



# **Focus on Future Membership & Volunteer Growth**

**South Carolina Society of  
Association Executives  
Annual Conference**

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# Overview

## **Optimal Use of Core Functions**

1. Retention/Renewal
2. Relationship Management
3. Volunteer Engagement
4. Segmentation/Market Management
5. Acquisition/Outreach
6. Accountability/Financial Management
7. Program Development
8. Research/Data Collection
9. Database Management
10. Image Management
11. Change Agent

## **Principles & Best Practices**

# Core Premise: Focus is on Future Growth

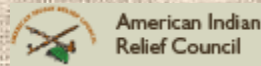
- Many resources developed over time (ASAE)
  - *Membership Essentials* handbook
  - Older: *Retaining Members, Millennium Membership*
  - *Decision to Join & Decision to Volunteer*
  - *7 Measures of Success*
- Goal today
  - Present view of what you need to achieve/maintain growth
  - Some best practices
- What we'll cover
  - Lessons/observations from 100+ associations
  - In-depth things learned from association positions
  - Conferences: ASAE, DMA Nonprofit, state societies
  - Focus: always on strategy PLUS execution



Nonprofit Federation



The National Office Products Alliance



# 1. Retention/Renewal

- #1 campaign or function: if calendar or anniversary
- How are these managed? In program reviews ...
  - We find that personalization may be lacking or done awkwardly
  - Batch lots without personalization instead of variable copy
  - Loaded up with add-ons: PAC, foundation contributions, demographic updates
  - Eliminating/deferring these steps tends to improve performance
- Basic goal: cut through the clutter and generate the sale
  - Best packages are often a cover letter and 'invoice'
  - Treated as mix of reminder and accounting process
  - Often use multi-media: phone up-front and telephone late in process: amore timely online renewals and better recapture
  - Generally a 90/60/30/0/-30 day, 5-contact sequence helps

# Best practices: renewal/reinstatement

- As with most marketing, other vehicles carry weight of reminding of benefits:
  - Emails, publications that are cultivational in nature
  - Peer to peer and/or staff phone calls
  - This takes pressure off the renewal to do more than it needs to
- Data management helps
  - Postal hygiene on a regular basis (NCOA & Address Service requests)
  - Leading with email allows bouncebacks to be flagged
- "Closed loop" to measure exposure, impact, outcomes

*"The battle is won or lost before you take the field"*

- Sun Tzu

## 2. Relationship Management

- If members are new, what impressions are they forming?
- Everything is new, so all introductory messages are collectively transmitted but may be a confused mass:
  - When events are held
  - How to register for meetings
  - How to participate in benefits
- How is contact managed?
  - How often would a confused member get a chance to speak with a live person to explain things?
  - If they do, how much overhead are you burning?
  - Do they turn to each other for (possibly right) answers?
- Best practices in CRM
  - Consist of repeated 'touches' from early in their tenure
  - Start with the acknowledgement: donor research demonstrates second gift declines sharply if *> 72 hours*
  - Timely response to calls & messages matter, for the issue at hand and symbolically

# Best practices: Relationship management

- Web: studies document low frequency of visits, value
- Even today, many sites hinder speed, flexibility of updating through old content management models
  - Design—Many suffer from excess “creativity” (flash animation) or too little (minimalist or crowded navigation)
  - Analytics—Very little analytics to measure member visits, frequency
  - User Experience—Many remain “brochureware”/no engagement
- Missing focus on search engine optimization
  - Need metatags, frequent updating, reciprocal links, content aggregators
- Track volume of member web visits and their tracking
  - Web traffic tracking: from hits to unique user sessions, harder to tell how many members visit
  - Measure real frequency of use, sections visited, surveys to validate
  - Segment/detail logs to measure progression/landing page visits

### 3. Volunteer Engagement

- **Role**: Builds community, access to SMEs/expertise, ensures we have right tone, provides voice to members, creates leadership “farm team,” avoids potential governance disasters.
- **Concerns**: Representation, how to allocate resources absent ROI, balancing quantity vs. quality, a system and group always exists absent strong active catalyst role.
- **Metrics**: # who participate, degree of desired turnover, degree of retired retention of volunteers in positions, impact on retention.

# Best practices: Volunteer engagement

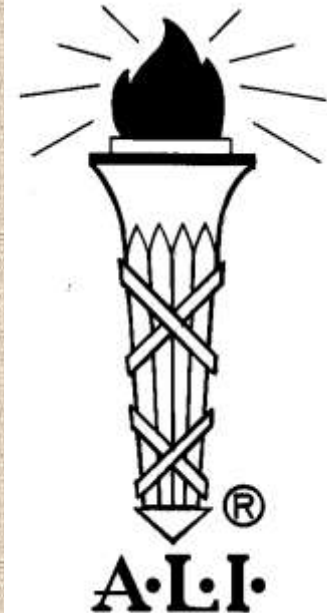
- Decision to volunteer presents reasons for engagement
  - Echoes 'give to get' mentality in *Decision to Join*
  - Emphasizes importance of effective recognition
  - Desire for effectiveness

## Observation:

- Key issue comes in member recognition
- Often rank and file members draw the wrong inferences
- Narrow range of members who are quoted, mentioned by way of indirect recognition ...
  - Too narrow conveys impression of a 'club.'
  - "Same people are always mentioned"

## 4. Segmentation/Market Management

- Major principle: reflects need to be inclusionary
  - ASAE: 4 major strategic initiatives includes diversity
  - Not political: driven by demographics
  - Our population is growing far more diverse: U.S. Caucasian minority by 2045
  - Globalization for national organizations
- Segmentation: diversity-based business model
  - Generational marketing, gender, level/breadth of functional areas: focus on service and engagement
  - To attract members, new members need to see people like them
  - American Law Institute example: “youth movement” from an average age of 65 (typical also of donor orgs.)



# Best practices: Generational marketing

- Same as with all individuals: to attract & keep, often two different methods
  - Underlying response dynamics haven't changed
  - Young respond to offers, word of mouth from others ... peers AND supervisors
  - Often barrier is trying something new, out of pocket
  - Offer satisfaction guarantees, trials offers, risk-reducers
- Coping strategies in nonprofit marketing
  - Huge wasted effort trying to convert young donors
  - Now, conscious attempts to skew younger in right ranges
  - Adapt programs to meet their psychic needs
    - Asking for time and in-kind support for advocacy, not money they don't have
    - Feeds desire to have an effect, address underlying issues



# Best practices: Acquisition/Outreach

- Design issues and tone
  - Two color: good stewardship, higher response
  - Foldouts emphasize what someone *really* gets
  - Get away from the crowded pocket folder—easy to store/read, low expense justifies repetitive contact
- Need to consider the role of the brochure
  - Mission: delivery system for painless contact
  - Fits within an overall communications mix and milieu
  - Typically driven by word of mouth: auditory vs. visual
  - The few outreach to the many > mass market
  - Mass marketing techniques support existing WOM
- Real test comes when reviewing the application
  - Tool to close the sale, translate awareness into action

# Best practices: Materials/forms design

- Balance need for data collection and marketing
  - Forms need to be easy to fill out
  - Single biggest deterrent to response: apparent difficulty to complete
  - A 'delayed response' is often a non-response
  - DM lessons: reply form is #1 driver of any collateral
  - Can use as a handout, but most effective are:
    - Prepopulated forms—easy to complete and return: conveys that it was meant for you
    - Clarifies the offer—price, basis, terms & conditions: statement of ethics, references, processing fees
    - Subliminally appreciated—tells them WHAT YOU WANT
    - Often materials are shy, hide the offer, or speak in generalities ... the reply 'means business'
    - Still critical even in the web era .. Mail drives web traffic but call to action should push website, inbound calls



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60 years ago, the  
American Society of  
Appraisers is the world's  
oldest and most widely  
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society of professional  
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American Society of Appraisers  
P.O. Box 13366  
Washington, DC 20044-0266

March 1998

Mr. Lowell  
5305A Shepherd Drive  
Waldorf, MD 20602

Dear Mr. Lowell:

I want to extend to you this invitation to apply for membership in the American Society of Appraisers (ASA)—the premier professional appraisal society, representing more than 6,000 appraisers from all disciplines.

Once you become an ASA member, your clients will recognize your superior qualifications . . . your professionalism . . . and your commitment to high ethical standards. You'll be affiliated with the most prestigious multidiscipline association of appraisers worldwide.

I encourage you to join today and set yourself apart from the competition . . . expand your client base . . . and increase your earnings. But that's not all. Here's what becoming a member of ASA will do for you:

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Fax: (703) 743-8473, E-mail: [asmemb@aso.com](mailto:asmemb@aso.com)  
Internet: [www.appraisers.org](http://www.appraisers.org)

**Membership Invitation**

**YES!** I accept your invitation to apply for membership in ASA

CODE 3064

**NAME & ADDRESS**

(Please type or print clearly with a ballpoint pen)

Name of Appraiser (omit professional title/ASA/DO title)

**Business Address**

Company \_\_\_\_\_  
Address \_\_\_\_\_  
City, State, ZIP, Country \_\_\_\_\_  
Business Phone \_\_\_\_\_  
Fax \_\_\_\_\_  
Web Site, Email \_\_\_\_\_  
State Security \* (optional) \_\_\_\_\_  
DOB Date (optional) \_\_\_\_\_

**Alternative Mailing Address**

(Use only if you don't want mail sent to your work address)

Address \_\_\_\_\_  
City, State, ZIP \_\_\_\_\_

**APPLICATION FEE**

A \$100 Candidate Application Fee (non-refundable) MUST accompany your completed application form. DO NOT send any other funds at this time. An invoice for International and Chapter dues will be issued upon receipt and approval of your application.

**PAYMENT METHOD**

Check enclosed for \$100 (Payable to ASA)  
 Charge \$100 to my:  
 VISA  
 MasterCard

ACCOUNT # \_\_\_\_\_  
EXPIRE \_\_\_\_\_  
SIGNATURE \_\_\_\_\_

Complete BOTH SIDES of this form and mail by June 30, 1998, with application fee to:  
American Society of Appraisers  
P.O. Box 1638  
Merrifield, VA 22116-9979

**FOR OFFICE USE ONLY**

Chapter \_\_\_\_\_  
Region \_\_\_\_\_  
Account # \_\_\_\_\_

Please complete the back side of application.

OVER PLEASE >

Hard to customize.  
'Prestige' soft sell.

Working within constraints:  
federation structure, local level approvals.

**MEMBERSHIP APPLICATION**

Complete the front side of this application form, and be sure to sign and date the Membership Agreement below.

**Provide three business references**

(Address and phone numbers must be complete.)

1. NAME OF REFERENCE \_\_\_\_\_  
PHONE NUMBER \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP \_\_\_\_\_

2. NAME OF REFERENCE \_\_\_\_\_  
PHONE NUMBER \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP \_\_\_\_\_

3. NAME OF REFERENCE \_\_\_\_\_  
PHONE NUMBER \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP \_\_\_\_\_

**Provide three personal references**

(Address and phone numbers must be complete.)

1. NAME OF REFERENCE \_\_\_\_\_  
PHONE NUMBER \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP \_\_\_\_\_

2. NAME OF REFERENCE \_\_\_\_\_  
PHONE NUMBER \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP \_\_\_\_\_

3. NAME OF REFERENCE \_\_\_\_\_  
PHONE NUMBER \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP \_\_\_\_\_

**APPRAISAL DISCIPLINE**

Please check your most significant appraisal discipline (Choose only one.)

Appraisal Review & Management  
 Gems & Jewelry  
 Personal Property  
 Business Valuations  
 Machinery & Technical Specialties  
 Real Property

**ANNUAL DUES**

You will receive a printed dues invoice when your candidacy has been approved.

Annual U.S. dues are as follows:

Candidate	..... \$305
Accredited Member (AM)	..... \$580
Accredited Senior Appraiser (ASA)	..... \$580

Chapter dues are \$25. In addition, some chapters have an assessment fee.

**MEMBERSHIP AGREEMENT**

The undersigned applicant certifies that he/she is either (1) employed in the appraisal profession or (2) interested in becoming an appraiser. The applicant further agrees to take and pass the society's examination in the Principles of Appraisal Practice and Code of Ethics within one year of acceptance into Candidate membership. In addition, the applicant agrees to complete the 15-hour course for the Standards of Professional Appraisal Practice (SUPAP) within two years of acceptance into Candidate membership.

I hereby certify that the statements contained herein are correct and, if related to membership, I agree to abide by the Constitution, Bylaws, and Administrative Rules of the society and its Principles of Appraisal Practice and Code of Ethics.

Agreement of Applicant: \_\_\_\_\_ Date: \_\_\_\_\_

Complete BOTH SIDES of this form and mail along with payment to:  
American Society of Appraisers  
P.O. Box 1638  
Merrifield, VA 22116-9979

Have you ever been convicted of a felony?  Yes  No

## 6. Accountability/Financial Management

- Past surveys of membership departments:
- Membership = relationship management department
- Often financial models do not place membership as the true "center of the universe"
  - Servicing costs may not be known
  - Membership expenses as a line item is seen to include governance expense
  - Cost of doing business is included with membership—residual that includes everything else
  - Some legitimate membership expenses (i.e. chapters or research) are included de facto but not itemized
- End result, fuzzy tracking for a broad issue that is seen by shorthand to be a 'catch-all'
- Lack of activity based costing also distorts true margin

# Best practices: Testing Impact on Results

	A: Original	B: Token	C: Letter
# Mailed	364,945	150,000	50,000
% Response	0.71%	1.23%	0.77%
Average Gift	\$36.48	\$23.73	\$55.52
Revenue/000	\$257.26	\$292.99	\$424.76
CPDR (\$/dollar)	\$1.38	\$1.54	\$0.93



A

B

C

## 7. Program Development

- **Role**: Ensures we have right “product,” what is being communicated has to be strong to attract prospects, building blocks for the value proposition.
- **Concerns**: How to review member services: importance and effectiveness, compare relative value, guide resource allocations, sunset review and procedures for declining services, assortment management. Addressing paradox of choice.
- **Metrics**: financial expense and revenue, margin, presence/absence of superior alternative investments.

## 700 member Trade Association: core benefits

- RSA Convention
- RSA Trade Show
- *IMPACT seminars*
- *RSA University*
- Consumer promotions/Local Marketing Toolkit\*
- Pepsi program
- *Promotions packet*
- RSA magazine
- *RSA Today* monthly newsletter
- RSA Section regional meetings
- Information on [www.rollerskating.org](http://www.rollerskating.org)
- RSA worker's comp insurance\*
- RSA liability/property insurance\*
- Music licensing discount programs\*
- Group purchasing programs\*
- RSA products

Program  
Categories

“Golden  
Handcuffs”

Affinity  
Programs

Core Services

\* potential golden handcuff

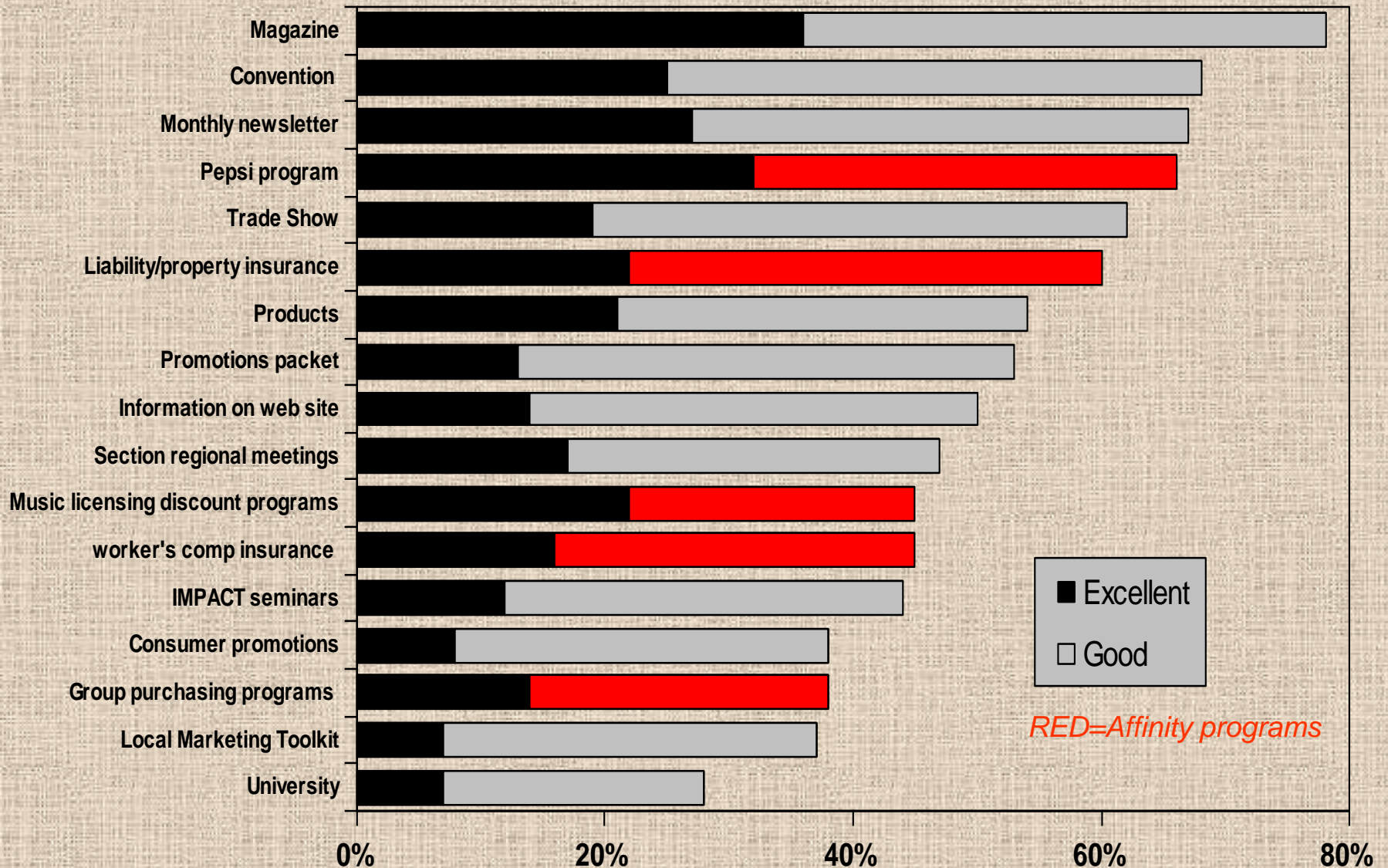
**xxx:** potential core/sunset

Note: member usage, perceptions = distinction between potential and actual

## 8. Research/Data Collection

- Primary (quantitative & qualitative) and secondary
- Mix of surveys, personal interviews, “lit review”
- Needs to provide answers to key questions
  - What does your audience care about most .. Least
  - Tangible benefits and intangibles (culture, image)
  - What is the contribution of each service to overall value
  - How do they prefer to be communicated with
  - Behavior: what/how much do they use, read, visit?
- Focus on both members *and* non-members
  - Non-members have opinions too
  - If you have an 80% retention, at least 20% each year are new (if you’re lucky!)
  - The non-member population often includes former members, others with meaningful exposure

# Best practices: Monitoring performance/satisfaction



**VALUES**

PERSONAL SECURITY

PRIDE

SELF ESTEEM

PEACE OF MIND

FOLLOWING GOD'S WILL

PERSONAL SATISFACTION

ACCOMPLISHMENT

PERSONAL SECURITY

**EMOTIONAL BENEFITS**

FEEL SAFE

PERSONAL JOY

PLEASE GOD / CLOSER TO GOD

DOING RIGHT THING

PEACE OF MIND

TRUST MY DECISION

DON'T FEEL GUILTY

I'M CONTRIBUTING / MAKING A DIFFERENCE

MAKES ME HAPPY

CONFIDENCE / TRUST IN ORG.

MAKING A BETTER WORLD / SOCIETY

**CONSEQUENCES**

PEOPLE ARE EMPOWERED

NOT WASTING MY MONEY

THEY HELP WHERE I CAN'T

RELIEVES SUFFERING

REACH MORE PEOPLE

I CAN SEE RESULTS OF MY DONATION

PEOPLE IN NEED GET HELP

CAN TURN TO THEM FOR HELP

BECOME SELF-SUFFICIENT

**ATTRIBUTES**

PROVIDES DOMESTIC / COMMUNITY SERVICES

SHARES MY VALUES

HELPS ALL PEOPLE / DOESN'T DISCRIMINATE

WELL ORGANIZED / MANAGED

WELL KNOWN

FAMILIAR / KNOW. ABOUT ORG.

INTERNATIONAL

BACKED BY CHURCH

PROVIDES SERVICES TO THE NEEDY

EFFICIENT USE OF FUNDS

ADVERTISE / PROVIDE INFO

I / KNOW PEOPLE WHO HAVE BEEN HELPED

# 9. Database Management

- Your central database is often an untapped resource
  - Central repository for correct information ...
    - Single most important factor in DM readability, how we treat your record is how we treat you
  - Data mining potential: pattern recognition opportunities for queries, reports, what if projections
  - Linking touches, purchases, participation to outcomes such as renewal performance
  - Contact management features: facilitate CRM, specialized touches for new members, 'at risk' members
- Necessary capabilities
  - Requires training in computers/database
  - May require downloads into better tools:  
i.e. Microsoft SQL used at Texas Medical Assn.
  - Sometimes a change in software

“All I ever hear about is people complaining about iMIS and yet nobody moves on.”

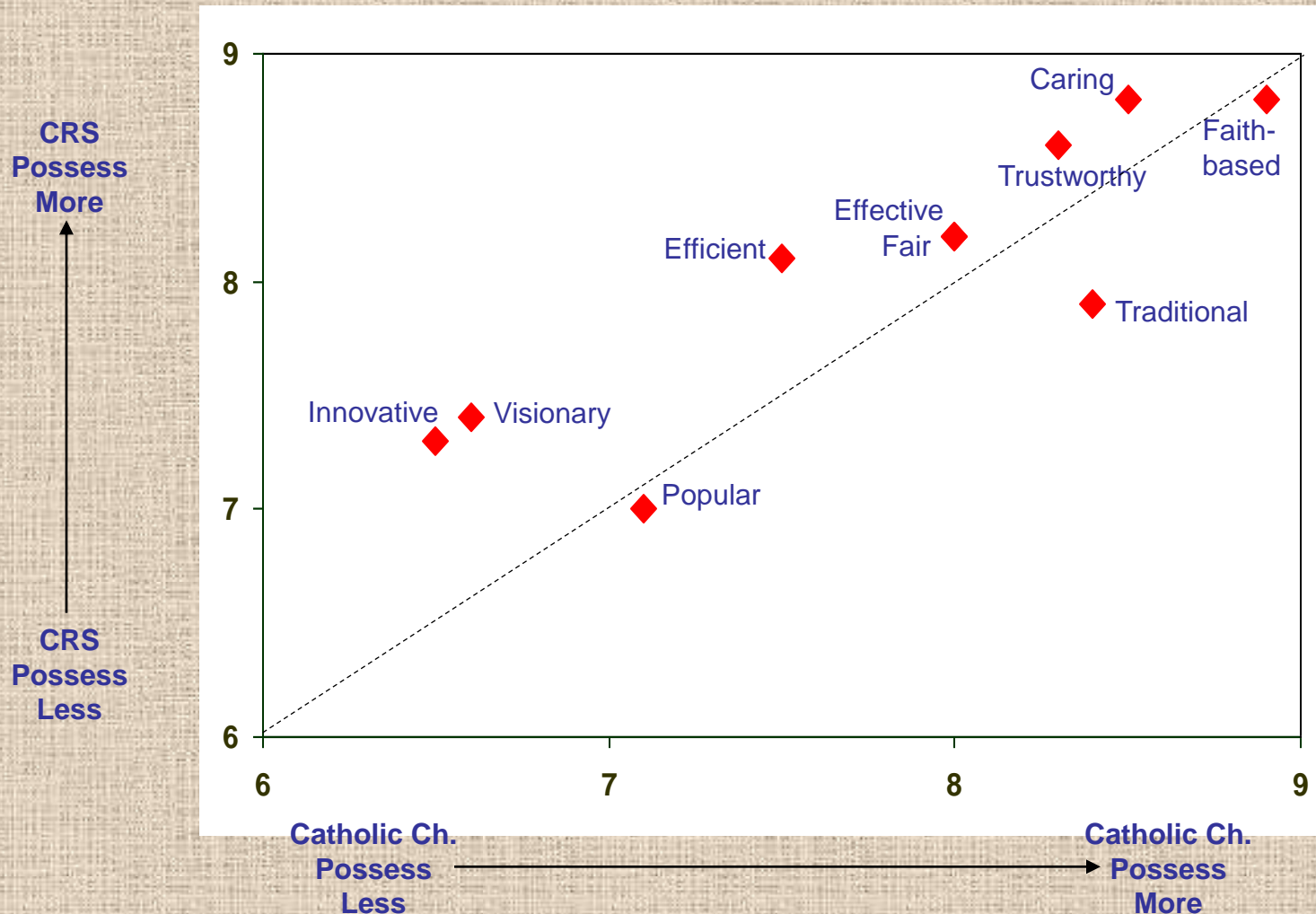
## 10. Image/Positioning

- Positioning is how you define your place in a competitive space
  - “What you are in the minds of your audience”
  - Combining logical and emotional appeals
  - Aggregate values
  - Clustering and segmenting external audiences in terms of their beliefs and needs
  - Linking to a brand
- Illustration of tools on following page
  - Measurement of beliefs, absolute and relative to competition



# Leadership Traits Performance – CRS & Catholic Charities

Performance - “Now, I would like you to rate Catholic Relief Services / Catholic Charities on how well it has or possesses the characteristics we just talked about. Please use this scale, where 1 = Does Not Possess at All and 10 = Totally Possess



# Best Practices: Tie membership to bigger picture

- Helpful to adopt a framework such as 7 Measures of Success

## **Commitment to purpose**

- Customer service culture
- Alignment of products/services with mission

## **Commitment to analysis & feedback**

- Data driven strategies
- Dialogue and engagement
- CEO as broker of ideas

## **Commitment to Action**

- Organizational adaptability
- Alliance building

- Focus on areas with direct impact: changing industry or profession
- Mass change represents changes of many single people and companies

# 11. Change Agent

- Consider short-term/long-term structure/needs
  - Membership function needs to be productive in *today's* environment & structure
    - ... while preparing for a better future
  - We so often evolve organically, unlikely we are optimal
  - Ways to determine and document this:
    - Benchmarking: comparisons to others in key metrics:
      - Proportion who use a specific service
      - Ratio of member to non-member attendees
      - Ratio of attendees to total members
      - Typical financial performance for events
      - Usage and finance of major member benefits
      - Satisfaction & importance measures
    - Consultants: structured evaluation focused on you
      - ASAE now has > 400 Consultants Council members

## **Best practices: Assessing new trends**

- Helpful to look at past fashion that has faded
  - Many 'Millennium Membership' principles
  - ASAE 'Supertrends' from strategic research
  - Structures: mass customization/customized membership
- Today: social media & generational marketing
  - Possibly a distraction
  - Critical to tap into markets with tools that reinforce existing communities: join & link instead of create
    - Distinguish between bloggers, other active member niches
    - Content developers, volunteer leaders, member recruiters
    - Determine if the new cadre are connectors, influentials
    - Opinion leaders, early adopters ... or too much time on their hands