

## Membership Marketing: Principles & Practicalities

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Associations Forum Pty Ltd



ECCV ~ Thursday 11 June 2015

## About Associations Forum

1. Commercial entity assisting associations in Australasia & Asia
2. 500 member organisations: professions, industries, charities
3. AF National Conference largest association event in Southern Hemisphere
4. Services similar to an association
  - Governance and constitution reviews
  - Policy and advocacy
  - Free member meetings and events
  - Networking and international connections
  - Member advice helpline
  - Journal, Enews, resources
  - Benchmarking surveys e.g. salaries, Boards, finances
  - Consulting and advice on boards, governance and planning



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## Facilitator's Career as a CEO and Volunteer Director – John Peacock

1. 20's – Commerce degree, large corporates; Board of professional association
2. 30's – Association manager and CEO of small association; Board of professional association and Chair of local community association
3. 40's – Established Associations Forum: providing education and advice to associations
4. 50's – Consolidation of Associations Forum and training of associations in Australasia and Asia



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## Facilitator's Career as a CEO and Volunteer Director – Denys Correll

1. 30's CEO of National Disability Services, Australia's peak body for non-government disability services – national structure
2. Early 40's Director Policy, Planning and Review in a Victorian Government Department
3. Mid 40's to mid 50s CEO Council on the Ageing – federated structure
4. Mid 50's to mid 60's International Council on Social Welfare – unitary structure of 9 regions
5. Voluntary positions in charities and NFP governance including Council of Social Service, MS Societies nationally and State



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## Topics to be covered

- 1 How to get new members
- 2 Tips for retaining current members
- 3 The database: a vital tool
- 4 Importance of processes and systems



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## Prior Questions

1. What are your association's current membership numbers and what would you realistically like them to be?
2. Which specific staff or volunteer position is tasked with increasing membership?
3. What database does your association use to record contact details of members and potential members?
4. What are your current annual membership fees?
5. What are the key services that members receive that make them join your association and renew?



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## 1 Membership recruitment context

- People join associations by free choice
- Having to be a compulsory member is registration
- People and organisations join because:
  - They support the cause generally
  - They seek the offerings of the association
- ECCV members are mostly in the former category
- If you are a fortunate association, leads will develop by nature of your cause (eg medical specialists)
- Do members join as individuals or on behalf of their organisation?
- Know why people join – and why they do not renew



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## Membership recruitment cycle

- The association's name is the starting point: make it clear
- Leads become prospects
- One Shared Database as the repository of information
- Capture leads on your database and cultivate them over time
- Prospects come members
- Once they are members, ensure that you retain them



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## Membership recruitment campaigns

- Stages
  - Existence
  - Public Relations eg story in The Age
  - Marketing
  - Sales
- Word-of-mouth recommendations and testimonials
- Member-get-member campaign



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## Marketing and sales

- Is your Mission and are your Benefits clear?
- Brand = Mission + Benefits + Reputation
- Marketing is mainly email direct marketing
- Identify sources of leads:
  - word-of-mouth
  - Association websites
  - events
  - direct email/direct mail campaigns
- Don't be scared by term "sales" & telemarketing
- Although sales can be soft not hard, you need training, systems, procedures



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## Membership targets

- Recruitment strategies need a PLAN and budget
- Potential project to compare:
  - Membership Potential
  - Actuals
  - Self-Assessment Rating
  - Target
- In other words:
  - How many potential members do we have? Eg 1,000
  - How many members do we have? Eg 330
  - What % mark would we give our recruitment efforts? Eg 50%
  - Therefore if we had a 100% effective recruitment effort, we would have 660 members.



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## Pricing & applications

- Charge what you are worth!
- If you charge less than \$110 (\$100 plus GST), you may be seen as worthless
- Some associations charge so little it is hardly worth depositing the cheque
- Do not change a joining fee: more likely, give people a discount to join for the first year
- Get applicants for membership to pay along with their application
- Only process the credit card or bank the cheque if the application is accepted
- Have a swift turnaround from receiving an application: don't wait 3 months until the next Committee meeting!
- Don't offer free membership or paid life membership



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## Budget investment considerations

- Higher membership fees x many members = considerable income
- Remember:
  - Members will be purchasers of the activities that your association runs
  - Members are a future income stream
- Ask whether investment in growing membership, such as buying an online database combined with a website or employing a Membership Officer, will be a worthwhile investment



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## Emotions

- Utilise – but don't over do – emotional reasons for joining
- Accept that some people are "joiners" and others are not
- Respect that some people don't want to join: don't harass them, but do record their disinterest on the database
- Some people have large ego's: get them involved but establish term limits on Presidents so it's not a job-for-life
- Some people will do well financially: use your association as a vehicle to give scholarships or start a Deductible Gift Recipient (DGR) foundation
- Have aspirational appeal



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## Membership standards

- Set standards with the criteria you expect for membership
- Make them sign a form saying they will observe the "Constitution and Rules" of the association
- Don't get them to seek proposer and seconder when applying
- Have internal promotion to higher levels of membership or service recognition awards
- Set relatively easy standards for joining, then have higher "aspirational" standards



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## Association benchmarking

- Potential project to compare:
  - Membership Potential
  - Actuals
  - Self-Assessment Rating
  - Target
- Equity of the association: what it is worth in \$'s
- Membership fees
- Constitutional comparison (Associations Forum can help)
- Number of genuinely active volunteers



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## Prior Questions – response #1

1. What are your association's current membership numbers and what would you realistically like them to be?
  - *Membership is over 200 at present.*
2. Which specific staff or volunteer position is tasked with increasing membership?
  - *No one is responsible to increase membership but one member is responsible to manage new requests.*
3. What database does your association use to record contact details of members and potential members?
  - *Self-created data base*
4. What are your current annual membership fees?
  - *Annual membership subscription is zero but life membership is \$50 per member. Members are individual.*
5. What are the key services that members receive that make them join your association and renew?
  - *One event every month. These events are different for each month and there is lot of variety is brought to these events.*



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## 2 Retaining members

- Now we have members, let's keep them!
- It is easier (and cheaper) to retain a member than recruit a new one
- People or organisations that do not renew may return at a later stage
- *Perpetual challenge to be a "must-join" association*
- People will more likely rejoin than join if they like your association, even if the real advantages are marginal
- Processes also very important, but different to recruitment and should be easier because you know them
- Use realistic internal self-assessment to consider whether members get value for money from membership
- Consider whether your not-for-profit suits annual set date renewals or anniversary renewals
- Amend, improve and refine the association's Mission and Goals if appropriate to what members need



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### Multiple points of contact

- Multiple instances of positive contact are helpful
  - events
  - social
  - email
  - printed newsletters
  - phone calls
  - services
  - discounts
  - networking
- Visits are helpful if they can be afforded



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### But don't harass and bug members

- Ask your members "would you like us to email you weekly, monthly or quarterly?"
- Have a communications plan – what information gets sent to what people at what time
- Occasionally send personalised emails
- Have a password-protected website with information unavailable to non-members



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### Stages in retaining members

- *Retention starts 1 month after joining/renewing, not 1 month before renewal is due*
- Renewal advance notice
- Official renewal documentation
- Friendly reminder
- Formal reminder
- Telephone 1
- Telephone 2
- Letter of discontinuation of membership
- Amended status on database (don't treat them the same)
- PLUS future follow up



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### Processes for Membership retention

- Need for the membership offering to be delivered
- Have a database that tracks all participation and interaction
- Personal attention and customer service
- Appeal to Generation X, Y and Z
- Have processes to follow up!



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### Surveying members regarding their needs and satisfaction

- Associations must know what their customers want
- And associations must know get feedback on the experience
- More senior members on Boards can lose touch
- Is the association providing:
  - Relevant services?
  - Timely services?
- Consider online surveying site, eg [surveymonkey.com](http://surveymonkey.com)
- *This is all to become a must-join and must-renew organisation*



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### "What's in it for me?"

- Give members the services they want and charge them for most services
- Occasionally have a free-and-exclusive-to-members event
- Typical services that will appeal are:
  - Events
  - Social interaction
  - Communications and information
  - Community good work



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## Prior Questions – response # 2

1. What are your association's current membership numbers and what would you realistically like them to be?
  - Currently 388, would like 15 who are no longer members to return, and would like all LGA's to be members (roughly 70)
2. Which specific staff or volunteer position is tasked with increasing membership?
  - Don't really have one, admin staff generally deal with membership queries and membership renewal process.
3. What database does your association use to record contact details of members and potential members?
  - CRM which is attached to our website
4. What are your current annual membership fees?
  - Varies, based on income, from \$135 up to \$815
5. What are the key services that members receive that make them join your association and renew?
  - Policy updates, advocacy, being a part of the 'bigger picture', connecting/networking with others, annual conference, monthly newsletter, weekly bulletins.



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## 3 Database as the vital tool

- Databases must be technologically quick and available to all staff
- They should be simple to use and intuitive - yet still require training and documentation
- Culture of using the database is paramount (including CEO)
- Databases are best if they are able to be expanded and enhanced relatively easily and simply
- The basic architecture and linkages are fundamental
- Reports must be available readily, flexibly and easily



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## Typical fields in Database

- Information on the INDIVIDUAL
- Information on the ORGANISATION - linked to the individual
- ADDRESSES
- EVENTS AND REGISTRATIONS
- CUSTOMER RELATIONSHIP MANAGEMENT (CRM)
- FINANCES (usually more difficult)
- Website access to own information if possible



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## 4 Importance of Processes & Systems

- Recruitment and retention is more of a science than an art
- Much work is required on the processes and systems - but this work will pay off
- Understand the costs of recruitment and renewal - and financial implications of not doing them well
- Small or large association, there is no excuse to not be organised
- And (once again) have a good database



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## Allocation of staff to tasks

- Know who is responsible: have an organisation chart
- Assess the skills required for different tasks and have the right people doing them
- In an ideal world, associations will be able to afford staff
- In ECCV member organisations, it is likely to be volunteers
- Some people have personalities that are accustomed to sales – and they are poor at the paperwork and follow up
- Some people have personalities that are accustomed to paperwork and follow up - and they are poor at sales



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## Don't accept that volunteers "too busy"

- Associations have the challenge of slack volunteers that don't do what they said they would do
- Have a culture of understanding this - whilst moving people on from voluntary portfolios when they don't deliver
- Volunteer Committees/Boards with no paid staff need to have two styles of meetings
  - Governance meetings to discuss strategy and overall outcomes
  - "Unpaid staff" meetings to decide who-does-what and when it is due



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### Closing comments

- Association name must be descriptive: it is marketing in itself
- Reputation is paramount: word of mouth will be your best marketing
- Have systems, processes and clear responsibilities for staff
- Database including both members and prospects is vital
- Excel spreadsheets are not databases; on line may not be necessary



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### Levels of AF Membership

1. Journal and eNews
2. Free events and member event discounts
3. Benchmarking surveys
4. Policy and advocacy
5. Member advice helpline
6. Local and international networks
7. Board and staff training (Silver and Gold)
8. Governance and constitution review (Silver and Gold)
9. Financial benchmarking (Gold)
10. Strategic planning discount (Gold)



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**NZ associations mean business** is a special section of the magazine, focusing on the needs and interests of New Zealand association members. It provides valuable information and resources for NZ-based association leaders.

### Thank you!

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