FUELING EXCEPTIONAL NEW MEMBER EXPERIENCES

3 UNCONVENTIONAL STRATEGIES FOR NEW MEMBER ONBOARDING, ENGAGEMENT, AND RETENTION

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FUELING EXCEPTIONAL NEW MEMBER EXPERIENCES

1 | Introduction: Opening Our Members' Hearts & Minds

2 | Unconventional Strategy #1: Orchestrate First Impressions

3 | Unconventional Strategy #2: Set the Stage for a Totally Mind-Blowing Member Culture

4 | Unconventional Strategy #3: Leverage Your Association’s Value Trigger Point

5 | Finale: Joining, Engaging, and Retaining are not Linear

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INTRODUCTION

OPENING OUR MEMBERS’ HEARTS & MINDS
We tend to talk about membership as a series of separate parts: first, we try to attract new members, then we set about engaging these new members and finally, as the year draws to a close we work on renewal efforts. Joining, we say, happens at the beginning of the cycle and renewing happens at the end of the cycle. What if this is not entirely correct? What if members see this cycle far differently?

Joining and renewing are far more closely linked than we think.

When members reflect on their time as a member of an association, their very first experiences take on special significance in their stories. They may not remember the benefits they were entitled to or even used, but they remember their experiences - vividly. They remember a super helpful interaction with a staff member or not receiving a callback. They remember being warmly welcomed at their first chapter meeting or they remember feeling awkward standing alone watching everyone else talk and laugh because they all knew each other. They remember getting the answer to a problem they had right off the bat or they remember getting many non-applicable emails.

These first impressions set the stage for whether the member will engage and also whether the member will renew. The experiences our members have in the first few moments, the first few days and in the first few months significantly influence how long the member stays a member. In this industry, there is a lot of attention paid to the mechanics of the renewal process. However, for many associations the biggest gains in retention can be found at the beginning of the cycle during the join process; not at the end.

In over 319 interviews, members talk about all the big and little first time experiences they had and how profoundly these experiences influenced their perception of the association. These experiences affect engagement and retention just as much as membership value impacts engagement and retention. Experiences like navigating the joining process, first searching the website, receiving their first emails, walking up to registration at the conference for the first time, and strolling into their first chapter event, these experiences cement members' perception of the organization - both positive and negative. These are the experiences that the member will hold with them long after their new membership card has expired.
Welcome to an unconventional way to think about new members.

This ebook is a series of stories and overarching member insights designed to get us thinking about our new members in a whole different light. The concepts in this book may help you retain those sometimes elusive new members, but that is not all. New members present us with a unique opportunity. Consider this --

There is something very special about new members. New members are a blank canvas in a sense. Every new member is our chance to make a great first impression, to set the tone and to start fresh. Each new member can become a very engaged member, a life-long member, a future leader of your association, a trusted contributor and a trailblazer that makes the profession better. In our new members is the opportunity to nurture our future best members. These are the members that may not only improve themselves but also improve the association and maybe improve the industry or profession - maybe even improve the world. But before we can hope to do any of this, first we have to engage our new members.

Why are new members elusive?

For most associations, new members are often harder to retain than other members. Most associations find that retention numbers are lower for these one-year and two-year members. Why? Because these new members haven’t engaged with the association yet. They don’t feel like one of us. They may feel relegated to the periphery. Perhaps this is because they haven’t taken the time to learn about the association. Perhaps it is because they are completely unaware of how to participate. Or perhaps it is because they have tried to join in and were rebuffed. There are two parts to engagement: value and member experience.

Low value

One reason new members lapse is that they estimate the value they receive is either less than the cost of membership or is less than they expected. Members express this value issue in a few different ways. Members say, “I think there is a lot more to this association than I know about but I just don’t have time to explore.” Or, “I know there are a ton of benefits I’m not using, but to use them I need to go to the website and research; I’m too busy for that.”
The value may or may not be there; the important thing to realize is members don’t think it is or they don’t know that it is.

**Poor Experience**

Another reason members lapse, is because they’ve had member experiences that made them frustrated, feel small, or feel like an outsider. Put yourself in a new member’s shoes and imagine what it is like to go to your first conference alone. Imagine walking into your first chapter meeting where everyone already knows everyone. For some of our members it is lonely and at the same time overwhelming. They are busy assessing if this is the right group for me. A poor experience confirms their fears that it is not.

New members are continually consciously and unconsciously deciding whether the association is for them. It is their first experiences that confirm or deny these big questions: is this organization for people like me? Will it be worth my time and worth my money? Did I make a mistake by joining?

During this time if they perceive poor value or have a weak member experience they quickly, mentally back out the door.

**Turn our membership process upside down to engage members.**

It is not that we don’t want to engage new members. We do! Many times associations just don’t think about the new member experience, and we don’t intentionally plan out those first impressions.

We have more influence over new member engagement than we might imagine. Yes, some members are going to leave because of circumstances beyond our control: a new job, a move or transfer to another industry or profession. But the rest, the members who leave in that first or second year just because they didn’t engage, they don’t see the value or they had a ho-hum set of member experiences; that we can influence!

Grounded in qualitative member research, I have uncovered the barriers new members often face and offer three unconventional strategies to build a new member base of engaged, supportive, and thoughtful members. Often, I drew these insights and recommendations from the bright spots found in the research; members who were fully engaged and associations doing work that matters.
UNCONVENTIONAL STRATEGY #1:

ORCHESTRATE FIRST IMPRESSIONS
Imagine you are a new member and you are also new to the profession. Your association is putting on a conference, and your boss suggests you go. You will learn a lot, she says. You register, you book your flights, and in a few months, you are heading off to the conference.

A day of traveling leaves you drained, but the next morning you are up bright and early trying to find your way to registration. The person behind the registration desk gives you a quick, small smile and asks your name. You hold your breath for a few seconds as a box of badges are thumbed through and hope that they do indeed have your name badge. You are handed your badge and a bag, step away from registration. Now, what?

Flipping through the program, you wonder which sessions to attend. Balancing a pastry on your knee you read the descriptions while watching the other attendees meet and greet each other. When it is time, off you head for a day of sessions. Soon you are overwhelmed. Some of the information is fantastic but much of the dialogue you don’t understand, and it seems like everyone else does. Many new terms get tossed around, and you feel you should know them, but you don’t.

That night you just want to stay in your hotel room and watch TV, but you know you should give the reception a try. You enter the room and look for the bar. With a drink in hand, you turn around, and your heart sinks. It seems like everyone in this giant room has a buddy or two. They are talking and laughing with friends, and you know no one. Imagine this is you for a moment. How do you feel?

I don’t have to imagine. I’ve lived this over and over early in my career and again as I started my speaking career. When I talk about this experience to audiences, very often a brave person or two will chime in and say they feel like this too. In fact, they are having this exact experience at the conference right now.

Members talk about the first-time attendee experience they had at conferences and chapter events. They also talk about all the other first impressions that made an impact on them like glitches in the system that prevent them from joining quickly online or issues editing their profile. Like calling the association, and no one picks up the phone.
UNCONVENTIONAL STRATEGY #1: ORCHESTRATE FIRST IMPRESSIONS

Their problem goes unresolved. From the website to newsletters, to online communities to events, our members are gathering first impressions everywhere.

These first impressions can be very positive and assure the new member that they did not make a mistake in joining. Or, left un inspected these first impressions can be unremarkable or even negative. It is no accident that staff at the Apple Store greets you as soon as you walk in the door. They inquire about what you need; they alert the person you need to see, they tell you how long it will take to get served and where to meet your contact. They actively orchestrate each and every first impression. The message is: you are being taken care of, you are in good hands, and you matter to us. The good news is this is not just something Apple can tap into; it is available for every association no matter how tiny or massive; it just takes extra thought and effort. In fact doing this might not cost you any money at all.

Using imaginative empathy we can walk through a new member’s conference experience in our minds. We can use the same process to imagine their first chapter event.

What is the member experience like at a high performing chapter event? What is it like at an average to low-performing chapter?

Stepping into the new member experience further, we can assume the role of the secret shopper and try joining our association online. How is the process/the experience? Now suppose you made a typo and tried to edit your profile. Can you? Assume you’ve moved or adopted a different married name. Can you change that? Register for a webinar. Register for the conference. How did the process work? Everywhere you experience a slight barrier; members experience a major obstacle because they are not nearly as familiar with the system as you are.

Now that we have identified all the barriers new members experience we can redesign them. You will find you become a web user experience expert in no time. You may find you need to spend more time training volunteers or recruiting more volunteers and then arming these teams to be effective greeters. You may find that you are spending more time helping your newest members learn what to expect and how to get the most value from their membership.
UNCONVENTIONAL STRATEGY #1: ORCHESTRATE FIRST IMPRESSIONS

Consider using imaginative empathy, being a secret shopper, or ask members to talk about their first impressions. Once you know which first impressions are making the biggest impact, build ideas for cultivating better first impressions. Your new members will welcome your efforts to welcome them.

There are many ways to provide great first impressions. Next is a story about how one conference provided a series of totally mind-blowing first impressions. These first impressions set the stage for an amazing participant culture to evolve.

UNCONVENTIONAL EXTENSION

Feel like you’ve mastered the basics of orchestrating great first impressions for members? Pick up a copy of Gary D. Chapman’s The 5 Languages of Appreciation in the Workplace. All of us gravitate to one or two ways in which we hope others will show us how much they appreciate us. Couples, family, co-workers and friends get into trouble when they give ‘gifts’ to others as they would like to receive them but not as the recipient needs to receive them. You may be focused on great swag when 4/5ths of your members want appreciation in other ways. This book will show you how.

Link to Book ➤
UNCONVENTIONAL STRATEGY #2:
SET THE STAGE FOR A HIGHLY FUNCTIONAL EVEN TOTALLY MIND-BLOWING MEMBER CULTURE
Starting seven weeks before the conference, I got an email that had the feel and tone of a personal letter from a friend. The emails varied. Sometimes they explained all the travel details; sometimes they talked a bit about what to expect; once there was a packing list. Each was signed “love & hugs, Stephanie”.

The big day came, and I drove 7 hours to the conference. I pulled into the parking lot, spent a few seconds cleaning up the passenger seat which had become a mess of granola bar wrappers and home to my phone, my wallet, etc., and then I jumped out of the car. There waiting at my trunk was a man with an orange CREW t-shirt and a super friendly smile. He took my suitcase, and I took my backpack and off we went chatting like we were old friends.

Just inside the grounds, five more orange t-shirted volunteers whooped, hollered and jumped up and down welcoming me and a few others trickling in from the parking lot who also had luggage Sherpas leading the way. The team of 5 invited us to try blowing giant bubbles. Not bubble wand bubbles but crazy big bucket and fabric loop bubbles.

Since I’m tall, my bubble didn’t hit the ground right away and stretched nearly 10 feet provoking more whooping and hollering and high-fives.

Just after registration, I found eight giant-sized picnic tables laden with craft stuff, each manned by a wide-smiling orange t-shirted volunteer. We all sat there for hours as the sun set, making new friends but talking like old friends; crafting, sharing supplies, and oohing and aahing over each creation.

During the next three days, everyone I passed in route to a session smiled at me. In sessions, participants felt safe to share deeply vulnerable experiences, worries, and feelings. Some shed tears, more often there was lots of laughter as we set our goals for our businesses and made plans to push harder than we ever had before. I didn’t meet everyone at this conference, but everyone is a friend.

Now, many months after the entrepreneur conference, the online community of participants is still going strong with 10+ posts a day. Virtually and sometimes face-to-face we are forging introductions, giving advice, and just providing support in the way of a virtual “you go!”
I’d describe this attendee culture as helpful, supportive, forward thinking, hard working and truly unique. Did the culture magically morph into its amazingly unique self organically? I don’t believe so. I think the organizers set the stage.

They purposely recruited one volunteer for every five attendees. They invited the volunteers a whole day in advance and spent that day doing team building activities and training; getting them ready to receive a huge group of globally based, travel weary attendees. They orchestrated great first impressions by assigning luggage Sherpas, bubble blowers, and a whole huge team to answer questions and show us the way. The orange shirts were easily recognizable. And each volunteer in the orange shirt was smiling wider than any of us.

The organizer later told me that they had been intentionally cultivating a tribe of people with similar beliefs and shared values. She also said in planning sessions they talk about how to include every attendee.

“We are sensitive to different social orientations, so we try to do things that are designed to help remove barriers and encourage openness and put people at ease.”

Some ideas work great, but there is always the opportunity to improve. Based on attendee feedback they are going to try a variety of new things this year.

Now this specific culture may not be the culture you are trying to create. But we can set the stage for improving the culture we have. I’m willing to bet most member cultures organically generate. What if we make room for a better member culture to grow, nurture and support the culture’s positive attributes?

Carefully crafted new member experiences can help mold the member culture you want to see. Creating fantastic first impressions for new members sets the stage for designing a member culture that makes members and the association better. Let’s create a member culture in which members take a more active role in their learning. Or a member culture where members support each other more. One in which the expectation is that everyone is friendly to everyone, even new members.
UNCONVENTIONAL STRATEGY #2: SET THE STAGE FOR A HIGHLY FUNCTIONAL EVEN TOTALLY MIND-BLOWING MEMBER CULTURE

Let’s create a culture in which members are encouraged to think about change objectively. One in which everyone embraces the privilege of helping.

To get started it might help to pose these questions:

- What kind of member culture will help members the most?

- Are there some cultural attributes that are holding members back?

- What can we do to orchestrate experiences that promote the desired behaviors?

Another way to set the stage culturally and provide great new member experiences is understanding our Association’s Value Trigger Point.

UNCONVENTIONAL EXTENSION

Are you at a decades-old association with a member culture that is so entrenched, so deep, so expected you are worried the staff could never, never make a dent? Don’t worry. Dan and Chip Heath wrote an incredibly thoughtful and helpful book that can help you get skilled in change management. The book is Switch: How To Change Things When Change is Hard. In fact, it is just about time for me to re-read this book again.

Link to Book
UNCONVENTIONAL STRATEGY #3:

LEVERAGE YOUR ASSOCIATION'S VALUE TRIGGER POINT
Some associations have an event, benefit, product or service that provides value to new members very soon after they join and this is the organization’s super power and their secret to life-long engaged members. Here are a few stories from members of associations that have this secret super power:

"It was at the conference that I realized the value of the association. The event is fantastic, and within the conference, there is a new professional track! Each of the instructors has been there and done that. The sessions prepared us for what we would encounter, told us what not to do and helped us frame what strategies we should focus on early in our career. The friends I made there, I still have years later. The best thing about the conference is that I felt confident and ready for the tough job ahead."

A member of another association said: "soon after I started in this job someone on the association staff called me. We had such a great conversation. I was dealing with a few problems that seemed like a crisis at the time. Nothing I said rattled her.

She assured me that many of my colleagues had been through the same. She gave me a set of really helpful tips. I tried them, and they worked!"

Another member of yet another association said: "they have this webinar series that I started watching as soon as I became a member and that alone is worth the cost of membership. I’m the only one who does what I do at this company, and I have a lot to learn. The association puts on a webinar series hosted by two professionals who have a long history in the industry; they are renowned trusted experts. Not only do they explain issues, but they also tell us about some options for dealing with the issues. I like that these webinars are not just alerts; they are also about implementation. Because of these webinars, I have the knowledge I need to negotiate with upper management, start new programs and feel confident when trying to influence my peers."
There is a secret held by associations who have life-long engaged members, and I am about to let you in on that secret. They have an Association Value Trigger Point (AVTP).

Ask a member when they realized the value of the association and if the association has a strong AVTP. They will vividly recall that moment when they realized the value, even 20 years later.

Sometimes the AVTP is an event. A new -to-the-profession academy, a conference or a webinar series. But it doesn’t have to be an event. It can be an indispensable tool, interaction with a staff member or a guide book. No matter what form the value takes, what makes the AVTP so compelling is it solves a big, current, pressing problem. Knowing the answer makes members feel more confident. We’ve armed them with the knowledge, skills, and processes for decision-making so they can go out there and rock it!

Does your association have an AVTP? Just ask members. When did you realize the value of the association? Or when did you realize the value of your membership?

If you hear definitive examples consistent across members, you have a strong AVTP. Hurray! Now that you know you have an AVTP you want to leverage that AVTP. It’s good for members to experience the AVTP so do things to ensure many members can participate in it as early in their membership as possible. To expand your AVTPs reach, you may have to improve your marketing or think about providing the AVTP in a different container like an online version. While they are experiencing the AVTP, teach them how to navigate the association’s other benefits and prepare them to find the solution to the next problem they are likely to have.

Are you pretty sure you don’t have an AVTP? We can create one. Developing a new AVTP is usually not too difficult. New members are new to many things but others came before them, and their problems are solvable. So, determine your new members’ biggest, most pressing problems. Solve those problems and turn the solutions into a bundled package that helps members address a huge pain point, learn the right new skills or achieve a goal. Make them look and feel like heroes and they will love the association for a long time.
UNCONVENTIONAL EXTENSION

To solve your new members’ biggest, most pressing, current problems you might need to innovate. If this is not something your association has done much of we, have a resource that can help you get started on the right path or streamline the innovation processes you have. Check out the 2016 Association Industry Innovation Research Study and see what techniques highly innovative small to large associations use when they innovate.

Link to Report ➔
FINALE:
JOINING, ENGAGING, AND RETAINING ARE NOT LINEAR
JOINING, ENGAGING, AND RETAINING HAPPENS ALL AT THE SAME TIME

It seems odd that to improve retention we have to go back to those first days when a new member joined. But that is exactly where the opportunity is.

Renewal reminders are perfect for reminding members who want to renew. Renewal reminders are not good for convincing someone to renew. The decision to renew doesn’t just happen during the renewal period, the decision to renew starts as early as the day a member joins.

Focusing on new member value and experience is the key to better renewals, but that’s not all. It also opens up the opportunity to encourage members to be engaged, open, constructive and helpful.

Are you ready to build an environment in which your members will thrive? Which unconventional strategy will you try out first?

HELP?

If you would like to learn more about these strategies, the insights supporting them and how to adapt these concepts at your association, please do reach out. You can contact me online at SmoothThePath.net.

ABOUT THE AUTHOR

Amanda Kaiser is a qualitative member researcher. She has conducted over 330 member interviews and counting. Through these conversations, she helps associations understand their members’ goals, challenges, opinions, fears, and hopes. These insights become the building blocks for increasing member recruitment, engagement, and retention.

Amanda is the Chief Path Finder at Kaiser Insights, a member research firm focused on qualitative methodologies including upfront qualitative research for industry benchmarking reports, secret shopper-style research, and in-depth member phone interviews. Channeling member insights she also writes a weekly blog for association professionals. Find it at SmoothThePath.net.
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Kaiser Insights LLC

Increasing Recruitment, Engagement, and Retention Through Story-Based, Qualitative Member Research

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