

Personalising membership communications for better retention

Providing added value to your members

It's time to stop seeing your members as just members; **they are your customers**. They are, quite rightly, demanding more value for money. So how can you provide 'added value' to your members?

Through **personalised communications** that are tailored and targeted to each member.

Read on to find out more...



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It's time to think like a retailer

The membership sector is more competitive than ever. There is often more than one professional body or association for an individual or company to choose from with little perceivable differentiation between them.

Just as in the retail world, members are becoming more discerning and fickle; wanting to see what effort you've made to understand their needs and moving onto another organisation if you don't meet their expectations.

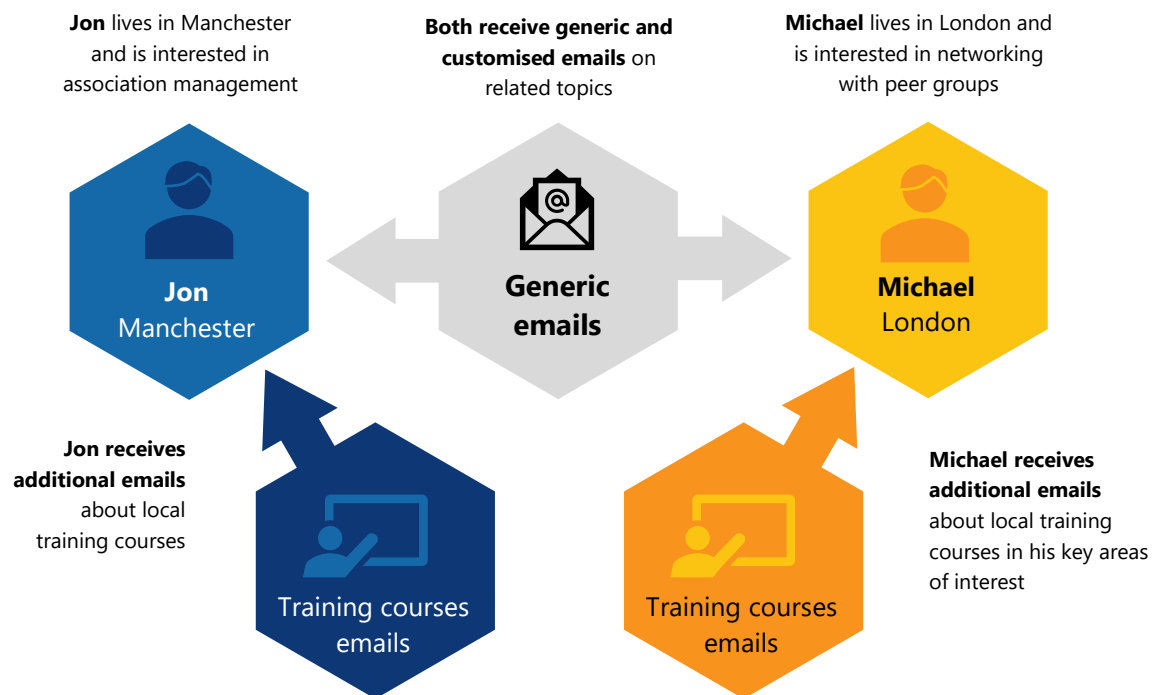
It's time to stop viewing members simply as members; **they are your customers**. And you need to work harder to retain their 'custom' (membership) year on year. Gone are the days of unquestionable member loyalty; every time the subscription renewal invoice lands on their desk they ask themselves 'what have I got out of being a member in the last year?'

With personalised communications you can make sure that the top-of-mind answer will be 'they really understand what's important to me'.

What are a member's needs?

That's the \$64,000 question! Each person or company has slightly different motivations for being a member of your organisation. What they are looking for from membership will vary from person to person but there are steps you can take to better meet those needs and that's by tailoring what information you provide them with and when you provide it to them to make sure that it's relevant and timely.

Not everyone is interested in the same thing and not everyone wants to communicate in the same way.



Once you know the profile of a member you can tailor communications to suit their interests and needs.

Your job is to provide choice in how people communicate with you and in what information they can opt into/out of. In order to know what kind of information members want you need to be able to segment them into different groups, which in turn requires profiling of your membership base.

10 tips for personalising your member communications

1. Change your mind set

It's time to stop seeing your members simply as members. Unless membership to your organisation is compulsory (which is rare) your members have no obligation to hand over their money year after year. They are *customers* of your organisation and will go elsewhere if they are not satisfied with the customer service they receive from you.

These days we all expect a high level of service whether dealing with our local library or a global entity like Amazon and we're quite prepared to complain (vocally) and leave if we are unsatisfied.

Start thinking in terms of customers and ask yourself 'what would I want?'

2. Survey your members

You can already make a lot of assumptions about what your members want based on the data you already have about them. You can segment by location if you know where they are based; their membership grade might tell you what kind of information they are interested in (e.g. student grades will be interested in training, CPD etc.). Look at what you've got and see what segments you can easily do already.

But don't be afraid to survey your members about what they do want/need. Ask them what they like that you already do and what they would like to see more of. And pay attention to the results!

Finally, remember your members are human beings – our needs are constantly changing depending on our circumstances – so be flexible and allow for members changing needs (e.g. as their job changes or level of seniority increases).

3. Gather all member information in one place

You've probably got information on your members stored in systems all across the organisation, such as in a membership database, finance system, website CMS and email platform. In order to get a fully rounded view of your members you need to gather all this data into one place. That way you can fully analyse it and see what your members' needs are – we call this a 360° view.

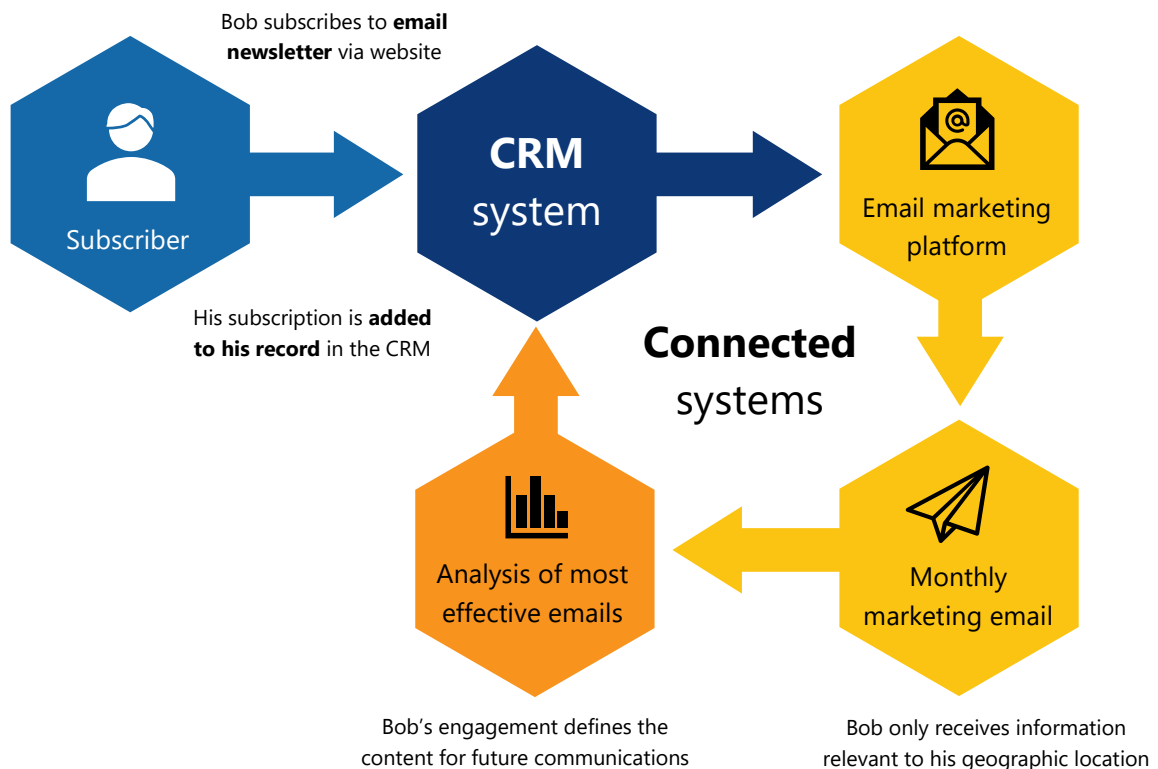
A good CRM system provides you with a central place to:

- a) Store all this member data
- b) Analyse it and segment your members according to different factors
- c) Drive communication actions

But for this to really work to its full potential you need to...

4. Integrate your data gathering systems

Connecting and integrating your various systems will allow you to fully utilise all this new data insight you've gained by gathering all your member data in one place. Imagine having your website CMS, CRM system and email marketing platform all connected together...



Your CRM provider will be able to advise which CMS and email platforms your CRM can integrate with such as Microsoft Dynamics and dotmailer.

5. Provide different ways of communicating

Whilst the main ways to communicate with members these days is via email it is by no means the only channel you should focus on. Customers today expect organisations they deal with to be available on the channel they want to use not just the channel(s) the organisation wants to use. That means using and gathering data from sources including social media, online, phone, email and more.

Keeping track of what channels each member likes to use is virtually impossible without the use of a CRM system. A good CRM will allow you to note what communication preferences a contact has, as well as their social media handles/latest tweets etc., all building up your picture of a member's preferences.

You need to identify all the communication channels your members want to engage with you on and make sure you use them, providing a consistent message across the board. A good CRM system allows you to monitor social channels as well as record what is said by whom.

6. Involve your colleagues

You can't create a communication strategy in a silo. Work with your colleagues across all member-facing departments to understand:

- a) What they believe the member experience should be for their areas
- b) What data they currently/could potentially gather that can support that experience

Working with colleagues at this stage is also key to getting buy-in to the process and changes ahead.

7. Provide them with a way to change preferences

A person's preferences will change from time to time, for example when they are researching something they will be like a sponge absorbing everything they can about a subject but once they have all the information they need they will switch off.

You need to allow your members the ability to change their preferences (both the medium used to communicate with them and the types of information available). Give them a preference centre on your website where they can see what they are getting currently and either amend it or unsubscribe completely.

8. Think big, start small, grow fast

It can be very daunting knowing where to start but we recommend listing all the ways in which you could personalise and improve your member experience and then pick them off one by one.

Remember:

- Ask your members how they find the new experience with each improvement
- Work with your CRM, CMS and email providers to identify the best way to make the process work – they are here to help you!

9. Measure member satisfaction

How do you know if what you're doing is working if you don't measure it? Identify what you want to measure (objectives) and how you can actually measure it (KPIs), then measure after each upgrade/improvement.

10. Be patient!

It does take time to develop and implement a personalisation strategy but persevere and you will be rewarded with a greater level of member satisfaction, membership retention and loyalty.

We can help...

We are experts in developing CRM systems for membership organisations, charity and regulatory bodies...

We've worked with organisations such as the Solicitor's Regulation Authority, The Royal Town Planning Institute, The Bar Council, The Girls' Day School Trust and the Association of School & College Leaders.

We can help you - so please call us.

We're not big and scary. We work with you to understand your requirements & budget, then create the right solution for you.

And we can advise on how you can integrate your systems to be able to **personalise your member communications.**

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