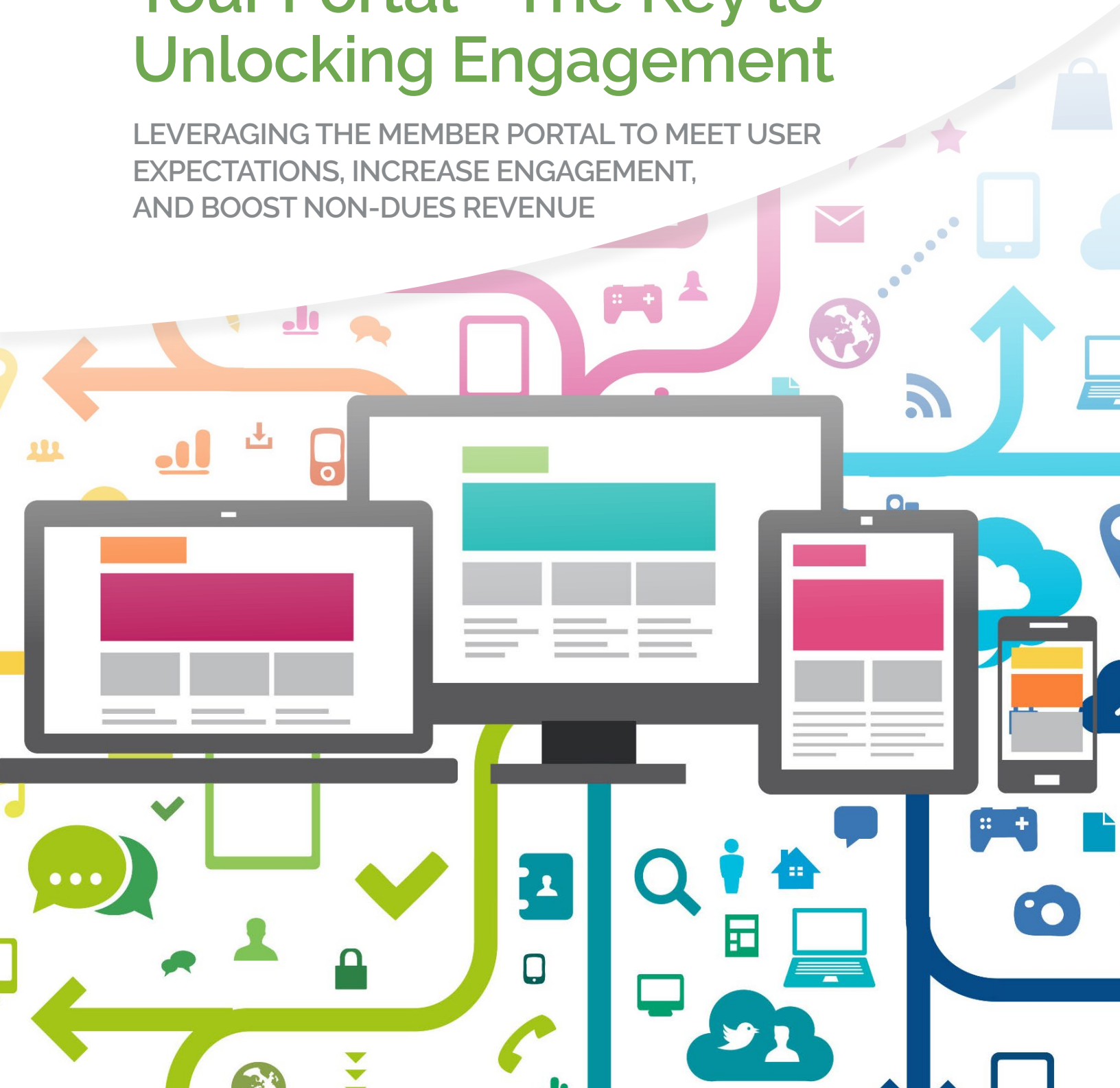


Your Portal - The Key to Unlocking Engagement

LEVERAGING THE MEMBER PORTAL TO MEET USER EXPECTATIONS, INCREASE ENGAGEMENT, AND BOOST NON-DUES REVENUE



Introduction



We're all accustomed to going online to manage our relationships and business with brands. We don't even think about the concept of self-service. We expect it.

Consider your own life. If you subscribe to a meal, produce, or clothing delivery service, you expect to be able to take out your phone and modify your subscription, shipment frequency, and payment method. Your members are no different! They bring their online expectations as a consumer to their membership experience.

A member portal helps you live up to those expectations. It's your constituents' "one-stop shop" for learning about

and registering for events, making profile changes, buying publications, checking into the community, renewing membership, and more. It's where they take care of professional development, networking, and association business.

Read on to learn how your portal can be leveraged as a tool to meet user expectations, increase member engagement, and drive non-dues revenue.

Meeting User Expectations

We're in an Expectation Economy. Members have a high set of expectations they apply to every product and service they purchase or use.

If you don't meet those expectations, they'll find another place to spend their time—and money. Here are some ways you can make sure your member portal meets and exceeds expectations.

Mobile Responsive Design. Every website visitor nowadays expects a site they can navigate on any device—mobile, tablet, or desktop. It is critical to provide the user experience members want in order to increase their ability to engage with your organization online through a mobile responsive member portal.

Easy Initial Login. Another expectation is single sign-on (SSO). Members don't want to keep track of more than one username and password to take care of association business. Member-only website pages, online community, online learning platform, and member portal—it's all your association in members' minds.

Additionally, if portal visitors—members and nonmembers—don't want to remember another username and password, consider giving them the ability to simplify the process by signing in with their Facebook and Google credentials. People like having choices. For some, this is the choice they'd rather make.

Time-Saving Features. Your member portal should have an intuitive design. Members should be able to find what they need quickly without having to overthink it. Fewer clicks means less confusion and less chance they'll bail out on the experience. Members who have individual and

organizational profiles should be able to switch between them from a single login. They can come to the member portal to update employee records. After they cross that task off their list, they can take care of personal business—reading the latest discussions in the online community or registering themselves for an event—without having to log out and back in again.

Security Measures. Members and customers expect your association to vigilantly guard their personal data. An identity management service like Amazon Cognito can help you securely manage authentication and authorization for users accessing your member portal.

Personalized, One-Stop Service. A member portal makes it easy for members to find everything they want and need in one place. Because you have their attention during their visit, you can make members aware of relevant events, products, and services. Best of all, the portal provides a valuable and personalized membership experience.

You can also encourage members to interact with your organization by making it very easy for them to:

- Search the member directory
- Read the latest online community discussions
- Register for next week's webinar
- Check to see how many more CEUs they need for recertification
- Buy the new book everyone's talking about
- Make (finally!) a PAC donation

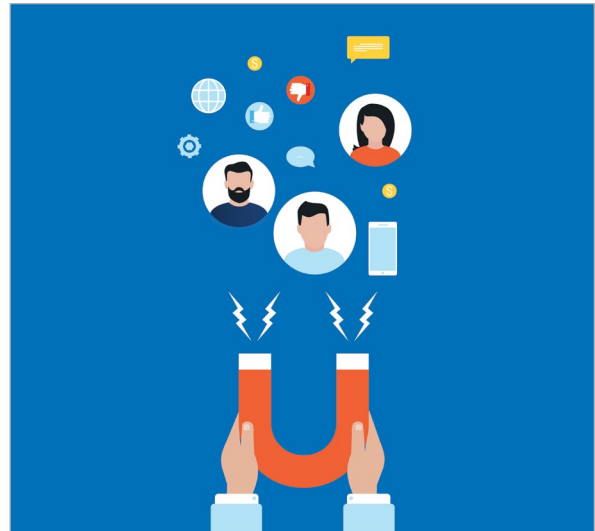
Give Them a Reason to Come Back

Members expect a return on their membership dues—an aspirational investment for them.

Members join your association with hopes of developing new skills and knowledge, advancing their career, developing new relationships, and increasing their company's bottom line. But this transformation won't happen unless they take action—attend events or programs, read, learn, connect, volunteer, contribute, or lead. They seek engagement that serves their needs and interests—and their schedule and budget. A member portal makes it easy for members to find opportunities for engagement and make your association a habit.

To develop any good habit, you must remove barriers that stand in the way of regular practice. Members are more likely to develop the association habit if all it takes is one click on a URL to find everything they need in one place. You want the member portal to become a favorite on their phone, tablet, or desktop browser's bookmark. Just one click and they can visit the member portal at breakfast or lunch, while commuting on the train or bus, on the treadmill, or relaxing on the couch.

Once in the member portal, they should be able to easily find everything they want or need to do with your association:



Members, especially new ones, don't always know how to take full advantage of their membership. Pique their interest and keep them in the loop by periodically refreshing the list of engagement opportunities on the portal home page.

- Participate in an online community discussion
- Check out and register for upcoming events
- Search the member directory
- Read a magazine article
- Purchase the latest benchmarking report
- Apply for certification

Empower Members & Save Staff Time

Change is a constant. Names change, jobs change, addresses change, and interests change.

Data entry is a never-ending chore. Wouldn't it be nice to get help from your members?

You can empower members to correct and update their data in the member portal. Use one (or all) of these methods to encourage them to review and edit their profiles:

- Rotating banner announcement on the portal home page
- Link in a newsletter
- Reminder during membership renewal

For organizational memberships, consider giving data management rights to the primary contact so they can update employee records. Encourage them to help their company take full advantage of their membership by using the portal to add new employee profiles.

It's amazing how often members don't renew their membership because they didn't see the renewal emails or invoices you sent. Keep them in the membership fold by setting up automated notifications in the member portal for membership renewal.



A self-service portal is more effective and more efficient, allowing your staff to focus on the tasks that truly benefit your members. It's a win-win situation for your association.

Provide a One-Stop-Shop

Whether they're on their phone, tablet, or desktop, members can find everything they need related to membership and your association in the member portal.



Since you have their attention in the portal, you can also tell members about revenue-producing events, products, and services they don't yet know about—or know they need.

A member portal is like a display window into your association. From the home page you can link to different engagement opportunities, like your online community, events, and certifications. But, you can also diversify your organization's revenue streams by adding an online storefront where members can purchase products and services, such as:

- Recorded webinars on industry trends
- Salary survey reports
- Publication subscriptions
- Credential study guides

Even if members don't open and read your emails and newsletters, you can still show

them what you have to offer in the member portal. It's easier for them to click on the bookmarked portal URL to see what's happening than it is to go searching for your last email in their inbox.

On the portal home page, remind members about the events already on their schedule, and also take advantage of their attention by promoting events they might like to attend. Link these promotions to event landing pages where they can learn more, register, and even see a Google Map of the venue's location.

The portal is a membercentric experience that offers at a glance all the different pathways to engagement.

Remove Barriers to Purchase

You're up against all kinds of competition for a member's limited time and attention: people interrupting them at work or home, email and text notifications, etc.

If you want them to keep coming back to your member portal or website, you must make their visit an efficient experience. If you wish to increase non-dues revenue, the member has to find and purchase what they need quickly.

Keep their transaction moving along with a streamlined checkout process. Visitors will be less likely to abandon their shopping cart—and the portal—if they can quickly purchase an ad, buy a book, or subscribe to a publication.

Don't give visitors a reason to walk away from their computer or click away from the portal. If they wish, let them securely store their preferred payment method so they don't have to find their wallet and type in a bunch of numbers. If they have permissions for both an organizational and individual member profile, make sure the portal dynamically associates the appropriate credit card with the profile they're using.

A universal shopping cart makes it easy for them to keep purchasing. Let visitors add multiple items to their cart, for example, an event registration, a PAC donation, and the latest benchmarking survey report. When they're ready to check out, they can make a single payment for those purchases.

Also, make sure your portal offers a persistent shopping cart. If members have a cart full of

items but are called away to a meeting before completing their purchase, their loaded cart will be waiting there for them when they return to the portal—they won't lose any time and you won't lose a cent.

Give a Boost to Dues Budget Too

Besides increasing non-dues revenue, the portal is also a great tool to increase revenue from membership dues:

- **Recruit Members.** Your member portal should display member and non-member pricing for events, publications, and other products and services. When non-members see the price difference, they may decide it's time to stop paying a premium, and become a member instead.
- **Retain Members.** When renewal emails aren't opened and mailed invoices end up on the wrong desk, your association risks becoming out of sight and out of mind. You can prevent this type of oversight by displaying automated renewal notifications. Members see that little notification alert icon when they arrive in the portal and know immediately that something's up. Notifications like this serve as a reminder to those who intend to renew. And, for those who are on the fence, the portal content reminds them of the value they've been receiving for their dues investment.



CONCLUSION:

A member portal should serve as the onestop-shop for your constituents to engage with your organization and maximize the value of their membership. By doing so you will help individuals become aware of the programs you offer and in turn boost nondues revenue.

Additionally, offering a self-service portal will help free up limited staff time and improve the overall member experience.

Now that you've read the white paper it's time to assess if your portal is making it easy for your constituents to find engagement opportunities Start by taking the portal engagement quiz to get your score.

We'd love to show you how our mobile responsive member portal can help you boost engagement and non-dues revenue.

Contact us to get started.

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