

MEMBERSHIP RECRUITMENT AND RETENTION

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Associations by their very nature are membership organizations, designed to serve and represent the interests and needs of a section of our society, such as a trade, profession, industry, hobby, cause, and so on. So it is often the case that "membership" is the hub of the organizational wheel, for example, the membership department (if there is one), membership staff, membership volunteers, membership programs, membership communications, and so on. Those who work in membership often feel acutely responsible for the success of the organization because so much is centered in membership. If membership numbers are good, it must mean the association is doing well; they must be doing the right things. If membership numbers are down, those who work in the hub of the wheel feel the weight of it. Strong recruitment and retention numbers are the responsibility of the membership professionals, right? Yes. But, ultimately, membership recruitment and retention results are greatly affected by the spokes, the tires, the pedals, the handlebar, and others. Just about everyone who works at the association—staff, volunteers, outside contractors—has an impact on the success of membership.

How would you answer this question: If your association's membership numbers showed consistent growth and strong retention numbers, would you say the association is successful? Are good membership numbers music to the ears of the CSE and the board of directors? The answer is obviously

"yes" to both of those questions. Good membership numbers equal good membership dues income. There is no question that membership dues is a vital income stream to any association. In addition, other areas of the operation may rely upon strong membership numbers to be successful, such as sponsorship, advertising, events, advocacy, and more. Again, membership is the hub of the wheel.

The purpose that underpins an association is not to simply be a vessel that holds a group of members but rather to accomplish things—big things! "Membership" as a function and construct helps the association achieve those big things. When thinking about membership you need to ask yourself, "Is membership the ends or the means?" Within the walls of a membership department, having valued benefits and great numbers seem like it should be an end. But from the CSE position, selling and retaining memberships is really a vehicle by which an association accomplishes great things for the collective.



Evolving Parameters

The association's bylaws should have clear definitions of the types, categories, and kinds of people, companies, or entities who are welcome behind the proverbial "member wall." You should be circumspect for opportunities to broaden (or narrow, as it may be) your definition of members. As industries and professions evolve and change, associations should be sure their membership definitions reflect that evolution.



Serving, Leading, and Connecting

People join associations for all kinds of reasons, and the professional directly responsible for membership and recruitment must do their best to determine motivating factors and provide corresponding services. In ASAE's *The Decision to Join*, we learn that people join associations as much to support a common good for their profession or industry as they do for the individual benefits that may be received.¹ This is incredibly important to remember as you develop programs and services, as well as in what how you communicate to your membership and prospective members. There are really two ways you can approach serving your membership: the base: asking your members what they want or need or anticipating their needs they don't know they yet have. The difference between the two could mean the difference between mediocrity and greatness.

accomplishment or member value standpoint. It was automobile inventor Henry Ford who said, "If I had asked people what they wanted, they would have said 'faster horses.'"

Most associations conduct periodic customer surveys, asking members what they want out of the association or what they think of the existing portfolio of services. The survey results become the mandate for future planning. Matching services to desired needs positions you as "responsive to the membership."

But what about being innovative or progressive in how you approach serving your members? Your members, like Americans in the early twentieth century when answering Henry Ford's question, don't know what they don't know. Association leadership should be doing their best to look around the corner to see what's happening in your members' lives and professions, and anticipate what they may need down the road. If you're able to do that successfully and be ready to meet those needs, your association will be seen as progressive and innovative, or maybe even clairvoyant!

Your retention efforts will be greatly helped if you are able to find ways to meaningfully connect with your members. Connection and value may be seen very differently by your members. If the primary purpose of joining your association by one person is to receive information and education to be more proficient at a job, that member may indeed be satisfied without feeling "connected" to the association. She may be perfectly content and feel there is great value received for her dues by receiving and reading your emails, magazine, journals, or social media posts. She may not need to feel connected. Another member may get more satisfaction out of contributing, being invited to do things and having his voice heard. He may not need the information or education as much. This distinction is similar to the difference between someone who is an active participant in an online discussion group and one who "lurks" in the forum.

In addition, the need for connection may change over time. For example, a member, early in her career, may want to be overloaded with information, but ten years down the road may crave connection with her colleagues and peers more than anything. The connection desire may also be driven by a person's location. Someone who doesn't have the opportunity to network locally with industry peers may seek connection through your association.

Connection through volunteerism can be very meaningful. Members who volunteer often receive great satisfaction and fulfillment knowing they are shaping the organization in significant ways. Involvement can weave a strong fabric of relationships with other members and build loyalty to your

association. Plus, your volunteers are more likely to refer others to your organization. A solid volunteer program is a double bonus for both recruitment and retention!

If you have multiple generations in your existing or prospective membership, you will need to think about diverse methods of connecting people to each other and with the association. The most traditional form of connection is when your members see each other, face to face, at events, such as an annual convention. A section of your members might not even be able to imagine your association existing without a face-to-face event like this, while other members may feel perfectly connected through a mobile device that fits in their pockets.

Either way, it's important to establish and maintain meaningful connections with as many members as possible.

Recruitment

Recruitment is, in association lingo, synonymous with "sales and marketing." Membership staff may coordinate recruitment tactics and ensure that they are executed, but your sales and marketing efforts should be a shared responsibility among all staff or volunteers who come into contact with prospective members.

The old saying that "you should fish where the fish are" holds true with membership recruitment, and there are usually two big ponds full of fish: your database of former members and your database of prospective members. Too many associations neglect their list of former members, thinking they left for a reason and that attempts to get them back may be futile. You may or may not know the reason they left, but membership staff should engage recruitment strategies to get them back. Pick up the phone and call them. Send them a hand-written letter or an email with an invitation to come back. Utilize your happy members to reach out to former and prospective members. Consider offering "come back to us" specials for your former members.

Looking toward prospective members, be sure your database is accurate and accurate as possible. This may mean engaging people to help build and scour the database, so that your marketing efforts are fruitful. Marketing and sales is where you can experiment with all kinds of tactics—storytelling, phone calling. You will need to employ messaging and content strategies that make your pitch very compelling. How compelling is the story?

in your email? Do your membership ads, email content, or social media postings look simple and meaningful to your audience? Above all else, ask them to join! You'll get 0 percent of the people you don't ask to join. Be sure every recruitment tactic has a bold and clear message to take action and join.

Here is a sampling of the kinds of things any association could be doing to attract potential members and seal the deal:

- Many associations allow nonmembers to subscribe to free daily or weekly email newsletters, which provide some meaningful content. By doing this, you're staying on their radars and enticing them (hopefully) to buy the full meal by giving them an appetizer.
- Similarly, some associations send complimentary issues of their print or digital magazines to prospective members. Advertisers love the broader audience, and prospective members get a taste of the association.
- Attend conferences and events at which prospective members will also be in attendance. Exploit opportunities to promote your association, but also seek to provide valuable information and content to demonstrate your value. Getting out on the road demonstrates your commitment to your profession or industry.
- Partner with other organizations or companies who have the audience you want. Execute joint promotions or even dual memberships.
- Split test your recruitment ideas. Instead of sending the same direct mail piece to five thousand prospects, print two or three different versions and see which resulted in the best return. And maybe send those mail pieces to five hundred prospects first, before investing in the five thousand. Sampling and testing can save the association a great deal of money, as well as help ensure the best return on investment.

Be aware that providing complimentary information and education as a way to entice membership—known as the "freemium" model of membership—may also be the very reason some people never pay membership dues. If you give them enough information to satisfy their needs, they may see no reason to pay dues. Here is where developing a content strategy would be useful.

Consider giving them just enough to whet their appetite, but no more. And then employ tactics to move them up the engagement ladder. Consider allowing free access to your valuable information for a limited amount of time or a limited number of articles, and then require them to join if they desire more. Have volunteer opportunities for your "free" members,

with the plan in mind to build greater loyalty and interest. Also consider requiring your free members to respond to periodic surveys (that glean valuable information for your strategies and goals) in order to continue receiving free benefits.

- Measuring success in recruitment can be pretty simple: did you bring in more members this year than last year (or it can be analyzed by week, month, quarter, or so on)? It is helpful to measure and break down your recruitment results by membership categories or other qualifiers. The more scientific you can get with analyzing your data, the more insights and opportunities you might uncover.

Retention

Membership retention involves systems, strategy, and tactics. Strong membership retention is possible and will happen if the association's strategic objectives and the delivery of benefits and services are in alignment. The CSE must provide leadership to ensure consistency, cooperation, and understanding of how the association's activities affect retention.

Retention is a year-round effort, but where the rubber hits the road is at renewal time. Association professionals must ensure that membership renewal is a "Renew Now" button in their emails or on the website. Ultimately, you need to take action and have systems that make it easy and compelling for members to pay their renewal fees. Here are some examples of systems and tactics you may use to keep members under the tent:

- In your renewal appeals, be sure you are able to tell a compelling story of exactly what the association has accomplished, what you are working hard on, and what your goals and vision are. The more you can personalize this to the specific member, the better. For example, "John, you told us that advocacy is the most important thing we do. You should know that we have accomplished XYZ this year. In addition, we are communicating right now with members of Congress about ABC."
 - Offer automatic billing on members' credit cards either as a payment plan option or to be charged at the anniversary renewal date. This is the "set and forget" payment approach may be something your most motivated members are willing to do. (This doesn't mean you shouldn't reach out and personally thank them for their renewal, simply because you said to just charge their Visa each year!)

- Get staff and volunteer members to email or call other members who are up for renewal or who are at risk of not renewing. Be strategic about this and get the right members to reach out to peers with whom they have something in common. Make this personal rather than the "Dear (Enter First Name Here)" shotgun approach. A member will first like to hear something such as, "Hey Sarah! How are things in St. Louis? We understand things in your market have been difficult this year. Tell me about what's happening..." Establish connection before you make your appeal to renew.
- In *The Art of Membership*, by Sheri Jacobs, we are told that members want their associations to be problem solvers.² Your retention results will be commensurate with your ability to show members how you are solving problems for them personally, as well as for the group to which they belong. Don't assume the members up for renewal know what problems you have solved or are solving—tell them.

Membership Models

With the advent of the Internet and the new "knowledge economy," people have unprecedented access to information and education, which was for decades the hallmark of the association. Associations have competition in the twenty-first century that did not exist in the twentieth century. This has caused associations to rethink how they serve members and how they structure their membership offerings. Correspondingly, members have been rethinking the value proposition of associations as they frequent the Internet search engines don't always lead them to the doorstep of an association!

Some may say these changes have turned "members" into "customers" who focus more on return on investment (ROI) than ever before. Others say that gone are the days when people felt it was their civic duty to join organizations. Even though *The Decision to Join* indicates that people join associations as much or more for the common good than for personal benefit, association executives have been moved to make changes. Many associations have been disrupting the old membership model of everyone paying the same price to join and get the same benefits. They've been experimenting and moving to new ways of engaging members, including segmenting, unbundling, tiered pricing, and even "freemium" models of membership (offering free benefits to anyone in their industry or profession as a way to bait and hook them).

Your model of membership is nothing more than how you package access to and price your benefits and services. The most traditional membership model is having members pay dues for a complete package of benefits—an all-inclusive approach. You may charge additional fees for attendance to events and webinars or for supplementary publications. But the core model is one price for your core members. The “unbundled” membership model is more of an à la carte setup. Members may pay a base set of dues—or nothing—and only pay for the benefits they consume. The advantage of this may be that members get as much—or as little—as they desire out of an association, rather than an all or nothing requirement.

To gauge whether or not your membership model is the most effective one for your association, be sure to engage both members and nonmembers in any focus group or reviews of the model. Generally, your members believe the membership model is just fine. It's your nonmembers who may have an issue with how you sell access to and price your benefits; their input may be more valuable than the chorus who already bought in. Following are some key questions the CSE might ask in a review of your membership model:

- Given the typical resources of our members (and nonmembers), the benefits we tout, and what our competition may offer, are we priced fairly?
- Are there opportunities to base pricing and access on different variables, such as benefits received, when someone is in the career path, size, or scope of organization, payment methods, or engagement levels?
- What new ways can you dream up for experimenting with the membership model?

Defining and Measuring Success

People vote with their wallets. If the association is doing the right thing, people will join and renew. But there are many hairs to be split, and you start analyzing recruitment and retention numbers. Remember that membership is a construct and function that supports the larger goals of the organization. Good membership numbers in and of themselves do not mean the organization is successful. Membership numbers are only one of many instruments on a dashboard that are critical to organizational health.

What Constitutes Good Membership Numbers?

Recruiting may be strong, but as new members are coming in the front door, are current members slipping out the backdoor? Good membership numbers require both solid recruitment and retention to build the breadth and depth of your member base.

Another key metric comes from segmentation of your membership by demographic, such as age range, gender, line function, ethnicity, member category, and so on. Your overall membership may reflect an 80 percent market penetration, but when you segment by age demographic, you discover you have 95 percent of the over-fifty-five market, 75 percent of forty- to fifty-year-olds, and only 30 percent of the twenty to forty market. Analyzing market penetration through segmentation will inform where you need to focus recruitment efforts. Analyzing retention rates by demographic informs strategic retention efforts.

Segmentation is also very helpful in strategically targeting recruitment efforts. If you were to focus on a specific category of member, what demographic offers you the most revenue potential (dues plus fees)? Strategic membership marketing has the power to optimize your revenue production.

As CSE, think strategically about what you need from membership efforts. Revenue production? Market penetration (to be the voice of the industry)? Strength in certain geographic areas (for legislative impact)? Once you define your desired outcomes, ensure that a strategic marketing plan is developed and implemented with results monitored.



A rudimentary way to measure membership success is simply by looking at your membership numbers and the trajectory of your growth or market penetration. In other words, if you have two thousand members at the beginning of the year and had a retention rate of 80 percent the prior year, and end the current year with twenty-two hundred members and an 82 percent retention rate, you must be doing well! Or, let's say there are 16,000 potential companies in your market that are eligible for membership (let's use golf courses as an example). At the beginning of the year, if you count 4,400 of those golf courses as members of the association, your market penetration is 27.5 percent. If by the end of a one-year membership cycle you count only 4,300, should you be disappointed? It depends. If the total number of courses in the market remained at 16,000, you might be a little deflated. But what if the number of courses eligible was only 15,500 (due to business closures)? Then in actuality, your market penetration (27.7 percent) is slightly better in the most recent year.

Be mindful of the fact that market conditions out of the association's control, as well as actions like industry mergers or acquisitions, may have an impact on the market penetration numbers. Beyond market penetration, you can monitor dues income as a sign of success. After all, associations need that revenue, so you can deploy resources to get the work done. It doesn't necessarily help to have stronger market penetration but also see a decline in dues income. Success in membership can be defined as membership's financial contribution to the overall enterprise, which is a vital way to ensure the work of the organization's strategic plan can be done.

Another way to measure membership success is to look at the lifetime value of your members. You could do this for all members or segments of your membership. The lifetime value of a member is the average financial impact a member has on the association. If you can measure the average tenure of a member (say, seven years is typical) and then determine what that average member pays per year in membership dues (\$400 per year), annual conference fee (\$750), and other nondues programs (\$75), then you can calculate the lifetime value. In this example, the average lifetime value of the average member is \$8,575 (\$1125/year times 7 years). That number is interesting to glean, especially when considering the budget and planning for membership recruitment and retention activities. Retention efforts might focus on increasing that lifetime value number—either in the annual spend with the association or the average tenure to eight or nine years, or both.

Other Strategic Membership Considerations

Whose Feedback Is Most Important?

Association professionals typically are obsessed with feedback and input. Hearing from your members can validate what you are doing, or instruct you on what you should be doing. Too often, though, membership may look to your most involved volunteers give you this feedback. This would be akin to the management of the Chicago White Sox asking only their season ticketholders if they are satisfied with the organization. Don't let your association's board be the voice of your members when it comes to satisfaction levels. The most involved volunteers are the first people to say, "I don't understand why more people aren't members!" Voila! That phrase alone should tell you that these folks are not the best to give you the feedback you need. Find ways to dive into the brains of former members, those who have never been members, the least engaged of your members.

All Things to All People?

Association professionals tend to be people-pleasers. We want to make our members and supporters happy. We don't like using the word *no* in any fashion. Who likes saying "no" to members when they need help? Because of our propensity to want to please everyone around us, we often allow "mission creep" to occur in our organizations. Mission creep is when we start adding stuff to our plates that are outside the scope of our core objectives. The most ardent people-pleasers have the unique talent of being able to justify working on any request a member throws their way. A slippery slope, indeed! What results is the inability to get the "real" work done.

Consider Figure 18.1 and assess your association's current approach to member service.

It is futile to try to be all things to your members. Rather, focus on a select few objectives and priorities that deliver member value and be the best you can be at those. If it is well known that your association is incredibly effective and meaningful with only the most important issues facing your industry, and your communications make it clear that this is all you do, the members and industry can be conditioned to realize this and not make erroneous requests of you.

Collecting and Using the Right Data

Every association—large and small—is collecting data on its members. It might be as minimalist as contact information and when the person paid his or her dues, to as complex as tracking demographics, purchase history, communications received by the person, conversation notes from phone calls with the member, volunteer history, speaking history, data on his or her business, certifications, and the list could go on and on. Knowing your members is incredibly important. Being able to slice and dice

FIGURE 18.1. WHAT IS YOUR ASSOCIATION TRYING TO BE?

Some things to all people	All things to all people
Some things to some people	All things to some people

your membership data and take a targeted approach to serving and engaging your members is quite an advantage over seeing your membership data as one amorphous blob of information. Tracking information and observing trends and changes in that data over time may be important to you or outside interests, such as the media.

If you are to keep track of dozens of bits of information on your members, be sure to think about how you plan to use that information before you develop all those custom fields in your database. One person in your office may argue it is critical to know the gender of each of your members, and it may indeed be important. But more important is getting a good answer to the questions—Why do we need to track that information, and what do we plan to do with it? Mentioned above are the media, Trade or consumer media may be interested in knowing whether more women are practicing the profession you represent today than ten years ago, and they may go to you as the source of that information. A great deal of time and energy can go into data collection and maintenance. Be sure to have a strategy and plan for using the data to support your membership recruitment and retention efforts.

Considering All Membership Types

Many associations have multiple membership types or categories, but they may have a "primary" member type. Take the Professional Association of Inkeepers International as an example. The "core" member may be the Inkeeper—the person or people who own bed and breakfasts and inns. There are also membership categories for aspiring Inkeepers and vendors who sell goods and services to Inkeepers. The name of the association is not the "Association for Aspiring Inkeepers," so it may be easy to see why aspiring Inkeepers could feel less important to PAII than the Inkeepers. To combat this in your association, be sure that association staff offer the best possible experience for all membership categories, even if the name of the association favors the spotlight on one category. Involve all member types in volunteer opportunities. Construct councils or committees around membership types, if that makes sense to you. Mention all membership types in your communications. Employ different recruitment and retention strategies by membership type. Make sure your website (in print design and content) has a place or home for each member or prospective member type. Consider recognizing members by category or type through an awards program. The bottom line is that everyone who pays dues to an association wants to feel as important and welcome as any other member.



Notes

1. J. G. Dalton, M. Dignam, the American Society of Association Executives, and the Center for Association Leadership, *The Decision to Join: How Individuals Determine Value and Why They Choose to Belong* (Washington, DC: ASAE Association Management Press, 2007).

2. S. Jacobs, *The Art of Membership: How to Attract, Retain and Cement Member Loyalty* (San Francisco: Jossey-Bass, 2014).

Resource

Jacobs, S., Assante, C., and the American Society of Association Executives. *Membership Essentials: Recruitment, Retention, Roles, Responsibilities and Resources*. Washington, DC: ASAE Association Management Press, 2008.

The Author

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