

Performance Improvement Series



Delivering an **Unforgettable Web Experience**

How Member-Centric Organizations are
Designing Highly Personalized Online
Environments that *Draw Members in and
Keep Them Coming Back for More*

Delivering an **Unforgettable Web Experience**

Attracting new members and controlling attrition is vital to growing your membership base.

But how do you accomplish this when a myriad of things compete for your members' attention? You do it by giving members an online presence — website, member portals, and mobile — that makes your organization indispensable.

Using membership software that creates a Single Source of Truth (SSoT) ensures you can **deliver the most personalized online member experience at every touchpoint.**

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01 What is a “Personalized Web Experience” and Why Does It Matter?

Your website is one of the most important interaction points you have with your members. It is where they come to learn, get informed, become inspired, and grow. Creating an engaging environment where they can do all of this in one convenient place will set your association apart from other sources and organizations that may vie for your members’ attention.

The “web experience” includes:

- Public-facing websites
- Member portals
- Mobile apps
- Event microsites
- Communications that drive members to any of the above

89%

of marketers see a positive ROI when they use personalization in their campaigns

2020 Adobe Personalization Survey

To optimize success, **your online environment must achieve four primary objectives:**

Objective #1:
Support Your Value Proposition

Your website must emphasize your value proposition — because your ability to deliver on that promise is what will matter at renewal time. **This is where you show your members in black and white exactly what you bring to the table.**

Objective #2:
Draw Members in and Keep Them Coming Back

Your website needs to be dynamic. It cannot deliver the exact same content the exact same way to every member. **The website needs to engage and challenge your members.** It needs

How compelling is your value proposition to members?

Only 51% of associations believe their value proposition is compelling.

Marketing General's 2023 Membership Marketing Benchmarking Report

to pique their curiosity and create a need for them to come back frequently to see what is new. Most of all, it needs to create FOMO (aka Fear of Missing Out).

Objective #3: **Motivate Them to Act**

A successful online presence needs to make it easy for members to act. This could mean:

- Registering for an event
- Signing up for a continuing education class
- Buying a report or directory
- Agreeing to sign a petition/get involved in advocacy work
- Volunteering for a committee
- Joining, renewing, referring a colleague

Objective #4: **Automatically Pivot**

If your website and member engagement management system are one and the same, your online presence reflects the member's history and automatically generates content that is tailored to their interests/behaviors. **When your system is in sync, your website can anticipate what members need and respond before they even have to ask**, such as by:

- Offering a conference discount based on their purchase of a training course
- Prompting them to update their profile if they have not logged in for a while
- Reminding them of an event registration deadline
- Alerting them to important industry news

02 It is Not Enough to *Think* You Know Your Members

To ensure you can meet your members' ever-changing needs, your organization must be data-driven. **Data needs to inform nearly every decision you make.** Today's associations need a purpose-built member engagement management system that provides a Single Source of Truth (SSoT) you can access at any time, from anywhere. With an SSoT, you have a real-time, 360° view of your members. It provides exceptional business intelligence you can use to:

- Spot trends
- Identify the issues that matter most to your members
- Develop member personas
- Predict member behavior
- Target prospective members
- Become a "Learning Organization" — *which leads to continuous performance improvement*



How an SSoT Helps You

A purpose-built member engagement management system provides a Single Source of Truth that:

- Consolidates your website, member data, and accounting system in **one system**
- Delivers a **comprehensive view of all interactions** with your members, including joins, renewals, event registrations and product purchases
- Provides **top-level security** you likely could not deliver using your own in-house server
- Ensures tight, two-way, “no-code” **integrations to Best-of-Breed applications**



How an SSoT Helps Your Members

By increasing member engagement through your online environment, you are building a stronger, lasting relationship. **You need to remember your members are consumers and they want to feel valued and understood.**



A purpose-built system will ensure you can offer members:

- **One centralized hub** where they can find everything they need
- Tailored, **relevant communications** that really speak to their needs and interests
- **Streamlined processes** — they can pay dues, buy products and register for events all in one transaction
- Access to any of your systems using just **one password** (Open API and out-of-the-box support for Single Sign-On (SSO) make this possible)
- Convenient **self-service options** to update their profiles and access your resources
- **Data security** measures they can trust

An SSoT Can Help Make Your Organization *Indispensable*

It is all about using your website to underscore how your organization is delivering value they cannot get elsewhere:



Offer **members-only resources**. Review the resources available to non-members to see if there are opportunities to make them member-exclusive.



Provide vital industry and **professional news and insights behind a firewall** on your site that only members can access to further demonstrate your value.



Create **members only continuing education courses**

(or modify your non-member course fee structure so joining becomes a "no-brainer")



Establish **members-only forums** where they can share information with colleagues — these can be established for key personas to really tap into specific member interests.



Introduce an "Ask an Expert" section to your portal where seasoned volunteer members **offer advice and counsel to newbies**. This gives ambitious members more exposure and provides a valuable service.

03 Using **Data-Driven Strategies** to Define Your Member Journey

By allowing you to **monitor and track all member interactions** — from the join, through onboarding, mentoring, product sales, event attendance, and renewal — your member engagement management system will help you become a data-driven organization.

Step 1: Identify your members needs.

- Issues your members care about most
- What motivates them
- Their communication preferences — *and pet peeves*
- Career goals and how you can help them

Step 2: Create different member journeys to cater to those needs.

- Into membership
- Through membership
- Post membership

So, how *exactly* do you create an effective member journey?

Set Your Goals

You will first want to define what you want to accomplish and decide how you will measure success. It does not have to be complicated — try to **set attainable, measurable goals** your entire team can work toward, such as:

- Increase first-year member retention rates by 10%
- Boost first-year engagement rates by 30%
- Bring back 15% of last year's lapsed members

Design Member Personas

Personas help you understand the motivations behind your members.

They are a vital part of your map, *more on that in section 04.*

Determine the Elements

The ideal mapping process should **outline exactly how you will interact with the member.**



Onboarding

Welcome the new member, help them discover the membership benefits that appeal to them, ask them for their communication preferences, and generally make them feel special and valued.

Your retention strategy must start now.

Mentoring

Assign a mentor who will regularly check in with the new member, invite them to events, encourage their participation in online forums, send resource links, etc.

Strategic Engagement

Provide personalized offers, survey/poll them about key issues or membership benefits, have various members of your staff call/text/email so they hear different voices, encourage them to network and volunteer, etc.

You want to gauge how they feel about your organization and identify any at-risk members early.

Create FOMO

Starting three months out from their renewal date, send personalized renewal offers that remind them of the benefits they have enjoyed, tease upcoming events, and promote upcoming resources that they cannot miss.

Remember that FOMO is a very powerful motivator you will want to leverage.

Create a Visual

Documenting the member journey is great but building a visual map is extremely powerful.

Consider creating one for each member persona and each step of the member journey. It does not have to be elaborate, but a visual representation can often help you identify gaps and opportunities that you might have missed.

Scope

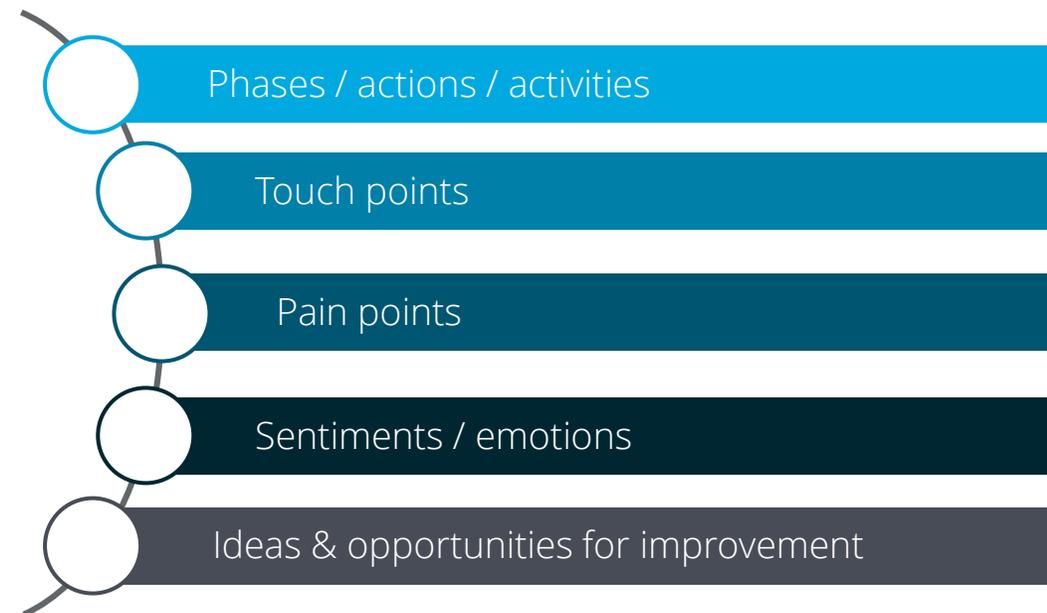
Single scenario with single goal

e.g. renew at end of first year

Persona

Single persona

e.g. Matt the mid-life career changer



04 How Do You Actively Engage Your Members? It Depends on Them.

Each of your members is unique. It is important to tap into their needs, concerns, and objectives to better serve them and ensure retention. But it is not enough to know what they want to hear; you also need to know how they want to hear it. One of the best ways to do this is by using your member engagement management system to create Member Personas.

Building Member Personas is Essential

Member personas are representations of members with specific characteristics, such as attitudes/beliefs, backgrounds, wants/desires, opinions, skills, behavior patterns, goals, or personalities. **Personas help you understand what really motivates your members — what drives them.**

Member Persona Examples



George the graduate



Sally the rural member



Matt the mid-life career changer



Cassie the member company rep



Harry the HR director

Building Member Personas is Essential

But **be careful not to confuse personas with membership segments**: a persona is the entire personality of certain members while segments are simply categories/classifications, such as demographic details.



By creating member personas, you can personalize your communications and make your members feel like you *really* understand them.

To build a useful persona, you will want to uncover:

- Why they joined
- Their specific pain points
- Which issues matter to them
- Where they are on their career development path
- Variables that could cause them to drop off — especially in the first year

A purpose-built member engagement management system will be critical in building and maintaining this data-driven initiative.

05 Creating Dynamic Content for Key Touchpoints

By personalizing content, your members will feel seen and heard. They will know you value them and their needs, which will keep them coming back year after year. Because of this loyalty, you will see steady retention rates and financials, as well as a core group you can depend on for advocacy initiatives.

Each touchpoint matters and there are specific ways you can leverage each one to achieve your objectives:

Objective #1: Website/Member Portals

Your website and member portals can be a goldmine of opportunity to engage your members.

You can serve up personalized content, including:

- Specialized offers (resources/events/discounts, etc.) when they log in
- Personalized messages about news they will find interesting
- Reminders about renewals or new resources
- Forum posts on topics they care about
- Polls that ask about issues that affect them
- Continuing education they may need
- Industry news tailored to their interests
- Celebrate the member when they reach key milestones with you, i.e., one-year anniversary, birthday, etc.

All of this refers back to the member persona and the journey map. To be successful, you need to map the optimal content/resources to the right person at the right stage in the member journey.

Objective #2: Communications

With an SSoT, you can create personalized emails that:

- Drive members to key sections of your website
- Highlight new features and resources
- Motivate them to act (such as buying a new book, registering for training, signing a petition, etc.)

You can track opens, clicks, and follow their progress — all of this produces new intelligence

you can use in future communications to them, and you can also automate the production of personalized emails, texts, and push notifications based on personas to make them feel special.

Objective #3: Social Media

Integration between your social media and member engagement management system creates a seamless member experience that increases convenience and satisfaction.

When a member signs in with a social media account, a new account should be automatically created and linked within your system. By eliminating the need to remember multiple log ins, you will attract more visits to your site. Members should also be able to easily share content from your site to their socials, which further increases your visibility.

Objective #4: Mobile App

Like most associations, you may offer a mobile app for annual conferences and other special events. But **you are leaving money on the table if you are not leveraging the significant benefits of a year-round mobile app.** It is a great way to increase member engagement and a quick and efficient method to get time-sensitive information out to your members.

With association software that integrates with Best-of-Breed mobile applications, you can:

- **Leverage Two-Way Communication:** With a mobile app, you are not just talking to members, they can communicate back to you and to their peers.

Generate New Sources of Revenue

A year-round mobile app not only lets you stay in touch with your members and get their feedback in real-time, but it also provides an opportunity to generate additional non-dues/non-membership fee revenue through:

- Mobile banner ads
- Splash screens
- Other advertising
- Sponsored content

- **Put Members in Control:** With push notifications, members can determine the types of news and alerts they want to receive from you.
- **Get Real-Time Feedback:** Poll app users by asking questions that will help you identify at-risk members, those who are itching to get ahead in their careers, and ones who may be advocates for your industry.

Objective #5: Events

Through your public website or an event microsite, you can:

- Share agenda details
- Coordinate speaker abstracts and bios
- Foster discussions

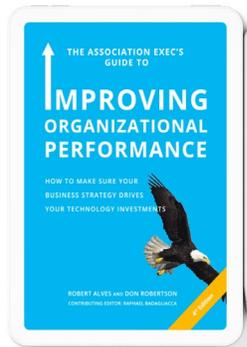
- Poll on key issues — to get immediate feedback on time-sensitive matters
- Amp up the excitement around your conference/meeting
- Appeal for volunteers
- Emphasize the need for continuing education

Because your SSoT pulls everything about your members together in one place, you can communicate with them on a highly personal level.



06 Next Steps

If you're considering new membership management software as part of your organization's digital transformation strategy in the next 1-2 years, we've put together several resources that can help you **now**.



eBook: Get insights on how to improve your performance by becoming a learning organization to achieve continuous performance improvement.

www.imis.com/assocbook



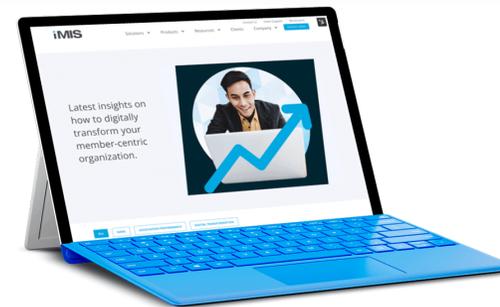
Whitepaper: Discover the three *critical* steps to creating your organization's digital transformation strategy.

www.imis.com/digitaltransform



Online Resources: Access a variety of complimentary resources to help you navigate your digital transformation journey from inception to evolution.

www.imis.com/digitaltransformation



Blog: Deep-dives on membership best practices & tips to drive sustainable growth for your organization.

blog.imis.com

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Advanced Solutions International (ASI) is a leading global provider of cloud software and services for associations and non-profits. We help clients digitally transform, streamline operations, and grow revenue through industry expertise, best-practice advice, and high-quality solutions. Our portfolio of solutions includes iMIS® for association and non-profit management, TopClass LMS for learning management, OpenWater for application and review management, and Clowder® for year-round mobile app management.



Ready to personalize your online presence?

iMIS is the only Engagement Management System (EMS) purpose-built for the way associations, unions, and non-profits work and designed *at its core* to personalize web experiences.

[Schedule a demo with the iMIS team today](#) to see how iMIS delivers the most personalized online member experience — and puts you on a clear path to continuous performance improvement.



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