



CONFERENCE

JANUARY 24–25, 2019

HILTON LAKE LAS VEGAS

Owning the Member Value Proposition: Year-Round Strategies to Improve Engagement

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Today's Learning Objectives

- Discuss the future of association membership and strategies for associations to remain sustainable and viable.
- Develop strategies to support an effective member service philosophy and year-round retention.
- Utilizing data to respond to ever changing trends in the association landscape.

Our Agenda

- The Modern Association: Industry Trends and the Future of Membership
- Holistic Member Engagement
- Member Communication Cycles
- Gathering and Leveraging Data
- Thinking Like an Association Leader
- Exercise
- Report Out & Discussion
- Q&A



The Modern Association

Industry Trends and the Future of Membership



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Consider for a moment...

- Today's Service Economy



IATES



The Service Economy

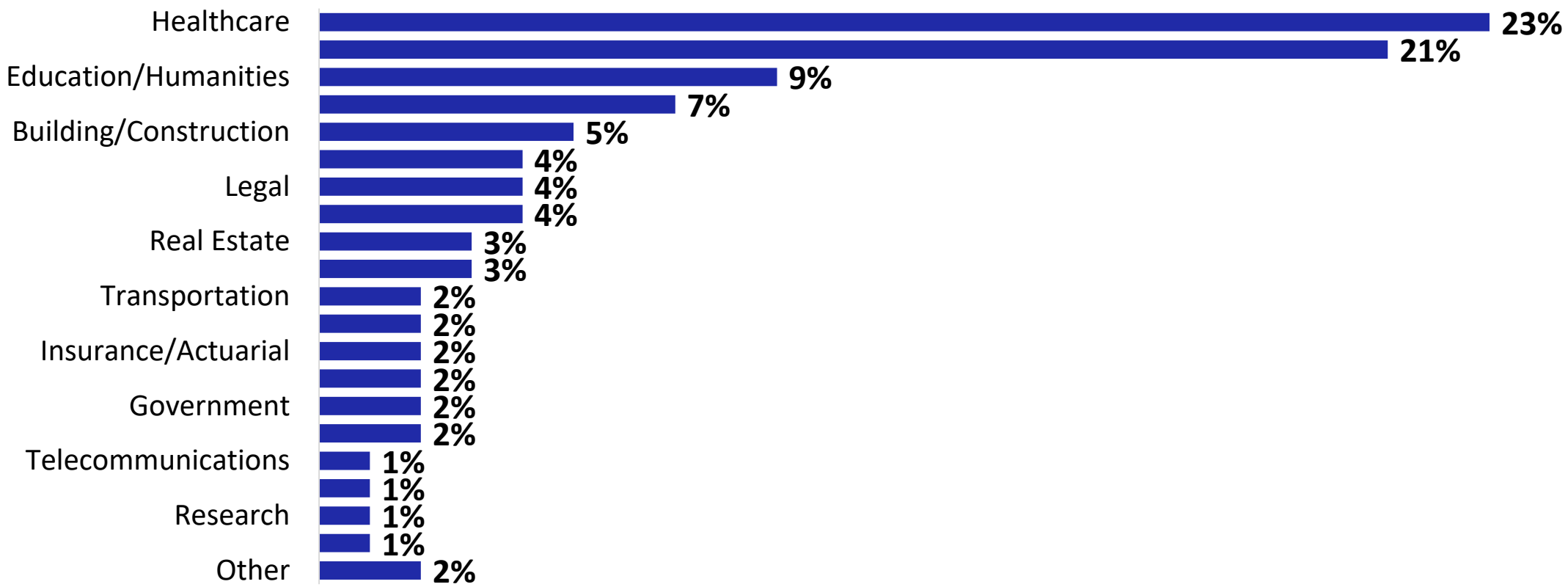
- Today's association is a service provider, not a “society”
- Service providers are compared, fairly or unfairly, with others
- Focus (after Mission & Vision) should be on ease of use, clarity of benefits, & cost
- You are a non-profit competing in a for-profit space – how do you differentiate?
 - Community – Leadership Opportunities – Commitment to the Practice

McKinley's Economic Impact on Associations (EIA) Study

- Annual survey, currently in its 10th edition
- Widely used tool and resource in understanding how associations adjust to ever-changing economic conditions and compare to peer organizations
- Survey focuses on association performance and decision making in 2017, the outlook for 2018, and, this year, diversity and inclusion initiatives among associations

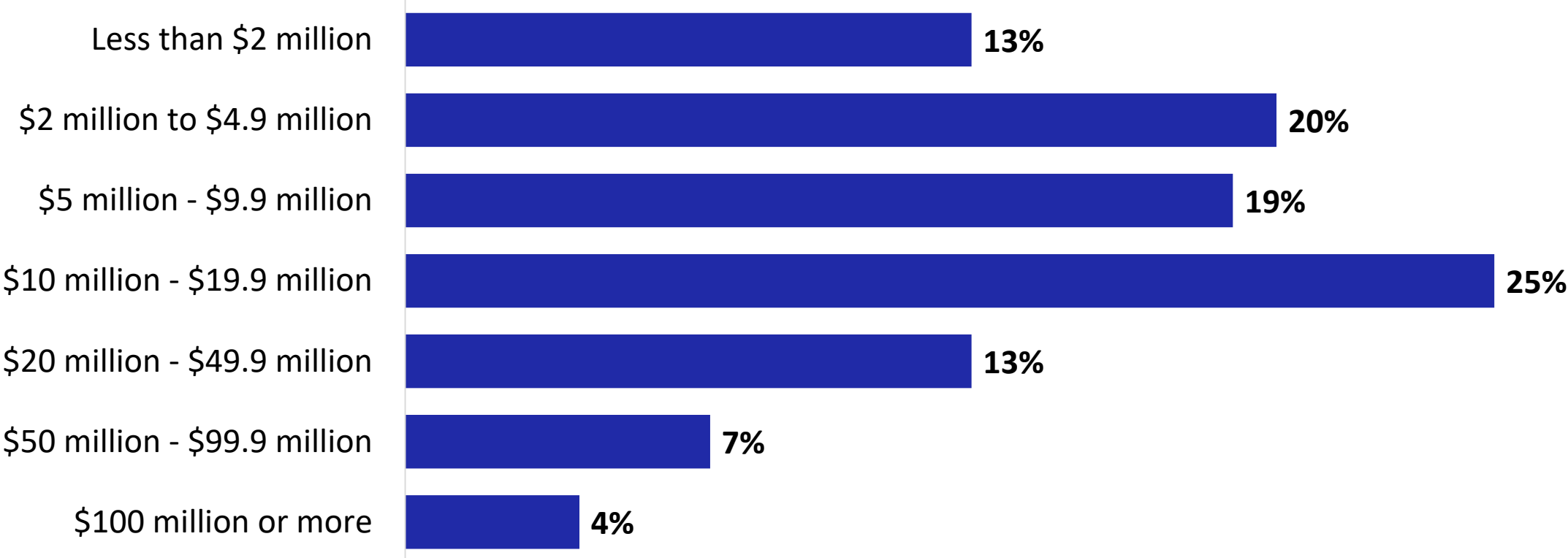
EIA Study: Respondent Profile

What field/industry does your association represent?



EIA Study: Respondent Profile

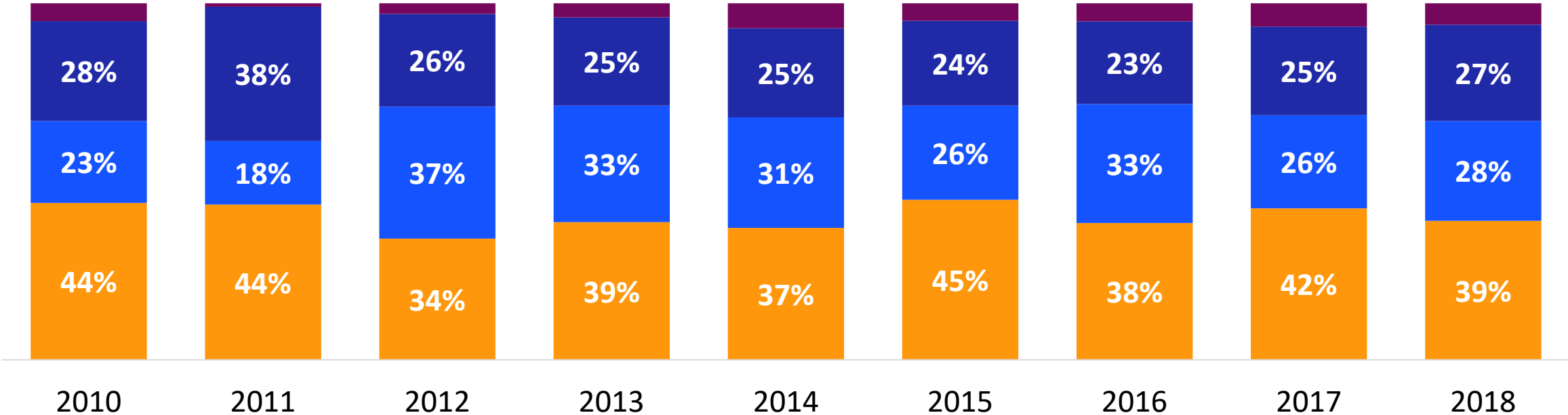
What is your organization's annual operating budget?



Membership Growth Has Been Consistent

Is the annualized trend in full, paid memberships for your association over the past 5 years:

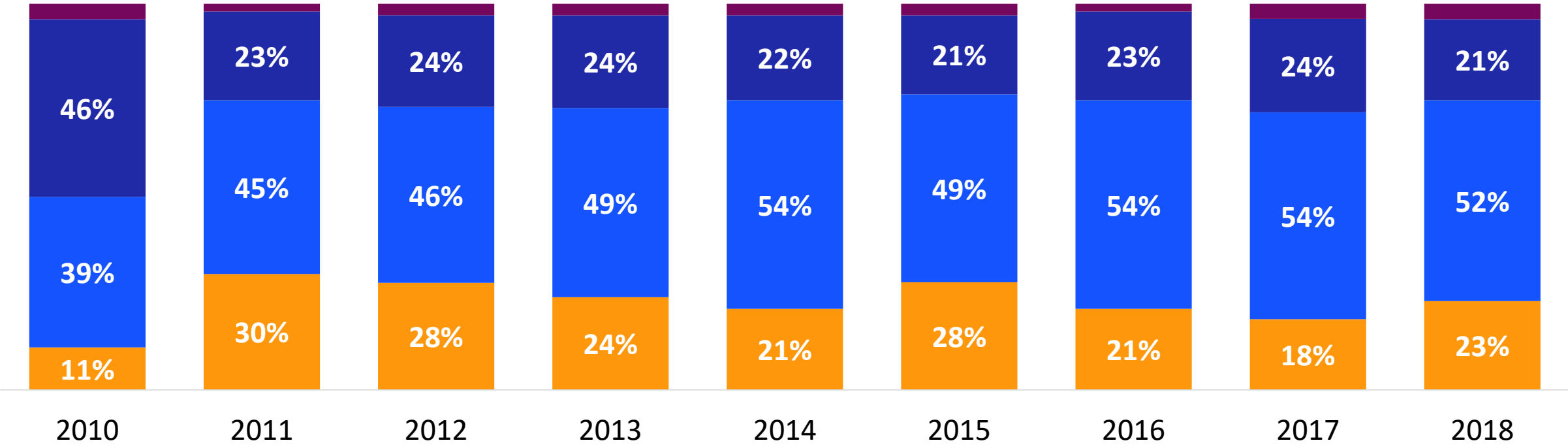
Higher Flat Lower Don't know



Retention Has Remained Consistent as Well

Over the past 12 months, has your retention rate:

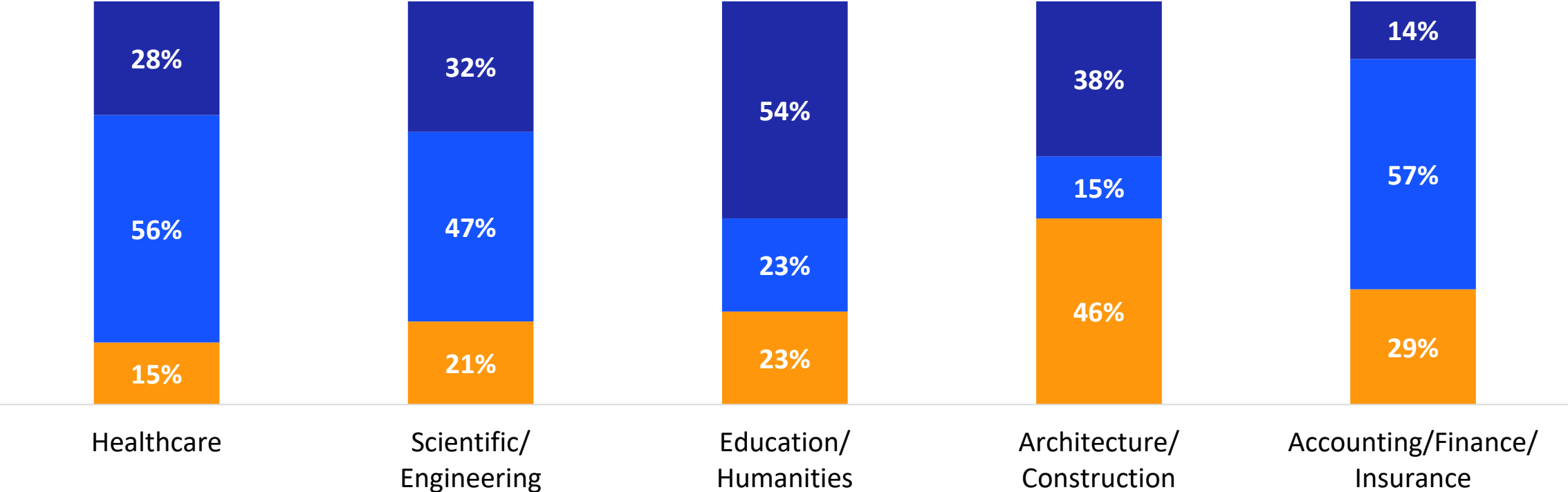
Increased Stayed the same Decreased Don't know



Optimism Not as Strong in Healthcare

2018 Outlook for Association by Field/Industry

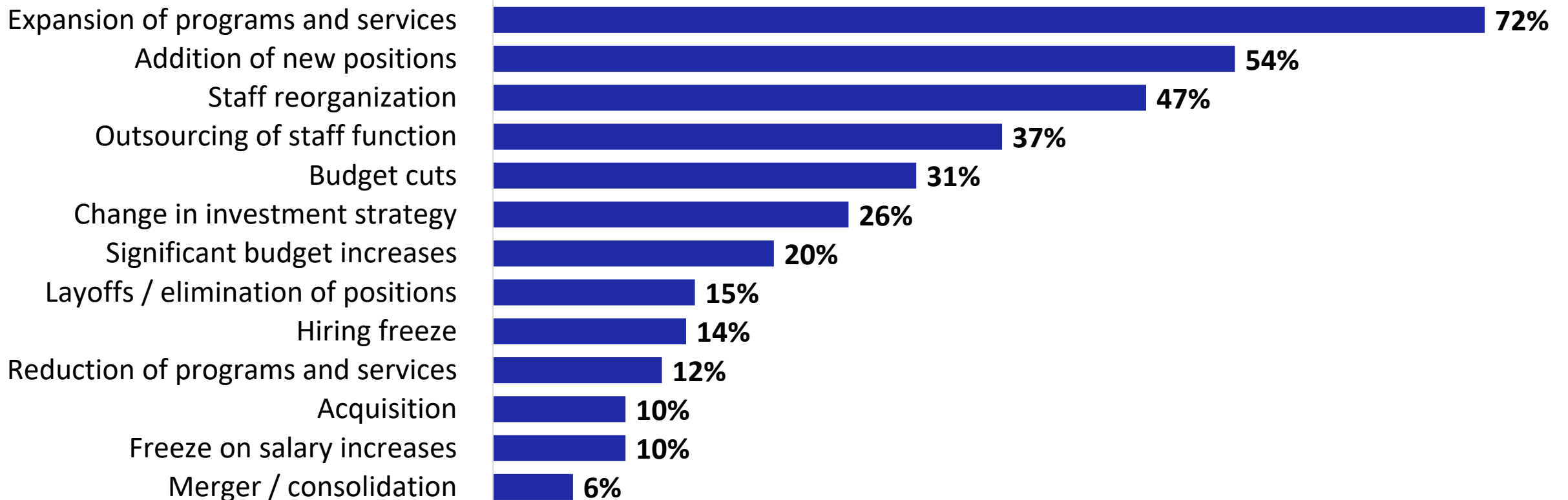
More optimistic About the same More concerned



Associations Planned for Expansion in 2018

What do you expect to happen at your association in 2018 because of current economic conditions?

% is happening/will happen/probably will happen



Healthcare Sector Less Likely to Expand as Other Sectors

| | Healthcare | Scientific/ Engineering | Education/ Humanities | Architecture/ Construction | Accounting/ Finance/ Insurance |
|------------------------------------|------------|----------------------------|--------------------------|-------------------------------|--------------------------------------|
| Expansion of programs and services | 62% | 62% | 86% | 100% | 86% |
| Addition of new positions | 42% | 62% | 43% | 38% | 77% |
| Staff reorganization | 49% | 45% | 62% | 54% | 54% |
| Outsourcing of staff function | 34% | 35% | 38% | 54% | 50% |
| Budget cuts | 31% | 24% | 46% | 33% | 36% |
| Change in investment strategy | 19% | 21% | 46% | 54% | 21% |
| Significant budget increases | 19% | 21% | 21% | 15% | 36% |
| Layoffs / elimination of positions | 13% | 18% | 8% | 8% | 14% |
| Hiring freeze | 13% | 6% | 23% | 8% | 21% |
| Reduction of programs and services | 19% | 12% | 0% | 8% | 21% |
| Acquisition | 3% | 6% | 15% | 15% | 14% |
| Freeze on salary increases | 8% | 9% | 15% | 8% | 7% |
| Merger / consolidation | 5% | 6% | 0% | 8% | 8% |



Holistic Member Engagement

LEADERSHIP • EDUCATION • ADVOCACY • DEVELOPMENT



Membership is a Holistic Experience

Effective Member Communications

Membership

- Recruiting, Retaining & Supporting

Government Relations

- Advocating for your Profession

Inter-Association Collaboration

- Connections to AOA

Events

- Where your Members Meet and

Interact with their Peers

Education/Research

- How your Members move themselves

and the practice forward

Technology

- How do you best leverage tech to

enhance the member experience?

How Do You Engage New Members?

- Member Retention starts on Day 1
- Identify your Primary Value Drivers
- Identify your Communication Channels
- Keep your Membership Team informed!

| Primary Value Drivers |
|-------------------------------|
| Membership (Community) |
| Education & Research |
| Events |
| Government Relations/Advocacy |
| Technology |
| Inter-Association Relations |

Key Communications Questions to Answer

- Do you know YOUR membership's key value drivers?
- How many touchpoints do you have with new members?
- How are your new member communications different?
 - These are your most vulnerable members
- What channels do you use to communicate member value?
 - Email
 - Facebook/Twitter/Instagram
 - Mail
 - Phone
- Do you have a similar plan for engaging renewing members?
 - Don't take them for granted!

Engagement Strategy

- Discuss your communication strategies with your tables
- Are you all doing the same things?
- Try to find one thing different at each of your tables
- 5 minutes



Start with Your Whole Team

- Monthly Team Meetings
- Involved all key functional areas
- Our team helped them identify common member questions/concerns



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Case Study – Onboarding on a Budget

- 6-month onboarding campaign
- Message content developed based on actual member data
 - Google Analytics
 - Engagement on the website
 - Feedback on benefits

site


Society for
Incentive
Travel
Excellence

Case Study – Onboarding on a Budget









- New “Member Hub”
- Live and recorded orientation webinars
 - Quarterly
- One stop shop for new and current members

[More Options](#)

Welcome to SITE!



We are excited to have you as part of our community and are ready to help you dream bigger and achieve more. **Wondering where to get started?** Explore what SITE can do for you with the quick links below, or view a recording of our [New Member Orientation Webinar!](#)

| | |
|---|--|
|  EDUCATION Advance your career with top-notch industry education |  CHAPTERS Get involved with your local community |
|  CALENDAR View a calendar of upcoming in-person events |  MEMBER DIRECTORY Connect with professionals around the world |
|  ADVOCACY See how we make the case for incentive travel |  RESEARCH Access the latest insights from the SITE Foundation |
|  VOLUNTEERING Get involved as a committee member or volunteer |  PARTNERSHIP Showcase your brand as a SITE sponsor |

Case Study – A Return to the Physical

- Printed new member kits
 - Certificate
 - Welcome Letter
 - Benefits highlights
- **Driven by Member Needs Survey Responses**



Case Study – A Return to the Physical

- Print + Digital = a Winning Combo
- 7 dedicated emails for new members
- Live & recorded orientation webinars
- All print resources available digitally
 - Allows existing members to have access



Attend the New Member Webinar

We've thrown a lot of information at you in your first few months as a new ILEA member. Let's slow down and take some time to answer questions about your member benefits.

You are encouraged to tune into the next quarterly New Member Webinar hosted by ILEA HQ and the ILEA Membership Development Committee.

DATE
TIME

[Register for the Webinar](#)

We know your time is valuable so, we'll make the most of it during this short webinar. Take a tour of the ILEA website and learn how to use the member portal and communities. Learn more about the resources and tools available to you now that you are an ILEA member and ask any questions you have about the organization or membership benefits.

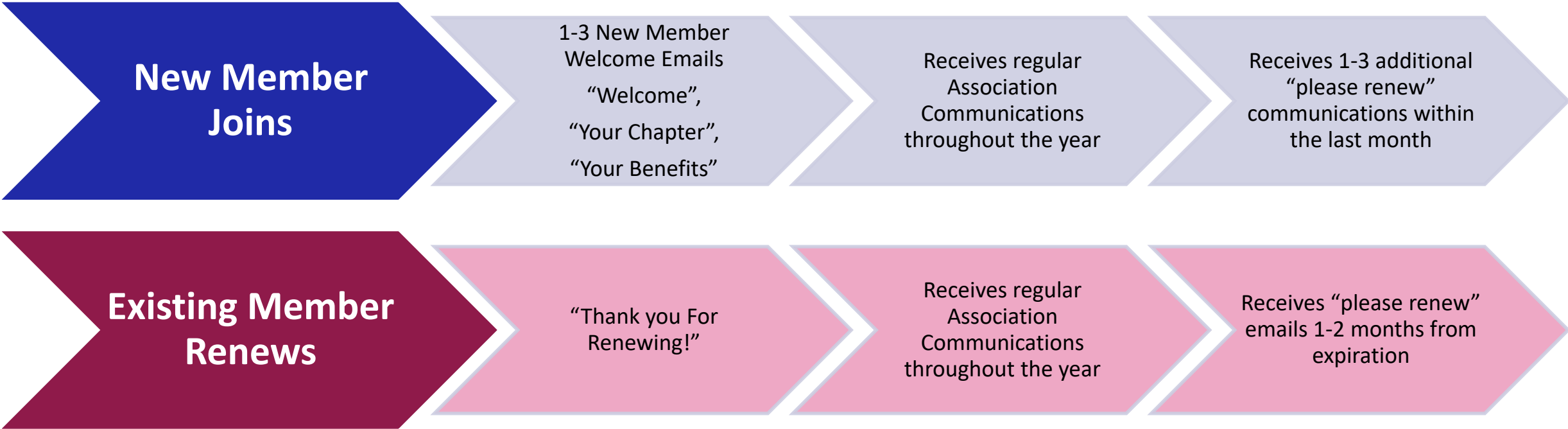
In this webinar, you'll have the opportunity to virtually meet other new members who undoubtedly have the same questions you do.

Register now to join us for the next New Member Webinar.

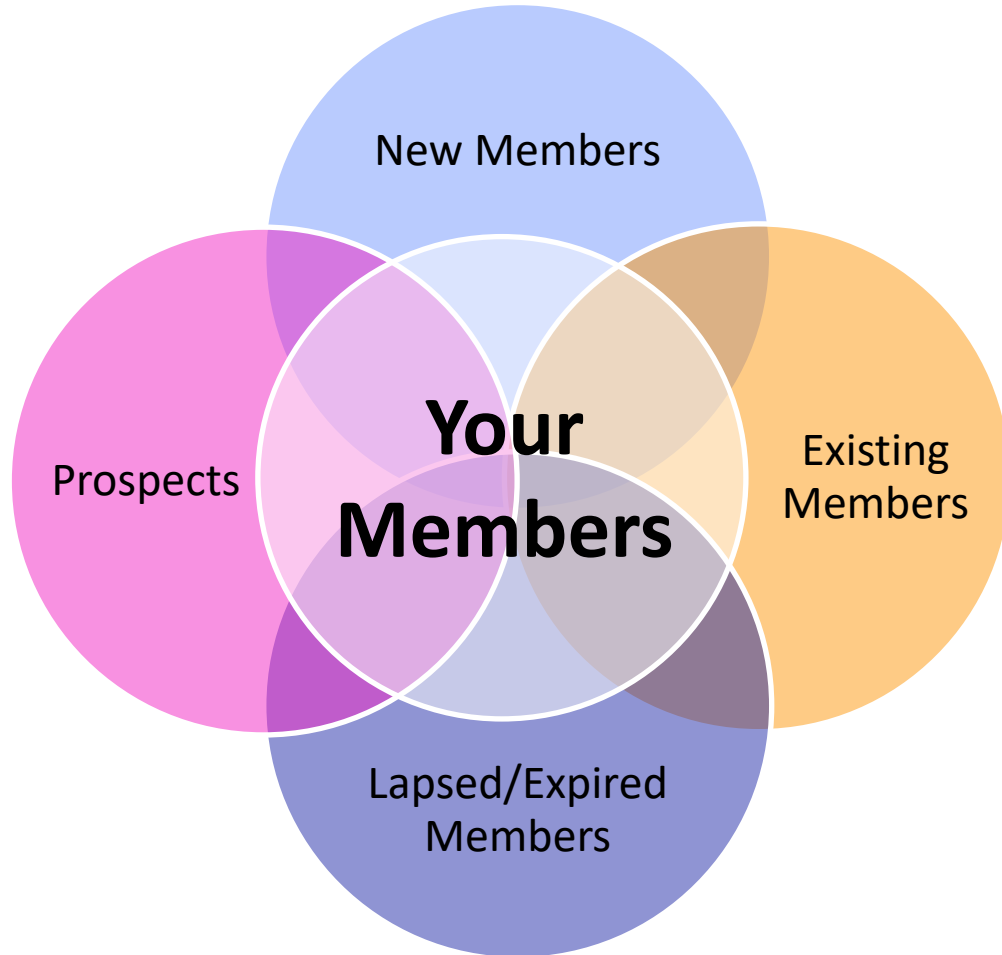
A Not so Great Member Engagement Story . . .



One Size Fits All is Not the Future of Membership



Segmentation Is the Future

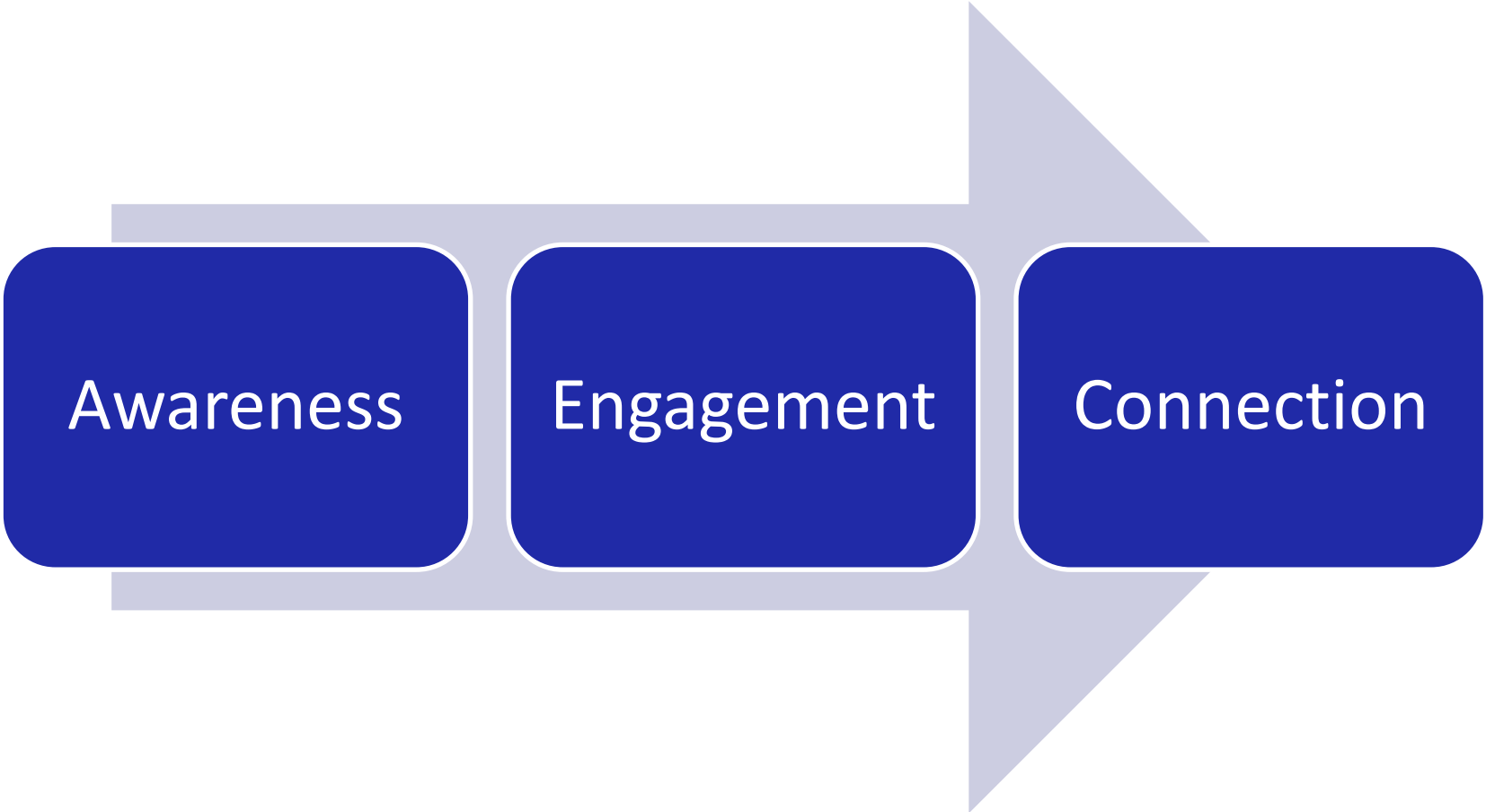


- Each segment receives unique communications
- All segments have through-line messaging
- These segments are just the start

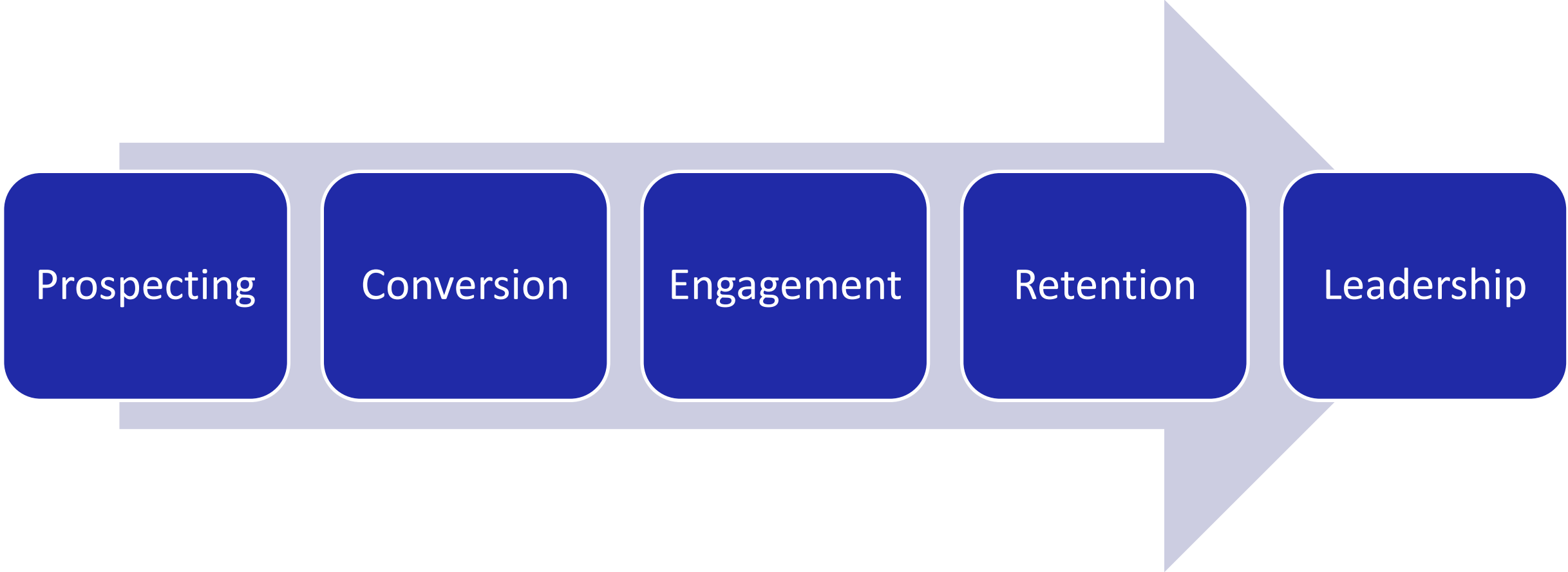


Member Communication Cycles

Goal: Relationship Building



Compelling Action Through Communication: The Communication Continuum



Position the WIFM Message

What's in it for me?

Provide details to help your prospects/members answer the following questions:

- *Why should I attend?*
- *What will I gain from this experience?*
- *Why was I invited?*
- *How will this help me do my job better?*

Highlight Primary and Secondary Calls to Action



PHYSICIANS

RESIDENTS

STUDENTS



Come Together at OMED 2018

Join us Oct. 5-9 at the **San Diego Convention Center** in San Diego for the opportunity to learn, connect and grow at the premier osteopathic medical event of the year. The convention center is an ideal base for exploring San Diego—even if you only have an hour or two. Check out the **OMED program** for the latest updates.

Register for the conference and book your hotel stay in one easy click. Full registration as well as one-day passes are available. **View registration fees.**

Secondary Call to Action



Know Before You Go

Get ready for OMED 2018 by choosing your hotel and planning your stay in San Diego. **Get started.**

Register Online



Primary Call to Action

Download registration form



Key to Engagement: Segmented Communications (Which Will Change over Time)

- What are your key segments?
 - Tenure
 - Age
 - Position/Role in Industry
 - Other demographic categories?
- Who are your decision makers? Your influencers?
- New Members: Orientation and Encouraging Engagement
- Mid-Tenure (Years 2-10): New Ways to Get Involved
- Veterans (10 or more Years): Leadership, Being Ambassadors

How Other Organizations Have Looked at Segmentation

Residents
and Young Physicians



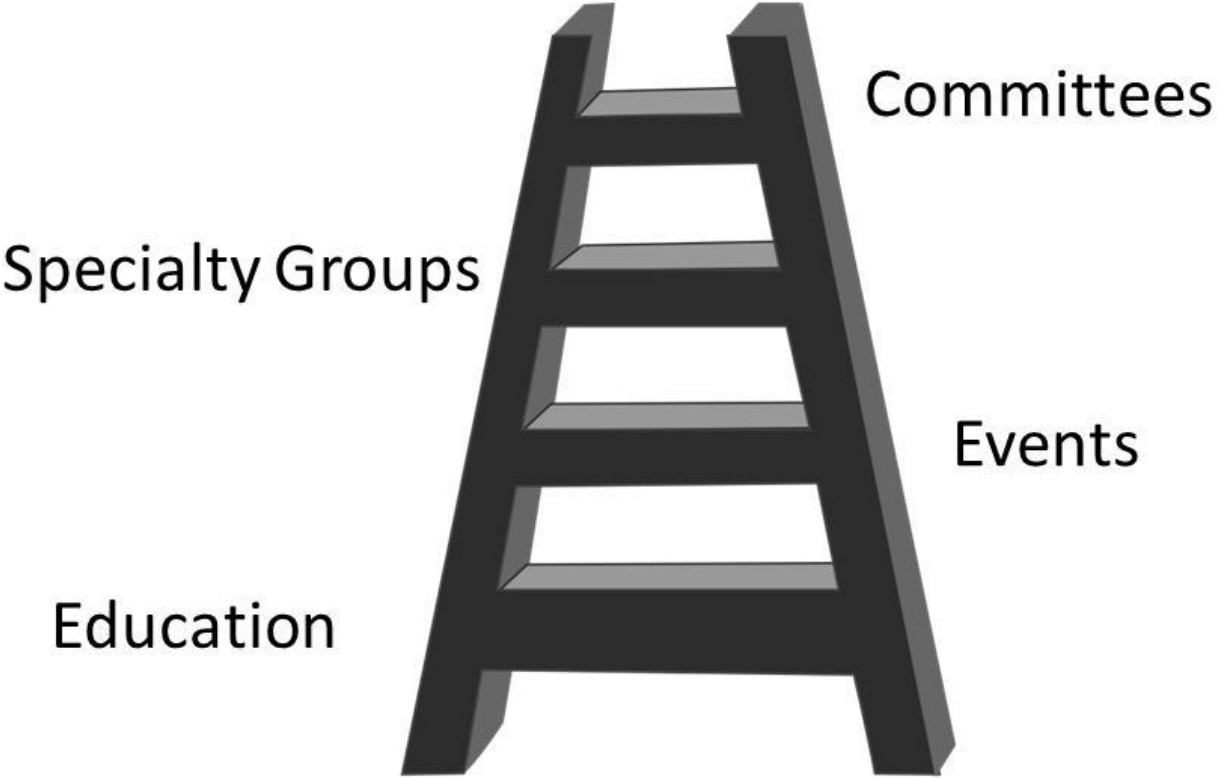
Personalized Track and
Education Pathways



Product Bundling and
Engagement Analysis

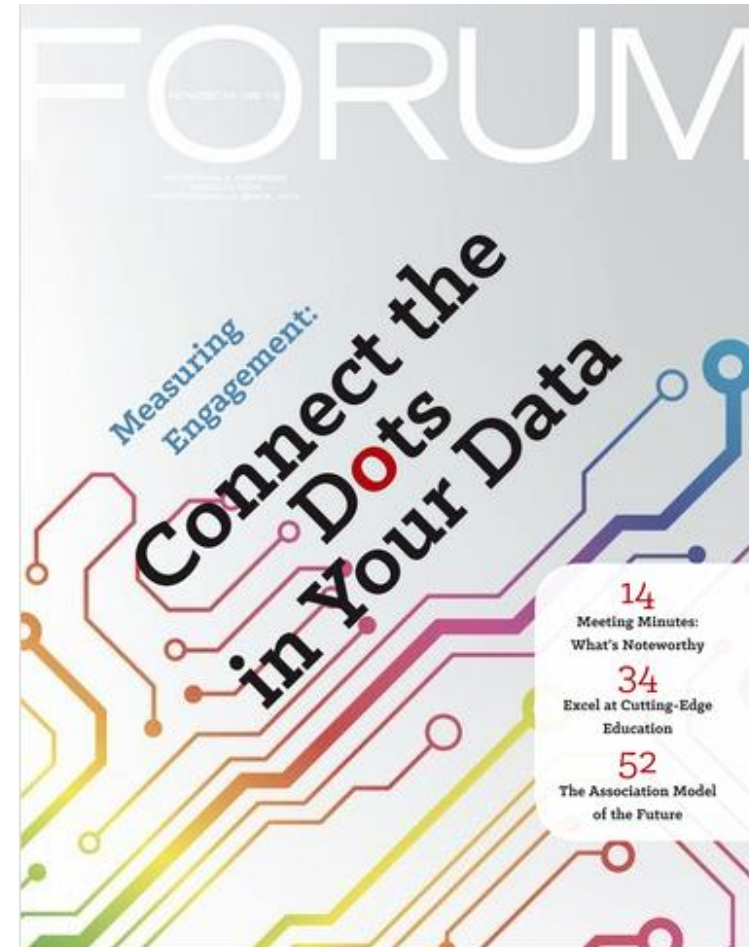


Understand Your Engagement Ladder



Case Study: AONE's Engagement Ladder

- Combine disparate data sets
- Find your tipping point
- Follow the money
- Get out the vote
- Segment your activities



Membership Communication Cycle

- Clearly define your annual touchpoints for all members
 - Clear difference between New & Renewing Member communications
- Are members getting too many emails or communications?
 - Can you consolidate less important messages to make them more relevant?
- How relevant is each communication to your members' needs?
 - Rank them, compare your results

Take These Thoughts Back With You

- What would you do differently?
- Short term, medium term, long term changes



Gathering and Leveraging Data



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Taking Data-Driven Action: Leveraging Your Existing Data

- What data do you already have and use?
- What are you capturing when they join?
 - When they renew?



Taking Data-Driven Action: Leveraging Your Existing Data

More Data with Less Work

- A/B Email Subjects & Newsletters
- Website traffic – clicks, searches, abandons
- Front line staff – most common questions
 - Are you tracking call topics?

Determining Your ROI

- How many members have to join/renew to pay for a new initiative?

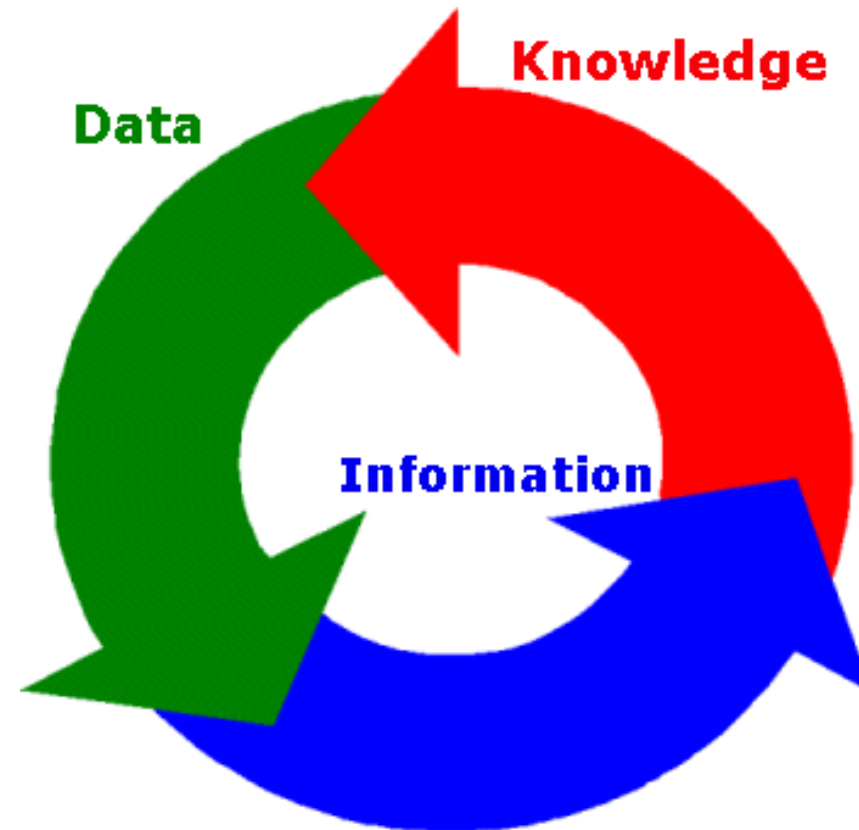
Taking Data-Driven Action: Collecting Data Effectively

If You Only Had 10 Questions...

- KPI Questions
 - Willingness to recommend membership
 - Satisfaction
 - Intent to renew
 - Value of membership
- Opportunity Analysis
 - Importance/Satisfaction with individual benefits
 - Professional Challenges
 - Communications Preferences

What Could You Do with Those 10 Questions?

- Net Promoter Score
- Loyalty Index
- Opportunity Analysis
- Gap Analysis

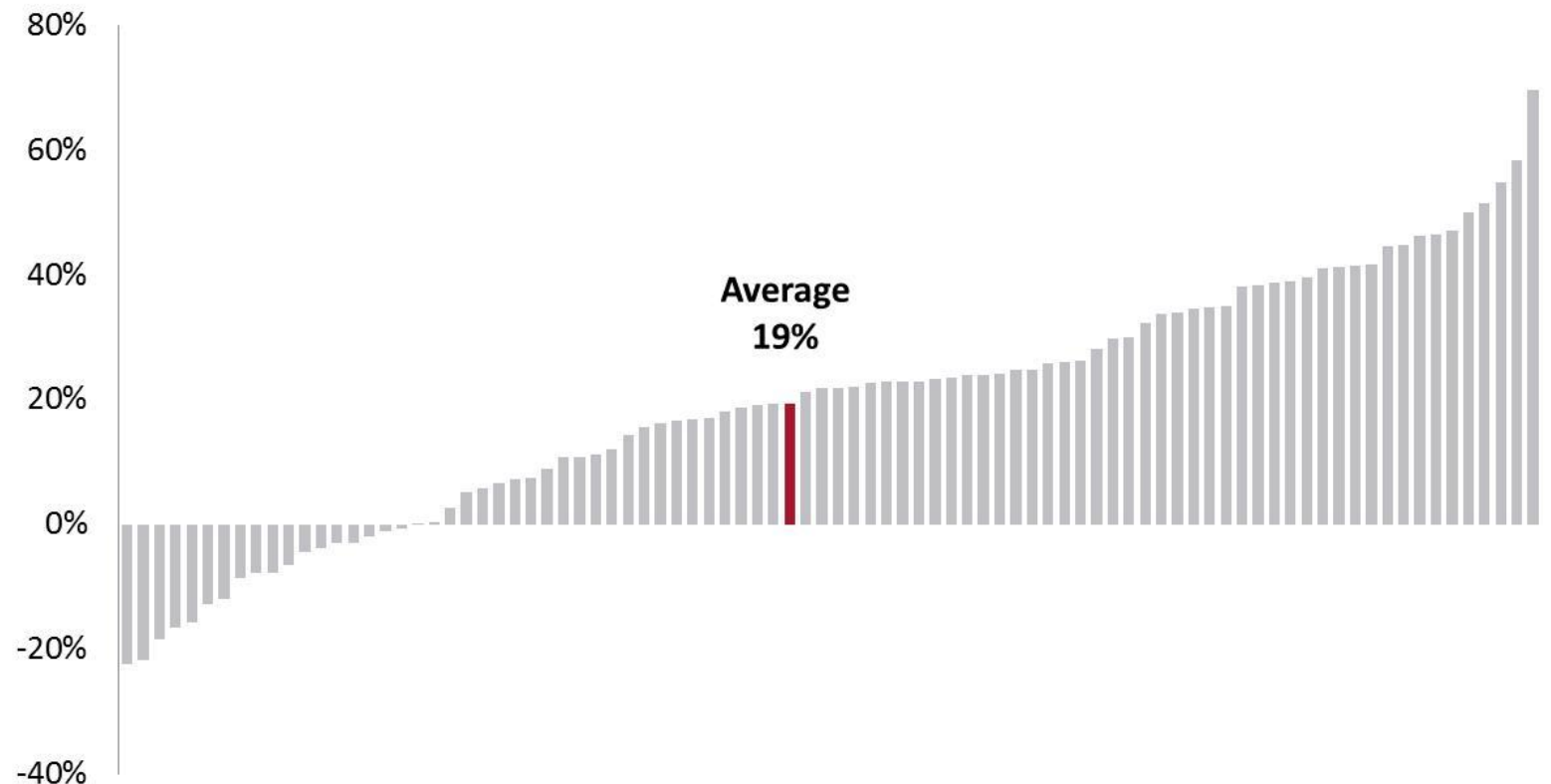


Net Promoter Score: How Does Your Association Compare?

How Willing are You to Recommend Membership?

NPS = % of Promoters (9 or 10) - % of Detractors (6 or lower)

Benchmarking Net Promoter Scores - Professional and Hybrid Associations

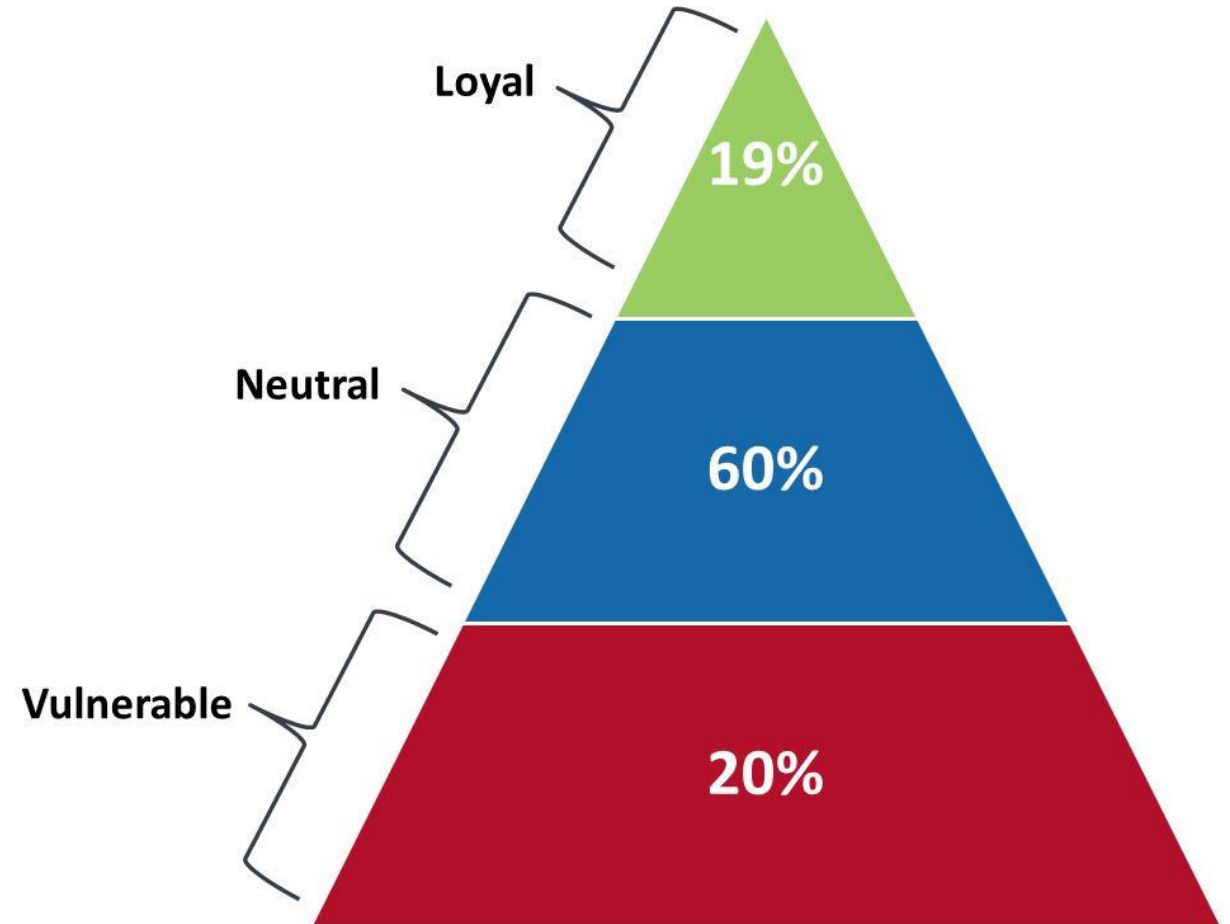


Calculating Your Loyalty Index: How Vulnerable Is Your Association?

Take 3 KPI Questions

- Satisfaction (5 points)
- Cost vs. Value (5 points)
- Willingness to Recommend (10 points)

- Loyal: 18-20 points
- Neutral: 15-17 points
- Vulnerable: 14 or fewer points



Taking Data-Driven Action: Other Research Opportunities

- “Exit” Interviews with Former Members
- Focus Groups at Annual Meeting
- Industry/Thought Leadership Studies



Thinking Like an Association Leader



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Association Leaders...

- Serve the Mission
- Drive toward the Vision
- Decisions should be contextualized using the following –
 - Does this “Serve the Mission”?
 - Does this help our organization move closer to our Vision?
- Focus on the End State First – Does it align with your Mission, Vision, Strategic Plan?

AOA's Mission

- **Advancing the distinctive philosophy and practice of osteopathic medicine**
- Example – Regional Meeting – “Does this Serve the Mission”
 - Why are we doing this?
 - To gather DOs together for shared learning and networking experiences, promotes growth and development
- Example – Selling Apparel – “Does this Serve the Mission”
 - Why are we doing this?
 - To “get exposure.” To gain revenue.



Exercise: Thinking Like an Association Leader

Thinking Like an Association Leader – The FAB Exercise

- Break Down your Benefits into 3 Components
 - Features
 - Advantages
 - Benefits
- Use these breakdowns to help market & promote your benefits more effectively

Thinking Like an Association Leader – The FAB Exercise

- Feature – is always a NOUN, it describes aesthetic design of a product. It names the part of the products and answers the question – what is it?
- Advantage – is either adjectives or action word, it tells us of the function of the feature and it answers the question – what does it do?
- Benefits – is the experience customers wants from your product, something they want to get out from buying it. The needs and wants they need to satisfy. It answers the question – what is it for me? Benefits can be either personal or corporate.

Thinking Like an Association Leader – The FAB Exercise

- Feature - What is it?
- Advantage - What does it do?
- Benefit - What does it mean to the customer?

- Example:
 - Feature: CME from the State/Specialty Society Meeting
 - Advantage: Learning a new innovative technique that ensures better outcomes for your patients
 - Benefit: Healthier, happier patients (who give you a positive social media review)

Let's Try It . . .

- Pick out your top features of membership (e.g., education, advocacy, meeting discounts).
 - What are the advantages and benefits of these features?
 - How can you frame this in a way that will advance your organization's value proposition?
 - Does this message change based on what type of member is reading it?
- Remember:
 - Feature - What is it?
 - Advantage - What does it do?
 - Benefit - What does it mean to the customer?



Discussion/Q&A



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Thank You