

# Supporting the Lifetime Member Journey

How to deliver a great member experience from recruitment to renewal for students to retirees – and everything in between.



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# Introduction

As an association professional, you know your members' needs and expectations evolve as they move through their careers and their membership with your organization. Are you doing all you can to give them a great experience every step of the way?

It's important to look at the member journey throughout the entire relationship with your organization and implement strategies and techniques to support members' needs from two aspects:



**Each phase of their career**

From student and early careerist to retiree



**Each phase of their membership experience**

From their first interaction to a lifelong relationship with your organization

To support both aspects of the lifetime member journey, it's also critically important to have integrated association-specific technology solutions in place. This approach helps your team operate efficiently and effectively, while driving membership growth, engagement, and revenue, as well as enhancing member value along the way.

## In this paper you'll learn:



Best practices and ideas for supporting each phase of your members' careers



Insights and tips for delivering value in each phase of the membership experience



An integrated approach to support your work throughout the lifetime member journey



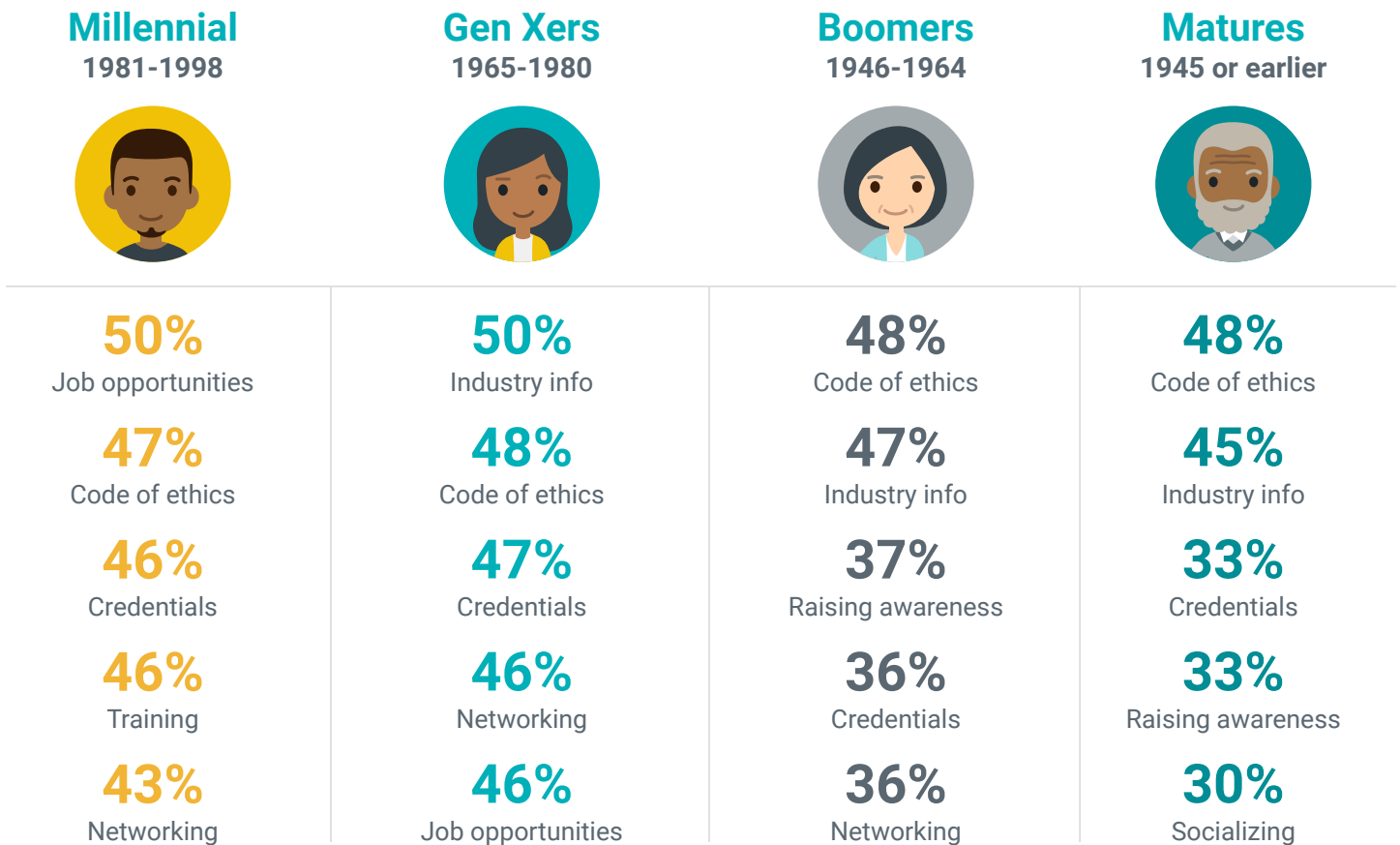
# What members want

As part of the 2018 Member Education and Career Development Report<sup>1</sup>, Community Brands found a shift in why individuals join member-based organizations within their industry. In the past, members felt a sense of professional responsibility to join organizations. Today, many

seek a place where they can network among a group of like-minded individuals, while growing and developing their careers in various ways. In fact, 51 percent of members surveyed report they joined their current organizations for benefits such as continuing education and networking.

Another report, the Community Brands 2016 Member Engagement Study<sup>2</sup>, found generational differences indicating members may value different benefits early in their careers than they do in the middle and latter stages of their careers.

## Top benefits by generation



What matters most to members in different age groups (% very important)

So, while members typically join an association to develop and grow their careers, they get value from the organizations to which they belong in different ways along their career journey. As you think about your members, consider what they're doing and what they may be looking for from your organization in each phase of their career. For example:

Career stage	What they're doing	How your organization can provide value
Student/new graduate	Interning, part of student association	Job board (for internship opportunities), training, certification opportunities
Early career	Searching for and applying for jobs	Job board, networking opportunities (including online community, annual meeting, and career fair), certification, professional education and credentialing
Mid-career	Growing their career	Board exam prep, certification and credentialing, connection with mentors, recommended learning paths, industry news, alerts about legislative issues affecting the profession, keeping up with best practices and research, professional networking
Late career	Hiring, growing as a leader	Job board, career fair booth, recruitment guide, leadership courses
Retirement	Mentoring, guest speaking	Mentorship, maintaining credentials, industry thought leadership opportunities, board member positions



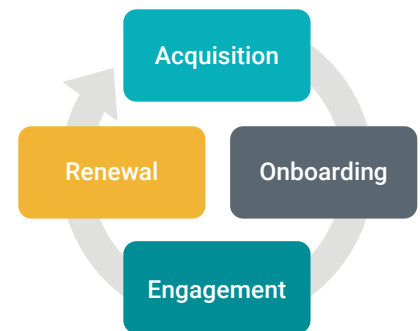
# An integrated approach to the lifetime member journey

It's critically important for your organization to support members as they move through each stage of their career journey, as well as each stage of the members' experience with your organization – from the moment they join through the moment they renew and renew again.

Let's break down the membership journey and consider how aspects of the career journey fit within it.

## Acquisition

Acquiring new members is an ongoing project. Each year, members leave your association as they change jobs/professions, go out of business, retire – the list goes on. The following approaches will help you reach your recruitment goals and improve the member experience along the way:



### 1 Provide targeted, valuable content

Offer content that helps you develop relationships with membership prospects. One of the best ways to do this is to get feedback from the different segments of your target membership market, for example, students, early careerists, mid-careerists, executives, and professionals in transition. Here's what to ask to identify each of their content needs:

- What do they need to know to advance their career or do their job better?
- What do they need to know to improve their bottom line?
- What issues trouble them, and what challenges do they encounter?



The Member Engagement Study found the best time to attract new members is early in their career stage (as a student or between one and five years into their career). As you develop content, you may want to weigh your content more heavily toward this early career stage segment.

If you provide valuable content – such as tip sheets, industry news, reports, or information about legislative issues affecting the profession – prospects will begin to think of you as a reliable source of information and a partner who helps them reach their goals. Your content then becomes a catalyst for converting website visitors into prospects (leads), and then converting prospects into new members.

## 2 Simplify the path to membership

Make sure when prospects are ready to join, the process is quick and easy. Start by evaluating your website and blog:

- Will first-time visitors know they're in the right place?
- Can they immediately see the value you provide to members?
- Is it obvious what impact membership will make on their life?
- Is it easy to figure out how to join?
- Are there opportunities outside of your website to promote membership?

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Lengthy forms are a turn-off, so be sure to ask only for what's necessary in your online membership application – the data you need now to process their membership. You can ask for more data later.

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Price can be a barrier to joining, especially for those early in their careers. Consider offering a budget-friendly monthly payment option.

## 3 Offer an incentive

Sometimes, an alluring incentive breaks down the last barrier to joining. For example, offer new members a special discount toward a future event, online learning, or webinar registration. Consider offering a mix of incentive options that may appeal to members, based on their career stage. Promote the incentive on your home page, in your blog sidebar, in email campaigns, and on social media. Also, evoke a sense of urgency in the incentive you offer. For example, members who join before a certain date get an exclusive invitation to a special in-person or virtual educational event.

## 4 Get social

Find out what platforms your prospects and members use and how they use them. Develop a social media strategy aligned with your organization's membership and marketing strategies, as well as with the needs and interests of your prospects and members throughout each stage of their careers. Use social media channels to demonstrate your value as an information curator for them. In addition to sharing your own content, select interesting and informative content from other sources to share. Also, let followers know about the membership experiences you provide – events, online learning, publications, and other resources.

## Onboarding

The new member onboarding process can be just as important to your association's success as acquiring new members. The first interactions with your organization make a lasting impression on a new member and provide the "hook" needed to build a relationship that lasts for years to come.

Help new members feel comfortable right away by letting them know how your organization works, what to expect next, and where to go for information. Here are some examples of what information to include in your welcome email:

### TIP

Be sure to highlight networking opportunities, learning opportunities, career resources, and key content that can help throughout their career journey.

- Trumpet the benefits they will now receive as a member of your association.
- Let them know what communications they can expect to receive from you and how often they'll receive those communications.
- Ask them to add you to their "safe sender" list, so they won't miss an update from you.
- Direct them to online resources, such as a calendar of events, your career center, and your online member community. Be sure to give them any log-in instructions and explain how to set up any user profiles.
- Connect each new member with a "buddy" to help him or her get to know the organization and feel more welcome.
- Make sure your new members know who to contact at your organization and where to go online if they have questions or would like to give feedback about their member experience.

Look for online community functionality built into your association management software (AMS) that automatically connects new members with top volunteer ambassadors to help new members get to know the organization.

### TIP





## Engagement

Once your new members are on board, provide them with the benefits and services they're seeking, while keeping them actively engaged with your association to help nurture a long-lasting relationship.

Take some time to think through how you provide member value, based on your members' career stages. Here are some ideas:

Offering networking events for your members helps you engage with them in person rather than solely online. Use your annual conferences to host opening and closing networking events in a personal and informal environment.

**TIP**

### 1 Assess your organization's services and offerings

Take a close look at your member offerings and programs to see how they map back to what your members want most in each stage of their careers. Ensure your offerings provide three key professional development benefits in some capacity: learning and continuing education, career growth, and networking.

Don't forget about personal interaction with your members. For example, provide an onsite career fair at your annual conferences and events to allow one-to-one interactions between your members and industry recruiters.

**TIP**

### 2 Think about career advancement

Consider how your organization's services and offerings may be improved upon to support members at every career stage. You can categorize services and offerings to help achieve this:

- Connect learning to job skills' development and advancement.
- Connect members to relevant, new job opportunities.
- Provide networking opportunities along the way with events, conferences, or job fairs.
- Give members a roadmap to advance in their careers by presenting them with ideas and tools to grow.



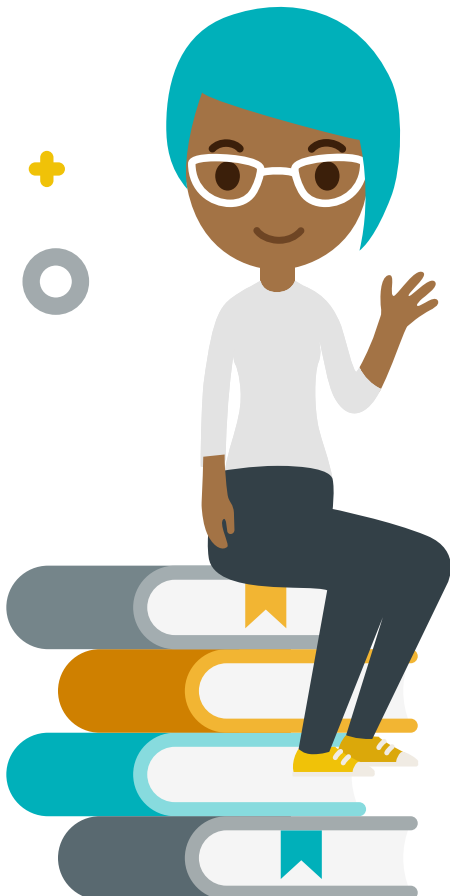
### 3 Evaluate your learning program

Think about what learning opportunities your members need in each stage of their career and audit your program to understand what learning formats may be beneficial to add. For example:

Start by asking “what do members need the most?” and “what frequently asked questions do we receive as an organization?” Next create resources and support around these members’ needs. Use data from your integrated software solutions to recommend products and communicate in a personal way with members – addressing their needs and development.



- Consider adding new offerings, such as personalized learning paths, just-in-time learning, virtual conferences, live webinars, webcasts, etc.
- Understand how other organizations have adopted different learning formats and how they may be adapted by your organization.
- Leverage technology that makes it easier to break down content; offer a variety of learning modes and formats; and deliver content through an organized, customized, on-demand course library.
- Track and award education credits for in-person learning and online learning. Use this data to recommend other relevant courses to members.
- Be a resource. Consider the knowledge and opportunities your association provides. Strategize how to provide value and be the “go to” organization for members and the industry you serve. Create a communication strategy that reinforces this objective. How will you let members know these resources are available? For instance, you could use trigger notifications in your association’s app.



Choose an event solution that allows you to offer personalized registration paths for attendees of your events, only displaying relevant tickets and event sessions.



Once you've considered how your member benefits support your members in each stage of their careers, here are four ways to keep members actively engaged with your association:

## 4 Get personal

Personalize the member experience by presenting your members with content specific to the needs and interests associated with their career stage. You'll win them over by demonstrating you understand them and you're working to deliver value to them.

## 5 Make recommendations

Take your member experience to the next level by offering recommendations, such as job postings based on member's career stage, certifications, or CE course completion.

## 6 Leverage new technology

Drive continuous engagement and keep your messages front and center by meeting members where they are. For example, use your mobile app and automated push notifications to send members important information and reminders, such as when event registration opens or when new content on a hot industry topic is available in your online community.

When asking for feedback, be sure to include a mix of members at various career stages for insights that will help you provide more targeted benefits and communications.



## 7 Listen

Asking members their opinions is a great way to find out what's working and what's not. As you plan various member programs, make changes to your website, or do anything that will directly impact your members, get your members involved. Select a few members who may be most interested in the project at hand and ask them for feedback. Be sure to include members at various stages in their careers. Ask them about their experience so far. Present them with your ideas for improvements and ask them what they think.



## Renewal

Many member management professionals focus their member renewal activities around the 90 days leading up to member renewal dates. But consider this: Your members' entire experience with your organization feeds their decision to renew their membership.

That said, each membership will eventually come down to the last 90 days before renewal. If you've made members feel welcome and provided value throughout the entire member experience, you're well on your way to renewal. The last three months present an opportunity to not only remind your members of the value your organization has provided thus far, but also rekindle the relationship with members whose interest may have faded.

Here are three simple, yet effective, tips for the 90 days before renewal:

### 1 Offer auto-renewals

The Community Brands 2017 Member Loyalty Study found 13 percent of lapsed members simply forgot to renew. One of the best ways to address this issue is to offer an option to automatically renew membership, with the membership fee charged to the member's credit card. Consider also offering both annual and more budget-friendly monthly payments. Your membership management software should allow you to set up these options, with corresponding automated emails that notify members when their membership has been renewed.

### 2 Communicate value

As you near renewal dates, remind your members of the benefits and value they receive from your organization. This is a great time to segment your list and send targeted messages. For example:

- Reinforce the value of membership by reminding members of the benefits they have taken advantage of, such as event discounts and learning opportunities.
- Remind members of the benefits they have not yet taken advantage of, and that there's still time to do so. Be sure to highlight specific benefits that may help them advance their careers.
- Let members know about the upcoming events and opportunities they'll miss out on if they don't renew.

### 3 Get (a little) pushy

For members who aren't set up for auto-renewal, give them an extra nudge via automated push notifications through your mobile app to remind them their membership is up for renewal.

# Supporting your work throughout the lifetime member journey

To support the full lifetime journey of your members – from recruitment to renewal for students to retirees – the technology you rely on for membership management (AMS), learning management (LMS), event management, and career services must be purpose-built and work well together.



Consider the following technology integration points and example scenarios of how they can help support a great experience throughout the lifetime member journey:

## AMS + Career Center

### Member prospect lists

Non-members who visit your job board and sign up as job seekers via job alerts or account registration are automatically delivered to your AMS as a list of new member prospects for your use in new member marketing and acquisition efforts.

### Single sign-on

Members can apply for jobs and manage their job seeker accounts and profiles without logging in to a separate system through single sign-on.

### Intelligent job recommendations

Members have the opportunity to opt-in to receive intelligent job recommendations based on their AMS member profile data, such as job title and location, giving them the ability to passively search for new career opportunities.

### Additional stored member activity

Member activity on your job board is captured and stored within the member's AMS record, giving you additional data and insights to drive more informed member marketing efforts.

## AMS + Event Services

### Single sign-on

During online registration, offer single sign-on to members for quick and easy registering. In real-time, member data will be pulled from your AMS and into the attendee's online registration, including contact and billing information.

### Intelligent session recommendations

Recommend additional sessions and products for purchase during online registration, based on the attendee's interest areas, job title, and/or membership level.

### Smart badges

Design your own smart badges using a badge designer tool. Drag and drop artwork on your event badges, format text fields, and create different designs, based on attendee type. Next, make your badges "smart" with dynamic graphics or text that change based on attendee demographics, dietary requirements, and interest fields in each registrant record.

### Additional stored member activity

Record session attendance in registration records for use in targeted marketing campaigns, awarding education credits, and gaining deeper insight into member interests.

### Lead retrieval

Provide lead retrieval services to exhibitors to help them succeed and realize ROI on your event.

### Attendee behavior

Receive attendee behavior reporting to understand how attendees move through your event, assess session success and popularity, and know which vendors they visited.



## Career Center + LMS

### Intelligent course recommendations

Your job board visitors see relevant jobs and popular, relevant, or recommended courses offered by your association that will help them become qualified for those jobs.

### Member acquisition

Non-members visiting your job board receive recommendations for courses and continuing education tied directly back to your association learning offerings, providing additional opportunity for new learner and member acquisition.

### Intelligent job recommendations

Employers who pay to market their jobs to members through your job board have their jobs hyper-targeted to learners who have earned particular credentials through your association and qualifies them for these employers' jobs in real time.

Members and non-members browsing your LMS course menu are presented with actual and relevant job opportunities they would be qualified for if they took suggested courses or learning paths through your organization.

Upon exiting courses or receiving certifications, learners are presented with job opportunities they are now qualified for as a result of their new competencies or credentials.



## Event Solutions + LMS

### Attendance tracking

Track session attendance at in-person events and immediately record attendance on each learner's dashboard. You're also able to award education credit, based on attendance and track course history across both virtual and in-person events.

### Seamless session recording delivery

Easily deliver recordings to attendees who registered for in-person events by simply deploying session recording access to all attendees through automatic LMS updates.

## AMS + LMS

### Synced profiles

Learners seamlessly navigate from your website to your e-learning catalog to your member page. Any updates to user data automatically sync across your AMS and LMS.

### E-commerce integration

Create a shopping experience through e-commerce integration that allows members to purchase your association's store products and learning products from either your association's e-commerce store or LMS storefront. A full view of your members' purchase history lives in your AMS.

### Progress tracking

Automatically track learner progress through quizzes, assessments, checkpoints, attendance, scores, and completions along with credits earned. The data is shared through both systems, providing members more insight into their learning path through their AMS member profile.

# Take your member experience to the next level



Delivering an exceptional member experience requires supporting members through each stage of their careers and offering value through each stage of their membership with your organization. Community Brands brings together a technology suite that fully supports a great member experience – offering integrated solutions that help your team operate efficiently and effectively, while driving membership growth, engagement, and revenue, as well as enhancing member value.

**Learn more about the industry's most powerful, integrated portfolio of technology solutions that supports today's leading associations and other member organizations:**



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