

A Systems Approach to Membership Development

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Getting and Keeping Your Association's Customer

Let's face it. Over the next 12 to 18 months one of the biggest challenges for most association executives will be keeping membership attrition to a minimum and membership retention to the maximum. Potentially dismal results, quite frankly, will give us all pause for thought and may inspire a little fear - hopefully it will be the impetus for affirmative action.

A downturned economy doesn't have to translate into doom and gloom. In fact, it may present some unique opportunities to associations resulting in innovation, continuous improvement and long term membership growth. Recognizing these opportunities is critical. Acting upon them by involving all association staff, defining a plan and taking a systems approach to membership development, is crucial.

A systems approach? This is best defined as a well-planned, well-documented system based on a set of principles and best practices that is needed to ensure that associations can effectively achieve their goals over time.

In his book *The E-Myth Revisited*[\[1\]](#), Michael E. Gerber describes a system as a solution that integrates all the moving parts of the business into a well-oiled machine, all working in concert toward a realized object. Gerber's system model is well-organized and well-documented with solutions based on real-world perspective and expressly stated goals. And, while its application is geared towards small businesses and franchises, it can be easily transposed to the association world.

Traditionally, the various parts of an association are independent and contribute in a dynamic way to furthering the organization as a whole. In addition to membership development, other programs or components include management and governance, member services, communications and public relations and legislative and regulatory affairs. Too often they tend to exist in silos, often co-existing separate from each other.

Since membership development is the program area that has the biggest impact on the association's existence, we tend to focus a good deal of our attention there. Membership development generally represents the series of tasks we associate with recruitment and retention and the annual event known as member renewal. As a core process, membership development often operates independently from other association programs or components, sometimes with not so satisfying results.

By taking a systems approach, membership development, along with other core programs or components, operate *interdependently*. This means that membership development impacts all other program areas within the association and their success (i.e. events or government relations) is dependent upon membership. An association with a successful membership development program has identified, formalized, incorporated and communicated a set of principles that

defines the importance of members, including their acquisition, involvement and ultimate satisfaction. These principles are shared and inculcated by all staff and volunteers.

According to *7 Measures of Success – What Remarkable Associations Do That Others Don't*^[2], the 4th measure, **Dialogue and Engagement**, states that all employees thrive in a culture where information is analyzed and shared and communicated and where everyone makes a contribution. Remarkable associations do not work in silos but share a common view where everything is about the member.

So, where should you begin with creating a membership development system that works for your association?

The successful association will develop their membership development strategies in four stages. Each of the strategies within each stage (see sidebar image below) propels members through the member career cycle (i.e. prospective member, new member, active member, renewing member, member satisfaction). There are 12 steps in the process.

Phase One – Preparation

These are the preliminary steps required to systemize your membership development program:

Step 1

- The lead person in charge of membership development (i.e. Director of Membership) establishes a volunteer-staff leadership team (staff and volunteers with complementary skill sets). Job descriptions may be necessary;
- The team identifies trends that personally and professionally impact members (regulatory burdens, continuing education requirements);
- They review key messages to confirm their relevance to the needs of members;
- They suggest tone and context necessary to gain the attention of different membership categories or segments (think diversity);
- They review draft copy of tools designed for volunteers supporting the membership development effort.

Step 2

- The team assesses the association's potential for membership growth (i.e. have they reached critical mass?);
- They identify current and potential member profiles (aging boomers, geographic disbursement);
- They perform an environmental scan – gather all information;
- They assess members' core needs against current member services;
- They review the organization's vision, mission, goals and values.

Step 3

- Establish key messages (they should be clear, consistent and powerful);
- Key messages are based on the values of the association (they cultivate understanding of the association).

Phase Two – Design

The information gathered in Phase One is utilized in the next phase but is also invaluable for sharing with all other programs within the association (i.e. think interdependency).

Step 4

Set numeric goals and programmatic objectives

Numeric goals - EXAMPLE

Current Membership Total: 892

Number of expected cancellations: -120

Number of new members: +130

Number of reinstatements +83

New Total Membership: 985

Programmatic goals (based on stages of membership development) – EXAMPLES

Prospecting - Add new sources of prospective member names

Recruiting - Develop a comprehensive membership recruitment campaign

Orienting - Create an orientation program that communicates to new and current members how to obtain value from their membership

Involving – Increase the number of members attending education events by 10 percent

Renewing – Strengthen the existing renewal process to maintain our current renewal rate of 82 percent

Step 5

- Establish strategies and tactics - in this context, strategies identify how stated objectives and overall numeric goals will be achieved. Tactics are the key actions needed to achieve the strategy. If you can fulfill a strategy in one action, it is most likely a tactic.

Step 6

- Maximize all options for membership - Have you maximized all your options?
- Review last year's strategies and tactics and repeat those that were successful
- Review those that were unsuccessful
- Review ideas that you have collected over the past year
- Brainstorm new possibilities
- Sort, prioritize and select the most appropriate strategies and tactics
- Understand the difference between an independent and integrated membership development:
 - The independent approach involves activities that rely solely on your efforts in planning and implementation. It is easy because it involves less people, less decision-making and less brain power. It also keeps activities in silos.

- An integrated approach includes those activities that must be planned and implemented in cooperation with other association departments, programs, activities and events. It is more difficult to achieve but more synergistic because it is more collaborative.

Step 7

- Develop a budget and a detailed work plan. (The work plan and budget will help you to track your progress and also make adjustments along the way.)
- Compile a summary of costs for all strategies and tactics.
- Develop a work plan that reflects tactics and actions for each strategy.

The best part about Phase Two is that when you begin the cycle again, you will have completed most of the work and will already have the steps laid out, documented and measured saving you time year to year. Furthermore, the work plan keeps you and your team focused and on task.

Phase Three – Implementation

This phase encourages everyone from the team to other important stakeholders to see membership development as a core process which informs all activities of the association.

Step 8

- Gain organizational support (i.e. key players within your organization such as committee chairs, senior staff, Executive Committee)
- Make a list of your key groups to be informed or involved in your plan (Board of Directors, staff)

Step 9

- Communicate plan to members (announce in the newsletter or at member orientation sessions)
- Communicate plan, milestones and results throughout the year to members (use every opportunity including print and in person)

Step 10

- Implement strategies and tactics. They should include the following features:
 - Break monthly work plan into tasks to be accomplished each week
 - Meet as appropriate with key contacts from volunteer-staff leadership team
 - Meet with staff contacts to explore opportunities to collaborate
 - Delegate tasks (as appropriate)
 - Keep in contact with key players to ensure implementation is underway
 - Make all accountable for their part in the implementation
 - Designate a monitor to keep the pulse on the timelines etc.

Step 11

- Monitor and report progress to key players (see above)
- Explore problems – existing or potential
- Make membership statistical reports available to all team members
- Keep everyone informed

Phase Four – Evaluation

The final phase helps everyone in the process answer the following questions:

1. Are we achieving our goals using our current strategies and tactics?
2. Will we achieve our goals using scheduled strategies and tactics?

Step 12

- Conduct periodic and year-end evaluations.
- A membership development program can be a costly and resource intensive venture so it is important to measure and evaluate team efforts and the plan.
- Evaluations will help to determine which strategies and tactics worked and can be repeated and which didn't and should be abandoned.
- Failing to conduct an evaluation guarantees that efforts that didn't work well will continue to not work and efforts that did work may not be fully maximized.
- Plans should be adjusted according to findings.
- When conducting a year-end evaluation, it should be timed to coincide with planning for the next year. Everyone who has made a contribution to the process should be invited to get them involved in the dialogue and gather their impressions.

So, why a systems approach to membership development?

It is my belief that it will provide your members with a clearly defined message on how to maximize their membership experience. It will give you the opportunity to maximize resources thereby getting more done with less effort. It will change your association's approach to membership development ensuring its continued growth. It helps members to achieve their potential. After all, membership satisfaction is your association's number one priority.

[1] Gerber, Michael E. *The E-Myth Revisited*. New York: HarperCollins Publishers, 1995

[2] Center for Association Leadership. *7 Measures of Success: What Remarkable Associations Do That Others Don't*. Washington, DC: 2006

Six Components of an Effective Membership Development Program

1. Membership Development Stages – Strategies and tactics, in five key stages, designed to cultivate members' awareness of the value of membership as a means to achieving their personal or professional goals.

- Prospecting – this is a process to identify, gather and qualify names of potential members
- Recruiting – this is the process used to invite prospects to become part of the organization
- Orienting – this is an ongoing process that helps members discover how to use the organization's programs, benefits and services to fulfill initial expectations, expand opportunities to become involved, and achieve a sense of value.
- Involving – this is the process used to help members meet their personal and professional goals through the use of the organization's programs, benefits and services.
- Renewing – this is the process used to extend access to the organization's programs, benefits and services.

2. Statistical History and Trends – Strategies and tactics created to compile and analyze the impact on members of trends in the external and internal environment, historical trends in membership's statistic, and shifts and changes in the current and potential membership profile.

3. Member Services Packages – Strategies and tactics designed to provide a range of benefits and services to meet member need.

4. Leader Support – Strategies and tactics designed to provide a range of benefits and services to meet member need.

5. Member Records and Operations – Strategies and tactics designed to ensure the accuracy of the records as they are entered, processed, accessed and stored.

6. Administration – Technique employed to oversee and manage the membership development program.

Patricia A. Siegel, CAE and James S. DeLizia, CAE. *Beyond Membership Marketing – Developing an Innovative Plan That Guarantees Results*. San Francisco, CA: Center for Excellence in Association Leadership, 1999.