

HOW TO LOSE NEW MEMBERS IN 90 DAYS OR LESS

A COLLECTION OF INSIGHTS
FROM **SURGE OPTIMISM**



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INTRODUCTION

The following pages house the results of an industry-wide virtual collaboration.

SURGE Optimism assembled association professionals from across the globe to harness collective knowledge, through a virtual conference focused on transformative ideas and designed to maximize social learning.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own thoughts. We have now assembled some of the best insights from these conversations into a body of knowledge for the benefit of the entire association community.

This eBook delves into the session, *How to Lose New Members in 90 Days or Less*. It includes themes from the speakers' conversation, snapshots of ideas from guest speakers, contributions from attendees, links to further resources, and more.

Thank you to all who participated – and if you missed it, go to the **SURGE Optimism** [event page](#) to watch all the sessions for free, at your leisure

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01

FEATURED SPEAKERS



Amanda Kaiser
Chief Path Finder at Kaiser
Insights LLC

Amanda Kaiser is a qualitative researcher for the association industry. To date, she conducted over 373 in-depth member interviews. Through these conversations, she comes to understand members' goals, challenges, and worries then translates these insights into strategies that exponentially improve member engagement. Channeling member insights, Amanda also writes a weekly blog for association professionals at SmoothThePath.net or follow her on Twitter [@SmoothThePath](https://twitter.com/SmoothThePath). Amanda can help you engage your new members early and engage them for life!





Larry Guthrie

**Director of Communications at
CCIM Institute**

Larry Guthrie is the director of communications and marketing for the Association for Corporate Growth, having joined the organization in 2013. Over the last 20 years, Larry has worked in both the corporate and association worlds across all areas of marketing, communications and events.

Currently, he delivers strategic marketing communications across 59 chapters and 14,500 members - including ACG's two signature events, four regular publications, membership recruitment & retention initiatives, public policy efforts and all social media channels.





Stephanie Selesnick CEM
President at International Trade Information, Inc.

A second-generation exhibition industry veteran, Stephanie is president of Las Vegas-based International Trade Information, Inc. The company helps internationalize US-based exhibitions by recruiting exhibitors and visitors, as well as taking entire shows offshore.

Over the last 20 years, she has worked with clients in a variety of industries including: agriculture, food and beverage, high technology construction, apparel, consumer electronics, etc.

A well known exhibition and event industry speaker and trainer, Stephanie has spoken with groups in person and via webinars all over the US, Canada, China, Southeast Asia, Europe, Mexico and Latin America. She blogs for UFI and Trade Show Executive Magazine, and is a co-founder and moderator for #Expochat, the weekly Tweetchat for the expo industry.





Lisa Vivinetto

**Co-founder and Chief
Marketing Officer at Dynamic
Benchmarking**

Lisa Vivinetto is a co-founder and the Chief Marketing Officer of Dynamic Benchmarking, a software company specializing in web-based benchmarking for professional and trade associations. She has been in the business of performance improvement since graduating from college, first in the field of training and development, and now helping associations and their members understand the power of benchmarking and peer to peer comparison. As an executive and sales educator Lisa knows first-hand the value of performance data to a company's success and truly believes that you "can't manage what you can't measure". Today, Lisa uses her experience as a career marketer, training and development professional and sales executive to introduce business leaders everywhere to the latest innovations in benchmarking.



02

THE POWER OF PICKING UP THE PHONE

BY AMANDA KAISER

In the [New Member Engagement Study](#), we asked associations about the tactics that worked best for them when engaging new members, giving them a range of options to rate including welcome packets, targeted social media, and video content.

Phone calls was the third most effective tactic. Surprised?

For large-scale associations with 20,000 new members joining every month, making phone calls to every individual is no small feat. For many associations, however, personal conversations might be worth the work.

Many association professionals believe that phone calls should come from a volunteer leader so the conversation is member-to-member. The study suggests that phone calls from staff are in fact more impactful. One possible explanation for this comes down to time and resources: an unpaid volunteer simply isn't available to make **those time-consuming** phone calls. Staff who are well-trained in the content and tone of these conversations can step in to meet this need.

So what about the content of these phone calls?

Instead of telling the new member all about what the association can do for them, ask them about themselves, their challenges and goals. You will gain a lot more from listening than you will from attempting to sell. Once the staff member has gathered this information from the new member, they can link them to resources like reports, articles or even personal contacts. This exchange can continue in a friendly follow-up email **that the new member receives within 24 hours of the phone call. Some associations even plan an additional 2 or 3 week follow up by email to find out if the new member took action and to answer any open questions.**

Phone calls can be powerful in a world of email overload. In the qualitative part of the research, we heard from some associations who said phone calls were one of the single best ways that they were onboarding new members. Pick up the phone and see what happens!

From the Chat - Weighing Communication Methods

Depending on staffing and member preferences, communication methods look very different.

"Part of this is figuring out what individuals are about - different personalities respond better to different types of outreach. Some people might love a phone call, others would find it intrusive."

— Amith Nagarajan —

"Emails talk at people. Let's start getting the members talking.... Ask them a question every now and then to give them a channel to talk to you."

— Dave Will —

"Yes! Some associations have such great emails folks think they are coming directly to them from just one person and they reply which is awesome. And some associations pick up the phone - done well, this is powerful!"

— Amanda Kaiser —

03

HOW TO IMPLEMENT A SUCCESSFUL EMAIL ONBOARDING CAMPAIGN

Guide your members through their early days with your association.

BY LARRY GUTHRIE

First impressions matter. When members join an association online, their first impression occurs via email. At my association, we use an email onboarding program to guide them through the first 90 days of their membership. With so many benefits available, it can be overwhelming for a new member; our approach allows them to easily digest the information, ensuring they make the most of the association right away.

Intentional onboarding makes members feel part of a community and impacts retention numbers, as [this study](#) shows. So how does it work?

Strategize

Any good email marketing campaign comes down to a content strategy defined by two things: value proposition and tone. Our process is figuring out what the value proposition is, evaluating that value proposition and working out how to communicate it. Integral to this is knowing your members - what do they want and need from your association, at what level of urgency?

Personalize

Should these communications come from the association, the CEO or a chapter leader? When an email is coming from an individual, you can infuse a personal tone. This is an instant engagement technique that establishes rapport. Our emails are both friendly and business-like, because our members are in the finance industry and that is their comfort zone. Imagine you're sitting next to them talking them through member benefits in an informative and welcoming way.

Centralize

My association is a part of ACG Global which has 59 chapters across the world. Our chapters' competencies are around hosting great events and forming personal connections, not necessarily marketing and communications. When we created a centralized onboarding campaign, we were able to take that off our chapters' plates and free some much-needed resources up for them.

While ACG Global fully onboards a member via email, their chapter leader reaches out to them personally and acts as the face of ACG, someone they will be seeing on a regular basis at events and meetings. This combination of high- and low-touch communication is a powerful member engagement tactic that really pays off.

Automate

Or don't! We use a drip marketing approach, based on an educational model where you divide up messaging into portions (think of it as a multi-course meal). In the first email, you can give them an overview of the menu, including membership benefits in a quick, scannable layout. And set the expectation of how frequently they will be receiving these emails.

For us, this is biweekly. Every two weeks, we send out a message prioritizing benefits as they relate to the first 90 days of a member's life cycle. Each email can delve deeper into a specific benefit and show them how to make the most of it. Make sure your instructions are clear and that you tell them the tangible impacts membership will have on their career.

Marketing automation is a great tool, and the prices are reducing dramatically. You can set it, then forget it by formatting and approving all your emails ahead of time. It's a reasonable and practical option for associations of all sizes. But an onboarding campaign can also be executed manually to equal levels of success. It simply requires someone to oversee it who is detail-oriented and good at email list management. **Most importantly, budget need not be a factor in whether or not you implement an onboarding campaign.**

From the Chat - Ideas Around Tiered Pricing for Members

Varied incentives for new members will have varied long term consequences.

"Do you think you have to work even harder to get the free people to pay once they've gotten something for free?"

— Carolyn Hook —

"I think the free membership tier idea could work in some spaces. The question would be if you could engage people frequently enough to build habit with your brand and through that, make a transition to paid membership at some stage, for some percentage of the free members, a natural thing. That is why I was thinking about it in the context of this session."

— Amith Nagarajan —

"A free membership even for something like a newsletter makes them see value, feel included etc. Maybe this is a good funnel?"

— Meena Dayak —

04

**MAKE NEWBIES FEEL
WELCOME!**

How to give new members a golden first experience and learn from their feedback.

BY STEPHANIE SELESNICK

Remember the first time you went to an association event and how that felt? Nerve wracking for most! Making new members feel welcome at your association's events is a smart investment of resources.

Will it cost more to organize an onboarding program to your events now, or replace the member who won't return because they had a negative first experience? Conversely, **when new members have a positive experience, chances are much better that they will renew membership as well as share the experience with colleagues.**

Some suggestions to help engage newbies include:

- Offer new member receptions at in-person events.
- Use small-budget alternatives such as matchmaking and mentorship programs. For examples, assign board members, who know large networks of people, to introduce new members to other attendees at meetings or events.
- Pay people on the frontlines, like receptionists, enough to ensure they provide the best first touchpoint your association can offer.
- Be open to new ideas - ask your team for their ideas!

Most respondents to [this new member engagement study](#) said it takes over a year to see results from a new member engagement program. The program should periodically be reviewed, retweaked and responsive to feedback.

Buy-in from management and executive teams is key, or the program will quickly fade. Manage their expectations by making it clear it's going to be a long-term program. Remind them how much it costs to recruit a new member versus retain one. Know what your ROI is on your new member engagement program and keep those metrics front and center.

Evaluate new member experiences after the fact to keep improving the process. Make appointments to speak with them post show. Don't be afraid to ask the hard questions: "How was your experience? Based on your experience, do you plan to attend the next event? What did you like? Dislike? What can we do better?" If you don't ask, you'll never know what is working - and what's not. Keep the questions open-ended and take notes. If respondents use this as an opportunity to ask questions, getting back to them in a timely manner will make them feel valued.

Analyze the feedback, and as stated above, tweak your program based on answers.

Be authentic, transparent, and creative. **If all goes to plan, your (formerly new) members will thank you when they return next year.**

From the Chat - Ensuring New Members Make a Connection

Reflecting on doing everything in your power to make new attendees feel truly recognized.

"A group I worked with always had a Board member greeting at the door. They took turns each event. It made a huge difference for new people and got them connected more quickly."

— Renee Lewis —

"We have a short series of calls with the mentors prior to the conference, then send them email addresses for their assignees so they can connect prior to the event. This weeds out any volunteers who aren't committed."

— Crystal Bazarnic —

"I really appreciate any association that can accommodate introverts like me with unique opportunities to engage outside of the giant reception hall with 1,000 people."

— Tracy Vanneman —

05

WHAT NEW MEMBERS WANT

Learn how to welcome new members at in-person events.

BY LISA VIVINETTO

In my research into [new member engagement](#), conducted alongside Amanda Kaiser at Kaiser Insights, we found that programs designed to welcome new members into an organization get results. They can boost member renewal rates and improve a member's experience for the long haul. There are many ways to go about engaging new members, and focusing on in-person experiences at events is one tactic that can offer big results.

One of the first trade shows that I attended was sponsored by a customer of ours at Dynamic Benchmarking. Initially, being a brand new supplier member, my partners and I knew no one at the show. **Not knowing what to expect was both exciting and nerve-wracking.**

First, they paired the three of us each with a buddy who met us on the first day and invited us to a cocktail party that night. Our buddies told us what was going on, what we should be attending, and what we shouldn't be.

Most importantly, they had the Executive Director and President of the association hold a special session for sponsor members prior to the show, where they talked with us about how important we were to the association, and how much appreciation they had for us. Overall, it made a great impression. We started the show feeling good, and knowing a few people right off the bat.

Because this was my first association meeting experience, I thought this approach to welcoming new members was typical. **Nine years and many conferences later, I now know that what we experienced at that show was unique.**

Over the years, I've gone to a lot of conferences and meetings by myself and know that entering a professional space full of strangers can be intimidating. Other welcoming initiatives I've participated in include a Dine Around, where you are matched up with people interested in the same topic as you for a group dinner. These dinners turn awkward situations into fun nights and strangers into friends.

New member engagement programs work, and they don't have to be big or expensive. What could you try at your next in-person event to make new attendees feel part of your organization? **Start small and iterate over time, and you will be pleasantly surprised at the outcome.**

From the Chat - Using Similarities to Bring People Together

How can associations connect people based on common interests?

"Can you imagine going to a party and just talking at someone for an hour and expecting them to like you? So why do we do that to members?"

— Dave Will —

"If you can connect a new (or existing) attendee/member with even ONE person that is a meaningful connection for them, that is magic. It is about quality over quantity, the question is how best to do that in a way that aligns personalities, interests, etc."

— Amith Nagarajan —

"Another thing we do that connects attendees with similarities is that we have optional seating at breakfasts by region, corporate partner, etc. So half the tables have labeled tents... if you go to the conference without knowing anyone, you can sit at the table for your vendor or region and automatically meet people with something in common."

— Crystal Bazarnic —

06

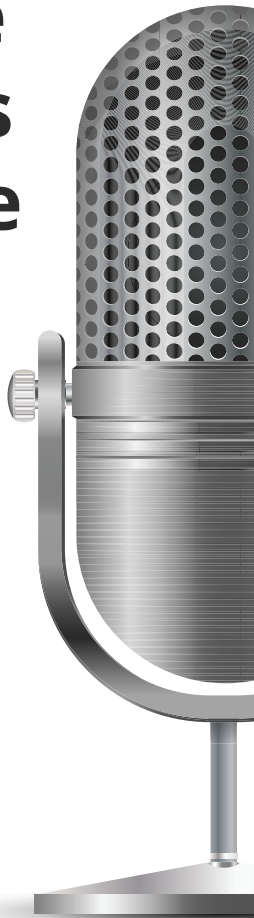
FURTHER RESOURCES

During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about new member retention. We've compiled them into a list here.

- [Event app](#): Pathable : Event App Technology
- [Article](#): Solve Your Member Engagement Problem to Solve Your Acquisition Problem
- [AI software](#): Digital Personality Hiring Tool
- [Engagement strategy](#): Braintree: Meet human Greatness
- [Online tool](#): Jotform: Easy-to-use online form builder for every business
- [Article](#): Membership Engagement: AMCP Conference Buddy Program Mentioned in ASAE Publication
- [Article](#): Do Not Stop Making Those New Member Phone Calls
- [Article](#): 6 Strategies for Member Email Effectiveness
- [Article](#): Association Myths Busted
- [Article](#): The New Member Engagement Rule of Three
- [Article](#): New Member Engagement Plans Produce Big Results... Slowly
- [Report](#): The New Member Engagement Study



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