

# **140 Tips To Help You Recruit and Retain More Members**

**By Sue Froggatt**

# Preface

Over the past 10 years I have been running training courses, speaking at conferences and undertaking benchmarking research on the recruitment and retention of members.

To help keep ideas circulating, I publish a free electronic 'membership tips bulletin'. This booklet summarizes many of these.

As you read through, highlight those that you find most relevant. Then circulate the booklet to others in your association and get a collective view of new ideas to consider. If you want to refine your thoughts for others to reference, here is a simple coding suggestion. Use:

'T' - To indicate you recommend testing the idea.

'P' - To indicate you suggest parking the idea for the moment, but re-consider it later.

'D' - To indicate that you already do this.

'N' - To indicate you think the idea would not work or apply.

I hope that you find a few gems that you can use to invigorate and stimulate your recruitment and retention activity!

With best wishes



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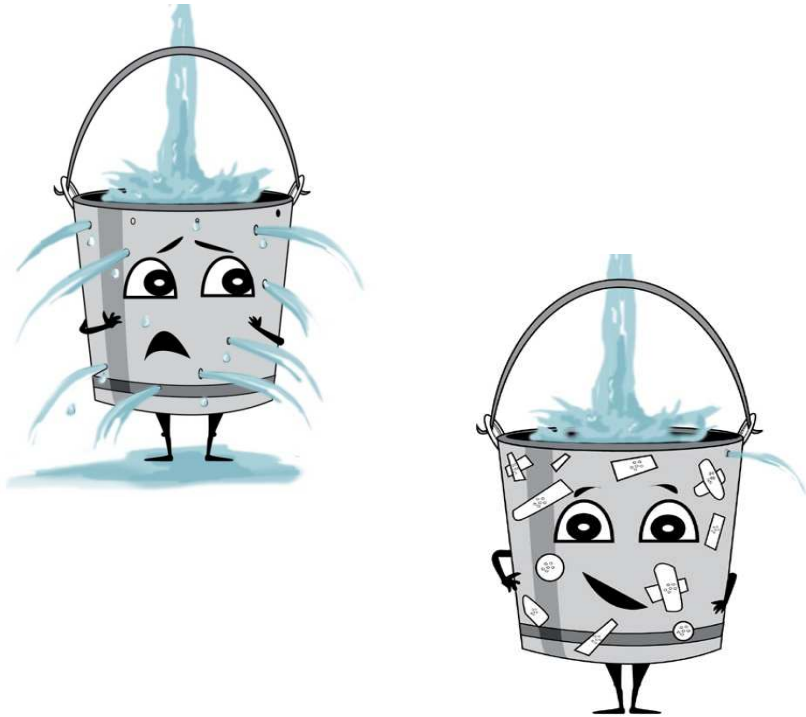
Back Cover: Details of Sue’s seminars and consultancy services.



## A. General Tips On Planning & Preparation

1. Schedule a period of quality time to plan. Find out what is currently happening at a 'macro' level in the membership community and in your members' industry. What future trends are predicted and how will this impact on what you do? The key to producing a great plan is the quality of the thinking, ideas and information that have gone into the planning process.
2. When you are developing your plans make sure they are based on realism. Build an evidence based knowledge bank of what has worked and what has not and why. Start off by understanding what the experts and gurus in the industry say is important and then test out their advice. Remember that the best plans are based on evidence, not on a 'hunch' or idea that someone in the team had. It is always useful to do some test marketing beforehand so that your predictions can be based on evidence. Start slowly and use what works because you can always do more.
3. One of the biggest problems today is staying focused on what really matters. The 80:20 rule applies to many areas of work – 80% of the result and impact will be due to 20% of the factors and tasks involved. If we pay attention to this, we can then make a huge difference to what we achieve. Remember that we often find it comfortable to focus on what we enjoy or are good at doing, and this is great if it happens to be the part of the task which yields the result. If not, then you need to make sure that you outsource or bring in experts to do the critical parts of the task.
4. Don't make the mistake of being locked into a reactive cycle of putting most of your resources into trying to recruit members to make up for the fact that you are losing lots of members. You may be disguising the fact that the real issue to which attention should be directed is retention.
5. To help make this important point, reflect on my leaky bucket analogy. There is no point in pouring more water into a leaky bucket

in an attempt to keep it full. It is much more productive in the medium and long term to plug the holes first.



6. Sit down with the team and develop a professional networking plan for everyone in the association, particularly those in a senior position.

The quality of your connections with key influencers in your community can have a significant impact on the success of your plans. Often one powerful connection can transform an organisation and open doors that would normally be closed.

Consider carefully who to include. You are looking for:

- Relationships that have reciprocation opportunities i.e. you are in a position genuinely to help each other.
- People you trust. Lack of trust will limit the chance of success.
- People with whom you strike up a natural rapport. It really helps if you genuinely like each other.

## **B. Tips On Developing & Evaluating Member Benefits**

### **Evaluating Benefits**

7. Periodically assess the value of all member benefits so that you can 'retire' those no longer appropriate, and free up resources to focus on new services. Develop a retirement process and a list of criteria you will use to withdraw member benefits so you can be open, transparent and consistent in your decision making. Possible criteria include:
  - Value and importance to members.
  - Value to the community or sector.
  - The level of awareness.
  - Usage and take-up by members.
  - Importance to your mission.
  - The resources used to produce and deliver.
  - Satisfaction with performance when used.
  - The level of competition. Are others providing a superior product?
  - Leverage. Does it lead to opportunities for additional revenue or additional member involvement?
8. Similarly have an evaluation process for deciding on which new benefits to introduce. Usually there is no shortage of ideas.

However, if you look at the success rate of new products then you quickly see that there is a shortage of GOOD ideas. Good ideas are ones that have been tested and critically evaluated. Areas to consider include:

- The strength of the need. Is it urgent or pressing? The stronger the need, the quicker the take-up.
- The level of demand. Is it of a sufficient size to warrant your investment? Is it likely to grow?
- Is it easy to understand what the product or service on offer is?
- Will members be willing to pay for it? Is there a budget already allocated for it?
- Is there a profitable route to market? You don't want to spend most of the price the member pays on marketing and distribution.
- Do you have an obvious advantage as the supplier of this product because of your positioning?

## **Benefit Research**

9. To become more relevant and meaningful in today's economic climate you need to be more challenging in what you provide for members. Ask yourself how each aspect of what you offer will make a difference and add real value for members? What will it enable them really to accomplish? How will it practically improve their life or business?
10. Review the members' personal development and business processes, then develop benefits that regularly help them with these. Look at the typical profile of a person or organisation as they develop their career or their business.

Break down each key process into typical stages to gain a clearer understanding of the different benefits they need from you and how best to communicate how you can help. Focus on process and issues which must be solved to progress to the next stage. Once you



have mapped this out, engage a few members at each stage to help you confirm and refine your thinking. This will help you to make sure you matter and really help with recruitment and retention.

11. Have benefits which help members stay ahead. If you are a:

- Professional institute, how can you help members increase their worth and their reputation?
- Trade association, how can you help members build their business? Can you deliver them new leads via a directory of suppliers on your web site? Can you turn your member directory into a 'Guide to Suppliers' and distribute it throughout the buying community? Can you develop a template of a newsletter that they can customise with their logo and pass on to their client base? Just think how much time you could collectively save your members every month! Can you take a large stand at overseas exhibitions and invite members to share the stand? Can you provide marketing or HR template tool-kits they can regularly tap into? Position yourself as an 'extra member of their team'. Can you provide larger framed membership certificates, thanking them for their contributions, for their reception area to help impress clients and other visitors?

12. When times get tough, what will be important to members? Here are a few suggestions of what some members might be looking for:

- To feel secure, safe and comfortable. Accreditation and certification will be important for those chasing fewer jobs, so support out-of-work members with training or retraining, which they can pay for at a later date when things improve. Offer a resumé bank.
- To feel good again and put things into perspective. Start or strengthen your link to a cause that truly inspires. Help them give to the less fortunate in society. Have a section in your monthly magazine or on your web site for members to share their success stories.

- Temporary paid assignments or opportunities to volunteer for projects that will keep them up-to-date with what is happening. They also might want to have a go at setting up their own business, so think of how you can support them.
13. If your members are not in a highly competitive environment, you might like to consider facilitating the opportunity for them to share and swap resources that they have developed and use the web to manage this. This could range from sharing documents e.g. brochures, posters, etc. to a community recycling facility. Eventually you could end up with an e-bay style auction! This could provide members with huge added value and help position you as being at the heart of your community. Allowing non-members to see a summary list of resources available might help with recruitment. This type of service helps build community, adds extra value to membership and fits in with today's recycling culture.
  14. Although it is best to aim to retain members based on the intrinsic value of their membership, it is likely that some are primarily interested in financial savings, or need to justify to others their membership investment based on a financial benefit. If this is the case, develop a specific benefit, ideally one they cannot get exactly the same anywhere else, which meets this criterion. For example, a keenly priced insurance policy tailored in a special way to cater for their specific profession.
  15. Useful research to carry out at a conference roundtable session is a 'membership value' exercise. Ask members to put an actual monetary value on the benefits they get from membership. This will help you understand where members feel there is most value. Use the results to guide what you cover in your recruitment literature and presentations. Also see if you can add extra value to those benefits on which members do not place a high value.
  16. The million dollar question to ask your members is "What would make membership not a nice to have, but a must have?"
  17. Understand how your membership value proposition is perceived

- by members because ‘perception’ of value is what really matters.
18. Rather than having many large member surveys, consider having smaller and more frequent ones. The advantage of this is that:
    - Members are more likely to participate if less time is involved.
    - It keeps information flowing in from them on a regular basis
    - It sends a constant signal to members that you are interested in hearing what they have to say.
    - For newer surveys, it makes it easier to refine questions based on more recent feedback.

## **Launching New Benefits**

19. When launching a new service or concept a useful way to explain it is to associate it with something with which your audience is already familiar. Lead them to it from that starting point. Also if you are launching something that is totally new, remember that you need a large marketing budget because you will first need to educate prospects as to the concept and then sell them you or your product.

## **C. Tips On Recruiting Members**

### **Planning Recruitment**

20. Recruitment is a process, not an event. Plan at the start of your activity to go back to your target group several times. Use various marketing approaches to build ‘share of mind’ of what you do and have to offer.
21. Focus on context and timing. What important events and activities are happening in a prospective member’s career, life or business that you can help them with? Where are they when this happens? Who do they talk to? How can you be standing there with helpful

and guiding information when it happens? Context, not content, is king. When you hit on the right context, it is much easier to get people's attention with relevant and engaging content. It is context that gives meaning to content.

22. To gain a better understanding of why people join, include non-members in your membership research. If you study only members you may be missing out on important information, for example, understanding any different characteristics between members and non-members.
23. A low risk approach to recruitment is to target members with a similar profile to existing members i.e. people or organisations that already behave and think like members. This is because they will find it easier to develop a feeling of belonging if they are like existing members. Your recruitment research should include developing a very clear profile and understanding of your existing members.
24. When considering using a new recruitment tactic, test it out first to see what results it generates before committing to a big campaign. By constantly testing and tweaking, you will learn what works. Work out an acceptable response rate. When you achieve a response which is acceptable, then scale up.

### **Raising Your Profile**

25. It is much easier to recruit new members if they are already aware of you, so ideally build your profile before you launch any major recruitment activity.
26. Speaking at events is good for building your reputation. To develop a good presentation:
  - Spend time on a good opening and closing statement.
  - Know the one or two powerful yet simple ideas that you want people to walk away with.
  - Ensure the flow of the topics you go through is logical.
  - Make good use of stories to illustrate points.

- Take time to practice.
27. Get your CEO to write letters to the editor. The letters page is very popular and useful for raising your profile in your area of expertise. Look out for some news that is breaking that you can relate to what you do, or comment on an article in last month's issue or take a positive stance on a controversial issue.
  28. Build your profile by participating on-line in the social media that your prospective members are actively involved in. The Internet has a 'give-give' culture, so be prepared to give away information with some value and invite readers to contact you directly for more details.

Use your contributions to position yourself as the lead on issues concerning your community. Also try to connect with the influencers in the virtual world.
  29. When an issue breaks that you want to be associated with, ring up key industry contacts for their opinion, and write up a summary and add in your comments. Then send out a bulletin or press release called "what people are saying about the issue".
  30. To attract the attention of the media:
    - Use research, surveys or white papers on hot topics.
    - Take a positive stance on a controversial issue.
  31. Raise awareness about what you do by providing free e-cards for anyone in the community to send to colleagues, friends or family. They can be used to raise awareness of an issue, cause or condition. Put links in the card to learn more about the issue, register their vote or make a donation.

## **Recruitment Tactics**

32. Make it easy for prospects to approach you by making the first contact easier. People, in general, are risk averse. So make the first contact easy for them, so they have little to lose by picking up the telephone. How? Promote a complimentary report, tips sheet or booklet on a topic that would interest them and position you as the community expert. Consider developing specific publications that

would appeal to prospective members. Here are some title suggestions:

- The 50 Essential Things You Need To Know About...
- A Career In...
- Opening A Business In... etc.

This will help good future prospects come forward and identify themselves to you!

33. To encourage non members to take a closer look at joining, use a free summary checklist to attract attention, and highlight that, as a member, they would get a comprehensive step-by-step user guide.
34. When a non-member buys something from you, use this to trigger a process that qualifies them further. If they are a good prospect, follow up with a series of appropriate communications.
35. It is very important to make sure that potential members can find your site via search engines. Analyse the keywords and phrases being used which could be associated with a prospective member. Particularly good keywords to use are relevant words that are frequently searched for but not being used by many websites i.e. high demand with low competition.
36. Attract people to your web site using curiosity. For example, enable people to find out something personal like how their salary compares with others working in the industry at a similar level. Have specific questions in your benchmarking surveys that you can use for recruitment purposes to help others become interested in what you do.
37. If you are considering taking a stand at an exhibition, try to visit the exhibition the year before you are considering attending and talk to other exhibitors. What they think of it? Where else do they exhibit? How does it compare? Once you have made a decision to exhibit, if there is a conference or a series of seminars running alongside, try to get an opportunity to speak.

At the exhibition plan to not only promote to people attending, but get to know people on other stands who are selling to the same target groups as you with non-competing products. Is there potential for cross promotion? Also take the opportunity to develop relationships with the industry publications and arrange to meet the editors.

38. One of the most effective ways to recruit new members is through personal recommendation by a trusted friend or colleague. People are more impressed by recommendations from people they already know. When two people engage in an honest and natural conversation, and one recommends the other to take a look at what you offer, then you could not wish for a better recruitment scenario. Your marketing plan should include activity that stimulates discussion and encourages people to talk about your benefits or work. For example:

- Collect and share stories about successful members or how you have helped any causes. Coach or train leaders in the art of becoming powerful storytellers.
- Encourage members to share their personal membership success stories.
- We enjoy telling others about a great or shared experience. What experience opportunities do you offer members?
- Introduce ‘conversation starter’ items that will help spark a natural discussion. Here are some examples I have seen used by membership organisations:
  - The traditional association lapel pin. Loyal members often wear them with pride.
  - One professional association has badges that younger qualified members find fun to wear or attach to their bag. They are printed with the words ‘I love my career... ask me why’.
  - Any item of clothing that is visible e.g. sweatshirts, hoodies, tee shirts, ties, etc. Have them printed with a few choice catchy, fun and arresting words.

- Make time to connect with key influencers and tell them what is happening. Alert them early on to the issues and success stories.
  - Use email and the web to spread good ideas of interest to specialist groups. Encourage 'pass-along'. Ask members, if they have found the information useful, to forward it to someone else.
39. Insert some really interesting news in your email header or footer and ask members to 'forward-to-a-friend'.
  40. Ask members under what circumstances and in what situations they would be happy and comfortable to talk about membership. This might reveal how best to approach encouraging them to help with recruitment.
  41. Approach supportive members, for example, existing volunteers or members who are already recommending membership to colleagues.
  42. Use different words. Instead of inviting members to participate in a 'Member-get-member' referral scheme, use 'Invite a colleague or friend to take a look'. This is a much softer and gentler approach.
  43. Work with partners. What other organisations have already established a positive relationship with the prospective new members you want to reach? Is there any potential for you to work together? Make networking with 'like-minded' organisations a deliberate strategy. Work with outside organisations to help you grow membership, be clear on how you define the relationship. Terms like 'partnership' and 'alliance' are often used to mean the same thing, but they are different. Partnerships focus on achieving the same goal, whereas alliances focus on sharing of resources rather than goals.
  44. If you are working with someone who wants to help but finds selling membership difficult, then try to re-frame it for them. Explain that selling is about helping people make better decisions. It is something you do with them, not to them. Give them a few good



questions and let them know the main 'turn offs'. For example, we dislike being approached by people who talk too much, or are overconfident, use pressure or try to be too chummy.

45. Consider introducing a trial membership for people who are not yet ready to commit, but are interested. Trial memberships are useful because they reduce the risk of making a bad decision and give you another option to talk to prospective members. Give them access to a few services and benefits to sample for a limited period so they can better understand the benefit of being a full member. Also monitor usage and follow-up afterwards.
46. Offer a membership gift pack for organisations or suppliers to give to customers or clients at Christmas or on special occasions. This might appeal to companies looking to reward staff who have made significant achievements or contributions, or educational institutions who want to reward high performers.
47. Offer very active or loyal members a complimentary, time or benefit limited membership to gift to a colleague. Try offering them vouchers to give to a friend.
48. Do you have a joining fee? Have you considered waiving it if a prospective new member has been recommended by an existing member? This is likely to make existing members feel important and they are more likely to talk about this to non-members... great for recruitment!
49. If you have a complex membership structure, try to simplify the selection process for the member. Can you ask them a few simple questions and then make suggestions as to which might suit them best? Can you present the options as a simple checklist, showing what is included and not included in each option? Try to use case histories of the typical member scenarios that prospective members can easily identify with, with real members saying which category suited them and why.

50. When sourcing mailing lists, a list that is made up of people who have taken an action that you want them to take e.g. responded to an offer by direct mail, will yield a better response than a compiled list i.e. one that is simply a copy of a directory. This is because what people do is a better predictor of behaviour than who they are (demographics). People are creatures of habit, so the best lists are of people who have demonstrated that they have bought a similar product or service to that which you are offering via direct mail. So if you are marketing an event to non-members in the hope that at some point they will be interested in joining, look for a list of people who attended courses they registered for as a result of receiving a mailshot.
51. If you are continually buying in mailing lists and regularly have to de-duplicate your database, consider treating the contact names that keep on appearing more than once differently. This group is likely to be more responsive to direct mail, the logic being that the more active people are, the more lists they end up on! So flag them separately and test this out – they could end up being a super responsive group.
52. Weigh a sample version of your mailshot early on in the preparation process. You don't want to find out just when you have finished sealing all the envelopes that the final weight just tips you over into the next postage bracket, and adds considerably to the cost of the mailshot!
53. Continually test the impact of different aspects of your mailing to improve your knowledge of what makes a big difference to the response. The elements you can test are:
  - Different mailing lists.
  - The inclusion of incentives to join.
  - Telephoning before or after the mailshot.
  - Using an involvement option e.g. a survey.
  - The shape, size, colour or thickness of the outer envelope.
  - The type of postage on the envelope.

- The use of testimonials from people with a high profile in the community vs. existing members.
- Different letter copy.
- Personalisation.
- Different colour ink.
- Who signs the letter.
- The length of the letter.
- The paper stock of the covering letterhead.
- The brochure and other enclosures.
- What day of the week to send out the mailshot.
- Different reply options.

### **Promotional Materials**

54. Review what information you give to prospective members. Have you highlighted:
- The main reasons why people join? For example, the problems that joining solves for members and how membership has helped them reach their goals?
  - How you will save them time? The one thing that we are all short of today is time. In fact many people would sacrifice pay for more time. So tell people how joining your association will save them time.
  - Benefits rather than features? Remember, unless you are talking to a technical person, that we are more interested and persuaded by benefits, not features. Here is a list of typical benefits that people want from membership:
    - To increase their knowledge base.
    - To broaden their experience and skill sets, and look for opportunities to learn new things.
    - To meet their peers.
    - To make new connections.
    - To find job opportunities and further their career.

- To find sales or business leads.
  - To give something back (altruism).
  - To get access to specific products and services.
  - To improve their professional image (status).
  - To impress their customers and potential clients.
  - To get help.
  - To feel a sense of belonging and camaraderie (a place to go where people know their name).
55. Use the words and phrases they use. Listen carefully to what members say and don't use jargon.
56. Research concludes that success and happiness at work encourages people to join associations. So you could test a promotional campaign with the theme: *'Are you successful and happy at work? Do you want to meet up with other winners? Then join the ....'* The research shows that although membership does not cause higher earnings and increased job satisfaction, associations are attractive to people in this situation. For a free copy of this research go to the William E. Smith Institute.
57. Incorporate testimonials and case histories at every opportunity. These are very powerful in persuading prospects.
58. For prospective members who have a price focus, give them clear examples of the financial advantages of being a member. Use quotes from members highlighting how membership has helped them save money, reduce costs, or generate extra income or become more profitable. Make your examples clear, valuable and irresistible.
59. Don't forget to find out if your membership fee is a tax deductible expense.
60. It is important in your copy to appeal at an emotional level. This is because it is much more 'natural' for us to react to things at an emotional level and act on first impressions.

By way of background consider this. Mankind emerged about 200,000 years ago as hunter gatherers and those who survived had traits to suit that way of life. They acted quickly and instinctively to respond to situations rather than using logic and reason, particularly when facing danger or fear. Then a mere 7,000 years ago we moved to an agricultural society and 250 years ago to an industrial society. This means for most of the time we have existed we have acted more on gut feeling and instinct. Evolutionary psychologists contend that although we may like to think that behaviour today is based on logic, our genes are hardwired to react to things emotionally, particularly to people.

If you are involved in face-to-face sales presentations, think very carefully about the first impression you give. What emotional message will your attire, body language, aftershave or perfume, tone of voice, mannerisms, handshake, etc. give? We take short cuts to help us make up our mind about someone when we first meet. One survey showed that 25% of people said they make up their mind about someone they meet in the first 30 seconds, and 50% of people within five minutes! What creates a poor first impression? No eye contact, body odour, limp handshakes, bad breath, poor timekeeping, scruffy appearance – especially shoes, strong accents, stupid conversations, facial hair, Cheshire cat smiles and over emphasis on technology.

61. Articulate the ‘intangible’ benefits of membership. What ‘feelings’ result when people become a member? Also, perhaps even more importantly, how will other people or organisations feel about them? What is the perception about members v. non members? Does being a member make people feel smarter, more appreciated, cooler or more fulfilled? Does being a member make an organisation more influential or more established? Clearly there is huge value in perception of how other people feel about you, so find out what the perceptions are in your sector of being a member.
62. The most important parts of a mailshot letter are:

- The recipient’s personal contact and address details, especially their name.
  - The headline.
  - The first paragraph.
  - The PS.
  - The status of the person who has signed it.
63. Questions are felt by many experts to be the key to successful selling, so use questions in your promotional copy. What questions have members had on their mind to which they want answers? After each question highlight how membership provides the answer to each problem.
64. Here is a formula to try out:
- To hook the reader’s interest in the headline, focus on solving problems, answering questions or satisfying needs that you know they are currently likely to be thinking about.
  - In the first paragraph show a clear statement of their needs.
  - Use the second paragraph to show how you have already solved this for a member they would recognise and be impressed by.
  - Remember that the reader isn’t interested in you. They want to know what you can do for them – so focus on issues that are currently on their mind!
65. Make the PS either a reason to act now - a call to action that prevents them from putting it in the ‘to be read later’ pile’ or refer to a benefit that you have mentioned in the copy, to make them read the copy to find what this was.
66. Attach a Post-it<sup>®</sup> note with a handwritten message to your brochure saying *“I thought I would send you this just in case you have met someone recently who might be interested in joining. If not, please file it just in case you meet someone in the coming months who you think would benefit from membership!”* Post-it notes are very eye-catching and help draw attention to a message. You can buy A4 sheets of Post-it notes to laser print your

message using a handwritten typeface, or get your regular printer to overprint them.

67. Results show that if you handwrite the envelope it will increase your chance that it will be opened and people will respond. But how do you find the time to do this? If you have a small number, you can outsource this by using a home worker. Alternatively ask your printer to laser handwrite the envelope using a typeface that resembles handwriting.
68. If you need photographs for your brochure, but only have a limited budget, consider approaching a local college that runs a photography course. Suggest to the tutor that this could be a real project that forms part of the students' coursework. It usually involves you spending time to give the class a briefing and covering any out of pocket costs. Similarly you could approach a college with a project to design you a logo.

## **Lead Management**

69. Often we work very hard to generate new enquiries, and then sadly neglect to follow up. One idea that makes everyone pay more attention to a new lead is as follows. Calculate the lifelong value of a member and put this figure, or better still an image of this amount of money, on every new inquiry sheet or screen. Now sit back and watch people pay more attention to follow through!! It now becomes very much more obvious as to the potential value of paying more attention to the inquiry.
70. Log and code all inquiries so you can track how many leads you in the recruitment pipeline and what stage they are at.
71. Invest in your lead management system. Organisations which have a mature and established lead follow-up system in place have better conversion rates than those which do not.
72. Don't leave it too long to follow up inquiries. After two days, each day you delay in returning a call will diminish your chances of success of recruiting them.

73. At the end of a conversation with a prospective member clarify what will be happening next. Say something like: “To summarise then, I will now ..... Is that what you had in mind?” Then pause and hand over the conversation to them. The benefit is that you will leave them feeling that they are in control and you also might get some additional useful information. If they seem keen, you could ask: “If when you get the information, and if you like what you see, what happens next?” This will give you an idea of what action to take, a time frame and if anyone else is involved in the buying decision.
74. When talking to prospective members, do not get concerned if they tell you they belong to another association. It is likely that someone will belong to more than one membership association in the sector. What you need is a very clear understanding of how you are different from other associations. Now you can explain the unique benefits you offer which others do not. If this is an action area for you, take a look at articles on ‘positioning’.
75. In a recession you will find it takes longer to convince members to join and you get more rejections because there is less money to spend. It is therefore a good idea to have a secondary objective. Your goal could be to use the conversation for research purposes or to start building a relationship for the future. Ask some research questions, for example: If there is one thing that we could help you with at the moment, what would it be? If we were starting again to build the association from scratch, what benefits and services would you want it to provide you with?
76. Find ways to improve the perceived value in a recession rather than look at reducing the membership fees. Dropping price can damage your brand and upset other members.
77. If your membership fee is relatively high, then use ‘advances’ to determine how the sale is progressing. An advance is when a prospective member takes an action which moves the sale forward. For example, they agree to come to a showcase or arrange a



meeting for you with a more senior decision maker. An advance is distinguished from a 'continuation'. This is what we often call nice or kind words or compliment, but no specific action has been agreed that moves the sale forward. For more on this, take a look at the work done by Neil Rackham on the SPIN selling process.

## D. Tips On Retaining Members

### New Member Orientation

78. New members need to be nurtured and should be treated differently because it is very important that in the first year you engage them. There is big payback in the long run from spending extra time and money at the start to encourage them to get going and use the benefits they now have available.
79. Devise a specific plan to build your relationship with new members during the first 12 months. Consider:
  - Developing a co-ordinated and customised series of communications introducing different parts of the member benefit package.
  - Asking regional committee members to write to them and invite them to a local meeting.
  - Sending new members a useful snippet that you have picked up that would interest them. This approach lets people know you are thinking about them.
80. Ask new members what they want out of their membership and then tell them the things they need to do in order to achieve their objective. Develop clear pathways with signposts along the way showing them what they need to do. Initially you need to take ownership of educating them, that in order to get benefit, they will need to take some action. Once they start to get involved, they will find other members with common goals and they will move forward with them, without your help. Most professional associations map

out the qualification and CPD pathways, but do not explore applying this type of thinking to other areas.

## **Involvement & Engagement**

81. Have a section in your retention plan that covers planned activities to engage inactive members. This is because member engagement is key to retaining members.
82. Have a field on each member's record in your database that shows their engagement level and pattern. This will enable you easily to target unengaged members. You will also be able to have better conversations with other members because you can reflect on what they have been doing.
83. Approach inactive members with a few simple suggestions showing what they can do. Most activity starts with small steps.
84. Time limit your involvement opportunities. This will appeal to members who are concerned about signing up for an open ended or long-term commitment.
  - Offer activities that enable members to achieve multiple objectives at the same time. For example, combine networking, with fitness and sight-seeing by organising an early morning jogging group at your annual convention that goes via some of the local attractions en route.
85. Send members who are not engaged a 'One Pledge' form. Invite members to pledge to do just one task in the coming year for the association or fellow members. List some of the options to choose from. For example:
  - Proof read a new membership brochure.
  - Write an article for the newsletter.
  - Make a short presentation at a local meeting.
  - Help out with a mailing.
  - Help design or analyse a survey.
  - Review a book.

- Offer to share a lift to your annual conference to save on travel costs.
- Mentor a new member.

Afterwards review the quality of their contribution, so you can determine who best to approach when new opportunities arise next year.

86. Engage members with meaningful surveys, then continue the dialogue with participants:
  - Thank them immediately for their contribution.
  - Send them a summary of the results.
  - Inviting them to participate in discussion groups on the topics they showed interest in.
87. Develop a range of different engagement and involvement 'pathways' that show the progression available and what members achieve at each step. Most professional associations are very good at mapping out the stages for members who want to progress in their career and take qualifications. Can you apply this same thinking to members who have joined for different reasons? For example, can you suggest a pathway for a company who wants to grow their business, or a carer who wants to support a relative who has an illness or condition, or a new member who is keen to make new friends? What is the sequence of actions they need to take to achieve their objective? Map this out so they have some clear pointers as to what they need to do first and how to progress further.
88. If you find it difficult to plot the pathway why not suggest the top five things that members need to do if they want to achieve a specific goal. Don't leave members to work it out for themselves. Guide them so they maximise their return on their membership investment.
89. Formalise your relationships with those most keen to help. Many associations have an Ambassador programme in place. These members are called upon to represent their association at events,

help recruit new members, get involved in talking to new members or other high profile tasks. Ambassadors may need and appreciate training or coaching so they can perform their role with extra confidence. Help them to speak comfortably about member opportunities, share inspiring member success stories and talk about the history of the association. Also make sure you have resources in place to manage the scheme and support them in the work they do.

90. Focus everyone on engagement. Demonstrate the importance of engagement to staff by reporting on the level of member engagement at all your staff and board meetings. Reward staff for coming up with good practical suggestions on how to engage members.
91. Encourage members to connect with other members using online discussion groups. If you set up groups, remember the '1-9-90' rule. This means expect 1% of members to be very active (post questions and answers), 9% of members just to answer and 90% of members to remain passive and just read who is saying what! So to be successful with any online forum, focus on finding the 1% of members who will help it grow and getting them going.
92. If your members are in competition with each other and cautious about working together on projects, here are some examples of the best type of collaborative projects to organise for them:
  - Make the objective and output one which will help all members to improve the whole profession or industry. For example, improve or raise industry awareness, result in a more informed public, workforce or consumer. Research projects work well for this reason.
  - Choose issues which need multiple voices if they are to have any the weight and credibility in the community.
  - Have a short deadline. This creates urgency and will focus them on getting things done. For example, a consultation deadline regarding the drafting of new legislation or a potential crisis

which, if the media caught onto it, could damage their professional image or hurt their business.

### **Developing Empathy With Members**

93. Develop a plan to encourage staff to get to know members. The more empathy you have with your members the better you will be at involving and retaining them.
94. To promote and foster a culture of interest in what is happening in the lives of your members, add an item to your internal meetings called 'something new'. This is when everyone in the group has to highlight something new they did not know about members, but that they have found out since the last meeting.
95. Ask new members of staff to interview a member every month for an article in your magazine. The theme could be 'a day in the life of a member'. If they have a series of standard questions to structure the article and ask it will make the task much easier. Possible questions are:
  - What are the key changes happening in your industry?
  - How long have you been in this role and how did you find it?
  - What do you like most about your role?
  - What do you like least?
  - What are your biggest challenges?
  - What skills do you think are important to your role?
  - What do you like to do when you are not at work?
96. Work continually on new ways to help members connect to other members at events. For many, this will be one of the main reasons they have joined. Use their name badges to highlight their areas of interest to make it easy for them to find like minded members.
97. Periodically spend a day with your members at their place of work. Use the time to watch behaviour and ask questions about:
  - What are their daily priorities?

- What problems they have. What work or career concerns do they often have on their mind?
  - Where are the opportunities to connect them with other members for mutual benefit?
  - Which type of communication do they prefer?
98. Put photographs of you and your team on your web site. It will help members to visualize you and build rapport.
99. Find out what members think by introducing ‘Careabout Groups’ to discover what members care about most. The naming of them sets a great tone and focus. These focus groups would discuss issues such as... what could you do to make a big difference, what are your biggest concerns about the benefits provided and how could you improve?
100. When it comes to renewal time, your members are likely to reflect on all the experiences they have had in the last year. What new or memorable experiences can you facilitate for members in the coming year? Evaluate the small experiences that members have and the signals you give out, for example, when they phone you up or try to find a specific piece of information on your web site. Ask your members to describe the membership experience and try to better understand each interaction. This is an important part of the value of membership.
101. Insert specific questions into your conversations with members to show you are genuinely interested in them. For example, when members telephone you, at the end of the conversation, try out these two simple questions:
- “How are we doing?
  - “Are you getting all you need from your membership right now?”
102. Look at your member ‘touch points’ and the decisions through their eyes. One large association has a ‘First Impression Specialist’ because of the impact this has on the membership experience.

Consider adding this task to someone's job description in the member service team.

### **Engaging Younger Members**

103. Develop specific action plans to engage younger, Generation Y, members, for example:
  - Create a 'Generational Task Force' to learn about the values, attributes and aspirations of members at key stages of their lifecycle.
  - Have an advisory committee for young members and board positions for young members.
  - Review their time clocks and fit in any involvement opportunities around the time that they have available.
  - Keep one step ahead. See how the even younger age groups, referred to as Generation Z (because Z comes after Y!), interact and behave.
  - Use the social networking and collaboration tools of Web 2.0 to connect younger members and harness their enthusiasm for collaboration in areas they are passionate about.
104. To attract and engage younger members, take time to really understand what motivates them. They:
  - Are cause minded. They will get involved if you hit a passion they have and they feel less obliged to do so than older members.
  - Are happy to create communities and like collaborating.
  - Prefer short, time limited, volunteer activity.
  - Seek different types and levels of experiences and opportunities.
  - Prefer more on-line activity and are technology savvy. Use mobile tools to communicate with them.
  - Are more willing to do things themselves.
  - Are used to coping with constant change.

- Are concerned about career development.
  - Have energy.
  - Provide fresh perspectives.
  - Like to run with ideas.
105. Young members have needs often not understood by board members, so have something in place that captures their expectations and feeds this information back into the planning process.
106. Have a young professionals' network.
107. Appreciate the generational challenges and issues current in the workplace and determine what you can do to help.
- Young members are likely to have many jobs and careers. They value flexible work that fits into a lifestyle and are less motivated by money. They are not impressed by being a manager or intimidated by peers, age and experience. They are loyal to themselves rather than an organisation. They want to work with managers who know how to get the best out of them. They are interested in being experts in a field and working in teams with experts they can learn from. How can you help them with these goals?
  - With these demands, employers will demand something in return. They will want them to be outcome orientated, have ownership for their own state of mind as well as the outcome of the task, and want employees to be willing to learn and adapt. How can you help members develop these attributes?

## **Recognition**

108. Let members know that you are following their achievements. For example, when a member lets you know they have changed their job title, as from Manager to Director, send them a congratulations card and a list of specific things that you can provide for members operating at this level. Likewise when a member retires, send them a list of what other retired members most value e.g. volunteer opportunities.



109. Recognition for members, and particularly volunteers, helps member retention.
110. Recognition should not focus on the annual award ceremony. It is all about developing an internal culture that continually notices members. It is a way of thinking and behaving that is built into the way you do what you do. Rarely is recognition about money or tangible gifts. It is a feeling of being supported, appreciated, enabled and empowered. It is more informal than formal e.g. using their name, smiling, listening to what they say, saying hello and thank you, planning their work well and noticing that they have been absent. A personal greeting or an interesting comment can be more powerful than the standard once-a-year recognition for most volunteers. Here are a few other ideas:
- Have a column about members in your newsletter.
  - Set up a special web page or banner to thank members who have made a special contribution.
  - Use a photograph of them if you can because people love looking at photographs of people.
  - Thank people who help with a simple hand written note - it is often the small things that make the difference!
111. If you are designing a formal awards scheme, consider:
- Making the criteria you used for judgement transparent. It is important that other people who have made a contribution are not de-motivated or upset by not being recognised. It needs to be obvious and clear why the contributions you are highlighting are different and special.
  - From the recipients' point of view, who needs to hear what they have done? It might have huge added value if their boss, their partner, their customers, etc. get to see and hear first hand what they have done.
  - Who makes the announcement? Is it more important to them that it is your CEO, a panel of judges or a peer in their specialist field?

- What is the reward? For many people the announcement and recognition by others is enough. What about offering a great or unique experience that they will never forget? What about offering something which will save them time? Time is more important to many people than money.

## Renewals

112. In difficult times, firstly stabilise your loyal members, then get on the telephone to groups of members who are deemed 'at risk'.
113. Develop a systematic and consistent approach for identifying those members most 'at risk' of not renewing. Here are a few factors that might determine who is on the list. Members:
  - Who have not used any of the benefits.
  - Who have pressure on their finances.
  - Whose subscription are paid by their employer.
  - Who have joined in the last 12 months. New members are most at risk.
  - Who have changed direction – professionally or their business.
  - In organisations where you have few contacts.
114. Circulate your at risk list to both staff and regional representatives to see if they have any personal or special knowledge of the members' circumstances that might help you determine the best way to approach an individual member.
115. Don't lose members who find themselves out of work or in difficult times. Remind vulnerable members not to 'drift away' and let them know how you support members who find themselves in difficulty. Ask them to contact you if they have been made redundant. You could offer them a 'Transitional' or hardship category if they are in-between jobs. Tell them how you can help members who are looking for work or projects.

116. Get proactive. Ahead of the renewals use this information as a 'velvet hammer' to contact inactive members well ahead of renewals and say, "you have paid for your subscription, so why aren't you using us?".
117. It is important to clean your membership database ahead of renewals. Otherwise if they do not rejoin, you don't know if this is because they genuinely no longer want to be a member, or that they did not see the renewal notice because they had moved!
118. Change your renewal notice and use it to thank members for their contribution. For example, thank volunteers for the hours they have spent serving on committees and thank longstanding members for their continued support.
119. Highlight for members what you have achieved with their contribution during the past year. Tell them what new things you are introducing next year and how it will improve their situation.
120. If you are introducing a subscription increase, or if you can tell a member has not been making use of many services, consider offering a downgrade option when they renew. Better to downgrade than to lose them!

## **E. Tips On Recruiting & Working With Volunteers**

121. By understanding members' motivations and matching these to suitable volunteer opportunities, you can provide a member with greater value from their membership. Take the time to understand what would be a good fit for them.

122. The main reason members don't volunteer is because no one asked them and they are not sure how to start. So learn the best way to spot and approach members. Also make sure involvement opportunities are well signposted and promoted.
123. Have more episodic volunteering opportunities for members. These are short term and time limited. They are attractive to members because they can try out what is involved before they make a stronger commitment. If you are struggling to find members to volunteer for leadership roles, it may be because they feel they will be stuck doing it for years.
124. Many organisations are now setting up Employee Volunteering Schemes (EVS) and the UK government is also backing this initiative. This presents a great opportunity for membership associations. By helping corporates to develop their schemes and facilitate volunteering opportunities, associations can raise their profile, find new members, strengthen relationships with existing members and gain extra resources.
125. Get organized for volunteers. Seven out of ten volunteers say that their work could have been better organized, so plan before you begin recruitment:
  - Have a Volunteer Agreement and policies and procedures in place.
  - Develop a good outline of the task and the benefits it offers the volunteer.
  - Outline an induction plan. A good induction plan can make the difference as to whether they drop out or continue with the assignment.
126. Keep your key volunteer committee members in touch and enthused about what is happening. One association had great results from using a 'speed dating' approach. At the start of their annual conference, committee members were invited to a special session. Small groups sat through a series of roundtable discussions, each with a different departmental head. They had ten minutes at each table to find out what was happening in an area

and had the opportunity to ask questions. After ten minutes, each departmental head moved onto the next table. Within an hour, all volunteers had been fully briefed on what was happening. The session proved lively, fun and informative. The outcome? Everyone left highly motivated and keen to spread the word to other members throughout the rest of the conference.

127. A word of caution. Make sure that people working with volunteers understand what situations will give volunteers employment rights. For example, certain types of payments and gifts, extra training or the degree of control that they have over the work, may give the volunteer employment rights.

## **F. Tips On Member Events**

128. See a conference as part of a learning continuum opportunity, rather than a one-off event. For example:
  - Invite delegates to set up profiles and interest areas beforehand so you can alert them to who is attending with similar interests.
  - Invite delegates to participate in an on-line event forum before each event. Set up a forum for each speaker to connect to delegates and exchange questions and ideas.
  - Brief speakers to signpost where interested delegates can go to find out more. This could be a future event, an on-line discussions or useful reading matter.
  - Record events and make available as downloads so they can hear or see it again.
129. Hold special sessions at your conferences for:
  - New members.
  - Members who volunteer. Use the time to motivate, support and thank them.

- Members who are thinking of volunteering or getting involved. Have a workshop which helps them understand and match themselves to the best opportunities.
130. Looking for some fresh ideas to help liven up your member events? Here are a few to try. Incorporate:
- Sessions that focus on the mistakes people made and how they learned from them – people are keen to know how to avoid potential pain!
  - Speakers with opposing or controversial views. Position them as sessions that are likely to challenge members thinking and identify alternative solutions.
  - Talks from people who broke the rules and challenged conventional wisdom.
  - Put on a ‘Great Ideas’ event. Who could resist an opportunity to be in on the latest great ideas in your sector or community?
  - Incorporate an ideas lab or an ideas café.
131. Create more structured networking opportunities and incorporate opportunities to facilitate knowledge exchange. Two ideas:
- Ask delegates to share an experience or something that moved or energised them with someone else in the room they have never met.
  - Use roundtables. They make it easier for delegates to join in conversations and meet other delegates.
132. Offer younger members or students, with less income, a financial incentive to attend e.g. free travel or a free ticket to the gala dinner. Invite them to car share.
133. Take charge of briefing your speakers:
- Help them become facilitators of dialogue and learning. Tell them to be a ‘guide on the side’, presenting key ideas and insights that act as a catalysts to stimulate discussion. Research shows that people learn best from discussion with their peers,

particularly from knowledge exchange and sharing practical experiences. Problem solving exercises and meaningful case studies will help audiences see how they can apply the content to their situation. Ask speakers to focus on a short presentation of insights, ideas and assumptions, and follow this with a series of questions to stimulate delegates in a lively discussion and exercises e.g. what do you do or how are you applying this? The more members engage and interact, the more they will learn.

- Check that they have a clear understanding of the audience, their needs (perceived and unperceived), knowledge gaps, interests and objectives.
  - Give them contact details of two or three delegates they can contact beforehand so they can better develop a presentation that suits the needs of the audience.
  - Ask them to be ruthless and select only material that contributes to the audience's objective.
  - Brief them on how people learn and how to engage delegates.
134. Use a professional conference facilitator to keep the day on track and maximise the delegate-to-delegate activity.
135. Help your presenters get even better by asking on the delegate feedback form: "Do you have any feedback for XYZ presenter?"
136. If networking is one of the key benefits of being a member ask members on the event feedback forms to rate it in terms of networking opportunities.
137. Before you cancel an event because of low bookings, here are some ideas for filling the empty spaces:
- Invite warm prospects who have inquired about joining.
  - Invite anyone in your team or a new member of staff who would benefit from talking to members.
  - Invite delegates to bring a colleague at a reduced fee.
  - Invite strategic partners.

- Invite editors or journalists from magazines who might write about you afterwards or come to you for an industry quote on a news topic.
  - Promote it to anyone who has phoned a helpline about related issues.
  - Finally, you could also try moving to a smaller room to will help create a cozy atmosphere.
138. To strengthen your ties with your community look out for opportunities to host events with others. This will help spread the financial risk. You could offer to host joint seminars where you talk about your area of expertise and they talk about theirs. If a supplier holds user group meetings, let them know that you would be happy to talk at the event on a topical subject related to your area of expertise. This reduces the workload and cost of marketing and enables you to reach each other's prospect and client base. Let key contacts know that this is something you offer and gauge the level of interest.
139. If you are involved in planning an international teleconference or videoconference and want to know the best time to set up a meeting <http://www.timeanddate.com/worldclock/>. You simply select the locations of people involved and it instantly tells you what time it is in those places!

## G. Other Tips

140. Enter your work in an award scheme. This is a useful way to gain an independent review of your work, raise your profile and gain media coverage. Some of the other value and benefits from entering an award scheme are:
- It makes you take the time to reflect on, and make an in-depth critical review of, the work you have been doing.
  - It can give you a benchmark of what organisations are doing in the industry. We know the value of internal appraisals, so



could this be an opportunity to have an independent appraisal of your efforts?

- Winning an award can be a major milestone in a person's professional career or the organisation's development.
- Finally, if you should win or be highly commended, that would be an exceptionally valuable message to give to members, stakeholders, industry influencers and of course, the people in the team!

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