member updates/newsletters
- Engagement/participation at events
- Feedback from members (e.g. polls/member surveys)
  Feedback from non-members (e.g. lapsed members/never members/resigned members)
- Marketing/membership literature
- Website visits/online social media interactions
- Responses to previous PR campaigns/advertisements
- Member joining/renewals literature
- Related governance roles/responsibilities
- Volunteering opportunities
- Feedback from member exit surveys
- Collaborative working to-date with third parties

Who should conduct a Member Engagement Review?

It can either be conducted internally or with the help of a third party. The benefit of having an external review is that it will be independent and the findings can be quickly benchmarked against similar organisations. The review should also be conducted with colleagues in and across other teams/departments to ensure a joined up approach across your organisation.

Action 3

Conduct a Member Engagement Review! We suggest that this activity includes a dedicated workshop/seminar with all member facing staff and this should cover off Actions 1 and 2.

Tip: Look out for a product/service focused approach in your organisation. This may indicate an embedded transactional relationship with members. What you need to initiate is a more relational approach, so the more positive member outcomes you establish the better!
Membership Engagement Planning
A Membership Engagement Plan can either be created in isolation or as part of overall membership planning/strategy, the latter being the more joined-up approach!

Typically a plan should look to formalise, improve and measure proposed future member engagement activity. It will typically cover a 1 to 3 year period.

We have created a list of key components that should feature in your member engagement plan. This is located on the Member Engagement Hub: www.memberwise.org.uk/engage

Action 4
Create a Member Engagement Plan!

Action 5
*Ensure your Member Engagement Plan is proactively reviewed!* By including quarterly updates and asking your senior management team to review it you will ensure the document becomes forward facing and doesn’t simply become ‘another retrospective document’.

Once your plan is agreed/signed off the high level elements/results achieved can feature in key member facing literature (e.g. Annual Report/Impact Report) as well internal documents (e.g. Business Plan/Corporate Strategy/Membership Strategy).
We have created a Member Engagement Strategy template to help you get started. This is located on the Member Engagement Hub:

www.memberwise.org.uk/engage

**Action 6**

*Once you have signed off for your Member Engagement Plan it is important for everyone to champion the improvement of member engagement.*

Consider asking an Office Holder/Council/Board Member to become a Member Engagement Champion and ensure your members are aware of this activity. It shows you are taking member engagement/value seriously!
Section 6
Member Engagement Fundamentals

We have recognised that a structured approach is required (via a review/plan/strategy). However, what else should be considered?

In this section we focus on four key member engagement focused areas that will provide you with insight and inspiration to take member engagement within your organisation to the next level.

• The Membership Journey
• The Context
• Personalisation
• Measurement/Reporting

Before the Membership Journey...
The process of engagement can commence before the membership journey actually begins. This can happen with future prospective members (soon to be eligible) or prospective members. A number of leading professional bodies are exploring this approach, and are taking advantage of member engagement opportunities they have identified, to maximise its potential.

Case Study: ChemNet - Royal Society of Chemistry (RSC)
The RSC is taking a sophisticated approach to potential future member engagement with its online platform, ChemNet. The tool enables school children to request help/guidance with chemistry related homework. The Society hopes that the result will be an increased level of engagement with chemistry from a younger age and so this should have a knock-on effect on those pursuing an interest/future career in chemistry.

Find out more – The MemberWise Engagement Hub contains a video interview with RSC Membership Recruitment Specialist, Gareth Davies. He provides a more detailed overview of this great member engagement initiative. Visit: www.memberwise.org.uk/engage
Engaging with Younger Members....
Earlier we introduced you to the concept of initiating engagement before or at the beginning of member journeys. An important group/segment that has very different member value and engagement requirements/expectations is your younger members/prospective members.

Typically, younger members will require more support, will be particularly engaged with offerings that aid career development and will want to access many services online from any location and from any device.

Similarly, if you have organisational members that are, for example, small businesses in the post start-up phase, they may welcome comprehensive and targeted support that will help development and growth.

Generational variations in member need should also be considered. For example, at present ‘millennials’ (members born between 1982 and 2002) will typically be at the start of their careers (entry/manager level) and so will require career stage specific help and support. If this is provided adequately this positive member output will almost certainly lead to one or more positive member outcome(s).

It is widely recognised that whilst ‘baby boomers’ (members born in the years following the second world war) were happy simply to belong to a membership organisation/association, millennials want more tangible benefits in return for their annual membership subscription fee.

Resource signposting
Check out the Member Benefits Evaluation Tool in the Insight Portfolio section on the MemberWise website to ensure your member benefits are fit for the future - www.memberwise.org.uk

Creating strategic alliances with relevant university student societies/clubs can be a helpful and cost effective way to raise brand awareness to a segment that is bombarded with marketing and promotional messages from a wide range of providers.

Action 7
Consider your involvement with student societies/clubs. Could you work together on a magazine, advice sheet, publication discounts, a student financial support fund or sponsor an annual conference/event?
When considering engagement improvements with younger members consider that they are new to your organisation and so may need benefits/information contextualising. It is often easy for us to forget what it is like being in their shoes. There is a need to be fully accessible, welcoming, understanding of their issues/frustrations and demonstrate value when required.

**Action 8**

**Consider implementing a formal or informal buddy/mentoring scheme.** When new/prospective members volunteer (e.g. committee membership) match them with an existing or more experienced member to provide them with insight, help and support.

Taking this approach to younger member engagement will serve you well! Our experience has been not to promise the earth though if budget/resource is an issue. Only promise what you can deliver!
During the Membership Journey
If we first explore the ‘real life’ journeys our members take then we can better understand when and how to engage, and which tools/messaging are the most appropriate to use. Consider specific career stages, life stages and/or organisational growth/development stage.

During the various membership journeys there are numerous opportunities to engage with members and at various depths, and this will be explored in this section.

To truly optimise the likelihood of increased member engagement outcomes there is a need to establish specific member engagement touch points (via the online and offline communications channels available) and deliver positive member outcomes (as previously outlined).

Key Definition: **Member Engagement Touch Point**
* A specific opportunity when a membership organisation can engage with a member (online or offline).

A comprehensive list of potential Member Engagement Touch Point opportunities is located in the Member Engagement Hub – [www.memberwise.org.uk/engage](http://www.memberwise.org.uk/engage)

Examples of membership journeys:
- Professional career journey (individual members)
- Vocational career journey (individual members)
- Employee to Employer journey (individual/corporate)
- Organisation growth/decline journey (corporate)

**Action 9**
*Map out key membership journeys, identify key touch points and ensure opportunities are optimised and featuredreported in your plans/strategies.*

These touch points should be recorded on your CRM against the individual, enabling you to track success and continually fine tune/adapt them. Also consider mapping the ‘ultimate’ member journey, including member upgrades/engagement and purchases, to establish where and when positive member engagement outcomes can be enabled via value driven activity.

The analytics that can be drawn from the usage of key member benefits should form part of your regular engagement management measurement/reporting and should be weighted on an appropriate scale, such as importance to member vs. contribution towards organisation purpose/values/objectives.
Note: Don’t forget opportunities for members who have common diversions from their journeys, such as advice for returners to work post career/family break or members looking for a career change. If targeted and available at the right time, there is potential for optimised engagement/value to be derived/generated.

Recognising Different Member Types, Needs and Expectations
We should recognise that, whilst engagement opportunities will align to common journeys, our members are all different with varied expectations/requirements linked to interaction.

A useful way to evaluate member value drivers and desired engagement outcomes in key membership segments is by using member personas.

This is an established marketing technique that focuses on clustering members into key groupings with similar needs/characteristics, personifying each grouping and developing targeted and appropriate member value propositions and marketing campaigns for each persona. It also makes it easier to think about, and target, particular member segments.

**Action 10**
*Create some key member personas and evaluate if you are optimising engagement with each group.* Consider motivations for joining, career stage, value drivers, demographics, attitudes, typical behaviours and add an image to bring each persona ‘to life’. Regularly revisit the personas to ensure relevance.
We have created 12 member types for you to consider:

- **Pioneers** – Active members who will pioneer membership
- **Advocates** – Members who will advocate membership and actively participate/volunteer
- **Responders** – Members who will respond to a direct call to action
- **Networkers** – Members who derive great value from networking with their peers
- **Passive Supporters** – Members who derive value but do not actively participate
- **Only If Relevant** – Members who will engage/participate only if the opportunity is relevant
- **Shapers** – Members who proactively champion development/change
- **Comparators** – Members who will compare your offering to other available alternatives
- **Knowledge/Skill Hungry** – Members who utilise resources to drive knowledge/skill
- **Politio-Socials** – Members who participate to build political/social presence
- **Non-Engagers** – Members who will not or do not want to engage
- **Resistants** – Members who will actively resist change/development
Although you might find this a useful way to think about members we suggest there are a few too many categories here to manage at an operational level. General consensus is that five or six segments are about the right number to focus on. The following is an example:

1. **Learners**: These members are involved because they want access to learning materials, a competency framework or other resource to assist with passing exams, career progression, etc. Their principle focus is learning and keeping up to date.

2. **Consumers**: They are members who frequently interact with you, online, attending events, reading newsletters, etc. Their interest goes beyond learning materials.

3. **Leaders**: They are active on committees, they often help out at events, they are well read and they share your values.

4. **Disengaged**: They are doing very little with your organisation and certainly aren’t getting value for money. They transact very little with you, they don’t recognise or agree with your policy work and they don’t think you adequately represent them as members.

5. **Unengaged**: They are members because they think they ought to be or it’s the right thing to do. They keep meaning to read more from your organisation and attend events but never quite achieve.

6. **Disgruntled**: These members want to believe in you but are struggling due to the offer, policy or something else not being aligned to their needs.

**Action 11**

*If we are to consider future activity based on member type and desire to interact, a first step to deeper engagement is to consider the number of members in each category and plan appropriate activity.* This could form a key part of your member engagement review.

**After the Membership Journey**

It is possible to engage or re-engage with members who may feel membership is no longer relevant/required. However, care needs to be taken here, e.g. data protection/opting out of communications.

We have listed some likely circumstances below and suggested appropriate messaging.

**Lapsed Members or Non-Renewers** – These individuals or organisations may not have renewed their membership simply because the proposition was not sufficiently strong or relevant at the time. Messaging to this audience will need to be value driven and targeted in order to increase the chance of re-engagement.
Members on Career Breaks – It might be that a member has not renewed because they have decided to take a career break. Messaging should be clear, concise and targeted, e.g. provide practical information/advice on returning to the world of work or a reduced subscription rate during the career break period.

Unemployed Members – The membership journey may come to an end due to unemployment or redundancy. Many membership organisations have discretionary discounts that can be applied in response to such circumstances. Normally messaging to such circumstances is responsive in nature (with appropriate understanding/tone). If appropriate help/support can be given to get the member back into employment there is a strong likelihood in the long term he/she will become an advocate of the organisation.

Messaging should show empathy, understanding and ideally provide help/advice on getting back to work.

Cancelled Members – This group should be handled with care. If an individual or organisation has taken an informed decision not to renew their membership and pro-actively cancelled this means that the value drivers were not met, membership was no longer affordable, membership was no longer relevant or something else went seriously wrong. You will need to clearly evidence that things have changed!

Retired Members – There may be a misconception that membership is over when members reach retirement. If this is not so messaging needs to be provided pre-retirement and appropriate activity should be arranged, e.g. dinners, retired members club or the opportunity to be provided with Life membership.

Deceased Members – It is sometimes appropriate for membership organisations and associations to recognise the contribution a member has made during his/her lifetime. Providing suitable recognition either in a member publication and/or at an Annual General Meeting (AGM) is a great mark of respect and members who were aware of this person’s contributions are likely to be engaged by this.

It is important to establish the reason(s) for leaving and only contact those likely to want to return if value can be demonstrated. Messaging to this audience should focus on how the organisation and/or membership has changed and the positive outcomes returning to membership will provide. As part of the exit process you may want to capture (within your Membership Database/CRM/Association Management System/Engagement Management System) whether the member wants to maintain communications with the organisation.
Action 12

*Review your membership database for lapsed and cancelled members and establish why they have left.* If a campaign is possible, consider different messaging for different audiences and/or consider including telephone calls as opposed to just email communication.

Action 13

*Ensure a member exit survey is in place.* It should be sent to all those who fail to renew, and the results should be regularly reviewed for potential member engagement issues/problems.

The Role of Context....

We have identified that engagement can be enhanced at various touch points during membership journeys, however this can be further optimised if linked to context (what is going on in the outside world). We estimate that if member value is demonstrated at the appropriate time it can improve positive member engagement outcomes many times over.

**Anticipation** - Anticipated regret, relief, gain and wellbeing can also be key drivers for potential engagement via marketing campaigns aimed at demonstrating that the solution is either membership or a benefit linked to membership.

**Pleasure** - At key points of the journey members will experience moments of pleasure. These can range from acceptance of entry, the passing of exams, and attending a new member event/ceremony with family/friends, to achieving a promotion or seeing a positive outcome following a financial donation.

**Pain** - At key points of the journey members will also experience moments of pain. These can range from having to re-sit an exam, going into business, and handling a particularly tough business environment, to a job role change, meeting rigid regulatory requirements or having a legal issue with a business partner.

These periods of anticipation, pleasure and pain provide opportunities for you to optimise member engagement outcomes.

**Warning:** Don’t go too far. There is a danger of potentially scaring members and/or being seen as taking advantage, and that is not something you want to achieve.

**Note:** If membership organisations and associations are not providing appropriate value during moments of pleasure and pain members may feel they are not being provided with appropriate/timely help and support.
Action 14
Review your various membership journeys and ensure touch points are clearly mapped, member value drivers are offered, positive member engagement outcomes are optimised and awareness is maximised via targeted promotional messages.

So, we have established that the right member value proposition

- In the right context
- At the right time (or stage of the member journey)
- To the right member segment
- Via the right communication/delivery channel
- In the right place

will optimise the likelihood of perceived member value and thus increase the opportunity for a positive member engagement outcome/conversion.

Approaches to Member Personalisation
Personalising content is a great way to increase member engagement. It makes the content more relevant to the member and so they are more likely to feel engaged. We have listed a range of member personalisation opportunities on our Member Engagement Hub – www.memberwise.org.uk/engage

There are varying degrees of personalisation and we have identified three levels to gauge your organisation’s development:

Basic: Personalising electronic and hardcopy communications/literature with basic content, e.g. member name.

Case Study:
Engagement and Context - British Medical Association (BMA)
In September 2015 the UK government proposed major changes to the NHS employment contract for junior doctors. The junior doctors (and wider profession) felt the proposed changes were not acceptable. In response the BMA implemented a strategy to attract extra members around this issue, resulting in a staggering 14,000 new joiners in just 12 weeks. The challenge was then to keep these new members, and so a programme of regular and early engagement activity (spanning welcome calls to the stimulation of product use) was implemented and extra resource invested in detailed analytics generation/review. For this cohort retention has been measured from September 2016 onwards and is at 90%. The ongoing engagement programme has been enhanced and now includes targeted local face to face activity and social media campaigns focusing exclusively on usage of the three key member benefits and excluding non-core benefits.

If you would like to find out more about how the BMA is driving membership value and growth you can view an online MemberWise Insight Presentation video (featuring Richard Sheret, Head of Commercial Development) on the MemberWise website. Visit: www.memberwise.org.uk/insightpresentations
Intermediate: Rendering and signposting content linked to knowledge of the member, e.g. membership record information – location, membership grade, special interest, previous purchases, facilitating cross and up selling.

Advanced: Regularly rendering and signposting online content linked to knowledge and behaviour of the member on multiple online/offline platforms (incorporating context), e.g. online behaviour, search criteria and personalized offers.

As a sector we need to take care as we transition to more sophisticated personalisation activity as there is a danger of coming across a bit ‘Big Brother’. Complex criteria (leading to mistakes) and labour intensive activities that serve ‘micro’ member segments, for example, are unlikely to deliver increased member value/growth. The latter could actually disengage other members. If you know similar segments will react in the same way to a particular campaign/promotion there is no need to segment them in the first place.

What is certain about member personalisation is that, if done effectively (and in the right tone), it can contribute towards improving overall member engagement levels.

Action 15

Fact: The association and membership sector (at the time of writing this resource) is at the basic/intermediate stage and needs to develop over the coming months/years to meet member experience expectations. Very few are operating at an advanced level.

When considering personalisation ensure any decision is linked to structured membership/professional development planning and/or planned digital delivery across the organisation.
If personalised templates are created, ensure these are shared/communicated to all member-facing staff so a consistent approach (brand and style) is applied across your organisation.

There is a need to roll out online personalisation in a staged manner as ‘big bang’ approaches carry increased risk of initial failure (that can again contribute towards disengagement).

We recommend the following 9-stage approach (within your framework of planning/strategy):

1. Think about your key segments
2. Identify personalisation opportunities
3. Create segmentation rules
4. User-test functionality/split test promotional messaging
5. Phased launch (test anything new with a small sample first)
6. Market/promote (taking a staggered approach)
7. Analyse the results
8. Tweak
9. Repeat

This can work across all channels and should be phased (to reduce risk).

The result of this activity should be deeper member engagement as content/materials will be/feel more bespoke. There is a need to carefully consider resource/budget as this activity will cost in terms of time/budget.
If you flicked directly to this final section of our toolkit you might be forgiven as this topic is at the top of everyone’s agenda at the moment.

Many organisations are looking for the magic formula that will allow them to effectively measure engagement. However, there is a need for each organisation to compile its own formula, one that is specific to them and relates to its strategies and objectives. A ‘trial and error’ approach needs to be taken to this evolving activity.

Why? Because the requirements of membership organisations/associations and members vary immensely and our ability to deliver/scale is different and variable.

In order to provide you with solid advice we first need to look at the few certainties:

- Measurement activity/reporting needs to be meaningful and conducted regularly
- Reporting should be at Board level (or equivalent and linked to your member engagement planning/strategy)
- Net Promoter Scoring is potentially an inaccurate measuring tool and provides little if any understanding about the drivers of advocacy
- Assessment criteria needs to be consistent, standardised and robust
- Crude output measurements (e.g. social media ‘Likes’) are not always a true reflection of ongoing engagement levels due to the intangible nature of member engagement
- One off and annual member surveys are not suitable tools to measure regular and ongoing member engagement

**Measuring the Tangibles (Rating)**

Effective measurement needs to deliver information in qualitative and quantitative formats. The results must indicate a true and current reflection of engagement. To help focus our thoughts on appropriate indicators we have listed a selection of basic and advanced indicators that can be found on our Member Engagement Hub – [www.memberwise.org.uk/engage](http://www.memberwise.org.uk/engage)

Once the measures are determined (with a range of appropriate weights applied to emphasise their relative importance), reporting needs to be proactive and can in many cases be presented in real time on dashboards either within your membership database/CRM and/or Content Management System (CMS). Flexibility to report on one-off engagement issues needs to be built in, e.g. system failures, political backlash.

**Action 16**

*Consider the engagement indicators your organisation can use to measure member engagement and put in place appropriate and regular reporting.*
Member Engagement Reporting & Information Storage
Data needs to be collected and stored in an accessible location and for many this will be

- Your membership database/CRM
- Content management system (CMS)
- Internal reports/spreadsheets
- Website analytics tool (e.g. Google Analytics)
- Online social media measurement tools

These separate tools will almost certainly store the core data you will need to report on some of the tangible/measurable member engagement indicators. However there is a real need to establish how realistic it will be to report regularly on numerous variables applied across numerous reporting channels.

Some membership organisations and associations are going further...

Engagement Score Reporting - The US based Critical Care Medicine (SCCM) uses engagement measures to categorise members and reward engagement via their online status (up to a super engaged Diamond Tier).

Member Value Statements - Basic value statements can communicate what the organisation will do in return for membership. More advanced versions are personalised to demonstrate what has been offered to a member during the year. For example, “In return for membership you received X, Y and Z”. Or “You paid £X and received £Y worth of extra value over and above your annual membership subscription fee”.

Taking a Holistic Approach to Measurement
The MemberWise Network believes that a holistic approach to member engagement is required. We have partnered with leading research agency, Research by Design, to explore how this critical work can be actioned.

Research by Design recently conducted a review of academic and industry literature on employee and consumer engagement.

This work revealed that gaining a true measure of member engagement takes more than just tracking member transactions. In fact, understanding transactions only scratches the surface and, on its own, is insufficient to provide a detailed picture of levels of engagement.
Based on this research, their member engagement definition (featured at the start of the toolkit) includes four key components that integrate behavioural, cognitive, emotional and social characteristics:
This model forms the basis for a holistic approach to measuring member engagement using both quantitative and qualitative data:

- Behavioural measures that help understand the level of activity and effort invested by members.
- Cognitive measures that provide insight on how well your organisation is capturing the attention and stimulating the interest of your members.
- Emotional measures that track the depth and meaningfulness of the relationship members have with your organisation.
- Social measures that indicate the level of community and connectedness felt by your members.

In this way the model goes beyond simple transactional measures to provide a deeper understanding of engagement that can provide the foundation of an effective engagement plan.

Learn more about the definition and member engagement model on the Research by Design website www.researchbydesign.co.uk/engage
Digging deep into Member Engagement
As we have seen membership organisations and associations are at different stages regarding the depth of member engagement they are achieving.

In response we have created a member engagement maturity model that will enable you to benchmark the stage your organisation is at and identify the elements that need to change/develop in order to engage more closely with members.

Our model is segmented into three stages of member engagement maturity – Basic, Intermediate and Advanced. Linked to each stage we have created criteria that contribute (or not) to each stage.

Action 17
Consider member engagement in the context of the member engagement maturity model and establish how deeply you are engaging with members and what needs to change/develop in order to engage further.
## Member Engagement Maturity Model

<table>
<thead>
<tr>
<th>Member Engagement Maturity Model</th>
<th>ENGAGEMENT LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BASIC</strong></td>
<td><strong>INTERMEDIATE</strong></td>
</tr>
<tr>
<td>Measurement &amp; Reporting</td>
<td>Non-existent</td>
</tr>
<tr>
<td>Member Engagement Planning &amp; Strategy</td>
<td>Non-existent</td>
</tr>
<tr>
<td>Member Value proposition</td>
<td>Product focused</td>
</tr>
<tr>
<td>Local/Special Interest Activity</td>
<td>Limited Activity</td>
</tr>
<tr>
<td>Communication Style</td>
<td>Broadcast</td>
</tr>
<tr>
<td>Interaction Type</td>
<td>Transactional</td>
</tr>
<tr>
<td>Responsiveness</td>
<td>Reactive</td>
</tr>
<tr>
<td>Personalisation</td>
<td>Basic – based on simple profiles</td>
</tr>
<tr>
<td>Participation (online and offline)</td>
<td>Low Levels</td>
</tr>
</tbody>
</table>
Section 8
Actions & Next Steps

We hope that you have found this toolkit useful. We recommend that you now create a member engagement action plan. We have created a template located on the Member Engagement Hub – www.memberwise.org.uk/engage

We suggest that you tick-off the relevant suggested actions as you embark on your member engagement improvement journey.

Need more member engagement focused help and support? The MemberWise Network provides the association and membership sector’s most comprehensive member engagement focused consultancy service. The service enables leading membership organisations and associations to:

• Take a more structured approach to developing member value, engagement and growth
• Quality assure current and proposed future member engagement/value activity
• Conduct independent/robust member engagement/value reviews
• Create comprehensive member engagement strategies/plans
• Deliver member engagement focused workshops for staff/senior management teams
• Provide member engagement focused actions to drive change/development

More information about our member engagement focused consultancy services available can be found on the Member Engagement Hub: www.memberwise.org.uk/engage
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Introducing our NEW Member Engagement Boot-Camp Series

In 2017 the MemberWise Network will deliver a series of dedicated half-day Boot-Camps that will provide you with the practical insight and knowledge needed to optimise member engagement and value.

Places at each Boot-Camp will be strictly limited and allocated on a first-come first-served basis.

For further information visit: [www.memberwise.org.uk/engage](http://www.memberwise.org.uk/engage)