

# PUTTING MEMBER ENGAGEMENT INTO ACTION

A COLLECTION OF INSIGHTS  
FROM **SURGE 2017**



**SURGE**  
2017

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# INTRODUCTION



**W**hat you're about to read is the result of an experiment in virtual collaboration. **SURGE 2017** assembled association professionals from across the globe to harness collective knowledge within a virtual summit of a completely new model.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own ideas. 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, one of the 12-part SURGE series, delves into the session, ***Putting Member Engagement Into Action***. 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 2017 [event page](#) to watch all the sessions for free, at your leisure!

**SURGE**  
2017

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01

# FEATURED SPEAKERS



**Beth Brodovsky**  
President of Iris  
Creative Group, Inc.

**Beth Brodovsky** works with organization leaders to inspire participation. As the president of Iris Creative Group, Inc, Beth and her team develop brand, campaign and event communications that get people take notice — and take action. She leads workshops and monthly online classes on marketing tactics and hosts the Driving Participation podcast to help nonprofit teams market like pros. Find Beth at [www.iriscreative.com](http://www.iriscreative.com) and subscribe to the podcast on iTunes at [bit.ly/DPpodcast](http://bit.ly/DPpodcast).





**Maddie Grant**  
Culture Consultant &  
Digital Strategist at Human  
Workplaces

**Maddie Grant** built a reputation as an expert digital strategist who has helped hundreds of organizations engage with their customer base and build capacity for using social media and online communities to achieve business results. Recognizing the transformative and human-centric power of social media early on, she helped organizations integrate social media into their culture authentically, rather than attempting to bolt it on a new process. Find her at [humanworkplaces.net](https://humanworkplaces.net)





**Amanda Kaiser**  
Chief Path Finder at Kaiser  
Insights LLC

**Amanda Kaiser** is a qualitative member researcher. She has conducted over 300 member interviews and counting. Through these interviews she helps associations understand their members' goals, challenges, opinions, fears, and hopes. These insights become the building blocks of their member-focused vision and future-focused strategy, innovation and marketing plans. Amanda also writes a weekly blog for association professionals. You can check it out and subscribe at [SmoothThePath.net](http://SmoothThePath.net) or follow her on Twitter @SmoothThePath.



02

# GUEST SPEAKERS





**Danny Iny**  
Co-Founder of Mirasee

**Danny Iny** is the founder of Mirasee, host of the [Business Reimagined](#) podcast, best-selling author of multiple books including [Engagement from Scratch!](#), [The Audience Revolution](#), and [Teach and Grow Rich](#), and creator of the acclaimed Audience Business Masterclass and Course Builder's Laboratory training programs, which have together graduated over 5,000 value-driven online entrepreneurs. Danny has maintained a passionate commitment to learning and transparency, freely sharing lessons learned from great successes, major challenges, and even his personal life to support the online entrepreneurial community as a teacher, speaker, angel investor, and advisor to many of the top leaders in our industry, who have Danny on speed-dial when they need help with their business or strategy.





**Devin Bartley**  
Assistant Director of  
Communications & Marketing,  
National Multifamily Housing  
Council

**Devin Bartley** has extensive experience developing, managing, and implementing successful and scalable marketing strategies and campaigns. Respected as a strategy-centric thinker with the ability to successfully lead cross-functional teams and projects, he utilizes analysis and creative expertise to maximize user experience, increase revenue, and identify opportunities for growth. By combining creative and technical backgrounds he devises creative solutions to otherwise difficult problems.



03

**WHAT DOES MEMBER  
ENGAGEMENT MEAN  
TO YOU?**

*Before setting out to increase engagement, Maddie Grant recommends asking this question.*

It's the hot topic that much of our work as association professionals revolves around, but the goal of member engagement can be obscured by indirect efforts and lack of focus. As a Culture Consultant, my area of expertise is engagement, both internal and external, of employees, customers, and members. **I believe that member engagement is the outcome of a strong culture.** To foster a strong, healthy culture, the component groups who make up your association must share a vision. First you must decide what engagement means for your association, then you are equipped with a set of questions to ask people when researching what members want and what will help them to engage as they wish.

**Association membership evolves over a life cycle.** At different points in a career, members have different needs. Accept that certain groups will be more active than others and respond to their desired level of engagement. When people take time out of their career to start families, naturally they will take a step back. But can the association continue to reach out to them with a light touch to keep them in the loop for whenever they want to restart activity as a member?

**Defining engagement involves deciding what high and low engagement looks like.** Low engagement members are still important to the functioning of the association, so respect these members' boundaries while ensuring that this type of member experience has a wide reach. High engagement members will be fewer in number, with a lower reach, but play an equally important role in contributing and striking this balance of member experiences.

For instance, at the American Nurses Association, those focused on defining member engagement decided to **consciously create a two-way, give and take relationship between the association and the member that would last a whole**

**life cycle.** Instead of using a generic template for the expectations of members based on demographics such as age group, they looked closely at the specifics and found nuances in their industry that would impact the way engagement played out.

Many mid-career nurses were going back to school for further study, and needed tailored resources separate from those provided to fresh-faced undergraduates. They also found that retired nurses continued to actively participate in the field as volunteers, regarding nursing as part of their identity. The association could support retirees in their voluntary work and learn from the wide-ranging experiences they brought to the association. **Thoughtful awareness of these various member experiences led to the development of long-term relationships with the association.**

In contrast, a scientific association I worked with went through a similar process of defining engagement. Their perspective centered on the mission: the ability of the association to provide a platform to support science. Whether or not a person engaged in this mission was a member did not matter to this definition. With this example in mind, **consider how you might engage people before they even join, through your online presence and other services.** This can be a novel way to test what will be useful and needed by people in the community before they commit to their journey as a member of the association.

Take on the critical work of defining engagement, and remember that external culture reflects what's going on internally. **Connect the dots beyond products and services to build relationships between the members and their association, and watch long-term engagement flourish.**

04

# THREE STEPS TO WELCOME NEW MEMBERS

*Enthusiasm peaks the moment a member joins, so how can your association harness this potential energy? Amanda Kaiser shares her ideas.*

**Have you heard of the study showing that prospective buyers make up their mind about a house within ten seconds of walking through the door?** Or that you know if you're going to click with a person based on your initial introduction? First impressions make a difference across the board.

With new association members, try applying the motto: **engagement at first sight**. I conduct qualitative research in the association community, and have recently completed a member engagement research project. I spoke to hundreds of members about their experiences and the value they found in associations. Members join and immediately want conformation that they made the right decision by joining. The member has emotionally invested in the association and they are excited to learn. Associations must capture that window of engagement, between three days and three weeks, before it passes by. Curate valuable experiences for your members, beginning with a warm welcome.

## Welcome to the industry

Many associations make token efforts to send new members a 'welcome' email. **Seize this opportunity and develop valuable, targeted content for newcomers.** Is this person new to the industry? What level of engagement do they want to commit to? Be curious and seek out these details through formal research or conversation, depending on your capacity, then tailor 'welcome' content to their needs. You never know what valuable skills or expertise someone might bring to your association until you reach out to them and ask.

## Create an aspirational environment

Enthusiasm peaks in the moment of joining, but how this translates into action varies for everyone. If a committee or board short on members tries too hard to persuade people to attend meetings, this air of desperation deters those who don't want to commit to responsibility in the beginning. On the other hand, if the association is insular and does not invite new voices to the table, those who do want to get involved can't penetrate the inner circle and offer up the skills and labour they have to share.

**By prioritising transparency and working out what new members want, barriers can be dismantled and new members can engage to the best of their ability.** If materials like a website or event brochure attract people and they see themselves reflected in your association, they will aspire to be a part of the environment.

## The registration table

The moment of arrival at an association conference or event can be pivotal in a new members' experience. It may be their first in-person interaction with the association or even the industry. A dismissive greeting, where the representative thrusts a name badge at them and sends them on their way, makes a nervous attendee feel unwelcome and intimidated. However, adding a friendly touch to this greeting transforms the event experience: "Welcome to the conference, how was your trip? Do you need anything? Would you like me to introduce you to this person who works in your field?"



**Never underestimate the power of conversation.** An attendee will walk away from that interaction smiling, ready to learn and network, and the rest of the conference will smile back at them. Engagement is contagious and encouraging bonding opportunities between members helps to integrate them into the community, and accountable for their actions within it. Be the promising new house or hot first date you want to see in the world! **Engage members early and engage them for life.**

05

# THE KEY TO AUTHENTIC ENGAGEMENT

*How can we make our connections authentic, both internally and with members? Danny Iny has a simple but effective idea.*



"I have a quick tip on how to create engagement with your audience and community as association professionals. The answer is deceptively simple but not easy. It comes down to one word: **vulnerability**. We're wired so that when someone shares with us their struggles, challenges and innermost fears, we lean in and connect. It's very powerful and it's the key to driving engagement.

"Sound simple? In fact, it's hard because it's scary. It requires that you step beyond the boundaries of what is proper, especially in traditional corporate communications. But the results are worth it. It's powerful to allow your true self to shine through - not in an unprofessional way that compromises who you are or what you do, but in a way that allows people to connect with you and understand what's really going on."

## From the Chat: The Power of Volunteers

*Our organization has been successful with micro-volunteer efforts that have a short time frame and a specific goal. They have been more productive than our standing committees made up of the "old guard." We struggle not with a lack of willingness to participate, but the lack of opportunity at our organization because we have these traditional groups where people stay on for years. I keep suggesting term limits, or for volunteers to bring in new people, but so far, no go! We have term limits for our Chairs and Vice Chairs, so that works, but our committee volunteers do a lot of work without structure or titles.*

*- Alicia Skulemowski -*

*I chair a committee for an association and got 19 people to join the committee using the micro-commitment concept. Rather than a one time ask, I invited them to join a group that has one job and they only need to volunteer to do it when they have time. It works great because I have a big enough group that 2-3 people always are available.*

*- Beth Brodovsky -*

*One potential solution is removing silos in the workplace and instilling Member Update meetings to discuss engaged members we can work with further and encourage others to be further involved.*

*- Veronica Gerson -*

*Some associations rely on volunteers to help them be more high touch, for example volunteer welcomers at events, or volunteers who make new member phone calls.*

*- Amanda Kaiser -*

*We asked members in our initial correspondence about their volunteer interest instead of signing them up to volunteer. The Volunteer Profile matched members to opportunities based on criteria they selected such as career stage, in-person or virtual work, technical interest area, ongoing or short-term project, leadership position, student outreach, etc. Members added that they were interested in the opportunities to their profile. Then we sent the "ask" with that personalization: "I'm contacting you because you said you were interested in a short-term project related to students. We have an opportunity in this area." Instead of ongoing blast emails to thousands of members, we were able to get the volunteers we needed in one or two emails with a quick turnaround.*

*- Carolyn Hook -*

06

# FOOLPROOF MARKETING STRATEGIES

*Devin Bartley has an online marketing strategy to stop members from falling through the cracks.*



**At the National Multifamily Housing Council, we bring together prominent owners, managers, and developers to help provide homes for 38 million Americans.** NMHC provides a form of insight, advocacy, and action that enables both our members and the communities they serve to thrive.

As part of our overall marketing campaign, we created a scoring model that tracks keywords you interact with on our website. If you engage with content that includes the word “data”, “data privacy” or “data security”, we increase your score. We use a baseline threshold of that score to qualify you for the campaign. **With behavioral scoring, we look for intent because it allows us to market to people who have already expressed interest in our products.** It re-targets people indirectly. We determine it based on keywords that apply to a product or conference. For example, [Optech](#) Conference and Exposition is about operations technology. It covers topics like sustainability, marketing and operations. We curate a list of those topics to use in our system as the driving factor of behavioral scores.

When we have identified our target audience, we start with an email campaign. With emails, when we send out a series of promotional emails for a product, people derive less and less utility from them over time. This is due to **decreasing marginal utility** - after the audience engages with the initial emails, emails four and five slip through the net because they are less exciting.

When engagement drops like this, we switch to other marketing channels. **Facebook has a large, dynamic ecosystem.** It comes in handy for first-step lead acquisition when engaging people outside of our database. We use LinkedIn and other channels, but find Facebook the most effective because people use it for both work and play in their daily life. People even use Facebook at work. Of course, we're not encouraging bad behavior... but if you're browsing Facebook on a Tuesday afternoon after getting a lot of work done on Monday, we can take advantage of that! When it comes to the cost per click or impression, Facebook is economical if you target correctly, based on statistics of when we get the most leads.

**A campaign is most effective when every iteration of it displays a different value proposition.** If people see the same thing repeatedly, they stop engaging. If the product value proposition is new with each email or ad, the audience becomes conditioned to seeing new information and engagement goes way up. For example, if you didn't purchase the product when we said early bird registration was closing, you obviously didn't care about it, so that value proposition is void to you. However, you might engage with the next value proposition if it's different. And if none of our value propositions are working for a particular person, we switch to another marketing channel or another segment of people altogether.



Save the date: **SURGE RETURNS IN 2018!**

Our free, innovative virtual summit for association professionals is coming back from **MAY 2ND-4TH.**

Do you want to attend or get involved in building **#SURGEspring?**

**PRE-REGISTER NOW**



# DESIGN: THE KEY TO OPTIMIZING INTERACTIONS

*Your website is your identity online, communicating who you are, what you want and who should show up, says Beth Brodovsky.*

**Every association wants to improve member engagement with an active cohort of members dedicated to making the community thrive.** What simple and practical actions can achieve this goal? To me, engagement is the emotional attraction and sense of belonging that draws members to their association. Participation is engagement in action. Here I will explore how you can design an online presence that will encourage easy and effective member engagement.

I run a company called [Iris Creative](#) that works in marketing and communications for organisations around the theme of participation. I host a podcast called Driving Participation, and have spent the last three years talking to people from all over the world about what participation means to them.

To illustrate the impact that a website can have, I use the example of two catering websites my son came across when planning his wedding. One looks dated, with few interactive features and gaudy neon text. The other looks chic, modern and minimalist. When I ask people to describe these businesses, just from looking at the home page, they accurately guess the size, audience and service specialty of each.

However, when asked how they feel about using one of these companies, differences show up. Most people would opt to use the modern, aesthetically pleasing website. However, about a fifth of people think this business must be outside of their budget, and don't know if they can trust them. The older website may be ugly, but it shows that the business has won many small-scale awards, and that social proof means something to people.

This shows that **based on what you present online, people make accurate assumptions about who you are, but how they feel about that assumption will vary.** Are you attracting the business, engagement level, and membership demographic you need? If the answer is yes, you don't need to revamp. If the answer is no, reflect on your image and the emotional response it creates in your target audience.

Online experiences are not so different from real life. No one wants to walk into a wedding alone feeling underdressed, faced with only the backs of blue suits. Navigating an out-of-date, difficult-to-use website gives off the same vibe, with the underlying message: people like you don't join this association. Instead, you want people to walk into your virtual space and feel at home. Prospective and existing members want more than anything to feel comfortable in the association environment, and a well-designed website indicates to a visitor that they have found a place for them.

An online presence goes beyond the visual impression left by your website's homepage. **Reduce friction at all costs by making it convenient for visitors to find what they need.** Improve transparency by researching what questions people have when they arrive at your website, and having those answers be accessible. If what they seek is buried deep in a barrage of overwhelming information, they will look elsewhere, at competing websites and organisations. Streamline the journey from the moment of joining through to further engagement with a user-friendly website.

Building an effective online presence starts with understanding your audience. Understanding is the first step towards problem-solving. **Once you know what outcomes you want to produce, work backwards and you can incorporate your online presence into the framework of a sustainable association.**

## From the Chat:

*Your website is your office, the virtual window to your organization. Any and all content found within it reflects the quality of your association. Poor or outdated design and content formats is telling your viewers a story of your organization. Is it the story you want to tell? Are you guilty of using the same, overused stock photography in your content? Try investing in quality photos of your members in action, doing the important work they do.*

*- Rick Rutherford -*

Want to learn how to host your own virtual event, much like **SURGE 2017 ?**

**AssociationSuccess.org** is in the process of creating an online course that will walk you through the steps involved in putting on your own interactive virtual summit.

Want to be notified when the course is available?

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# WORD CLOUD

What were the most discussed topics in the attendee chat? The more frequently a word was used, the larger it appears in this image!







# FURTHER RESOURCES

During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about the future of learning. We've compiled them into a list here. Keep on learning!

- [Podcast: Driving Participation](#)
- [Blog: Smooth The Path](#)
- [Research: The New Member Engagement Study](#)
- [Case Study: Defining Engagement](#)
- [Book: The Paradox of Choice: Why Less is More](#)
- [Article: How Associations Can Leverage the Ikea Effect](#)
- [Article: Bringing the Real World Back into Engagement Scores](#)

