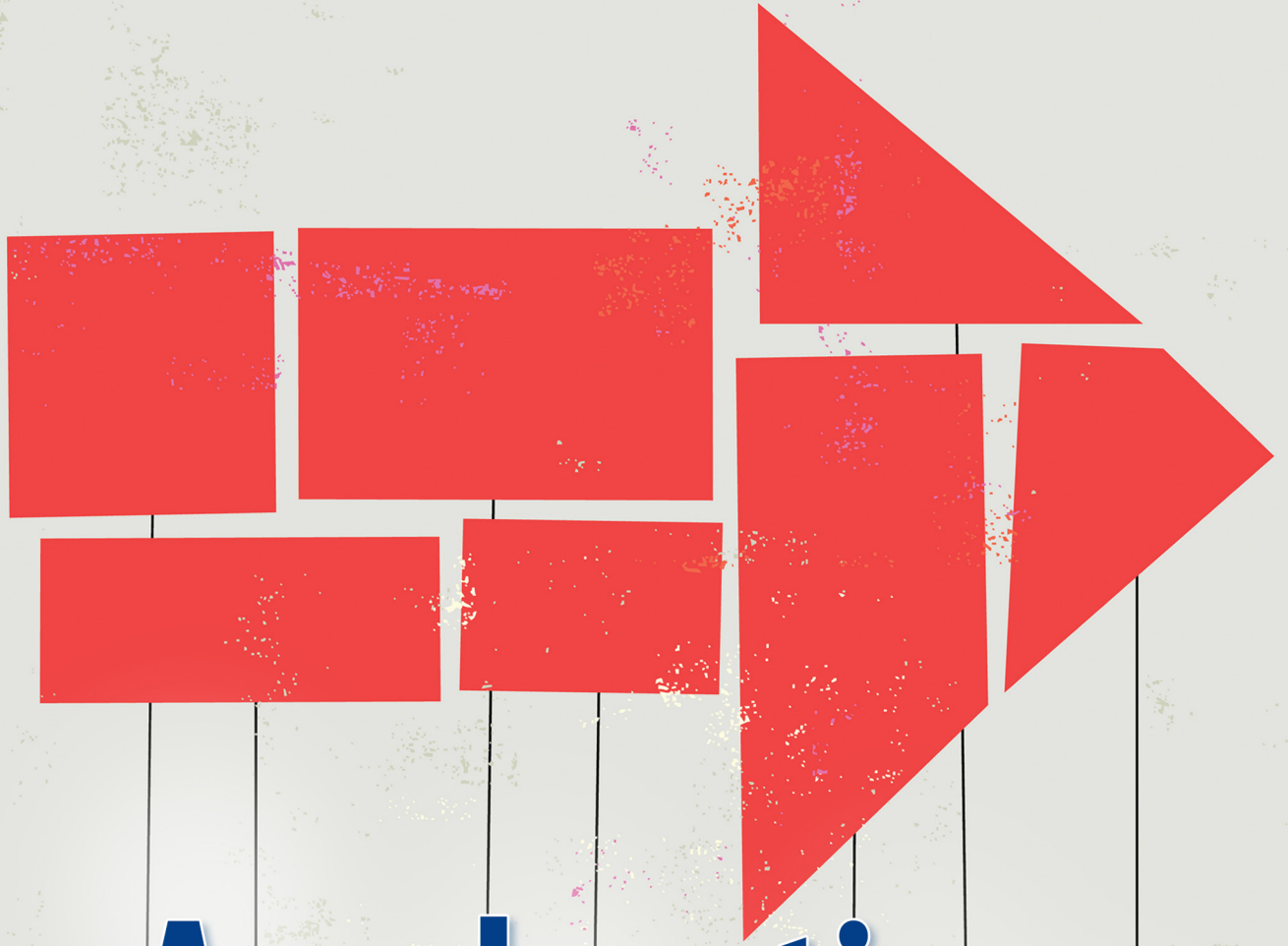


Steve Lane, Bryce Gartner, and Dan Varroney



Accelerating Strategic Member Engagement[©]



Accelerating Strategic Member Engagement[©]

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WHY THIS E-BOOK? WHY NOW?

“Accelerating Strategic Member Engagement” is an excellent e-book that was well laid out and thought provoking. While member engagement is not a new concept, this e-book framed it in a way that I believe really highlights its impact. I especially liked the Strategic Member Engagement Framework which provides a useful and easy to understand model to evaluate current activities within my association for how successfully they engage members. The bottom line is the e-book gave me immediate take-a-ways that I can use in my organization and suspect it will do the same for other association executives too.”

Jeffrey D. Morgan, FASAE, CAE

President & CEO

National Investor Relations Institute

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INTRODUCTION

Imagine the discussion that took place when your association's founders first convened. We are confident that they did **not** say: "Let's go hire some staff and ask them to sell us stuff". Intuitively, they understood that people seek out others who have a common interest, and become most engaged with those who express appreciation for their contributions. Your founders recognized they could achieve more powerful outcomes collectively than individually.

So we ask you...

- Why is it that the member engagement strategies of so many associations look more like bureaucratic processes and sales strategies?
- Why have so many associations created an "all you can eat" buffet of offerings, causing resources to be spread thin and more focused on "outputs" than the "outcomes" that members seek?
- Why are the offerings of so many associations watered-down to one size fits all formats?

WHAT IS STRATEGIC MEMBER ENGAGEMENT?

More importantly, what could it be? This e-book explores both common practices and the impact that strategic member engagement is having on leading edge associations. We hope you find this e-book thought provoking, and that it stimulates you to tell us your story. At minimum, we are sure it will provide a very different lens for viewing what you track, measure and analyze.

For many executives, the term "member engagement" either sounds touchy-feely or, like popcorn, it sounds and smells more interesting than it actually tastes. As former association executives, we've been in your shoes. So we wondered if others have shared our experience that member engagement can be so much more than good customer service.

At the majority of associations, member engagement takes a back-seat to fighting fires and meeting budget expectations. Few association executives describe it as a "differentiating strategy", a "growth accelerator" or "game-changer". However, we are seeing early indicators of new ways to think about member engagement. A few executives are demonstrating the direct linkages between their efforts, member outcomes, and their association's business model. So let's begin with our definition and then explain how we arrived at it.

At the majority of associations, member engagement takes a back-seat to fighting fires and meeting budget expectations.

DEFINING STRATEGIC MEMBER ENGAGEMENT...

“Creating unparalleled and sustainable value by bringing people together in ways that they find meaningful and practical, because they perceive an ability to impact something they desire, individually and collectively”

Seems so obvious, how can this be strategic? Don't all associations begin with a small group who wanted to make a difference? Yet, in so many ways, associations have shifted away from the core reason they were founded. We will demonstrate how this simple definition is quite distant from what the members of many associations actually experience today.

CONTEXT: THE NEW NORM

How members are engaged has evolved over time, driven by numerous factors as associations and their members navigate the rapids of economic, technological and political turbulence. Associations have experienced wide swings between the good times and trying desperately to identify new sources of short term revenues and to be perceived as relevant. Today's corporate and individual members view their participation with associations through a very different lens than when they had relatively few go-to sources for information and knowledge-sharing. In a knowledge economy, it's all about having just-in-time sources that help members drive business and professional outcomes. And to really value the information, they must be actively engaged. ***This is the new norm.***

POSITIONING FOR THE FUTURE

With today's new norm, how do you differentiate your organization from all of the alternative solution sources to which your members have access? How do you have the information tonight for the question they need to answer tomorrow morning? How do you create a differentiating “experience” that makes members think of you first (before they Google or Bing for other sources)? And, critically, how do you build a connected community that positions both your organization and your constituencies for long term success? These questions are at the core of today's confusion about “member engagement”.

LONG-TERM IMPACT

We emphasize that Strategic Member Engagement is about long term, sustainable strategies to enhance your organization's long-term health. It is not about short-term band aids. Strategic member engagement has huge implications for your competitive positioning and business model. In fact, for some associations, it can be a game-changing accelerator to your growth strategy.

ABOUT OUR RESEARCH

We have surfaced a number of associations experimenting with non-traditional approaches and demonstrating results. While the insights and suggestions we present may apply more broadly, our research focused on U.S. trade associations and professional societies that are national or international in scope.

Our research combines our experiences with clients, numerous executive interviews, discussions at the executive forums we host, and our Strategic Member Engagement Survey conducted in October/November 2013. Approximately 307 association executives participated in the survey, with 61% from Professional Societies and 39% from Trade Associations. We were curious if patterns developed based upon such things as the industry/profession served, the association's size, market share, degree of competition and perhaps wild cards like being the credentialing body or benefiting from legislative mandates. It's not surprising that our research raises many additional questions, and we can't wait to interview more of you to get your reactions and test our assumptions.

The Strategic Member Engagement Survey Highlights and Full Report can be found on each of our websites. For more information about the authors and their firms, please see the appendix of this e-book.

STRATEGIC MEMBER ENGAGEMENT DRIVES OPERATING RESULTS

While we identified a few differences between trade associations and professional societies, we found it interesting that most of the key findings were not about the type of association or demographic factors such as size. Instead, we found that the degree to which leadership understand and strategize about member issues and engage members in creating new solutions has far greater correlation to the following 3-year operating results:

- Member Retention
- Annual Operating Revenue
- Registrations to the Primary Annual Meeting
- Annual Revenue from Fee-for-Service Offerings
- Timely Membership Renewals

Leaders and Laggards: Our research is providing strong evidence that strategic member engagement can be an accelerator to your growth and positioning strategies.

INDIVIDUAL OR COMPANY MEMBERS

We frequently hear: "Trade Associations and Professional Societies are quite different". And, yes, our research surfaced a few differences. And, of course associations with company members have to pay even closer attention to antitrust guidelines. But, when it comes to strategic member engagement it still comes down to the individuals who are participating (or could be). We rarely find a trade association that has optimized the penetration of their member companies. Instead of engaging and impacting hundreds of

individuals, they often only have 1 to 10 contacts even in very large companies; and not all of them are actively participating. You will find many of the concepts and approaches described in this e-book can be applied in either environment.

ALIGNMENT WITH YOUR VALUE PREMISE

Throughout this e-book, we delve into the 9 core principles of strategic member engagement. At the heart of these principles is the association's underlying value premise. Associations are grounded in their unique positioning as the neutral integrator. They bring disparate and sometimes competing audiences together to address shared opportunities and challenges. At the core of an association's value premise is the ability to collectively create new solutions and influence the future destiny of its members in ways they could not achieve on their own. Examples include: standards development, legislative and regulatory advocacy, stimulating innovation, growing markets, industry voice and PR, and stimulating thought leadership.

Over the years there has been much discussion about association relevancy. Executives recognize that their association must increasingly play a more valuable role in the success of their members. Yet, so many associations are struggling to be perceived as relevant and/or to identify a sustainable business model. To address this, we've divided the e-book into three sections:

- Driving Value
- Winning Together
- Setting the Course

In the first section entitled "Driving Value", we talk about positioning your association for success through strategic alignment with member objectives and their desired outcomes. We describe 4 levels of member engagement and talk about how leading associations are providing both "push" and "pull" offerings to create new solutions.

In section two, "Winning Together", we explore why you might reduce the extent to which you focus on doing things **for** members, and increase your focus on doing things **with** them. Moving to "we" can be your game changer. We explore how member knowledge contributions lead to collaboration in creating new solutions, and ultimately to connectedness with your organization. We also discuss perceptions of why members leave, how one size fits none, and the power of audience segmentation.

Finally, in "Setting the Course" we explore the business case for member engagement strategies and explain how to utilize the Strategic Member Engagement Framework®. We discuss your organizational readiness to execute member engagement strategies, to include "unlocking" your existing data and identifying predictive member behaviors. And, we explore the importance of structural, cultural and resource alignment to optimize and sustain your member engagement strategies.

Here are the core concepts and principles underlying strategic member engagement. Together, they will help you build a fully-integrated model to position your organization for long-term success. As you progress through the e-book, these concepts and principles are explored in detail, supported by our research, and progressively build upon each other.

9 CORE PRINCIPLES OF STRATEGIC MEMBER ENGAGEMENT:

Each chapter of this e-book will highlight one of the following 9 core principles of Strategic Member Engagement:

DRIVING VALUE:

PRINCIPLE #1: **Knowledge-based Solutions Require “Push” and “Pull” Approaches**

PRINCIPLE #2: **Outcomes Trump Outputs; Change the Conversation**

PRINCIPLE #3: **Making a Difference; Winning Heart and Mindshare**

WINNING TOGETHER:

PRINCIPLE #4: **The 3 “C’s” of Strategic Member Engagement**

PRINCIPLE #5: **Moving to “We”; the Real Game-Changer**

PRINCIPLE #6: **One-Size Fits None; All Members Are Not Equal**

SETTING THE COURSE:

PRINCIPLE #7: **Connectedness Drives Your Business Model**

PRINCIPLE #8: **Data-Driven, Segmentation Strategies**

PRINCIPLE #9: **Structural, Cultural & Resource Alignment**

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This e-book and the Strategic Member Engagement Survey Report were developed as a collaborative effort between:

- Vertical Leap Consulting www.VerticalLeapConsulting.com
- Icimo, LLC www.icimo.com
- Potomac Core Consulting www.PotomacCore.com

SECTION ONE:

DRIVING VALUE

In this section, we set the stage for why strategic member engagement drives superior long-term value; why it is about far more than sales or customer service tactics. We discuss positioning your association for success through strategic alignment with member objectives and their desired outcomes. We describe 4 levels of member engagement and how leading associations are providing both “push” and “pull” offerings to create new solutions. These associations have Boards that are highly engaged and strategic; focusing on member impact (not just satisfaction with association outputs). It’s about winning both heart and mind-share, and can be a real game-changer for your association.

CHAPTER ONE

Knowledge-Based Solutions

This chapter focuses on the evolving approaches that associations are taking to cut through the noise (data overload) that surrounds their members. While advocacy and various forms of education and information will remain staple offerings, addressing member “up at night” issues is increasingly about sharing knowledge and creating new solutions together.

**PRINCIPLE #1:
KNOWLEDGE-BASED SOLUTIONS REQUIRE “PUSH”
AND “PULL” APPROACHES**

In today’s knowledge economy and with many options available to members, the association’s competitive positioning requires creating a differentiating “experience” that treats each member as having a piece of the knowledge puzzle. Creating knowledge-based solutions is achieved through a proactive blend of “push” and “pull” information-sharing mechanisms.

PUSH AND PULL

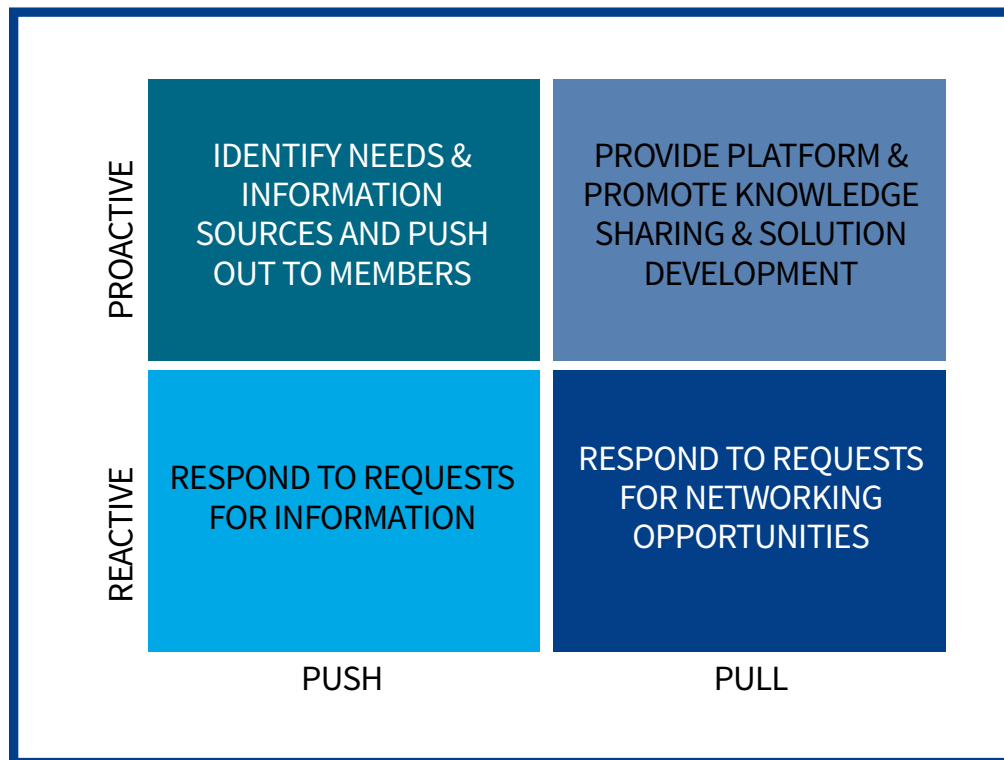
Most association executives recognize that the challenges their members face today require knowledge-based solutions. Yet, the most prevalent approach is to seek out knowledge experts and “**push**” that person’s knowledge out to the masses via educational programs, newsletters and journals.

Leading edge associations view their role as the integrator, aggregator, curator and enabler. This means “**pulling**” members together and facilitating the sharing of knowledge so that innovative solutions are created to address shared challenges and opportunities. These associations view their constituencies as each having a piece of the knowledge puzzle.

While traditional networking does provide some value, it relies upon the right people connecting. This can be easily replicated by your competitors. Leading associations are figuring out how to capture the insights of many members and stakeholders and provide the tools that enable members to tap into the collective knowledge for strategic and tactical insights upon demand. Members can’t be waiting for next month’s journal or next year’s conference. The great news is that, as a form of organization, only associations are so fundamentally positioned to provide both “push” and “pull” experiences.

MOVE FROM REACTIVE TO PRO-ACTIVE

Over and over we hear association boards and executives say they want their organization to be more pro-active and less reactive. Using the concepts of “push” and “pull”, and reactive to proactive, think about your current offerings and planned initiatives. How would you plot your offerings into the 4 boxes of the graphic shown below?



MARKETPLACE PENETRATION

The results of our survey demonstrate that association executives see significant opportunity to increase market penetration. In fact, less than one-third of the survey respondents said their current market share is at or above 60%.

COMPETITION

Boards are often uncomfortable labeling another association as a “competitor”. They speak of them as “potential alliance partners”. Board members may even be active volunteer leaders within other related associations. In a rising economic tide, the competition for members’ “mindshare”, time and monies can be less of an issue. But, emerging from the great recession, and with knowledge-based solutions as a context, some associations are exploring strategic member engagement as a marketplace differentiator and growth accelerator, regardless of their competitive landscape.

Their competitors may have more resources, larger conferences, and stronger branding. But, rarely are they finding a competitor with a truly compelling engagement “experience”.

In our survey, we asked executives: “How would you characterize the level of competition your association faces from other organizations (associations, non-profits, and/or for—profit) for each of the following offerings?” Given the options of “extremely high”, “high”, “moderate”, “low” and “unsure”, here are **the percent of respondents who said: “Extremely High” and “High”**:

	<u>Professional Society</u>	<u>Trade Association</u>
Education programming (incl. online)	59%	28%
Content publications (incl. online)	54%	39%
E-communications (alerts, newsletters)	48%	46%
Suppliers’ financial support (ads, Sponsorships, exhibits, etc.)	46%	47%
Membership	46%	35%
Knowledge repository & access tools	35%	18%
Research reports	35%	26%
General networking	35%	29%
Industry/Profession “voice”	28%	27%
Small peer groups	27%	14%
Career center/job board	23%	12%
Advocacy & Regulatory efforts	17%	20%

Note that for most of these offerings, professional society respondents perceived greater levels of competition than their trade association counterparts.

MARKETPLACE POSITIONING

Then we asked an open-ended question: **“If you have competition from other organizations that overlap your market/profession, how do you differentiate the “experience” that members have with your organization?”** We grouped the 141 verbatim responses into the categories shown in the following chart. It’s interesting that most chose to respond to this question in terms of market positioning (rather than the “experience” members have). Although these were short, top-of-mind statements, we feel they provide an

interesting context to our thoughts about strategic member engagement. Likely, most associations combine several market positioning factors. However, consider how strategic member engagement might serve as a long-term impact accelerator regardless of your positioning strategy.

	<u>Professional Societies</u>	<u>Trade Associations</u>
Differentiate By Audience		
Niche audience	21%	17%
Big-tent inclusiveness	22%	13%
Differentiate By Offerings		
Niche offerings	10%	15%
Breadth of offerings	3%	5%
By quality of offerings	15%	5%
By thought leadership	0%	3%
By staff expertise	0%	2%
By price/accessibility	1%	0%
Differentiate By Member Engagement		
Peer interactions/ relationships	12%	20%
Other		
Provided insufficient information to categorize	9%	7%
Didn't know or felt it was N/A	7%	13%

Members have limited time and resources to spread among alternative solution providers. As such, the differentiator often involves the relationships formed and the ability to impact something they collectively seek.

A carefully constructed portfolio of “push” offerings is important, especially for short-term revenue. But, it’s no surprise that traditional “push” offerings often go un-purchased and receive “yawn” responses on satisfaction surveys. In fact, we find that most members can’t articulate the benefits of their association beyond generalizations about education, networking and advocacy. For push solutions, members value credible, timely information that is synthesized and vetted by thought leaders. Push offerings are especially important to early career members as we will discuss in a later chapter.

The strategic challenge is to continually fill the pipeline with constituencies who are seeking a more powerful “experience” than they receive elsewhere.

The strategic challenge is to continually fill the pipeline with constituencies who are seeking a more powerful “experience” than they receive elsewhere. They need to view your association as something more than just an event manager or one of many solution providers. Using the Strategic Member Engagement Framework® discussed in chapter five you will be able to construct a balanced portfolio of push and pull experiences.

SUMMARY THOUGHTS

- Most association executives perceive significant opportunity to increase market share
- Most executives perceive significant competition for their primary offerings
- Most executives strive to move their organization to be more proactive and less reactive
- Members seek knowledge-based solutions & these require “push” and “pull” approaches
- Each constituent has some piece of the puzzle
- When competing for mindshare, strategic member engagement can be a real marketplace differentiator

CHAPTER TWO

What Really Drives Member Value?

This chapter focuses on what members really care about: creating new solutions to impact their opportunities and challenges. This means focusing on member outcomes, not just the association's outputs.

**PRINCIPLE #2:
“OUTCOMES” TRUMP “OUTPUTS”; CHANGE THE
CONVERSATION**

Members don't really care about the association's “outputs”. They only care about “outcomes” that address their business/professional challenges and opportunities. Everything else is just noise. Change the conversation from selling and testing satisfaction with association outputs (conference, journal, etc.) to engaging members in ways that facilitate knowledge-sharing and collaboration with other members. This begins with a highly engaged and strategically focused Board.

MEMBERS CARE ABOUT OUTCOMES

For any business enterprise there are “inputs”, “outputs” and “outcomes”. Too often an association's internal discussions are about tweaking “outputs”, not creatively driving the “outcomes” that members really care about. This only fuels the “we/you” culture that exists in so many associations. Associations really get into trouble when internal discussions infer “we know what's best for our members”. When members don't feel that they can impact something that they care about, they form their own coalitions, forums and on-line communities outside of the association. Have you checked out your competing LinkedIn Groups lately to see who is there and what they are discussing?

Members care about “outcomes” for themselves, their organizations, their constituencies, and customers. An association's “outputs” (events, journal, newsletters, etc.) are just mechanisms and tactics. Strategic member engagement begins with changing the

Strategic member engagement begins with changing the conversation from “outputs” to “outcomes”.

conversation from “outputs” to “outcomes”. It sets a very different context for strategic dialogue between the senior staff and board. It requires that you have sufficient insights into the external and operational challenges and opportunities of your members; segment by segment. This causes you to rethink “inputs”. Focusing on outcomes will drive the appropriate outputs, not the other way around.

STRATEGIC ENGAGEMENT OF THE BOARD

In our survey, only 40% of respondents said their Boards are: **“Highly Engaged and Strategic in Focus”**. The survey also asked: “To what degree does your Board understand and strategize about the needs of the average core member?” (With “core” defined as: “not associate members, student members, supplier members, e-members, etc.”). Only about half of the respondents said their boards understand and strategize about the needs of the core members to a: “High” or “Very High” degree.

What’s the impact? The survey showed much higher correlations for those who reported a “Very High” degree of board understanding and strategizing (than those who responded “Moderate” or “Out of Touch”) to their reporting “upward” on the following 3-year business trends:

- Member Retention
- Annual Operating Revenue
- Paid Registrations at Primary Annual Meeting
- Timely Membership Renewals

As for the degree of engagement by Committee (non-board) members, 41% of professional society executives and 44% of trade association executives reported that their committee members were: “disengaged” or “somewhat engaged”.

Whether obtained via survey, focus groups, interviews, roundtables, online community dialogue, social media tracking or other mechanisms, it’s essential to truly understand *how* your association is currently impacting member objectives. This requires securing actionable data about member perceptions of their environmental and operational challenges.

UNDERSTANDING & STRATEGIZING ABOUT MEMBER “UP-AT-NIGHT” ISSUES

Whether obtained via survey, focus groups, interviews, roundtables, online community dialogue, social media tracking or other mechanisms, it’s essential to truly understand ***how*** your association is currently impacting member objectives. This requires securing actionable data about member perceptions of their environmental and operational challenges.

Examples of Member Challenges: Most of these apply to the members of both trade associations and professional societies, but may have a little different spin based upon whether the member you are talking with is wearing their “company hat” or their “individual hat”. To emphasize this point, if you are not surfacing many of these issues, you may not be asking the right questions or have not sufficiently penetrated your company members.

External Challenges

- Increasing market penetration/share
- Emerging technologies awareness
- End-user awareness of company products
- Adverse legislation/regulation
- Access to data on emerging markets
- Identifying alliance partners
- Available workforce

Operational Challenges

- Strategic business planning
- Cost controls
- Customer service/retention
- Regulatory Compliance
- Risk Management
- Developing leadership
- Team processes
- Cross-functional knowledge sharing

We asked about the categories of “up-at-night” issues that association executives put in their member impact surveys. Even among those who regularly survey member “up-at-night” issues:

- 24% of national trade association respondents and 35% of national professional society respondents do **not** include questions about **federal or state policy and regulatory issues**
- 26% of national professional societies do **not** include questions about **operational and technology trends/issues**

ACHIEVING OUTCOMES TOGETHER

With a shared focus on outcomes, many members want to contribute and be connected if they believe that great outcomes will be achieved. Once members are fully engaged in envisioning outcomes, you can have the innovative programmatic discussions about how best to achieve those outcomes. Strategic Member

Engagement drives the association's business model, while enhancing the association's influence, prestige, and competitive positioning. Such discussions completely change the conversation away from: "what do I get for my dues?"

ENGAGEMENT IS NOT JUST AN EVENT

Wherever we go, we find association executives focused (perhaps fixated) upon the next board meeting, annual meeting, committee meeting, etc. Rather than engagement opportunities, these are often treated like outputs that once achieved can be checked off the to-do list.

"IMPACT" VS. "SATISFACTION"

Quite often, associations are merely tracking member "satisfaction" with their offerings. "Satisfaction" surveys have the explicit connotation of ***"we want to know if you as a member appreciate all that we are doing for you"***. Often disappointed with satisfaction survey results, associations add more and more services. Others pursue a branding and/or marketing communications assessment; convinced they must not be telling their story well enough. Hand in hand with this focus on satisfaction, we often find associations with mission and/or vision statements that say: ***"We will be the premier association (in our space)"; rather than talking about optimizing member outcomes.***

Member Impact Surveys, on the other hand, are forward looking. They focus on the desired future outcomes that members seek to address their "up at night" issues. These issues must be examined segment by segment. When conducting a member impact survey, be sure to observe any disconnects between what members seek and what your board and committee chairs view as priorities.

As you might expect, our Strategic Member Engagement Survey also found high correlations between the degree to which the Board members understand and strategize about core member issues and the frequency of surveying member "up-at-night" issues. 58% of the responding executives who said they survey these annually, also reported "Very High" or "High" for the degree to which the Board understands and strategizes about core member issues. This compares to only 41% for those who survey "infrequently".

This is also an opportunity to find out how various segments of members and non-members prefer to be engaged, and which other organizations are trying to meet their needs. Impact and outcomes data allows you to set priorities and minimize the activities that no longer provide sufficient relative value.

Strategic Member Engagement drives the association's business model, while enhancing the association's influence, prestige, and competitive positioning. Such discussions completely change the conversation away from: "what do I get for my dues?"

IMPACT SURVEY CORRELATIONS TO YOUR OPERATING RESULTS

So, is there any correlation between the frequency of impact surveys and 3-year business model trends? Our survey shows that those who survey annually were far more likely to report an upward 3-year trend in:

- Member Retention
- Annual Operating Revenue
- Registrations to the Primary Annual Meeting
- Annual Revenue from Fee-for-Service Offerings
- Timely Membership Renewals

SUMMARY THOUGHTS

TRADITIONAL THINKING	STRATEGIC MEMBER ENGAGEMENT
Focus on perfecting association “outputs”	Focus on achieving Member “outcomes”
Discuss member benefits	Discuss members’ external & operational challenges
Focus volunteer leaders on the association’s success	Focus volunteer leaders on the members’ success
Highly engaged Boards are time consuming and distracting from what needs to get done	Highly engaged and strategically focused Boards have a very high correlation to the Association’s operating results
Fill up Board meetings with Board Books and tactical discussions	Facilitate Board strategic discussions about member objectives
Engagement means hold another event or sell them something	Engagement means help them contribute & collaborate in developing new solutions to achieve their objectives
Track member satisfaction	Assess the Association’s impact on members
Member engagement is good for member satisfaction & retention	Member engagement drives the association’s business model
We need to tell our story “louder” so members will appreciate all we do for them.	Focusing on outcomes changes the conversation

Only 40% of executives believe their Boards are highly engaged and strategic in focus

- Only half of executives perceive their Boards demonstrate a very high level of understanding and strategizing about the needs of the average core member
 - 41% of professional society executives and 44% of trade association executives reported that their committee members were: “disengaged” or “somewhat engaged”.
 - The associations who in our Strategic Member Engagement Survey most often reported an upward 3-year trend in:
 - ▷ Member Retention
 - ▷ Annual Operating Revenue
 - ▷ Registrations to the Primary Annual Meeting
 - ▷ Annual Revenue from Fee-for-Service Offerings
 - ▷ Timely Membership Renewals
- **Were the ones who more frequently reported these capabilities:**
- ▷ Very highly engaged boards who are strategic in focus
 - ▷ Regularly conduct member impact surveys of “up-at-night” issues (not merely satisfaction surveys)
 - ▷ Very high Board understanding and strategizing about the needs of members

CHAPTER THREE

4 Levels of Member Engagement

This chapter focuses on how strategic member engagement can differentiate your association in the face of numerous options available to your members. We explore how the member's "experience" with your association can secure their heart and mindshare. Understand the 4 levels of engagement and begin targeting segmented audiences to move to higher levels of engagement.

**PRINCIPLE #3:
MAKING A DIFFERENCE; WINNING HEART
AND MINDSHARE**

People will only contribute time, knowledge and ideas when they perceive an opportunity to impact the outcomes they seek. There are 4 levels of strategic member engagement. The key to winning heart and mindshare is to continually create new opportunities for constituencies to contribute knowledge and collaborate with other members.

Everyone is busier than ever, especially as associations emerge from the recession and shift attention to growth strategies. As such, people will only contribute time, knowledge and ideas when they perceive an opportunity to impact the outcomes they seek. At best, all other activities might be interesting, but not a personal priority. At worst, those activities are just noise that may degrade the perceived value of the association. The definition of strategic member engagement is: "Creating unparalleled and sustainable value by bringing people together in ways that they find meaningful and practical, because they perceive an ability to impact something they desire, individually and collectively". This definition is at the core of winning heart and mindshare.

The definition of strategic member engagement is: **"Creating unparalleled and sustainable value by bringing people together in ways that they find meaningful and practical, because they perceive an ability to impact something they desire, individually and collectively"**.

A simple analogy about winning heart and mindshare is that most people like having access to both the Boy Scouts and the Girl Scouts. If their children are boys, they may still buy Girl Scout cookies every year. But, if they only have boys, their time and energy is far more likely to be spent on the Boy Scouts where they perceive a greater ability to impact an outcome they care about (i.e. their children's' development).

If members are focused on outcomes and an association's real value premise is bringing stakeholders together to share knowledge and create future solutions, why do so many associations emphasize doing things **for** members, instead of seeking their knowledge contributions? When associations do ask for knowledge contributions, it is often just directed toward what the association feels are good "outputs" (e.g. conference programming or operating policies). Winning members' heart and mindshare begins with understanding the 4 levels of engagement.

4 LEVELS OF STRATEGIC MEMBER ENGAGEMENT

Think about your various constituency segments within the following 4-level framework. We've listed a few examples to get you started:

- **Disconnected Observer:** lurking on website or on-line community, communications scanner, congressional staff, the general public
- **Appreciative Recipient:** event attendee, subscriber, product purchaser, ad/exhibit/sponsorship purchaser
- **Knowledge Contributor:** speaker, writer, availability as a knowledge expert, mentor. This can also be the constituent that translates or transfers knowledge between stakeholders
- **Solutions Collaborator:** board, committees, roundtables, special interest groups, legislative campaign

ASSESS ALL CONSTITUENCIES & STAKEHOLDERS

Initially, assess all constituency segments. Ignore whether they are members or non-members as this gets in the way of thinking about behaviors and touch points. Often "membership" is based upon other factors. Examples include: joining just to take advantage of a discounted conference or subscription rate, or based upon the timing of when the annual conference returns to that member's region. Here are some sample behaviors for each engagement level:

4 Levels of Strategic Member Engagement

DISCONNECTED OBSERVER	APPRECIATIVE RECIPIENT	KNOWLEDGE CONTRIBUTOR	SOLUTION COLLABORATOR
General Public			
Student	Member	Writer	Legislative Fly-in Participant
Website Lurker	Product Buyer	Speaker	S.I.G. or Roundtable Member
	Subscriber	Trainer	Task Force Member
	Conference Attendee	Mentor	Committee Member
	Exhibitor/Advertiser		Board

There will be overlaps. In fact, the members who are most engaged tend to display all 4 levels. To get started, look for segments where the constituencies are distinguished primarily by one or two levels (e.g. student members might primarily be disconnected observers/appreciative recipients. Some associations draw thousands of constituents to their annual meeting who rarely contribute anything to the collective body of knowledge or the development of new solutions.

And, there may be a segment that doesn't contribute new knowledge, but has a powerful impact by translating or transferring the knowledge of others via social media/blogs, by uploading documents to the community's knowledge repository, etc.

The key question is: "What is the impact of the observable behavior on the overall industry or profession?" You will surface patterns as you dig deeper; e.g. one sub-segment might be long-term observers who are not impacting anyone but themselves, while another is increasingly pursuing higher levels of knowledge contribution and collaboration. Later, we will describe the power of identifying predictive behaviors.

It is about creating new opportunities to contribute and collaborate, while concurrently identifying and transitioning those segments that have the highest probability for increased knowledge contribution and collaboration.

TARGETING CONSTITUENCY SEGMENTS

To be clear, we are not implying that you should try to move all your stakeholder segments to higher levels of engagement. It is about creating new opportunities to contribute and collaborate, while concurrently identifying and transitioning those segments that have the highest probability for increased knowledge contribution and collaboration. It may be as simple as creating a portal or LinkedIn group for a segment of your members. Or, if you are well beyond that already, perhaps determining the feasibility of something more advanced.

THE NATIONAL VS. AFFILIATE CONUNDRUM

When associations have chapters, sections or affiliates, it's also important to clarify how constituency segments are best engaged at each level. Use the 4-level engagement framework to test your assumptions about the level of contribution and connectedness that is desired given the scope of each organization. Identify the segments of your constituencies that best fit each box. For example, early career members may not be able to travel to national or international events. Their contribution and connectedness needs might be best met at the local level. A small business that only operates in a small region, may be a strong fit "knowledge contributor" and "solution collaborator" at a chapter or affiliate level.

BEST ENGAGEMENT LEVEL – NATIONAL/INTERNATIONAL VS. LOCAL

	WITH NATIONAL/ INTERNATIONAL	WITH CHAPTER/ AFFILIATE
4. Solutions Collaborator		
3. Knowledge Contributor		
2. Appreciative Recipient		
1. Disconnected Observer		

SUMMARY THOUGHTS

TRADITIONAL THINKING	STRATEGIC MEMBER ENGAGEMENT
Treat members equally	Understand the 4 levels of engagement & look for constituency segments that are primarily distinguished by one or two (of the 4) levels
Create opportunities for members to engage in the Association's outputs	Create opportunities for members to engage in the design of new solutions that drive member outcomes
Track monies constituencies spend and their attendance	Identify member behaviors that impact the industry or profession
Success is measured by membership growth, retention, and fees paid	Success is also measured in member behaviors that stimulate connectedness (heart and mindshare). Target high probability segments to move to higher levels of engagement.
We support chapters and affiliates (as long as they don't compete with us)	Differentiate the "experience" at the national level and understand which member segments are best served at the local level

SECTION TWO:

WINNING TOGETHER

This section explores why you might reduce the extent to which you focus on doing things **for** members, and increase your focus on doing things **with** them. Moving to “we” can be your game changer. We explore how member knowledge contributions lead to collaboration in creating new solutions, and ultimately to connectedness with your organization. We also discuss perceptions of why members leave, how one size fits none, and the power of audience segmentation.

CHAPTER FOUR

Stimulating Connectedness

This chapter focuses on the 3 “C’s” of strategic member engagement; how providing opportunities for knowledge contribution can lead to collaboration and, when reinforced, will stimulate connectedness. We’ll also have a look at executive perceptions of why members leave their association.

PRINCIPLE # 4: THE 3 C’S OF STRATEGIC MEMBER ENGAGEMENT

Understanding why members leave gets to the heart of member connectedness. Connectedness is the critical organizational outcome that drives long term success and (unlike “loyalty”) can be measured in behavioral terms. The 3 C’s capture how member knowledge “contributions” lead to “collaboration” and stimulate/reinforce “connectedness”.

We often find volunteer leaders who are dismayed that they can no longer sustain the intimate, club-like culture within their membership they found so engaging when they first became part of the organization. Yet at these same associations the newer members often say there’s a traditional “club” (typically among current and past volunteer leaders) that is hard to penetrate. For these associations, traditional approaches are often too limiting, not scalable, or overly bureaucratic. Finding new ways for members to contribute, experience peer intimacy and feel valued is critical.

Finding new ways for members to contribute, experience peer intimacy and feel valued is critical.

WHY MEMBERS LEAVE

In our survey of Strategic Member Engagement, we asked executives to rate the frequency at which members leave for 11 potential reasons. While the ranking changed slightly, both professional society and trade association executives agreed the top 5 reasons that members leave are:

- Insufficient perceived value (ROI)
- Retired, changed companies, in transition

- Joined for a one-time purchase discount (e.g. meeting registration)
- Acquired by another company that won't pay the dues
- Insufficient connection to their business/professional objectives

PERCEPTION VS. DATA

The survey also raises some interesting questions about perceptions versus data. Here are a few examples:

- While 53% of professional societies said that “contributions not sufficiently valued” was “rarely/never” a reason members left the association, the survey showed a very large number of contribution/collaboration behaviors are **not** being tracked.
- Almost half of the trade association respondents and one-quarter of professional society respondents said they have seen an upward trend over the past 3 years in revenue coming from fee-for-service offerings. In fact, only 4% and 14% respectively said this trend was down. Given this, it's interesting that:
 - ▷ 21% of professional society respondents said they “don't know” their 3-year trend in revenue coming from fee-for-service offerings;
 - ▷ 36% of professional society respondents said they “don't know” when asked the extent to which members leave because they prefer a la carte offerings (vs. bundled packages)
 - ▷ The combination of these two responses become especially important if the association infrequently surveys member up-at-night needs and/or do not track and segment data related to member engagement behaviors
- We expected and received a few verbatim responses to an open-ended question asking about “other” reasons members leave that said “cost of dues” and member “budget cut-backs”. Yet we wonder if this often implies that members are only spending money on things for which they perceive higher value. More telling verbatim responses included:
 - ▷ “Federated state model; do not want to belong to a state organization”
 - ▷ “Burdensome bureaucracy prevents superior customer service”
 - ▷ “Large percentage of people who won't join associations”
 - ▷ “(We) don't offer a la carte model”
 - ▷ “Membership is linked to meeting requirement, and the meeting moves from country to country”

STIMULATING CONNECTEDNESS

Many association executives still yearn for member “loyalty” and have traditionally sought to measure it by retention rates. In today’s world, what does membership loyalty mean? We see very few examples of one-stop-shopping. In a knowledge economy, members proactively seek information from many sources. However, people most value the things in which they personally participate. They feel more “connected” to those groups who value their personal contributions. For example, it’s always harder to get top company executives to sign off on membership dues or registration fees when they aren’t personally engaged with the association.

Accelerating strategic member engagement is about creating many opportunities and “experiences” to contribute and feel valued; something that members don’t find elsewhere. Often there is a defining moment when someone’s desire to contribute is reinforced by the association. This can be as simple as a genuine “thank you” or as grand as a “hero” award ceremony.

As shown in the graphic on the next page, if a member perceives an opportunity to have an impact upon something he/she cares about, behaviors start to change from being a Recipient to a Knowledge **CONTRIBUTOR**. And, for some, individual contribution that is recognized and openly appreciated leads to Solutions **COLLABORATION** with other knowledge contributors.

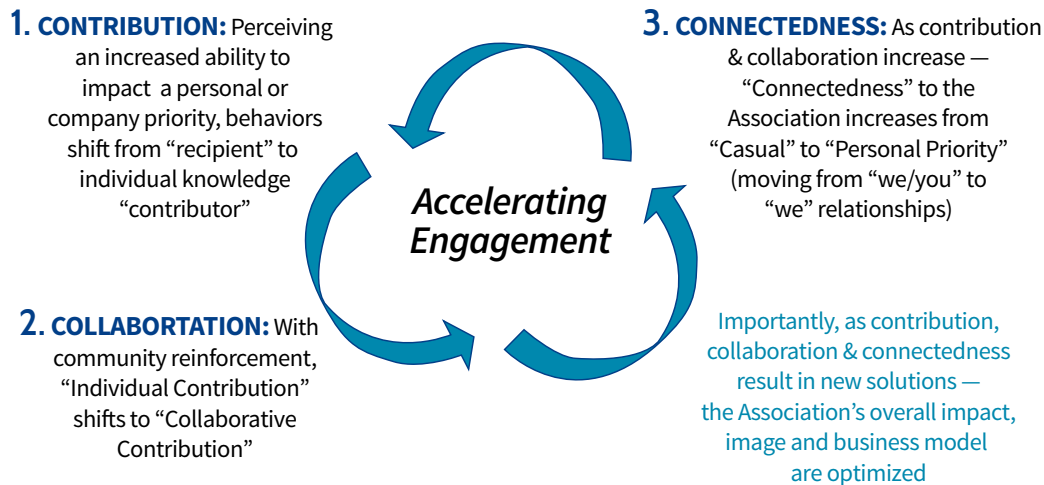
This is the point at which association magic begins! It’s when contributions and collaboration evolve into a sense of belonging that we call “**CONNECTEDNESS**”. While you can’t measure “loyalty”, you can measure connectedness in terms of contribution behaviors, the resulting impact on the development of new solutions, and the overall revenue impact a member (or a member segment) has on your business model.

In a knowledge economy, members proactively seek information from many sources. However, people most value the things in which they personally participate. They feel more “connected” to those groups who value their personal contributions.

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The 3 C's of Strategic Member Engagement

CONTRIBUTION → **COLLABORATION** → **CONNECTEDNESS**



TARGETING CONTRIBUTORS AND COLLABORATORS

But, you say: “how will anything get done if we engage too many members in everything we try to do?” Yes, this is a very real concern, especially in the traditional model of engaging members to push out association offerings. We’ve all experienced the well-meaning, but over-engaged conference planning committee. Optimizing the 3 C’s requires a balanced approach of engaging member segments to contribute knowledge and collaborate in the design of new solutions, and then leaving it up to staff and alliance partners to execute.

WHAT ARE YOU TRACKING?

Associations today are more likely to be operating on a 3-S’s mental model: Seek, Sell and (hope to) Satisfy. In our survey, we asked executives which member behaviors they were tracking, and found that they were far more likely to be tracking “Transactional or Recipient” behaviors than “Knowledge Contribution and Collaboration” behaviors.

- 77% to 99% track the following “Transactional or Recipient” behaviors:
 - Event registration
 - Purchases of offerings
 - Subscriptions
 - Open & click-through rates on e-communications
 - Paying exhibitors

Associations today are more likely to be operating on a 3-S’s mental model: Seek, Sell and (hope to) Satisfy.

- ▷ Webinar attendees
 - ▷ Sponsors
 - ▷ Advertisers
- Whereas 50% to 70% do not track the following “Knowledge Contribution and Collaboration” behaviors (or said they don’t know):
 - ▷ Participate in the development of industry/professional practice guidelines and/or standards
 - ▷ Being available to other members as a knowledge expert
 - ▷ Writing contributions (to journals, newsletters, etc.)
 - ▷ Serving as a trainer
 - ▷ Online community participation (including LinkedIn, Facebook, Twitter, private community)
 - ▷ Serving as a mentor
 - ▷ Refer a prospective member or customer
 - ▷ Provide a testimonial about the association
 - ▷ Contribute to your knowledge repository (white papers, etc.)
 - ▷ Peer roundtable participation (typically functionally focused)
 - ▷ Develop/maintain district relationships with legislators
 - ▷ Contribute time/knowledge/ideas to research effort
 - ▷ Research forum participation
 - ▷ Contribute to positive social media buzz about the association
- And yet, our open-ended question seeking specific examples by those who had said “yes” they have been able to identify behaviors that foreshadow increases in a member’s level of knowledge contribution and participation in subsequent years, surfaced some interesting comments. Below are examples from both professional societies and trade associations:
 - ▷ “The more they participate, the more they want to contribute and share the experience” (Trade Association Executive)
 - ▷ “Engagement in strategic (and specific segment work) seems to lead to broader leadership than does tactical work” (Professional Society Executive)
 - ▷ “Because we track every level of interaction that members have with us, we see that many want to participate in short, finite and focused activities” (Trade Association Executive)
 - ▷ “We have launched a mentoring program; over 45% of our members are engaged” (Trade Association Executive)
 - ▷ “A connected approach to knowledge management and engagement opportunities” (Professional Society Executive)
 - ▷ “Companies that have staff who volunteer with the association appear more likely to renew their memberships year over year” (Trade Association Executive)
 - ▷ “We have developed an internal member engagement tracking system to identify and forecast future behavior” (Trade Association Executive)

SUMMARY THOUGHTS

TRADITIONAL THINKING	STRATEGIC MEMBER ENGAGEMENT
Bundle services for one-stop shopping	Differentiate from services and the “experience” provided by others
Requests for volunteers	Create numerous opportunities for members (especially key segments) to contribute and feel valued
Stimulate member sales with the 3 S’s (seek, sell & satisfy)	Stimulate member connectedness with the 3 C’s (contribute, collaborate, connect)
Scattershot approaches, hoping someone wants to play	Segment targeting of those most wanting to contribute knowledge and collaborate with peers
Recognize Board members and those in the inner circle	Also recognize other knowledge contributors
Track transactions and recipient behaviors	Also track knowledge contribution and collaboration behaviors
If members leave it’s not really our fault; it’s the economy, etc.	Members leave when they perceive insufficient value, insufficient connection to their business/personal objectives, insufficient opportunity to have an impact, or they really don’t want a bundled package of offerings and only joined for a discount.

CHAPTER FIVE

Creating Solutions Together

This chapter focuses on overcoming the dilemma of the “all-you-can-eat” buffet that gets driven by today’s mantra of “what we do **for** you”. People value and contribute their expertise to solutions they care about.

**PRINCIPLE #5:
MOVING TO “WE”; THE REAL GAME-CHANGER**

*Traditionally, associations focus on what they do **for** members. The real power of the association form of organization is facilitating the creation of new solutions to address evolving member objectives. To accelerate this, volunteer leaders and staff must create a culture of “we”. Succeeding together changes the conversation from R.O.I. (“what have you done for me lately”) to R.O.M.E. (together we achieve return on member engagement).*

THE “WE/YOU” FALLACY

Determining your alignment with member needs includes assessing the relationships between staff, volunteer leaders and other members. We find that most association executives view this interface through a lens of “we/you”. The evolving association model is all about “we”. So, what do we mean by that?

We’ll talk more extensively about organizational culture in the last chapter, but there is a fundamental flaw in the approach of many associations. Everything, whether spoken, written or inferred, says: “**here is → what we do for you**”. And, in their attempt to demonstrate that staff and volunteer leaders do care what members think, associations tend to become far more reactive than proactive. Worse yet, some shy away from asking members what they really want for fear they might actually get that feedback. Not everyone wants to have their views challenged, especially if they have spent years executing on those views/assumptions.

Associations speak of “member benefits” almost exclusively as what members receive for their money. Frankly, seeing value in what any organization does for you can be relatively fleeting. How often do we hear something that sounds like: “what have you done for me lately?” or “... that I can’t do for myself”?

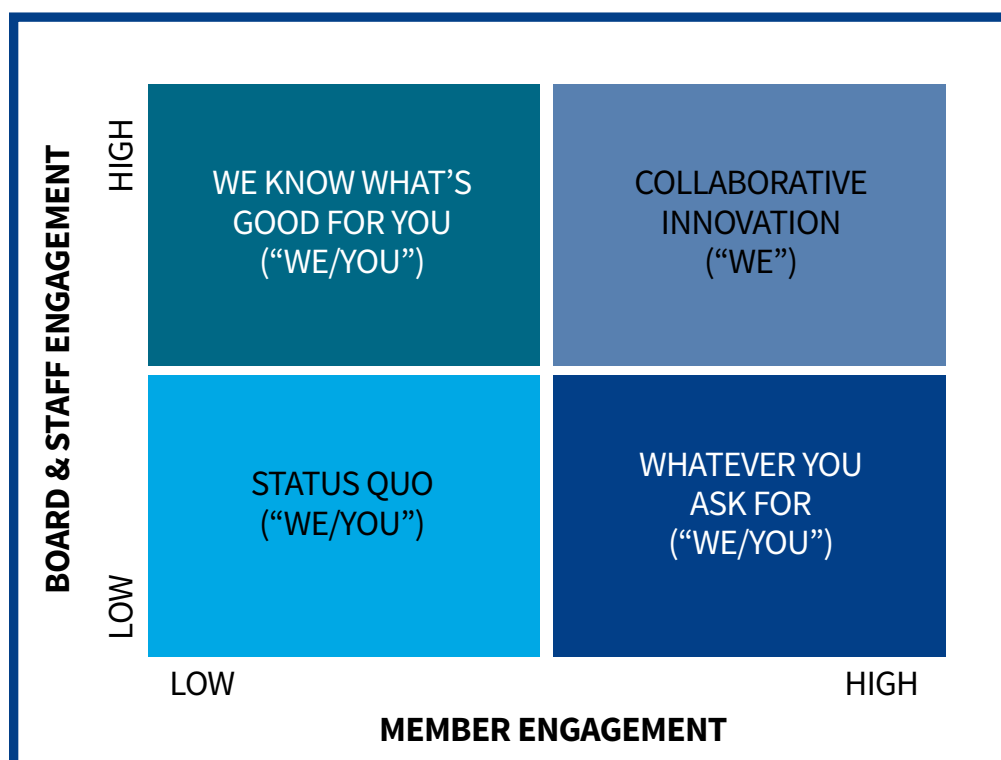
Yet most associations continue to push out “stuff” and hope that enough members find sufficient value to keep paying dues and attending meetings. Is it any wonder that so many members answer satisfaction questionnaires with responses like: “not aware” or “don’t participate”?

CHANGE THE DIALOGUE FROM R.O.I. (Return On Investment) TO R.OM.E. (Return on Member Engagement)

People value, and make contributions to, the activities that help them achieve something they (or their company) value. Continually doing more things for them is unsustainable. It creates the proverbial “all you can eat buffet” which makes neither members nor staff happy. Change the dialogue from “here’s what you get for your money” to “here’s the power of engaging with others in your industry/profession to create new, innovative solutions”. The following chart depicts what happens when various levels of Board/Staff engagement are met with various levels of member engagement.

Notice that 3 of the 4 boxes in this graphic help perpetuate the “we/you” philosophy. Only when board/staff engagement *and* member engagement are high do innovative solutions surface through a “we” collaboration.

**Change the dialogue
from “here’s what you
get for your money” to
“here’s the power of
engaging with others in
your industry/profession
to create new, innovative
solutions”.**



STRATEGIC MEMBER ENGAGEMENT FRAMEWORK®

Moving to “we” doesn’t happen overnight. It requires nurturing; “surprise and delight” if you will. Actually it is a 3-stage transition that goes from:

- “**We** (staff & volunteer leaders)/**They** (outsiders)” to
- “**We/You**” (as the member becomes a recipient of association offerings), and then strategically on to
- “**We**” (highly engaged solution community)

Only in the last phase do you move away from the connotation of “we do things for you”. As members start to contribute and collaborate the relationship shifts toward “we create new solutions together”. However, if members are never effectively engaged, they remain in “we/you” relationships with the association.

NOT FOR EVERY CONSTITUENT

Before we dive deeper, don’t expect that every member will want to be engaged at a knowledge contribution/collaboration level. This goes back to the definition of strategic member engagement: **“Creating unparalleled and sustainable value by bringing people together in ways that they find meaningful and practical, because they perceive an ability to impact something they desire, individually and collectively”**. Likely, there will always be segments of your members and other stakeholders that only want to lurk on your website, or be recipients of specific services/products. The key is to identify, stimulate and reward those who do want to be appreciated for their contributions.

The graphic below presents the Strategic Member Engagement Framework® and depicts the various blends of member/stakeholder behaviors and the relationship of those behaviors to the level of impact they have on the individual, the industry or profession. The combined impact of member behaviors determines the association’s Return on Member Engagement (R.O.M.E.). Within the framework you find disconnected observers in the lower left, a highly engaged solution community in the upper right, and varying degrees of recipient and knowledge contribution behaviors in-between.

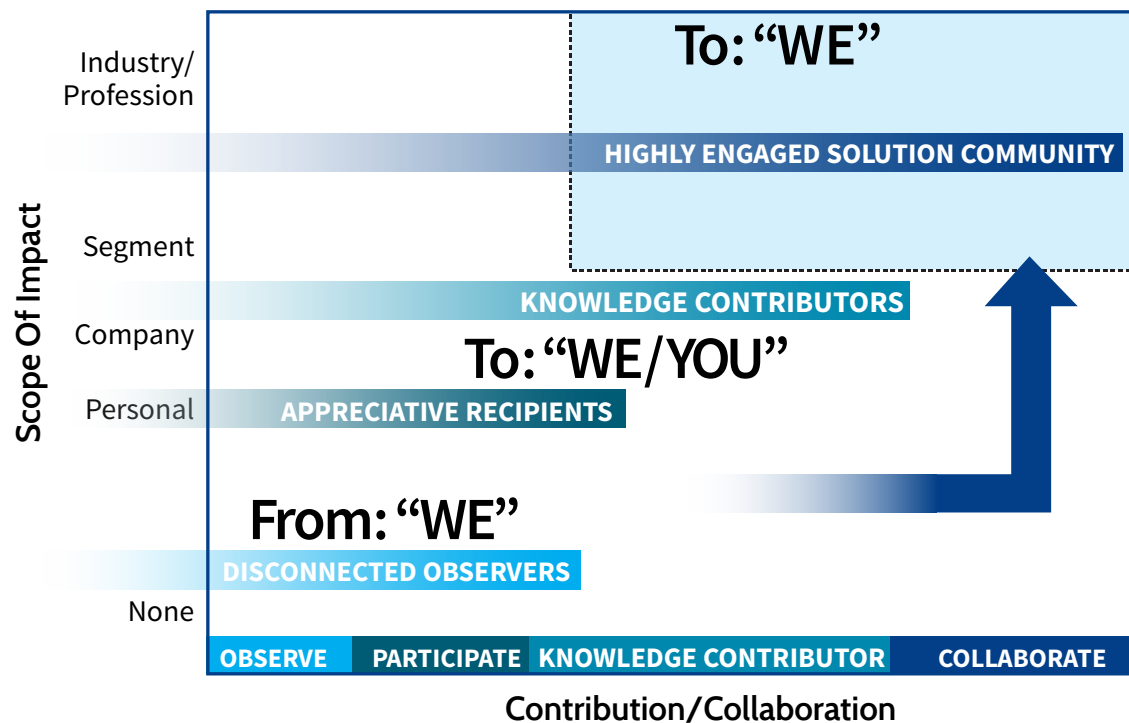
We arrived at this framework through our research, which included discussions with numerous association executives. Some of them were experimenting with variations of a different model; one that plotted monetary contributions against volunteer hours. There are two major flaws in that model: it perpetuates the “we/you” relationship where members are valued for supporting the association’s outputs; and without the connectedness factor, there is no “stickiness”. In fact, members may be spreading out their time and monies to many organizations, with no particular preference (much less knowledge contribution) to yours.

The Strategic Engagement Framework® is built upon the relationship between increasing levels of membership impact and increasing levels of contribution and connectedness. In chapter eight we discuss:

- Using this framework and analysis methodology to identify member engagement behaviors that are predictive of future increases in the level of engagement for targeted member segments
- Tools to measure and track member engagement

Strategic Member Engagement Framework®

How contribution & collaboration drive impact



INNOVATION VIA COLLABORATION; TOGETHER WE SUCCEED

By treating each member and employee as having some piece of the knowledge puzzle, they become engaged in ways that make for a powerful sharing of knowledge and the creation of new solutions. Evolving technology capabilities are rapidly (and cost-effectively) enabling effective knowledge sharing among members. Moving to "we" is about inclusiveness and being open to the possibilities that might surface. This requires an integrated blend of "push" and "pull" offerings, with the explicit expectation that *together* we make great things happen.

Increasingly, associations are recognizing (especially when facing stiff competition) that member engagement strategies can be their true differentiator and game-changer in the marketplace.

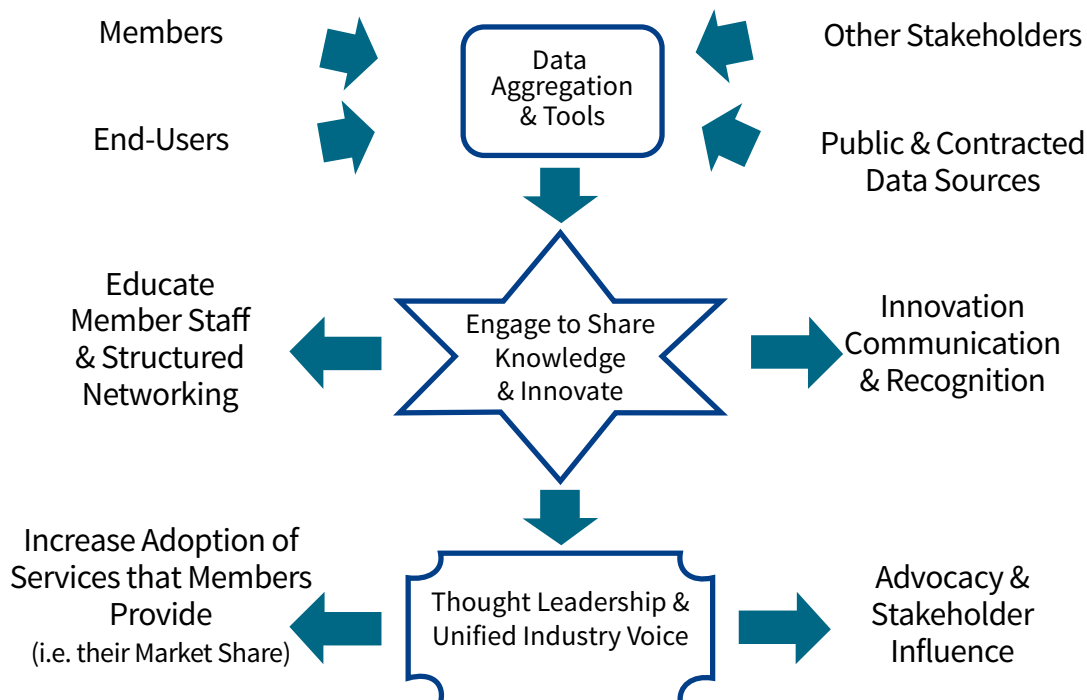
The graphic below captures the essence of how one client is creating a fully-integrated model and “we” community. The model flows from:

- Capturing, aggregating & integrating critical data from its constituencies; to
- Providing tools to enable the community to share knowledge and innovate; to
- Providing a blend of “push” and “pull” offerings; to
- Positioning the organization as the industry thought leader and the unified industry voice to increase adoption of its members’ products and services and influence external stakeholders

Moving to “we” is about inclusiveness and being open to the possibilities that might surface. This requires an integrated blend of “push” and “pull” offerings, with the explicit expectation that *together we* make great things happen.

How One Client Provides Value

(Moving to “We” with a blend of “push” and “pull” strategies)



SUMMARY THOUGHTS

TRADITIONAL THINKING	STRATEGIC MEMBER ENGAGEMENT
Communicate what the association does for members	Move to “we” and communicate what staff and members do together to achieve the members’ desired outcomes
Striving to be relevant, the association has created an all-you-can-eat buffet of primarily “push” offerings hoping there is something there that each member wants to receive	To be relevant, help members collaborate to achieve something they care about. Use the Strategic Engagement Framework to stimulate and reinforce a balanced blend of member behaviors that collectively result in an optimal association impact
The association primarily exists to educate and influence others, and to hold networking events; hoping that they can individually figure out how to use the information once back home	People value, and make contributions to activities that help them achieve something they care about. Treat each member as having a piece of the puzzle and the association’s job is to facilitate 24/7 knowledge-sharing that leads to innovative solutions

CHAPTER SIX

Divide and Engage; The Power of Segmentation

One-size-fits all approaches rarely work in the long-term. This applies to your member offerings and how you engage various constituency segments. This chapter looks more specifically at how to apply the preceding principles by first identifying and profiling various member segments.

PRINCIPLE #6:**ONE SIZE FITS NONE; ALL MEMBERS ARE NOT EQUAL**

One-size-fits-all offerings generally satisfy no one, but the solution is not to create an all-you-can-eat buffet and hope that there is a little something there for every member. Strategic Member Engagement is about segmenting your constituencies in ways that you really understand: their unique needs, how these change over time (e.g. by career stage), how you might engage them to drive value, and the impact of each segment on your business model. Using the Strategic Member Engagement Framework® allows you to identify and predict the engagement potential of each member segment.

ONE SIZE FITS NONE

Strategic member engagement means data-driven decisions. By segmenting your audience you can begin to understand each segment's priorities. What are the outcomes they seek? How do they participate with your association today? What can you learn about them via the social media they embrace?

Audience segmentation will vary from association to association. Common examples include: company size, location, the engaged individual's role, scope of responsibility and career stage, their types of engagement, the challenges faced, special interests, and by which see another organization as their primary source for various solutions.

WHO MOST WANTS TO CONTRIBUTE KNOWLEDGE AND COLLABORATE?

In our survey, only 46% of executives from professional societies and 53% from trade associations reported that they have been able to identify a segment of their core membership that MOST wants to contribute their knowledge and collaborate. The implications for those who report that they can identify such a segment includes:

- 71% also said their board understands and strategizes about core member needs to a “very high” degree, and
- More often reported an upward trend in 3-year annual revenue than those reporting they have not identified such segments

DIVERSE AND RAPIDLY EVOLVING EXPECTATIONS

The constituencies of most associations have so many options and solution partners available, that many no longer want a standard, bundled package of benefits that is covered by dues. For example, we know of annual meetings where non-members (who qualify to be members) outnumber members by 2:1 or greater.

Some constituencies just want to lurk on your website, and there will be some who only want to be “appreciative recipients” of one or two offerings. However, as mentioned earlier, even though there is an upward trend in fee-for-service offerings, many of the survey respondents don’t know if members leave due to preferring a la carte offerings over bundled packages.

SEGMENTED COMMUNICATION AND ENGAGEMENT TACTICS

Segmentation drives your communication and engagement strategies and mechanisms. You must avoid continually sending everything to all constituencies, and wondering why there are so few “click-throughs” (including by your volunteer leaders). Understanding your constituency segments also helps staff better determine:

- When to use “push” tactics (e.g. education, product sales)
- When to use “pull” tactics that encourage knowledge contribution and collaboration behaviors, and
- When to use influencing strategies (e.g. with Legislators, Regulators, the media).

Think in terms of primary and secondary approaches, not one-size-fits-all.

Segmenting Audiences

		Primary Approach	Secondary Approach	
Core Members	}	MEMBER ENGAGEMENT LEVELS:		
Other Members		1. Disconnected Observer	Sales	Engage
Prospective Members		2. Appreciative Recipient	Sales	Engage
Prospective Buyers		3. Knowledge Contributor	Engage	Sales
Other Stakeholders		4. Solutions Collaborator	Engage	Sales
		OTHER STAKEHOLDERS		
		(e.g. Legislators, Regulators, Other Associations, NGOs)		

Understand, Target & Differentiate between:

- Engagement Strategies
- Sales Strategies
- Influencing Strategies

DEVELOP MEMBER SEGMENT PROFILES

Having compiled relevant data about your constituencies (environmental, operational challenges, etc.), you are ready to begin developing profiles of each major segment of your various audiences. For professional societies these will likely include the demographic and behavioral characteristics that set them apart from other segments. For associations that offer company memberships, segmentation may need to occur at both the company and key participant levels.

In creating profiles for these segments (and perhaps sub-segments), utilize the 20/80 rule so you don't get into analysis paralysis. Don't expect to move every segment to a higher level of engagement. Look for the segments that you most desire to have contributing to the collective body of knowledge and the development of new solutions. Also identify those segments that most drive your evolving business model. You will likely find strong overlap. For example, in one trade association the segments that were most ready to move were the Clinical Executives and the Chief Operating Officers of mid to large-sized member companies. In another trade association it was the Chief Technology Officers. In a professional society it was the members who shared a particular career stage and sub-specialty.

Don't expect to move every segment to a higher level of engagement. Look for the segments that you most desire to have contributing to the collective body of knowledge and the development of new solutions. Also identify those segments that most drive your evolving business model. You will likely find strong overlap.

APPLY THE PROFILES TO PROSPECTS

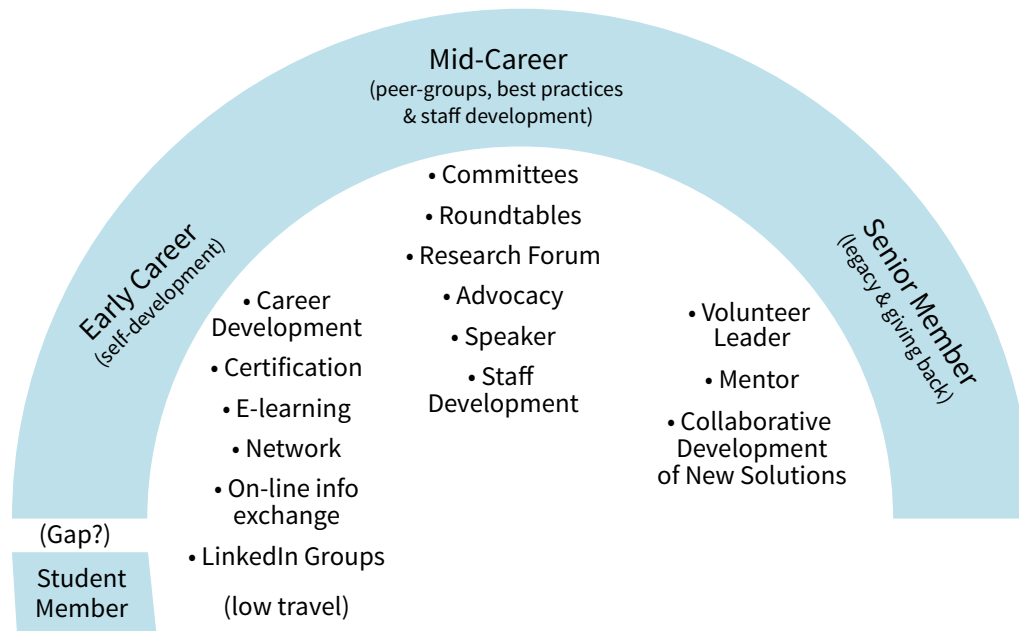
Start with your membership and then scan your marketplace to see how many more people or companies are out there that haven't participated with your association in any way, but might fit the segment profiles. This helps you target them with the appropriate engagement or sales approaches.

CAREER STAGE IMPLICATIONS

One example of developing profiles is to examine each membership segment by career stage. For example (in the traditional model), early-career professionals value push offerings because they want to impact their speed of learning and to obtain needed credentials. Most often they want answers to short-term issues and tactical "tools" that they can apply immediately. A seasoned professional or manager may want to brainstorm best practices with a small group of peers or identify emerging technologies. At later career stages they may be more interested in being part of an effective advocacy effort that changes the playing field.

Strategic Member Engagement – Career Stage Focus

(Traditional Example for Discussion)



How is this evolving at your association?

While most associations have educational offerings, too often they are not targeted to the needs of members at varying stages of their career. The graphic above is intended to get you thinking about what might apply for your specific membership. At each stage there may be gaps in the developmental opportunities that members can obtain within their own company. That means there may be huge opportunities for an association to provide value by exposing members to the best practices of other professional/organizations and participating collaboratively in the development of new solutions.

While most associations have educational offerings, too often they are not targeted to the needs of members at varying stages of their career.

STAYING CONNECTED

Paying attention to how member needs change over their career is critical to keeping them connected with your organization. As one CEO noted: “**(too often members assume) there is a timeline for a member’s role with the association and you have to adhere to it; i.e. stick around for 20 years and then you can run for the Board. I think a lot of younger members don’t buy into that concept and go elsewhere**”.

In our survey, 67% of professional society and 51% of trade association respondents reported that they **are** able to identify differences in how their members want to be engaged based upon their career stage. Our assumption though is that many are really only talking about identifying different “transaction/recipient” behaviors by career stage. We say this because **only** 29% professional society respondents and 37% of trade association respondents said they “have been able to identify any specific engagement behaviors that foreshadow increases in a member’s level of knowledge contribution and participation in subsequent years.”

PERFORMANCE DEVELOPMENT STAGES

In addition to career stages, here’s a time-proven performance development model that has 4 simple steps:

LEARN → PERFORM → PERPETUATE → SHAPE →

For each role that you are considering impacting, explore what those constituents might need that they can’t get back home or on their own. Your more experienced members don’t need the “101” level development opportunities that are typically needed in the “learn” and “perform” stages. The “101” level is generally expected upon employment or is something their company provides shortly afterward. Your members may find value in helping them develop some of the “perpetuate” competencies (documentation, training others, basic management, etc.). Typically, they most value opportunities at the “shaping” stage (examining best industry/professional practices, brainstorming with peers, participating in research, developing new standards, etc.)

SUMMARY THOUGHTS

TRADITIONAL THINKING	STRATEGIC MEMBER ENGAGEMENT
The association wants “loyal” members	Members have lots of solution options and the association drives “connectedness” through a differentiating member “experience” targeted at the rapidly changing needs of member segments
Create one-size-fits-all offerings and hope that every member will eventually engage in some or all of the offerings	Identify the diverse and rapidly changing needs of the member segments; especially those who most want to engage and who drive your business model. Create member segment profiles.
Create one-size-fits-all communications, and wonder why there are so few “click-throughs”	Create segmented communications matched to what each member segment most cares about
Create one approach to all member, recipient and supplier prospects	Apply the lessons-learned in developing member segment profiles to create targeted approaches to prospects
Since the association’s offerings are not sufficiently appreciated, it must be due to branding, messaging, marketing and sales capabilities	For members to feel connected, focus on helping them develop new solutions to the things they care about
To meet varying educational and developmental needs, the association offers multiple tracks at the conference and topical webinars	To meet varying educational and developmental needs, the association segments members by career stage and provides very different experiences at each stage
The association hopes sufficient numbers of members and attendees will continue to participate in association offerings, or that they can be replaced with new members/attendees	Identify specific behaviors that foretell of future increases in knowledge contribution and collaboration; and track the relative impact of these members on our business model.

The national associations who in our Strategic Member Engagement Survey most often reported an upward 3-year trend in:

- Member Retention
- Annual Operating Revenue
- Registrations to the Primary Annual Meeting
- Annual Revenue from Fee-for-Service Offerings
- Timely Membership Renewals

Were the ones who more frequently reported these capabilities:

- Ability to gather and segment member data; especially if able to integrate data from multiple sources/platforms
- Have identified member segments who most want to contribute knowledge and collaborate with other members
- Have identified specific behaviors that foreshadow future increases in knowledge contribution and collaboration

SECTION THREE:

SETTING THE COURSE

In this section we explore the business case for member engagement strategies and explain how to utilize the Strategic Member Engagement Framework®. We discuss your organizational readiness to execute member engagement strategies, which include the ability to “unlock” your existing data and identifying predictive member behaviors. Finally, we explore the importance of structural, cultural and resource alignment to execute, optimize and sustain your strategic member engagement approaches.

CHAPTER SEVEN

The Business Case for Strategic Member Engagement

Previous chapters discussed several of the core principles of strategic member engagement, including how they drive member value. Before we jump into how best to execute member engagement strategies, let's summarize some of the potential implications for your business model.

PRINCIPLE #7: CONNECTEDNESS DRIVES YOUR BUSINESS MODEL

Member engagement is not a strategy in itself. It's the accelerant to your positioning strategy and long term results. It's about creating a differentiating experience that increases connectedness within the community (members and staff) based upon the desire to impact shared objectives. It's not about being the low-cost provider of "push" offerings. Association leaders and laggards in 5 critical components of an association's business model reveal the association's return on member engagement (R.O.M.E.).

RETURN ON MEMBER ENGAGEMENT ("R.O.M.E.")

The assessment of association business models is a great subject for another book. So rather than dive deeply into that here, we want to stimulate your thinking and creativity about a few of the components that we found had high correlations to the impact of member engagement strategies.

Many association business models rely upon selling "access" to knowledge as a member-only benefit, or at a member discount. While that made sense when associations were the primary source of industry and professional information, many associations still cling to a model that is in rapid decline. Today, members require far more than just access to knowledge experts and the credentialing you provide. Going to the other extreme, there are a number of associations who in their effort to look bigger, give membership away if the prospect pays the non-member rate to the annual conference. This totally devalues membership. Associations who assess and segment their constituencies using the strategic member engagement principles are sure to find their business model evolving.

Remember the 3-C's and the Boy Scouts/Girl Scouts example:

When members feel connected, an amazing phenomenon occurs. They stop viewing the organization as just a conceptually worthwhile donation to a cause, meeting to attend or journal to read. They become the association's evangelists, pay dues on time, demonstrate leadership, enlist others to join, contribute to research funds and PAC's, participate in "on the Hill" days, and special forums. They bring colleagues to the annual meeting. They meet with your service provider constituencies. They become speakers at your events and writers in your publications. You now have a basis for measuring Return on Member Engagement (R.O.M.E.).

But, as we've said throughout, strategic member engagement is a long-term strategy accelerator. Remember that R.O.M.E. is not built in a day.

BUSINESS MODEL IMPACT

Our research finds significant correlations between upward trending 3-year operating results in the following 5 dashboard areas shown in the left column of the chart below to those associations (both professional societies and trade associations) reporting the strongest capabilities in the 6 organizational activities shown in the right column:

Associations Reporting Upward 3-Year Operating Trends:

Member Retention

Annual Operating Revenue

Registrations to Primary Annual Meeting

Annual Revenue from Fee-for-Service Offerings

More Frequently Report These Capabilities:

Very highly engaged boards who are strategic in focus

Very high Board understanding and strategizing about the needs of the average member

Conduct a member impact survey of "up-at-night" issues annually

Ability to gather and segment member data; especially if able to integrate data from multiple sources/platforms

Timely Membership Renewals

Have identified member segments who most want to contribute knowledge and collaborate with other members

Have identified specific behaviors that foreshadow future increases in knowledge contribution and collaboration

Here are a few specifics from the Strategic Member Engagement Survey that demonstrate the long-term impact of strategic member engagement when embraced by an association Board:

When:	% Also Reporting Upward Three-year Trend in:	
Strategic, Highly Engaged Board Tactically Focused Board	Retention	28%
		18%
Strategic, Highly Engaged Board Tactically Focused Board Annual	Operating Revenue	50%
		27%
Strategic, Highly Engaged Board Tactically Focused Board	Paid Registrations at Primary Annual Meeting	39%
		19%
Strategic, Highly Engaged Board Tactically Focused Board	Annual Revenue from Fee-for-Service Offerings	29%
		19%
Strategic, Highly Engaged Board Tactically Focused Board	Timely Membership Renewals	22%
		14%

And, by the Degree of Board Understanding & Strategizing About the Needs of the Average Member:

When:	% Also Reporting Upward Three-year Trend in:	
Very High Degree Moderate Degree/Out of Touch	Retention	29%
		21%
Very High Degree Moderate Degree/Out of Touch	Operating Revenue	54%
		39%
Very High Degree Moderate Degree/Out of Touch	Paid Registrations at Primary Annual Meeting	37%
		27%
Very High Degree Moderate Degree/Out of Touch	Annual Revenue from Fee-for-Service Offerings(*)	20%
		25%
Very High Degree Moderate Degree/Out of Touch	Timely Membership Renewals	22%
		16%

(*) Note the exception. Because, fee for service offerings are typically driven by staff and not necessarily benefiting from a high degree of Board understanding and strategizing about the needs of the average member. Fee-for-Service offerings today are more likely to be about short term sales strategies, not long term positioning.

MARKETPLACE POSITIONING

Over the past 20 years or more, there have been numerous books about marketplace positioning and various industry leaders who understood whether to position their organization as the operational excellence/low cost provider, versus the product innovator, versus the customer intimacy/solutions collaborator. History has shown that it's hard enough maintaining market leadership in one approach and almost impossible to effectively blend them. Associations are all about the later approach. No other form of organization is as well positioned as an association to be the leader in customer intimacy/solutions collaboration.

But, as discussed earlier, this does not mean creating an all you can eat buffet of offerings. Think restaurants for a moment. Very few that offer an on-going, full-service buffet are known for quality or the customer “experience” or have many customers that visit their buffet on a regular basis. And, while eating at such a restaurant, most customers are not going to sample everything on the buffet. They pick and choose, which means that lots of food and staff effort goes to waste at the end of each day.

No other form of organization is as well positioned as an association to be the leader in customer intimacy/solutions collaboration.

SNIFF TEST AND FEASIBILITY ASSESSMENT

Instead, review all of your current offerings and potential strategic initiatives with the perspective of relative member impact on the things members most care about. Does each offering and initiative fit within your vision of desired impact? We call this the “sniff” test. Then explore the relative difficulty to accomplish each offering or new initiative. This feasibility assessment is a critical early step in product development and important to revisit in program management. Then scrutinize the members’ unmet needs for the potential to engage key segments in the development of new solutions; especially in a manner that differentiates your association from your competitors.

The key business model implication is that (unlike positioning to be the low-cost provider) market leaders in customer (member) intimacy/solutions development are seen as having a much higher value; value worth paying a premium for. But again, to value the “experience” and personally witness the power of this model requires members to be personally engaged.

An interesting observation is that in the traditional model of “we do things for you, and hope you’ll volunteer to do things for us”, the tendency is to try to sell more push offerings at the lowest possible price and/or bundle them as a package. In today’s traditional model, associations typically give away for free the high-value opportunities to contribute knowledge and collaborate. In the new model of R.O.M.E. (Return on Member Engagement), members will experience far more value because of their engagement. And (over time) will gladly pay for the outcomes achieved through this high-impact experience. For those associations with company members, payments to the association will be allocated from operating divisions seeking outcomes, not from an overhead line item called “subscriptions and memberships”; an obvious item to cut in down economic cycles.

In the new model of R.O.M.E. (Return on Member Engagement), members will experience far more value because of their engagement. And (over time) will gladly pay for the outcomes achieved through this high-impact experience.

FEE-FOR-SERVICE OR BUNDLED PACKAGE?

Our research shows an upward trend in fee-for-service offerings. This is not surprising coming out of the great recession with associations focused on driving new non-dues revenue in the “we do things for you” mindset. However the research also surfaced that a great many associations don’t know if their members leave due to preferring a la carte offerings to bundled packages. Don’t be surprised if rethinking the 4 levels of engagement and your segmentation analysis begins to re-shape how you think about “membership”, bundled benefit packages, member-only benefits, etc.

BUSINESS MODEL DRIVER SUCCESS STORY

Here’s a client example how strategic member engagement became both a marketplace differentiator and a significant business model driver. The new CEO of a mid-sized trade association learned that in preceding years the top executives of the industry had turned their attention to two other non-profit entities. Those industry CEO’s had grown weary of the association’s previous efforts to push out educational programs for which they found little value. Armed with member insights about external and operational challenges, the new CEO rapidly implemented 10 functionally-focused executive roundtables (COO’s, CFO’s, etc.). These met in-person twice a year. Rather than the traditional speaker-driven agenda that members had experienced elsewhere, the roundtable format was by-invite-only, limited to 20 true peers. The roundtables developed their agendas and peer dialogue comprised the entire format.

Since implementation, the roundtable participants have significantly ratcheted up both their personal and company scope of engagement. They consistently come to the annual meeting in the spring, and the executive forum in the fall. They've become speakers, writers, task force members and find many ways to contribute personally. In getting "connected" to the association, this group of approximately 200 executives has helped secure sponsorships, brought their direct reports to programs, and actively participated in advocacy efforts. They have become advocates of the association and convinced peers in non-member companies to join. And, with their high level of engagement, their CEO's saw value and again became personally involved in the association. That client has almost tripled their annual revenue over the past 10 years and is highly regarded for the impact they are having.

MEASURE MEMBER OUTCOMES, NOT JUST ASSOCIATION OUTPUTS

While most association executives say that the role of their organization is to optimize the success of their members, relatively few are attempting to measure that success. Yes, it's extremely difficult to make the direct connection of the association's overall impact to specific outcomes for individual members or even segments of the membership. However, assessing and communicating industry and professional trends continues to demonstrate that the association is appropriately focused and committed to the "we" relationship.

LIFETIME MEMBER VALUE

Association executives have long discussed Lifetime Member Value, but usually in terms of monies spent over the duration of a membership. While useful, rarely did it make obvious what could be done to increase LMV other than to ramp up marketing and sales efforts. Augmenting those calculations by tracking the knowledge contribution and collaboration behaviors that foreshadow future increases in engagement (segment by segment) and that drive your business model provides data critical to your action planning and engagement strategies.

SUMMARY THOUGHTS

TRADITIONAL THINKING	STRATEGIC MEMBER ENGAGEMENT
Just find more members and short-term sales	Also think long-term. Identify those who don't want a bundled package. Apply different approaches to those who want to buy an offering, than those who want to contribute knowledge and collaborate. Creating a more viable long-term business model
Measure & report association outputs	Also measure & report member outcomes
Communicate the members' ROI	Communicate the members' R.O.M.E.
Be all things to all members; reactively adding to the buffet of offerings and positioning as the low cost provider	Be the member intimacy/solutions stimulator. Members will pay for better solutions that they help to create.
Measure Lifetime Member Value in terms of monies spent	Also track member knowledge contributions and collaboration behaviors that forecast future levels of engagement so as to better predict LMV segment by segment

The national associations who in our Strategic Member Engagement Survey most often reported an upward 3-year trend in:

- Member Retention
- Annual Operating Revenue
- Registrations to the Primary Annual Meeting
- Annual Revenue from Fee-for-Service Offerings
- Timely Membership Renewals

Were the ones who more frequently reported these capabilities:

- Very highly engaged boards who are strategic in focus
- Regularly conduct member impact surveys of “up-at-night” issues (not merely satisfaction surveys)
- Ability to gather and segment member data; especially if able to integrate data from multiple sources/platforms
- Very high Board understanding and strategizing about the needs of members
- Have identified member segments who most want to contribute knowledge and collaborate with other members
- Have identified specific behaviors that foreshadow future increases in knowledge contribution and collaboration

CHAPTER EIGHT

Utilizing the Strategic Member Engagement Framework[©]

This chapter focuses on how to obtain and utilize actionable data about constituencies and your marketplace. We explore how to utilize the Strategic Member Engagement Framework[®] described in the previous chapter to “map” the engagement levels of your various constituency segments. With this approach, you can begin to identify the behaviors that are predictors of future increases in levels of engagement.

PRINCIPLE #8:
DATA-DRIVEN SEGMENTATION STRATEGIES

Now more than ever you have the tools available to capture critical information about your constituencies and to use the data to create segmented approaches to member engagement. Utilizing the Strategic Member Engagement Framework[®] create new opportunities for the constituency segments who, by their predictive behaviors, have self-identified as the most ready to increase their level of professional or industry impact.

Anxious boards look to the executive team to surface important patterns and innovation opportunities. Without actionable data to guide decision-making, your best intentions will always be “hit or miss”. Or worse, they may hold you back from acting upon hidden opportunities.

“UNLOCK” YOUR EXISTING DATA

Associations have a wealth of hidden data, but lack sufficient tools to access, synthesize and utilize that data. Often the data resides in numerous, dispersed systems such as their AMS, CRM systems, with their outsourcing partners, or

Anxious boards look to the executive team to surface important patterns and innovation opportunities. Without actionable data to guide decision-making, your best intentions will always be “hit or miss”. Or worse, they may hold you back from acting upon hidden opportunities.

even in spreadsheets. Now you can more readily integrate all of your existing data sources without manually transferring data, or being limited to what is housed in your primary AMS. Tools are available to quickly convert your data into analytic visuals and operational dashboards to make better business decisions in real-time.

In mining your data, it's critically important to identify:

- Behaviors that lead to higher levels of engagement
- Career stage and other life cycle implications
- Movement between member segments
- Themes that overlap member segments
- Opportunities to facilitate higher levels of engagement within a specific member segment

Is there “appended data” from the marketplace that you can obtain and apply? For example, a large professional society that has many members who pay their own dues, now has evidence to demonstrate that a primary determinant of whether a prospective member actually joins/renews is annual household income. Armed with this data, this association knows exactly (and can map it down to the street level) who to target with marketing efforts.

UTILIZING THE STRATEGIC MEMBER ENGAGEMENT FRAMEWORK®

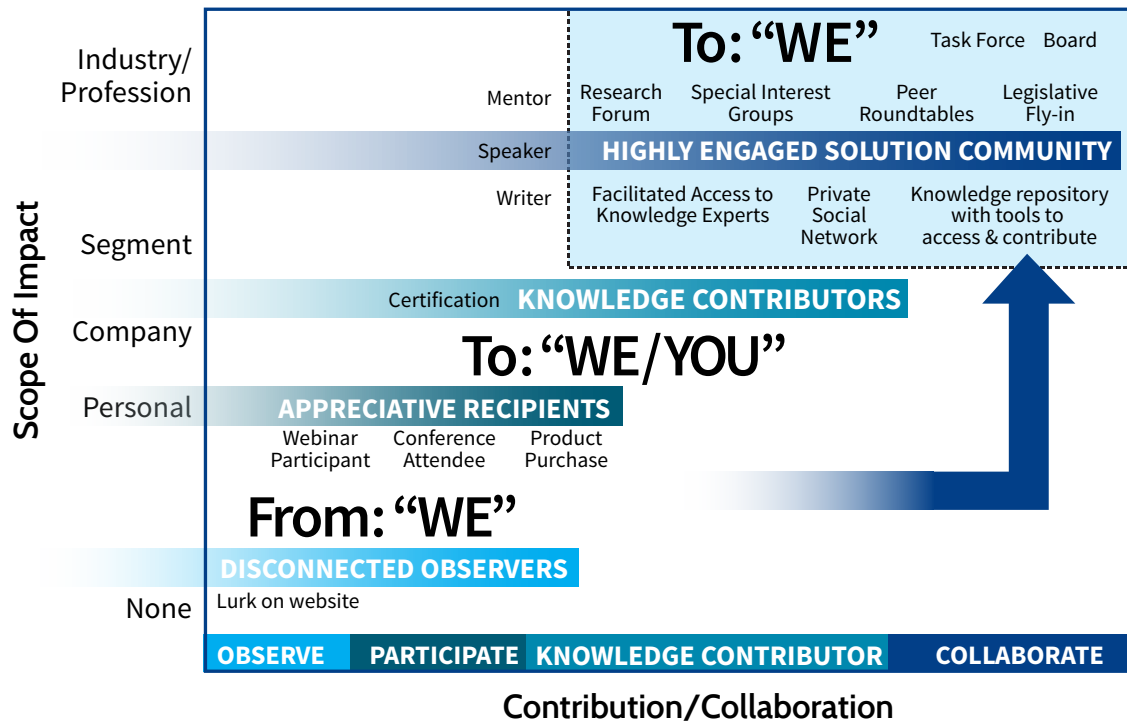
Drilling down into the framework presented in chapter five, the graphic below reflects standard association offerings. It depicts disconnected observers in the lower left and a highly engaged solution community in the upper right quadrant; with varying degrees of recipient and contributor behaviors in-between. Our goal is to get you thinking. But, we emphasize that every association has its uniqueness in history, momentum, strategies, culture, etc. How you use the framework to begin the mapping process has to fit your specific situation. Once again, start out by ignoring whether your constituencies are members or non-members as this gets in the way of thinking about behaviors and touch points.

Using a small number of profiles that you have selected to examine (see previous chapter), begin identifying engagement behavior thresholds. Discern what makes a segment unique in its behaviors. Start with the behaviors (touch points) that most contribute to the whole industry/profession; plotting them on this “impact” and “contribution/collaboration” matrix.

Strategic Member Engagement Framework[®]

How contribution & collaboration drive impact

(Examples for discussion — each association must determine relative values)



Then assess the monetary value of members in that segment; paying particular attention to recency and frequency. Likely patterns will emerge and you can determine segments or sub-segments that you want to target and track in an on-going manner.

CREATING ENGAGEMENT OPPORTUNITIES

Interviews with association executives confirmed our intuition that a very small percentage of members fall in the upper right portion of this framework. It often caps out at board and committee members and just a few highly respected knowledge experts. With the “we do things for you” mindset, most associations are focused on pushing out offerings that fall in the Participate/Personal Impact segment of this framework.

The key is to consistently create innovative mechanisms that encourage targeted member segments to continually contribute their expertise in a collaborative manner, and for the community to recognize their individual and combined contributions. Today, members have numerous collaboration alternatives. If nothing else they will form their own LinkedIn group without you.

At this point, many of you are thinking: We don't have the time and resources to do this! That may be because you are still holding tightly to the "we do stuff for members" control model of operating. As an example, we often find in healthcare associations a long history of "vetting" all input, and allowing only "the inner circle" to participate in the vetting process. Is vetting information by those who are recognized leaders in a specialized field important when creating guidelines, developing standards of quality and to be the trusted source of information? Absolutely! But, some of these associations are recognizing that if they want to engage and retain a high market share of the targeted audience, this can't be the only mechanism available for members to contribute to the body of knowledge and collaborate with other members to test concepts and develop better approaches.

For example, the age "40-something" doctor who has a lot to offer the association and wants higher levels of engagement, may feel excluded from the "inner circle". To counter this, a number of associations are actively exploring ways to build upon prior success (e.g. with Special Interest Groups, poster expositions, etc.) to provide a more robust "pull" experience 365 days a year. For some, this is an important differentiating strategy from their for-profit and not-for-profit competition.

The key is to consistently create innovative mechanisms that encourage targeted member segments to continually contribute their expertise in a collaborative manner, and for the community to recognize their individual and combined contributions. Today, members have numerous collaboration alternatives. If nothing else they will form their own LinkedIn group without you.

ANALYSIS METHODOLOGY

Within this framework, begin developing a tracking and analysis methodology. However, we highly encourage you to first work through the initial data gathering, impact visioning and the important "we/you" to "we" philosophy steps. Otherwise, you are likely to create an analysis methodology that is viewed by staff as "busy-work" reporting, and you may spin your wheels not knowing what to do with the data.

We are not proponents of "scoring" formulas (e.g. applying point-factor calculations) that attempt to create an overall (aggregate) score for each member. While interesting, we find that the aggregate of all behaviors/touch points may not result in clarity about where to apply resources. That said, an overall member score that just focuses upon monies spent may match up well to an all-you-can-eat buffet of offerings and short-term sales/"push" tactics.

IDENTIFY PREDICTIVE BEHAVIORS

Strategic member engagement tracking is about identifying a handful of activities that foretell future behaviors that drive both the association's overall impact and its business model. Within the constituency segments you analyze, identify behaviors that are predictive of increasing levels of engagement.

Upon identifying predictive behaviors, you can assess if there are related trends in other segments of your constituencies. Perhaps another segment has different, but similarly predictive behavioral trends. And, as more data becomes available, expect to see “life cycles” emerge for those behaviors (e.g. there are often gaps between student and average member behaviors). This gets back to why it's important to pay attention to ***recency and frequency***.

In our survey, only 29% of professional society respondents and 37% of those from trade associations said they have been able to identify any specific engagement behaviors that foreshadow increases in a member's level of knowledge contribution and participation in subsequent years (e.g. SIG participation leading to subsequent speaking, writing, etc.). Most often the associations who said they have been able to identify specific behaviors, listed: participation on committees, task forces, project teams or user groups.

So, why is being able to segment contributors and to foreshadow future increases in this behavior important to long-term business model trends? Those who said they “have been able to identify specific behaviors that foreshadow increases in a member's level of knowledge contribution and participation in subsequent years”, more frequently reported an upward 3-year trend in:

- Member retention
- Annual revenue
- Paid registrations at the primary annual meeting
- Fee for service revenue
- Timely membership renewals

Strategic member engagement tracking is about identifying a handful of activities that foretell future behaviors that drive both the association's overall impact and its business model. Within the constituency segments you analyze, identify behaviors that are predictive of increasing levels of engagement.

DATA INTEGRATION AND ANALYTICS

Over the past couple of years there has been a growing interest in analyzing and tracking member engagement. At recent ASAE Conferences, several of the major AMS providers talked about the tools/modules they have developed for this purpose. However, our research demonstrates that for most association executives there is a lack of clarity about what to measure and what to do with the results. A common definition of “member engagement” has been lacking across associations and the vendor community. **Strategic Member Engagement is: “Creating unparalleled and sustainable value by bringing people together in ways that they find meaningful and practical, because they perceive an ability to impact something they desire, individually and collectively”.**

Data integration and analytics are further complicated by the fact that for many associations, the data resides in multiple databases and spreadsheets, both in-house and with outsourcing partners (e.g. event registration or sales sourcing firms). Our strong recommendation is to “fix the problem, don’t feed the engine”. Stop thinking of these as reporting tools and think of them as business decision-making tools.

Through relevancy quadrants and other visual analytics you can readily develop “dashboards” to track patterns (by member segment) and leading indicators of potential movement to higher levels of engagement. You already have a mental model for this: in the “we-they” context, it’s called “up-selling”. Map out your various member segments and quantify the return of moving key segments to higher levels of engagement.

In our survey, **two-thirds** of all respondents said “no” or “unsure” when asked if they are able to integrate data from multiple sources/platforms to identify high-impact trends across all members’ engagement activities.

Does data integration capability impact your business model? Those who reported that they are able to integrate data from multiple sources, more frequently also reported an upward trend in:

- Annual revenue
- Primary meeting registrations
- Fee for Service revenue
- Timely membership renewals

SUMMARY THOUGHTS

TRADITIONAL THINKING	STRATEGIC MEMBER ENGAGEMENT
What gets measured gets done	Focus on tracking and measuring what really matters
Staff perceives the AMS as frustrating, and executives are unable to get timely, actionable reports	Use technology tools to unlock and aggregate data from multiple sources and create analytics and visuals that drive real-time decision-making (not waiting for a report)
Approach all members in the same manner	Without actionable data, your best intentions will always be “hit or miss”, or watered down to the least common denominator. Append available member and prospect data from the marketplace to augment your segmentation capability. Create member segment profiles and identify behavior thresholds and predictive behaviors for each
Contain high-impact knowledge contribution & collaboration opportunities to volunteer leaders and select knowledge experts	Create more engagement opportunities and compelling experiences for lots of members to share information and develop new solutions
Track member transactions and recipient behaviors (e.g. opened our e-newsletter)	Utilize the Strategic Member Engagement Framework® and adapt it to fit your association. Also track knowledge contribution and collaboration behaviors and how they link to connectedness and drive your business model
Keep running hard doing what you are doing	Identify a small number of member behaviors that drive the association’s impact and business model, and that are predictive of future engagement patterns

The national associations who in our Strategic Member Engagement Survey most often reported an upward 3-year trend in:

- Member Retention
- Annual Operating Revenue
- Registrations to the Primary Annual Meeting
- Annual Revenue from Fee-for-Service Offerings
- Timely Membership Renewals

Were the ones who more frequently reported these capabilities:

- Ability to gather and segment member data; especially if able to integrate data from multiple sources/platforms
- Very high Board understanding and strategizing about the needs of members
- Have identified member segments who most want to contribute knowledge and collaborate with other members
- Have identified specific behaviors that foreshadow future increases in knowledge contribution and collaboration

CHAPTER NINE

Taking the Leap

Having addressed strategic member engagement from the conceptual, business model and data-driven perspectives, in this chapter we examine some of the structural and cultural implications of executing your member engagement strategies.

**PRINCIPLE #9:
STRUCTURAL, CULTURAL AND RESOURCE ALIGNMENT**

Associations are the ideal organizational model to leverage a culture of “we”. But this requires a shift from today’s association structures and processes that are primarily built to push out offerings. Today, staff are reinforced for their efficiency, not for working innovatively with members to create better solutions. Strategic Member Engagement requires the alignment of structure, culture and resources. Many of the 9 principles of Strategic Member Engagement also apply to staff engagement.

The underlying premise is that, unlike other forms of organization, associations are ideally structured to blend “push” and “pull” offerings, and to engage members in a culture of “we”. However, as discussed in preceding chapters, the “we do things for our members” mantra has primarily promoted “push” offerings. In fact, associations have built structures, policies, and practices to support and control these efforts. Even when offerings appear to be “pull” opportunities (networking, knowledge repositories, special interest groups, etc.), all too often there is the explicit understanding and verbiage that “we are doing this for you”. So, what does this cultural dynamic mean and how does it impede Strategic Member Engagement?

MOVING TO “WE”

Let’s dig a little deeper. While “ensuring happy members” has always been important to retention efforts, too often we sense a thinly veiled annoyance among staff. That **“life would be so much easier if member volunteers would get out of the way and let staff do their job”**. Similarly, volunteer leaders don’t understand why staff can’t move more quickly. Over time, a deep-seated “we-they” culture is formed that significantly impacts the association’s credibility and competitive positioning. In “we” relationships the association’s value premise competitively positions the organization as the “integrator, aggregator, curator and facilitator”.

By treating each member as having some piece of the knowledge puzzle, members become engaged in ways that make for a powerful sharing of knowledge and the creation of new solutions.

Members expect “line-of-sight” connections between what you are providing and their most critical “up-at-night” issues. This means that all employees must view themselves as collaborative partners who, together with members, continually seek insights and new solutions that enhance the community’s success. Members can sense when staff are in the boat rowing with them, versus standing on the shoreline; handing them an oar and conveying best wishes. Working together as innovators, staff and connected members provide resource fluidity and responsiveness to address rapidly changing member business priorities.

An interesting finding from the Strategic Member Engagement Survey is that:

- 55% of all respondents said that: “lack relationship with staff or leadership” was “rarely/never” a reason that members left the association, yet more than half of all respondents “infrequently/rarely” survey members regarding the quality of their interface with their staff.

Because form follows vision, associations must structure their organizations to fluidly address rapidly changing member needs. While you need functional expertise, functional silos are generally counter-productive in creating a culture of “we”. If staff are to be part of the “we” equation, they must be regularly engaged in discussions with members about member “up at night” issues and the brainstorming of new solutions. All too often at conferences, board meetings and various programs we see staff in the hallways or huddling amongst themselves, rather than interfacing with members to better understand their rapidly evolving needs. While running a large meeting is challenging and time consuming, staff can’t afford to be thought of as just meeting planners. Instead, they must be viewed as partners and collaborators.

Members can sense when staff are in the boat rowing with them, versus standing on the shoreline; handing them an oar and conveying best wishes. Working together as innovators, staff and connected members provide resource fluidity and responsiveness to address rapidly changing member business priorities.

SELF-FORMING ENGAGEMENT OPPORTUNITIES

As noted in “Race for Relevance” by Coerver and Byers, “Associations of the future need to adopt speed-dating like approaches to engagement...” The authors were on-target saying that: “(busy) people have time for:

- Projects that are meaningful
- Ideas that help them perform in their work

- Initiatives that are interesting
- Causes they care about; and
- Activities that are fun”

Our take-away is not to create more formalized committees and to hold more meetings. Rather, facilitate self-forming sub-groups who make engagement a priority because they feel their contributions are valued by their peers and lead to outcomes they personally value. Such efforts are scalable and should be promoted and reinforced. For example, when someone searches your website for a specific topic, a “call to action” engagement opportunity should appear, not just a push-offering.

REWARD HIGHER LEVELS OF ENGAGEMENT

We encourage you to explore ways to recognize and reward those members who demonstrate the predictive behaviors that lead to even higher levels of engagement. This is not a new concept. Associations have long assigned premium exhibit spaces to vendors who racked up the most “points” by overall financial contributions to the association (exhibit, sponsor, advertise, etc.). The key is to identify and reward the knowledge contribution and collaboration behaviors that are predictive of higher levels of future engagement. We are aware of at least one association that is exploring offering discounts for the members who have the highest “engagement” scores.

BUILD POWERFUL CONTRIBUTION/COLLABORATION NETWORKS

In the November 2012 Harvard Business Review article “Change Faster,” John P. Kotter, the renowned change leadership guru, talks about creating the “volunteer army” and overlaying the traditional hierarchy with a network-like structure. While Kotter’s context was creating a volunteer network of staff, that concept is even more powerful for associations who are able to combine member and staff resources.

TRANSFORM THE VOLUNTEER LEADER CULTURE

We characterize the culture of many boards as “we/you/they”. In essence, board members set themselves apart from staff and from other members. This is especially counter-productive if they are primarily talking to themselves, and believe they know what’s best for the members. With all the “here’s what we do for you” messaging, they likely view staff as a vendor. And, as evidence that boards sometimes just talk to themselves, our member impact surveys often surface a disconnect between what the board feels is important and the perceptions of various segments of the membership.

Occasionally, we even find situations where board members are so stimulated by the engagement experience they have with each other, that they want to control the exclusivity of that experience. They begin personally directing every committee, every task force, the development of each new offering, each workshop agenda, etc. This is especially true where being on the board is viewed as having ascended to the top of

their field, as opposed to being appointed for their governance, leadership, strategic thinking competencies. Association executives often bemoan that there just aren't enough members willing to be volunteers. And, yes, that is the reality within the "we/you/they" culture and when the association is primarily seeking member engagement to purchase services or to deliver association outputs.

ALIGN ENABLING INFRASTRUCTURE

Recently, innovations in systems integration have provided access to relatively inexpensive solutions for merging your existing data. If you haven't already, we encourage you to talk with Joanne Rang of ITAG (www.itaginfo.com), a highly respected technology consultant whose firm helps associations think through their various options. ITAG will evaluate the current configuration of your AMS and ancillary systems to recommend a solution architecture that supports the functional needs of the business and strategic member engagement objectives.

DATA ANALYTICS & OPTIMIZATION

Solutions provided by icimo, LLC (one of the authors) let you leverage data wherever it resides: AMS, CRM, databases, even spreadsheets to identify trends and opportunities in your member and non-member demographic and engagement data. We know how painful it can be to go through a database conversion. Instead, leverage your existing system by accessing and using the data locked within them. Icimo solutions are amazingly flexible and robust, guiding you with best practices for developing interactive dashboards specific to membership growth, retention, engagement behaviors, and guiding targeted communications.

APPLY ENGAGEMENT PRINCIPLES TO STAFF

Even in the "push stuff out" cultural model, some of the human capital systems that exist in many associations today fail to engage staff in ways that connect members, stimulate innovation, and fluidly address rapidly changing priorities. Often these systems are structured in traditional functional silos with job descriptions focused on outputs and tasks, not member outcome expectations. Traditional operating structures, roles, performance management systems, and incentive programs fail to translate into a "great place to work" in today's business environment.

The successful association of the future will view its role as the stimulator, integrator, aggregator, curator and enabler/facilitator; engaging members in ways that share and capture knowledge. Association communities will create innovative solutions to address their challenges and opportunities. Collaboration tools will be shared

The successful association of the future will view its role as the stimulator, integrator, aggregator, curator and enabler/facilitator; engaging members in ways that share and capture knowledge.

among members, not viewed as the association's in-house system. Members will be engaged on their terms, not a one-size-fits-all approach. The strengths of each staff member will be optimized across traditional functional boundaries.

For many associations this requires that staff enhance their skill set, competencies and cultural mind-set. Performance development, recognition and rewards will focus on achieving member outcomes, not pushing outputs out the door on-time. Staff need to know that members value their efforts. Otherwise, it's just about pleasing the boss and collecting a paycheck.

PRODUCT DEVELOPMENT MINDSET

Begin the process of developing new offerings with clarity about outcomes sought. Then move through the process by systematically identifying "gates" to pass through (milestones, sufficient market data, etc.); making go/no go decisions at each gate before additional time and funding are applied.

SUMMARY THOUGHTS

TRADITIONAL THINKING	STRATEGIC MEMBER ENGAGEMENT
The association's mantra is "we do great things for our members and we are the preeminent association in our space". The association strives for excellence in customer service in spite of getting annoyed with requests and other distractions to doing the real work.	The association minimizes "we/you" relationships. Staff and members perceive they are in this together to optimize combined resources and achieve great outcomes.
Process and messaging promote a "we/you/they" culture on the Board	Create a shared vision for the organization by creating a culture of "we"
The association's operating structure and processes make it difficult to move quickly in pushing out new offerings	Align your operating structure, culture and infrastructure to flexibly and pro-actively address changes in the up at night issues and opportunities of your members. Promote self-forming solution networks under our umbrella and make new approaches scalable.
Send out communications about volunteer leader contributions	Engage the contributing members in ways that they don't experience elsewhere; feeling valued they want to connect with peers in collaboration efforts
Make the association a great place to work by providing benefits, work life balance, and clarity about expectations; pretty much in a one-size-fits-all manner	Also challenge, recognize and reward staff who work closely with members to solve member challenges and leverage opportunities, and whose collaboration with staff and members drives your association being a great a place to work
Siloed efforts and communications wherein only about a quarter of the staff feel challenged and their strengths optimized	Apply the strategic engagement principles to staff, leveraging their individual talents and strengths across traditional functional boundaries.

EPILOGUE

PULLING IT ALL TOGETHER

Strategic Member Engagement is about long term, sustainable strategies to enhance your organization's long-term health. It is not about short term band aids. Strategic member engagement has huge implications for your competitive positioning and business model. In fact, for some associations, it can be a game-changing accelerator to your growth strategy.

While focused on for-profit entities, when the Temkin Group published their 2013 (Customer) Experience Ratings they identified four competencies that set apart the leading organizations:

- **Purposeful Leadership:** Operate consistently with a clear set of values
- **Employee Engagement:** Align employees with the goals of the organization
- **Compelling Brand Values:** Deliver on your brand promises to customers
- **Customer Connectedness:** Infuse customer insight across the organization

These easily translate to the association community. Aren't these what associations are all about? Another clear advantage for associations is that your investors *are* your community, so they are investing in themselves. And, no other form of organization is so structurally configured to provide a blend of "push" and "pull" opportunities that lead to the innovative solutions sought by members.

We encourage you to tear down the traditional we/you barriers, incorporate staff into that community, and recognize that your association's origins (the early discussions of your founders) are also your guidance for the future.

CONTEXT: THE NEW NORM

How members are engaged has evolved over time, driven by numerous factors as associations and their members navigate the rapids of economic, technological and political turbulence. Associations have experienced wide swings between the good times and trying desperately to identify new sources of short term revenues and to be perceived as relevant. Today's corporate and individual members view their participation with associations through a very different lens than when they had relatively few go-to sources for information and knowledge-sharing. In a knowledge economy, it's all about having just-in-time sources that help them drive business and professional outcomes. And to really value the information, they must be actively engaged. This is the new norm.

TAKING YOUR ORGANIZATION TO THE NEXT LEVEL

The question is not where do you begin? The question is: How best to optimize what you are already doing? As demonstrated throughout this e-book, none of this is rocket science. However, Board Members and Staff are so busy fighting day-to-day fires they just don't pause long enough to step back and ask the "why?", "why us?" and "what's the relative impact?" These are questions that focus on desired member outcomes. Staff and volunteer committees get caught up in trying to perfect existing association outputs.

Create a discussion within your organization around Strategic Member Engagement, defined as:

“Creating unparalleled and sustainable value by bringing people together in ways that they find meaningful and practical, because they perceive an ability to impact something they desire, individually and collectively”.

Engage targeted member segments to contribute knowledge and collaborate in the design of new solutions to what they care about, and then leave the execution to staff and alliance partners.

Then track over time any changes in your operating results. Our research has established a baseline and we will be excited to hear about your experience. Once again, the national associations who in our Strategic Member Engagement Survey most often reported an upward 3-year trend in:

- Member Retention
- Annual Operating Revenue
- Registrations to the Primary Annual Meeting
- Annual Revenue from Fee-for-Service Offerings
- Timely Membership Renewals

Were the ones who more frequently reported these capabilities:

- Very highly engaged boards who are strategic in focus
- Regularly conduct member impact surveys of “up-at-night” issues (not merely satisfaction surveys)
- Ability to gather and segment member data; especially if able to integrate data from multiple sources/platforms
- Very high Board understanding and strategizing about the needs of members
- Have identified member segments who most want to contribute knowledge and collaborate with other members
- Have identified specific behaviors that foreshadow future increases in knowledge contribution and collaboration

Don't be surprised if your analysis begins to re-shape how you think about “membership”, bundled benefit packages, member-only benefits, etc.

As you continue your journey into Strategic Member Engagement, apply the 9 core principles:

NINE CORE PRINCIPLES OF STRATEGIC MEMBER ENGAGEMENT

Principle #1: Knowledge-Based Solutions Require “Push” And “Pull” Approaches

In today’s knowledge economy and with many options available to members, the association’s competitive positioning requires creating a differentiating “experience” that treats each member as having a piece of the knowledge puzzle. Creating knowledge-based solutions is achieved through a proactive blend of “push” and “pull” information-sharing mechanisms.

Principle #2: “Outcomes” Trump “Outputs”; Change the Conversation

Members don’t really care about the association’s “outputs”. They only care about “outcomes” that address their business/professional challenges and opportunities. Everything else is just noise. Change the conversation from selling and testing satisfaction with association outputs (conference, journal, etc.) to engaging members in ways that facilitate knowledge-sharing and collaboration with other members. This begins with a highly engaged and strategically focused Board.

Principle #3: Making a Difference; Winning Heart and Mindshare

People will only contribute time, knowledge and ideas when they perceive an opportunity to impact the outcomes they seek. There are 4 levels of strategic member engagement. The key to winning heart and mindshare is to continually create new opportunities for constituencies to contribute knowledge and collaborate with other members.

Principle # 4: The 3 C’s of Strategic Member Engagement

Understanding why members leave gets the heart of member “connectedness”. Connectedness is the critical organizational outcome that drives long term success and (unlike “loyalty”) can be measured in behavioral terms. The 3 C’s capture how member knowledge “contributions” lead to “collaboration” and stimulate/reinforce “connectedness”.

Principle #5: Moving to “We”; the Real Game-changer

*Traditionally, associations focus on what they do **for** members. The real power of the association form of organization is facilitating the creation of new solutions to address evolving member objectives. To accelerate this, volunteer leaders and staff must create a culture of “we”. Succeeding together changes the conversation from R.O.I. (“what have you done for me lately) to R.O.M.E. (together we achieve return on member engagement).*

Principle #6: One Size Fits None; All Members Are Not Equal

One-size-fits-all offerings generally satisfy no one, but the solution is not to create an all-you-can-eat buffet and hope that there is a little something there for every member. Strategic Member Engagement is about segmenting your constituencies in ways that you really understand: their unique needs, how these change over time (e.g. by career stage), how you might engage them to drive value, and the impact of each segment on your business model. Using the Strategic Member Engagement Framework® allows you to identify and predict the engagement potential of each member segment.

Principle #7: Connectedness Drives Your Business Model

Member engagement is not a strategy in itself. It's the accelerant to your positioning strategy and long-term results. It's about creating a differentiating experience that increases connectedness within the community (members and staff) based upon the desire to impact shared objectives. It's not about being the low-cost provider of "push" offerings. Association leaders and laggards in 5 critical components of an association's business model reveal the association's return on member engagement (R.O.M.E.).

Principle #8: Data-Driven Segmentation Strategies

Now more than ever you have the tools available to capture critical information about your constituencies and to use the data to create segmented approaches to member engagement. Utilizing the Strategic Member Engagement Framework® create new opportunities for the constituency segments who, by their predictive behaviors, have self-identified as the most ready to increase their level of professional or industry impact.

Principle #9: Structural, Cultural and Resource Alignment

Associations are the ideal organizational model to leverage a culture of "we". But this requires a shift from today's association structures and processes that are primarily built to push out offerings. Today, staff are reinforced for their efficiency, not for working innovatively with members to create better solutions. Strategic Member Engagement requires the alignment of structure, culture and resources. Many of the 9 principles of Strategic Member Engagement also apply to staff engagement.

We suggest you create dialogues with staff and volunteer leaders around a series of questions you find most relevant. While such a list could go on for pages, here are a few to get you thinking:

Understanding Members' Desired Outcomes and the Association's Potential Impact:

- Discuss the need for knowledge-based solutions to help members address their “up at night” issues.
- How do their major issues and opportunities differ segment by segment? How recent is your “impact opportunity” data (vs. member satisfaction with current offerings)?
- What level of impact would you like to be having on the challenges and opportunities your members face?
- Besides your organization, where else do they go for these solutions today?

Board Engagement and Focus:

- If they are not already, how might you increase the level of engagement, understanding of member issues and strategic focus of your board?
- Change the discussion from Association “outputs” to Member “outcomes”

Assess Your Current Portfolio of Offerings:

- Use the Strategic Member Engagement Framework® to identify which of your existing offerings utilize primarily “push” approaches
- To what extent are you currently trying to provide a reactive, all-you-can-eat buffet of offerings?
- To what extent are you limiting your offerings to one-size-fits-all approaches?
- Do your member education/development offerings target member segments by career stage?
- How might you provide a stronger balance of push and pull offerings?

Assess Current Levels of Member Engagement, Segment by Segment:

- Discuss where each stakeholder segment best fits within the 4 levels of engagement model?
- Are you tracking knowledge contribution/collaboration behaviors or merely transactional/recipient behaviors?
- What is the impact of each stakeholder segment on your business model?
- What member behaviors foretell future increases in contribution, collaboration and connectedness?

Staff and Member Interface:

- Discuss how staff interfaces with members today and what that might look like in a strategic member engagement model. What are the implications of moving to “We”?
- Discuss how you might change the dialogue from member ROI to member R.O.M.E.

Optimizing Data-Driven Decisions:

- Explore ways to “unlock” your existing data

We leave you with this question:

How will you enable members and staff to shape the future of your association?

Please share your story with us.

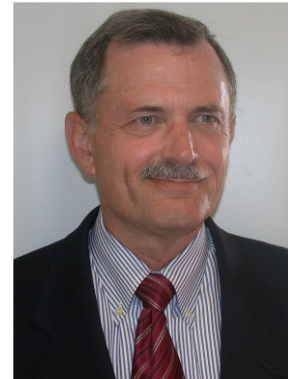
ABOUT THE AUTHORS

For more information, please contact any of the authors.

STEVE LANE

Founder And President
Vertical Leap Consulting

Vertical Leap helps trade associations and professional societies develop and execute high-impact growth and positioning strategies. Founded in 2002, we assist executives and boards who face tough challenges and compelling reasons to take their organization to a higher level of performance and impact, with strategies and business models that position their organizations for long-term success.



Through our analyses, group facilitation and advisory services, our senior consultants help you develop and translate growth and positioning strategies into actionable operating plans. We help you identify growth options, strengthen market position, develop innovative solutions, create a differentiating member engagement experience, grow and diversify revenues, and optimize organizational health, adaptability and data-driven decision-making. Sub-specialties include: roadmaps, dashboards, turnarounds, leadership transitions, member engagement strategies, and working with executives who are new to their organization. Every engagement is collaboratively designed to meet your unique situation and to effectively engage those who must execute your new strategies and solutions.

Founder and President, Steve Lane previously spent 25 years on executive teams in various strategy, operations leadership and organizational effectiveness roles in a variety of industries, culminating with a technology trade association. Steve facilitates two association executive forums that each meet multiple times annually: the Healthcare Association CEO Forum, and the Operational Excellence Roundtable (for executive team members). He also hosts the Association Executive Team LinkedIn Group. Steve was recently on the Board of the Maryland SAE and has been a speaker at a number of ASAE events and executive forums. Steve has authored articles for Association Trends and CEO Update including: “Fast-Drying Cement” that captures one of Steve’s special interests: the first six months of an executive’s tenure with an association.

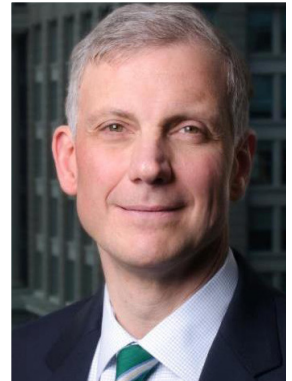
To learn more about Steve and Vertical Leap Consulting see: www.VerticalLeapConsulting.com

DAN VARRONEY

Founder And President

Potomac Core Consulting

Founded in May 2012, Potomac Core Consulting is a Washington, DC area leading revenue growth management firm specializing in customized Growth Strategy, Competitive Strategy, and Strategic Member Engagement solutions. The team of accomplished Association Executives and growth strategists provide strategic consulting services to Trade Associations and Professional Societies to strengthen their competitive position, motivate member participation, and drive sustained revenue growth.



The company's Founder Dan Varroney has extensive Trade Association background leading three major efforts resulting in record performance: President, Newt Gingrich's American Solutions Advocacy organization, Senior Vice President, the National Association of Manufacturers' National Membership & Grass Roots operation, and as the first President and CEO at the Association for Corporate Growth.

In February 2013, Potomac Core Consulting and Vertical Leap Consulting developed a white paper "Accelerating Member Engagement & Revenue Growth in Uncertain Times" that overviews an important building block approach to successful association strategy. Potomac Core Consulting provides ongoing research to the association community through: association CEO interviews to expand the Strategic Member Engagement knowledge base. They have published over 80 articles at: <http://potomaccore.com/blog> where they consistently incorporate data and trends that lead to higher levels of engagement. The Growth Strategies CEO Forum, which meets 4 times per year is conducted jointly with Vertical Leap Consulting for association Chief Executive Officers in the Washington DC area.

In addition to Strategic Member Engagement blogging and research, Dan also authored an Association Trends Article on how Associations "Become durable, relevant and visible in a turbulent world". To learn more about Dan and Potomac Core Consulting, see www.PotomacCore.com

BRYCE GARTNER

Founder And Ceo
Icimo, Llc

Icimo, LLC is a software and services company that blends marketing and technology functions. We leverage data solutions and expertise to help organizations use data, increase return-on-investment and grow their business. Icimo's methodology and professional services get clients using their data quickly. Custom quadrant analysis and dashboard templates combined with training and best practices give clients a jump-start to using data and building successful analytics. From small to enterprise level clients, icimo, LLC works to deliver insights that drive smart business decisions in minutes, not months.



Bryce Gartner gets organizations beyond the big data buzzword and puts their data to work. He is a proven leader in creating data driven organizations, brand management, strategic planning, and new product development. Bryce's quest for business solutions has led him to build a broad range of experiences and relationships. He blends his expertise in both marketing and technology to build solutions that grow business based on customer data.

Over the past 20 years, Bryce's career has crossed over several industries including association, banking, e-commerce, technology, sports and entertainment. He speaks at the national, regional and local level on topics including Association Management, big data, data analytics and visualization, technology integration, marketing and operational strategy. In strategic leadership roles as well as CMO, CIO and CTO, Bryce has merged marketing and technology to create strategies with direct impact on the bottom line, growth and ultimately success of the company.

The icimo, LLC team consists of data, marketing and technology professionals with more than 80 years of combined experience. We are data minded storytellers and business minded strategists. We have managed and developed solutions across a variety of industries and throughout the business/marketing life cycle.

To learn more about Bryce and icimo, LLC visit www.icimo.com.

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