

# A New View of the Member Journey

HOW DATA SEGMENTATION CAN LEAD TO A MORE RELEVANT MEMBER EXPERIENCE



# Introduction

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Members are bringing a new set of expectations to their association experience. Their experience as customers sets the standard for the experience they expect from you. They're used to interacting with brands that provide a more relevant and personalized experience than ever before. The entire customer experience has become a professional area of focus and expertise known as CX—and even has its own association.

Brands recognize that this new personalized approach to understanding and interacting with customers is essential to building and maintaining their loyalty. The member experience is just as critical for member engagement and loyalty. To deliver a satisfying experience, you

must understand the different segments of your membership, their needs, their familiarity with your association, and their interaction with your association throughout their member journey. It's time to retire conventional wisdom about the membership experience and think differently about the member journey.

*Read on to learn about a new approach to the member experience: a focus on member segments, including their stage in the member journey, rather than members in aggregate. It doesn't matter what type of technology resources you have on hand, any association can adopt this strategy.*

# Traditional vs. New Approach to the Membership Experience

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Yes, your organization should be tracking data.

## *The Traditional Approach*

Associations have traditionally taken a 'linear' approach to the member experience in that their communications with members are sporadic, tending to focus on specific events such as the annual conference or membership renewal. The assumption is that all members have the same level of experience with the association and are all moving along the same path. This leads to associations promoting their events by sending the same, one-size-fits-all communications to their members.

Some associations have moved on from this dated approach, but not all. At our ASAE Annual Meeting session, we asked attendees about their email strategy and the reasons they didn't segment their outbound communications. The reasons given included:

**Cultural barriers:** "We've always done it this way."

**Market assumptions:** "Members are basically the same so they're treated the same."

**Resource issues:** 75 percent of the attendees said a lack of resources is the biggest barrier to segmentation.

- **Staffing:** They don't have enough time.
- **Technology:** They don't have analytical tools, marketing technology, CRM, or necessary integration between systems.
- **Data integrity:** They don't have the right data or don't trust their data.

When associations take a generic, one-size-fits-all approach to marketing and communication, the resulting messages are only relevant to some members. Unsegmented messages don't resonate as they don't take into consideration a member's needs and interests.

## *The New Approach*

On the other hand, when you target messaging or content at a specific membership segment, it attracts a higher level of attention, interest, and engagement because it resonates with those members. They see that you "get" them—you've made the effort to understand and satisfy their needs and interests.

The session attendees who segmented emails used traditional demographic categories, such as member type, age, or geography, which are all appropriate. However, we think it's time to take segmentation a step further by adding another characteristic, that being the stage your members and prospective members, are at in their journey with your association. We define these journey stages as follows:

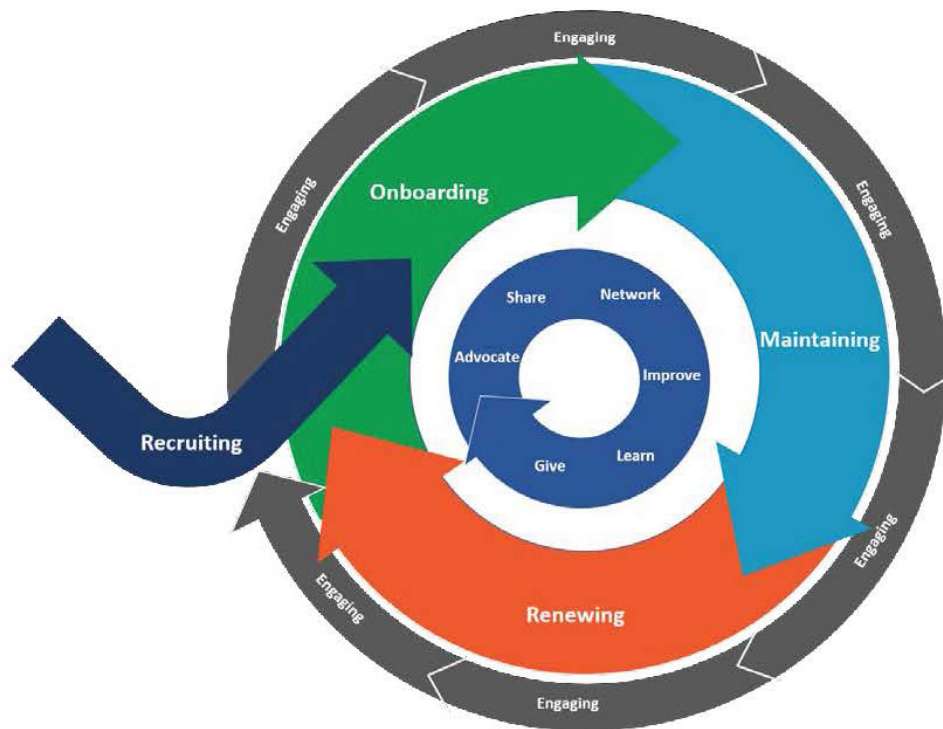
- Recruiting (considering membership).
- Onboarding (new members).
- Maintaining (active members).
- Renewing (members approaching renewal)

Because the membership journey is an ongoing and evolving process, we suggest taking a cyclical approach to the member experience instead of the traditional linear approach. For example, imagine five members who are in the same career stage and work for the same type of company, but are in different stages of their member journey.

- Month 2 (new) member
- Month 10 (new) member
- Year 2 member
- Year 5 member
- Year 9 member

Each of these members have different membership needs and interests, and different levels of familiarity with your association. They'd appreciate messaging aligned to their stage in the member journey and content focused on the things they care about at this point in their membership.

# Step 1: Map the Member Journey



*The first step in adopting this new approach to the membership experience is to use member journey mapping. This exercise helps you better understand members and their interaction with your association during the different stages of their member journey.*

For each stage of the member journey, discuss and document a member's thoughts, feelings, expectations, needs, and wants. Think about their emotional needs as well as their functional needs. This exercise helps uncover member pain points—areas where you can improve programs, processes, and practices.

For example, during onboarding, a new member may feel overwhelmed by information and not know where to start on your website. Or, they may feel like an outsider when attending an event for the first time as they watch others greet old friends. How can you orient them to your member portal and website? How can you help them find a clear path for exploring the benefits of membership? How can you help them meet fellow members?

# Step 2: Develop an Association Persona/ Member Journey Matrix

Now, it's time to turn insight into action with the help of an association persona/member journey matrix—that's a mouthful for an easy exercise.

First, identify the key personas (roles) inside your organization who rely on member data to make better decisions and improve the membership experience. Our example includes four association personas:


- Executive director
- Membership director
- Marketing/communication director
- Events/meetings director

Next, identify the type of data you need to help each persona enhance the member experience at each stage of the member journey. What does each persona care about during the recruiting stage? What questions do they need answered during the onboarding stage?

For example, the membership director wants to know if the onboarding process is working. Is the content relevant and helpful? Is it encouraging them to take the next steps? Are we learning what we need to know about these new members?

The marketing/communication director is interested in other metrics. How many members are setting communication preferences during those first few months? How many are opening and reading the onboarding emails?

Each association persona needs data to help them gain new insight and develop more effective strategies and tactics.

Member Journey Stage	Recruiting	Onboarding	Maintaining	Renewing
Association Persona				
Executive Director	Target number of new members. Revenue from new members.	Can we measure the success of our onboarding efforts? Are our onboarding processes efficient?	Are our educational programs moving our mission forward?	Why are members churning? What are the demographics/tenure of churned members? What is the overall health of the association?
Membership Director	How many new members have we recruited? What are the demographics of new members?	Are we effectively nourishing & engaging new members?	Can we identify which members are not engaging?	What are our year-over-year retention rates based on member tenure?
Marketing & Communications	Which campaigns are most effective in driving new members?	Are we adequately capturing member preferences? (i.e. frequency & type of communication)	Which campaigns resonate the most with the membership? What were engagement rates for each segment?	Which campaigns are most effective in driving membership renewals? What were the most effective by segment?
Events & Event Management	Which events drive the largest new member registration?	Which event themes & content are the most popular in engaging new members?	Which were the best attended events for each stage and segment?	How successful was an event with regards to converting lapsed members?



# Low Tech & High Tech Options for Improving the Member Experience

Any association can adopt this new approach to improving the member journey.

With Word docs and Excel spreadsheets, you can map out the member journey, create the matrix, and use the data you have and the insights you gain to provide a more relevant, satisfying experience at each stage of a member's journey.

However, technology turbo-charges this strategy. Whether you have a simple database or more sophisticated association management software (AMS) with a wide range of modules, like MemberSuite, you can collect data that will help you and your colleagues better understand your members and their engagement during the different stages of their member journey.

Ideally, your "tech stack" includes an AMS with these modules or an AMS with a strong API that integrates and is able to pull data from external systems:

- CRM
- Email marketing
- BI/advanced analytics
- Website/member portal
- Event management
- Learning management
- Financial management

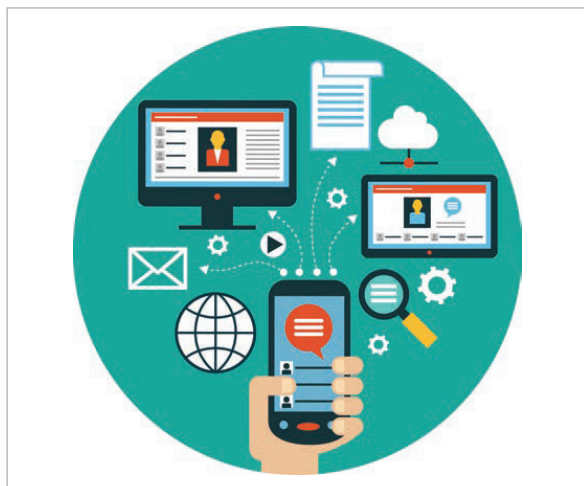
## Segmentation and Personalization

Technology can help your association engage with members in a segmented, personalized way. If you don't have the right technology now, develop a

technology plan that moves you in that direction because one day soon, your members will expect nothing less.

Even without an AMS like MemberSuite, you can still target different membership segments with the type of content they want and need.

- **Website:** Dedicate specific pages to different segments, such as new members or members who have solo practices or small businesses.
- **Email:** Create distribution lists of member segments based on where they are in the member journey.
- **Social media:** Find out where members hang out. If you discover that young members prefer a specific platform, for example, Instagram or Snapchat, share updates of interest to that segment on those platforms.



# Measuring & Improving Engagement

Assumptions and hunches are misleading. If your AMS and its modules collect member engagement data, you can dive deeper into that data and learn the truth about member behavior at the different stages of their member journey. Looking at engagement data in aggregate doesn't tell the whole story. You need to break data down into segments so you can see what's really happening during the member journey.

Let's look at actual association data. Because this association segmented their member data, they spotted issues they might not have noticed if they looked at their data in aggregate.

## *Example: Engagement by Member Tenure*

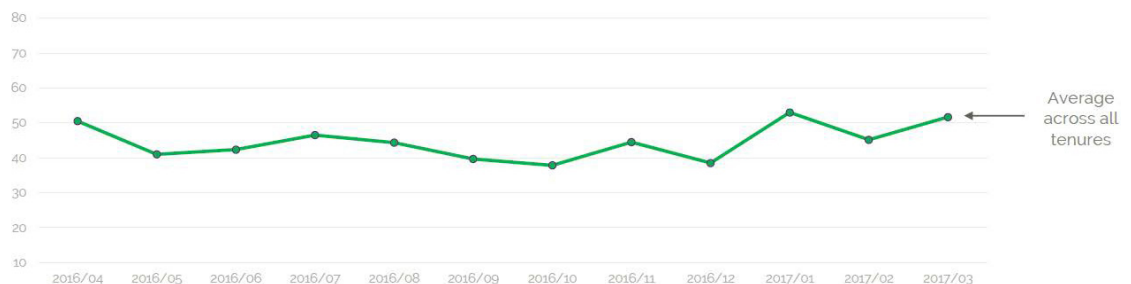
The first graph shows the number of logins (website visits) over 12 months by all members. If you only analyze this member engagement data in aggregate, you wouldn't see anything unusual or concerning. But when you segment data, a different picture emerges.

The second graph shows the number of logins over the same period by different segments of members based on tenure. Members who have been with the association for more than five years have the highest number of visits throughout the year and log in at a steady rate. They know how to engage with you, know what's available, and have made a habit of using association resources.

However, new members (tenure of less than one year) log in less often and have an erratic pattern of logins. They don't yet have a grasp on resources. The association hasn't become a habit. It makes you wonder...

- What causes them to visit the site at certain times of the year but not at others?
- How could you familiarize them (and not overwhelm them) with your association's resources?
- What would make them visit the site more often? What do they need at this stage of their journey? What are their needs and interests?

*Aggregate Engagement (Number of Logins) by Member Tenure*



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# Measuring & Improving Engagement

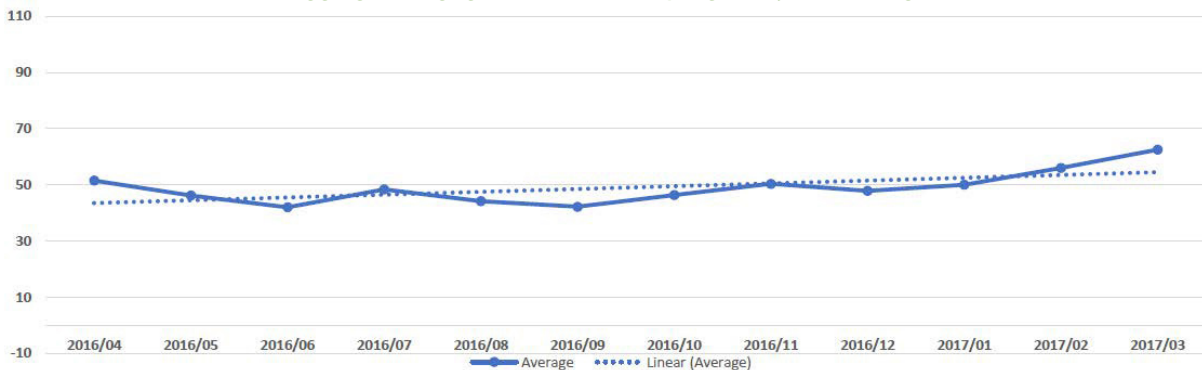
## Example: Engagement by Member Age

Here's another example of the dangers of looking at member data in aggregate. The first graph shows the number of logins (website visits) by all members. Again, nothing alarming.

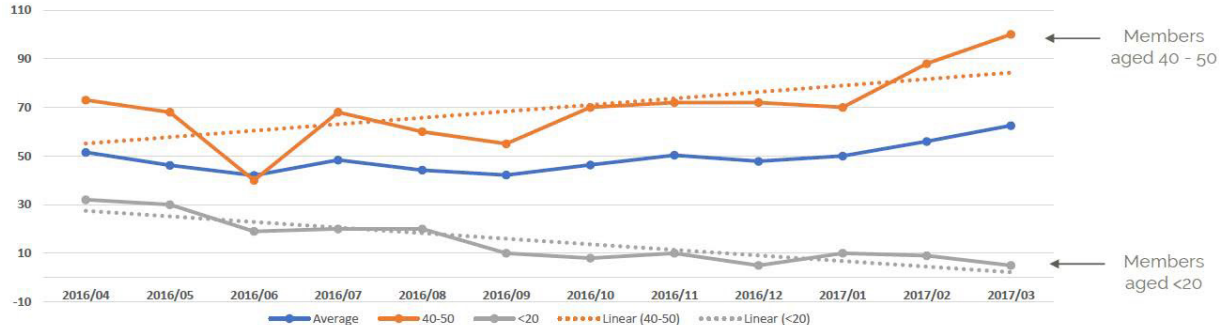
The second graph shows the number of logins by different segments of members based on age. Look at how visits by members who are less than 20 years old fall steadily during the course of the year to nearly zero. Yet, members in other age groups visit the website more frequently.

- Young members aren't visiting your website. Do they know what your website offers? How are you familiarizing them with your website's resources?
- Did they not find what they needed so never returned? Do you have resources specifically for young members? Do you know what they need and want?
- Do you have a retention problem looming?

*Aggregate Engagement (Number of Logins) by Member Age*



*Aggregate Engagement (Number of Logins) by Member Age*







## CONCLUSION:

Anyone can adopt this new approach to the member experience. It doesn't matter if you use spreadsheets or an AMS with a wide range of modules. An engagement strategy informed by data segmentation is the key to delivering a more relevant and satisfying member experience.

What should you do next?

- Consider the stages of the membership journey as additional data segments.
- Map your member journey and combine it with the association persona matrix to identify the type of information your team should collect about members in different stages of the member journey.

- Inventory your own tech stack and assess how your existing tools can assist you in gathering that data.

*When you understand the behavior, needs, and interests of different membership segments throughout the stages of their member journey, you can provide a more personalized and transformative membership experience.*

*We'd love to show you how our solutions can help you segment data and measure member engagement.* Contact us to get started.

**(678) 606-0310**

***hello@membersuite.com***

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