

# How to Create a Strategic Marketing and Membership Mindset

Sean Abell, ASHP



# How to Create a Strategic Marketing and Membership Mindset



**Sean Abell**

Marketing Manager, Membership  
ASHP

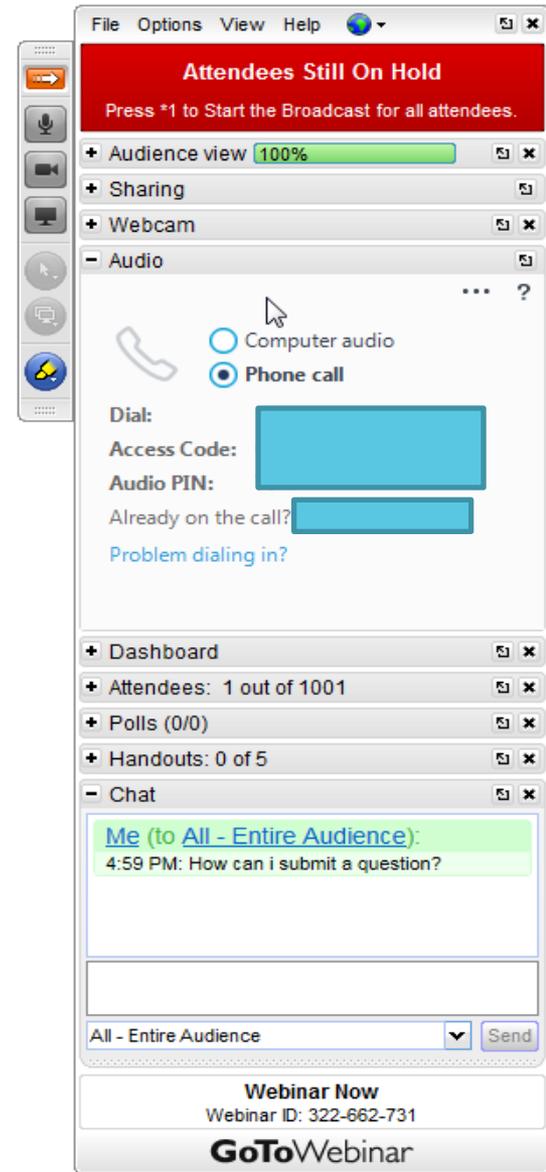
Sean has more than 20 years of experience in Association Sales and Marketing and currently manages membership marketing activities including the development and execution of member renewal and acquisition campaigns driving member engagement and revenue at ASHP.

Sean's prior experience includes work for the American Chemical Society where he served as Director of Marketing and the American Institute for Ultrasound in Medicine as a Marketing Specialist.

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*At the end of the Webinar, we will review additional resources for state affiliates available online at [ASHP.org](http://ASHP.org)*

# How to Create a Strategic Marketing and Membership Mindset

## 2017 Membership Marketing Benchmarking Report



- Association executives from more than 1,000 organizations responded to the survey
- Results presented are specific to individual membership organizations

# How to Create a Strategic Marketing and Membership Mindset

1. Communicating Value
2. Understand Your Members
3. Marketing Review
4. Customize Your Marketing
5. Resources

# How to Create a Strategic Marketing and Membership Mindset

## Communicating Value

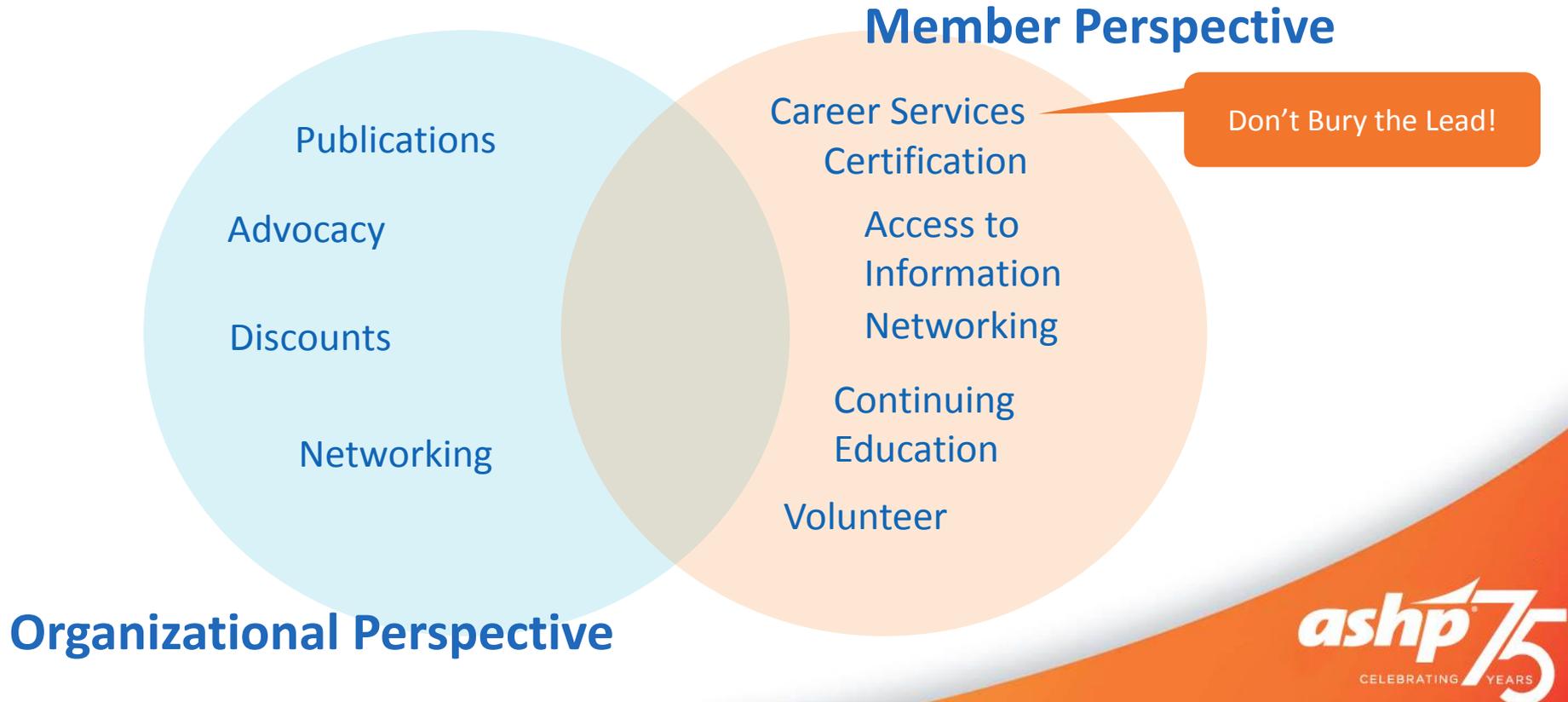
- Member feedback
- Organizational perspective



# How to Create a Strategic Marketing and Membership Mindset

## Communicating Value

Member feedback vs. Organizational perspective



# How to Create a Strategic Marketing and Membership Mindset

## Communicating Value - 2017 Benchmarking

Top Reasons Members Join (MGI Benchmark)	
Networking	49%
Continuing education	32%
Access to specialized/current information	22%
Learning best practices	22%
To support the mission	22%
Advocacy	17%
Conferences/tradeshows	16%
Prestige	16%
Association publications	16%
Discounts	14%

# How to Create a Strategic Marketing and Membership Mindset

## Understand Your Members

- Internal and external factors
- Member retention & attrition
- Average membership tenure & value

# How to Create a Strategic Marketing and Membership Mindset

## Step 2: Understand Your Members - 2017 Benchmarking

Top External Challenges to Growing Membership (MGI)	
Economy/Cost of Membership	34%
Competitive Associations/Sources for Information	32%
Lack of Brand Awareness	29%
Misperception about the Organization	25%
Declining Member/Employer Budgets	24%



# How to Create a Strategic Marketing and Membership Mindset

## Step 2: Understand Your Members - 2017 Benchmarking

Top Internal Challenges to Growing Membership (MGI)	
Difficulty in Communicating Value of Benefits	37%
Difficulty Attracting/Retaining Younger Members	26%
Insufficient Staff	23%
Difficulty in Finding & Reaching Prospects	22%
Membership too Diverse	20%



# How to Create a Strategic Marketing and Membership Mindset

## Step 2: Understand Your Members - 2017 Benchmarking

Top Reasons Not to Renew(MGI)	
Employer won't pay or stopped paying dues	37%
Lack of Engagement with the Organization	31%
Left the field/industry/profession	30%
Forgot to renew	24%
Retirement	23%
Could not justify membership costs with significant ROI	23%
Lack of value	22%
Too expensive	22%



# How to Create a Strategic Marketing and Membership Mindset

## Step 2: Understand Your Members:

### Average membership tenure & value

Category	# Members	Retention	Attrition	Avg. Tenure*	Membership Rate	**Value Per Member
A	100	0.72	0.28	3.6	\$100	\$357.14
B	100	0.68	0.32	3.1	\$75	\$234.37
C	100	0.64	0.36	2.8	\$50	\$138.89
D	100	0.25	0.75	1.3	\$25	\$33.33
<i>Average</i>		<i>0.57</i>	<i>0.4275</i>	<i>2.3</i>	<i>\$62.5</i>	<i>\$146.20</i>

Category 'A' value per member calculation:  $1 / .28 = 3.6 \times \$100 \text{ Rate} = \$357.14$

\***Calculate Average Tenure:**  $1 / \text{Attrition rate} = \text{Average Tenure}$

\*\* Membership only (Not including non-dues revenue)

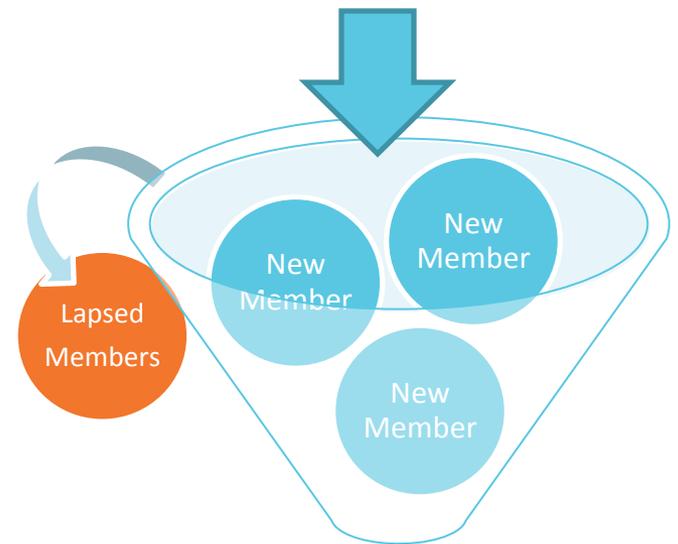
# How to Create a Strategic Marketing and Membership Mindset

## Step 2: Understand Your Members:

Steady State Calculation or Potential Membership is a relationship between new members added and lapsed members lost and indicates where your membership is headed over time (MGI).

**To reach your annual and long term goals it is helpful to understand this relationship**

Annual New Member Input / Reciprocal of Renewal Rate (or Lapse Rate) Shown as a Decimal = Total Membership Steady State.



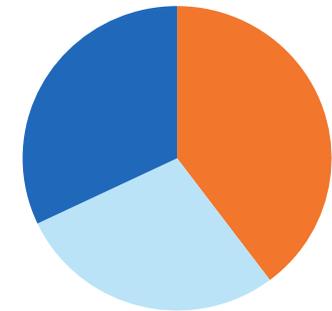
# How to Create a Strategic Marketing and Membership Mindset

## Step 2: Understand Your Members:

### Steady State Calculation or Potential Membership Scenarios

Scenario	New Members	÷	Attrition	=	Potential	Retention rate
1	2,975	÷	.32	=	9,296	68%
2	2,975	÷	.22	=	13,522	78%
3	3,975	÷	.22	=	18,068	78%
4	2,975	÷	.12	=	24,791	88%

Average Association spent 40% more on recruitment than Renewal Marketing in the last fiscal year

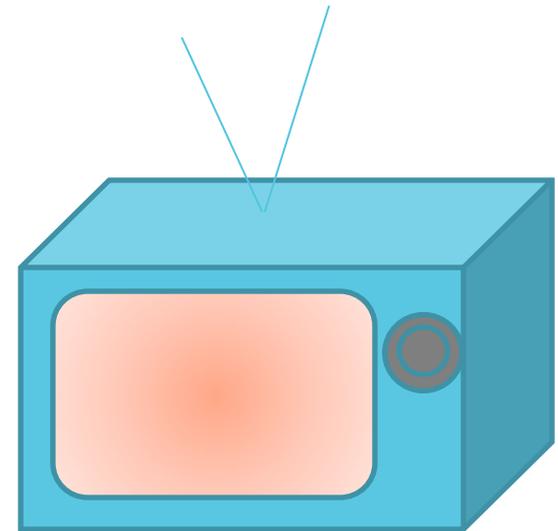


■ Recruitment ■ Retention ■ Branding

# How to Create a Strategic Marketing and Membership Mindset

## Marketing Review

- Marketing Channel Assessment
- Legacy Campaign Review
  - Prospecting
  - Renewal



# How to Create a Strategic Marketing and Membership Mindset

## Marketing Review - 2017 Benchmarking

### Marketing Channel Review

Most Effective Marketing Channel for New Members	
Word-of-Mouth	65%
E-mail	56%
Direct Mail	32%
Digital Marketing	31%
Chapters	29%
Promotion at Self-hosted Conference	28%
Cross Selling	27%
Local Events/Meetings	27%
Association Sponsored Events	26%
Exhibit at Other Conferences	18%

Influence the influencer

Know Your List!

# How to Create a Strategic Marketing and Membership Mindset

## Marketing Review - 2017 Benchmarking

### Marketing Channel Review

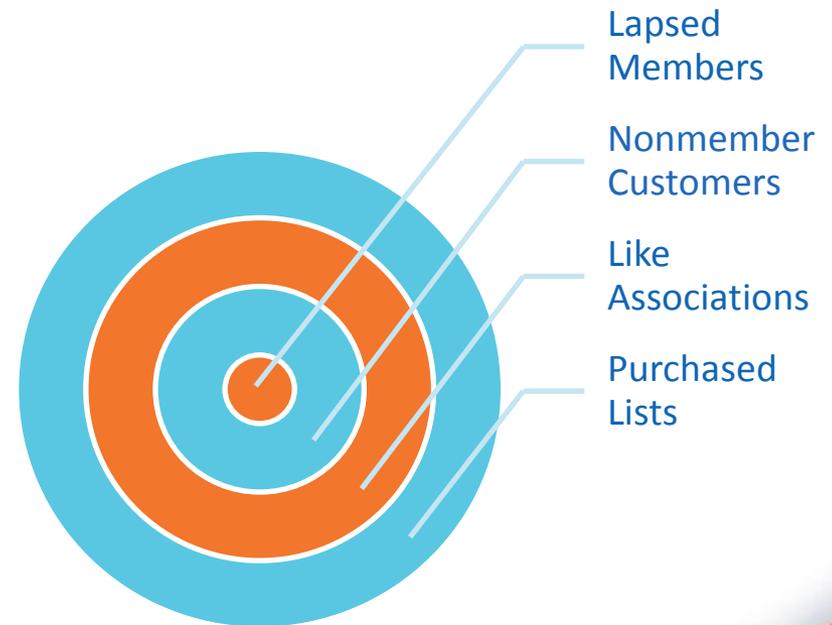
Most Effective Marketing Channel for Renewals	
E-mail	84%
Direct Mail	57%
Staff Phone Calls	23%
Peer Member Contacts	14%
Telemarketing	13%
Social Media	6%
Chapter Phone Calls	6%
Board Phone Calls	5%
Magazine Cover Wraps	3%
Employer Contacts	3%

High ROI  
Producer!

# How to Create a Strategic Marketing and Membership Mindset

## Marketing Review

- Legacy Campaign Review
  - Review Annual Expenses
  - Annual Recruitment Activities
    - Inside Prospect Groups
      - Lapsed Members
      - Non-member customers
    - Outside Lists
      - Conference attendees
      - Rented lists



# How to Create a Strategic Marketing and Membership Mindset

## Marketing Review

- Build Your Own Contact List
  - Add an email signup button to your Website
    - “Sign Up to Receive the Quarterly Newsletter”
  - Register for “gated” content
    - Research report or white paper?
  - Host live/virtual events
  - Visitors to your site (retarget)
  - Geotargeting



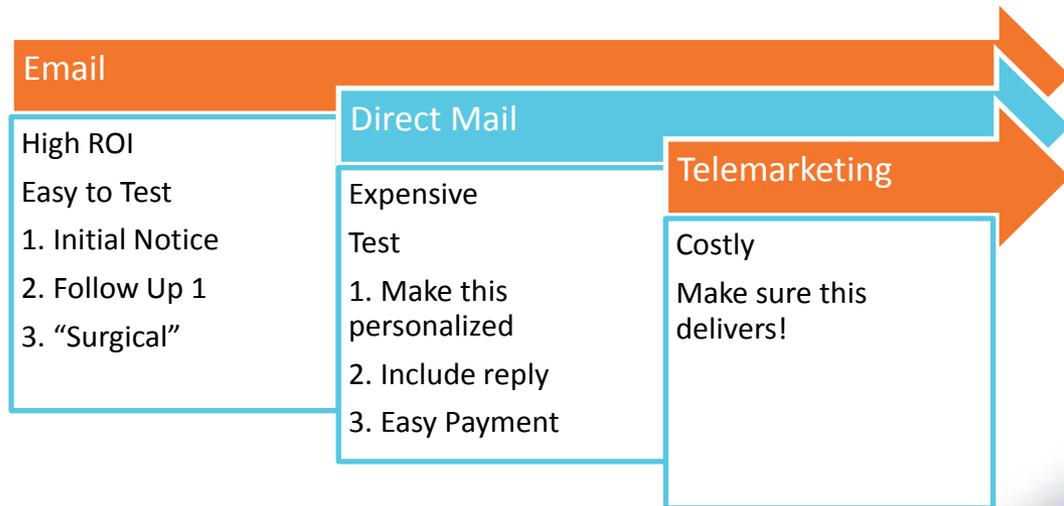
# How to Create a Strategic Marketing and Membership Mindset

## Marketing Review

- Legacy Campaign Review

- Renewal Cycle

- Annual
- Rolling
- What is being tested?
- Do incentives exist?



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## Customize Your Marketing

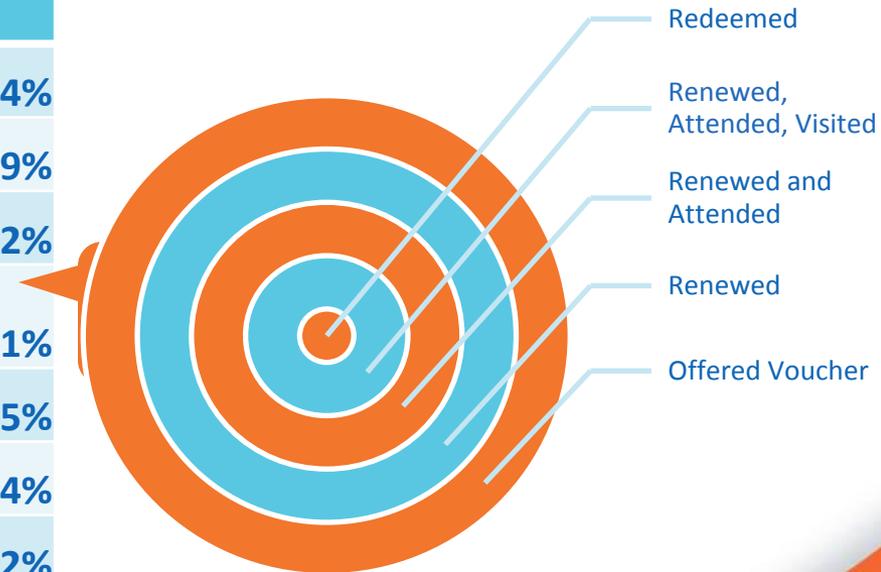
- Offer Effectiveness
- Market Segmentation
  - Cost per segment
  - Key messages per segment
  - Channels per segment



# How to Create a Strategic Marketing and Membership Mindset

## Customize Your Marketing - 2017 Benchmarking

Effectiveness of Offers for Recruiting New Members – (Very Effective/Effective)	
Year 1 Dues Discount	64%
Conference/Convention Discount	59%
Online Registration Discount	52%
Product Discount, Coupons, Vouchers	41%
Multiyear Dues Discount	35%
Free Gifts, Premiums	34%
Free Trial	32%
Member Referral Incentives	31%
Drawings/Contests	19%
No Risk Dues Back (Refund)	18%



# How to Create a Strategic Marketing and Membership Mindset

## Customize Your Marketing: Market Segmentation

Category	Value	Key Messages	Test	Offers	Email	Social	Direct mail	Telemarketing
A	\$357	Convenience	Message	Early Renewal	5X	30 Days	2X	YES
B	\$234	Get Involved	Voucher	Installment	5X	30 Days	2X	YES
C	\$138	Residency Resources	Method	Multiyear Discount	8X	60 Days	1X	NO
D	\$33	Establish Yourself	Frequency	Drawings, Contests	10X	90 Days	1X	NO

Address the cost and value per segment, utilize key messages per segment, spend wisely utilizing appropriate channels per segment

FaceBook Custom Audiences  
Twitter Tailored Audiences  
LinkedIn Custom Audience

# How to Create a Strategic Marketing and Membership Mindset

Customize Your Marketing: Always be testing!



# How to Create a Strategic Marketing and Membership Mindset

## Customize Your Marketing: Market Segmentation

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## Resources



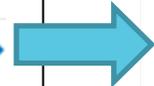
- Download the results from Marketing General Incorporated ([www.marketinggeneral.com](http://www.marketinggeneral.com))
- Important Membership Formulas: <http://membershipmarketing.blogspot.com/2009/02/important-membership-marketing-formulas.html>

# How to Create a Strategic Marketing and Membership Mindset

Access the Recruitment and Retention Toolkit at ASHP.org

<https://www.ashp.org/State-Affiliates/Membership/Recruitment-and-Retention/>

Membership	
RECRUITMENT AND RETENTION	→
<b>FIVE STEPS TO SUCCESS</b>	→
<b>4 BEST PRACTICES IN MEMBER MARKETING AND RECRUITMENT</b>	→
<b>MEMBER RETENTION: HARD WORK, BUT SOMEBODY'S GOTTA DO IT</b>	→
<b>MEMBER RETENTION TACTICS: LOW INVESTMENT, HIGH IMPACT</b>	→
<b>WHAT DOES MEMBER ENGAGEMENT MEAN IN YOUR ASSOCIATION?</b>	→
<b>HOW TO ENGAGE VOLUNTEER LEADERS IN MEMBER RETENTION</b>	→
<b>MEMBERSHIP SURVEY TEMPLATE</b>	→



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## Five Steps to Success

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### Attract, Retain and Cement Member Loyalty

Attracting and maintaining members is a common challenge for many organizations but it doesn't have to be. ASHP has created a five-step guide that will aid in jump starting this process and provide you with the tools to help you successfully execute your plan.

Today's consumers have developed higher expectations of membership organizations. It is no longer acceptable for associations simply to advance its mission. Members now expect a return on their investment of dues dollars. To respond to this trend, organizations must consistently demonstrate the value they return to their members.

#### Step 1 - Determine Your Value

If you ask many association leaders and volunteers why someone would join their organization most will rattle off a list of "members-only benefits, including:

- Advocacy
- Discounts on products and services
- Publications

# How to Create a Strategic Marketing and Membership Mindset

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6. Questions?

