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Benchmarking**
PERFORMANCE MATTERS

&



Kaiser Insights LLC

PRESENT:



New Member Engagement S T U D Y

**TOOLS TO SIGNIFICANTLY BOOST
NEW MEMBER RETENTION RATES**

(and delight your new members)

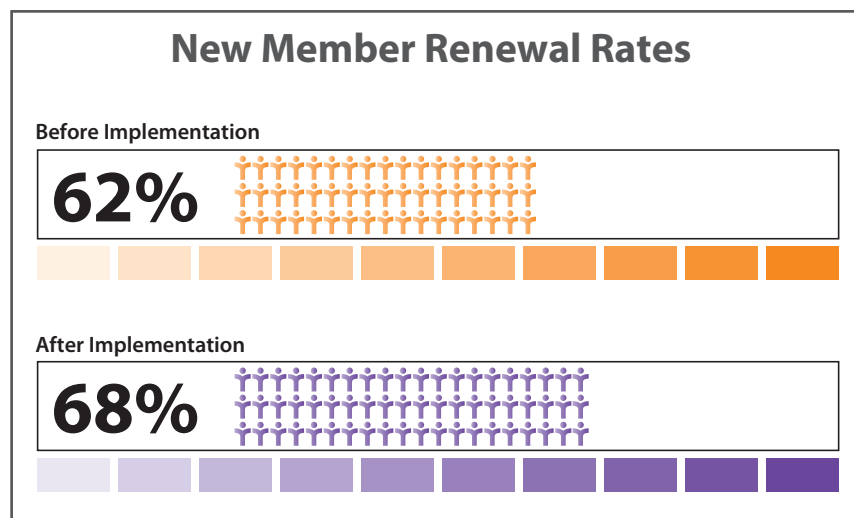


Executive Summary

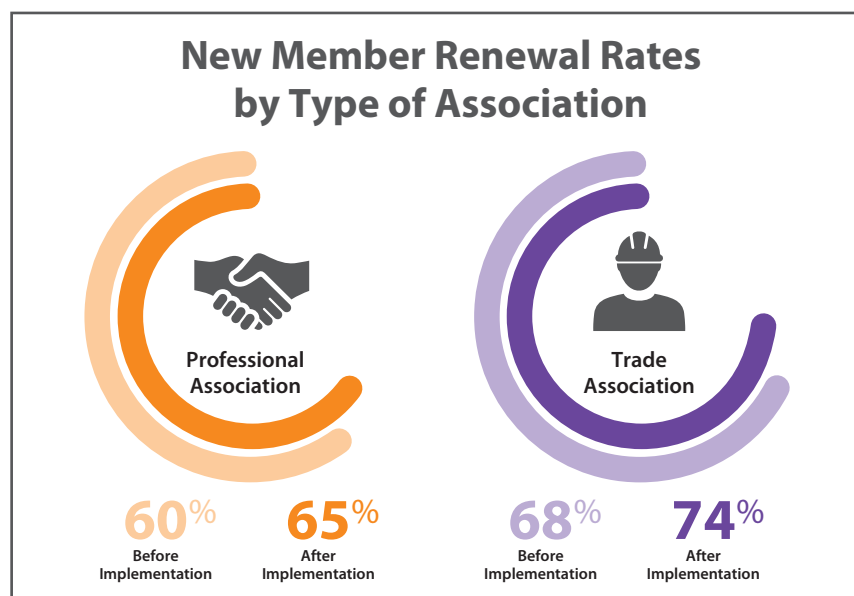
Whether your association has just one staff person or big offices with 399 staff; an annual budget of \$200,000 or \$91,000,000, new member engagement plans work. No matter whether your association calls Altoona, PA or Zuni, NM home or if your association is a professional or trade association, new member engagement plans work!

YOUR NEW MEMBER ENGAGEMENT PLAN CAN SIGNIFICANTLY IMPROVE NEW MEMBER RETENTION RATES

Associations with onboarding, orientation, or welcoming plans boost their new member renewal rates. In fact, on average, across all respondents, the renewal rate rose from 62% before implementation to 68% post plan implementation.

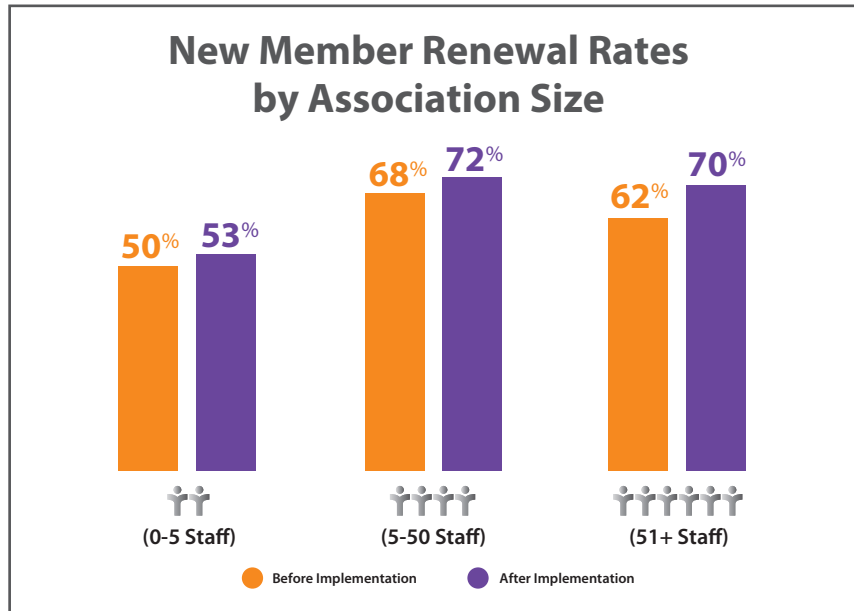


New member engagement programs show positive results for both professional and trade associations.

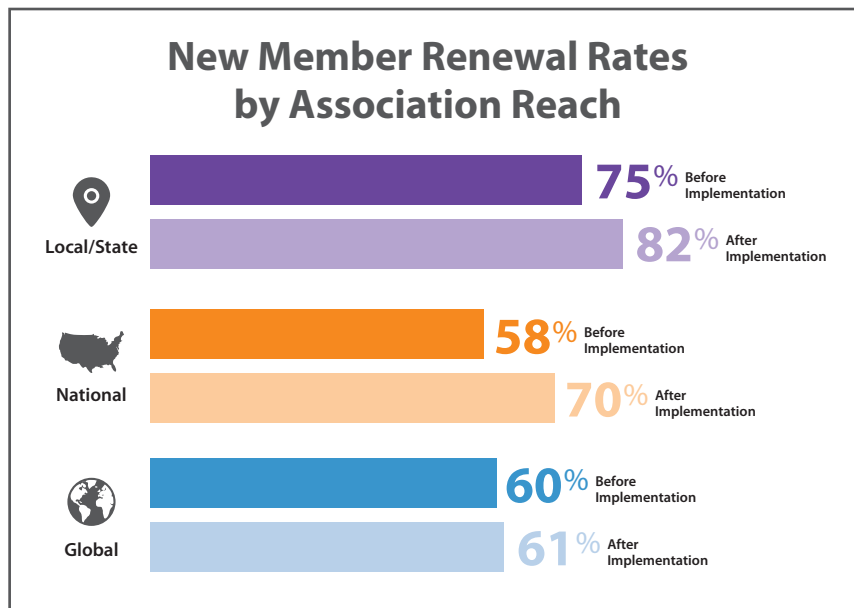




And new member engagement programs increase new member retention in all sizes of associations.

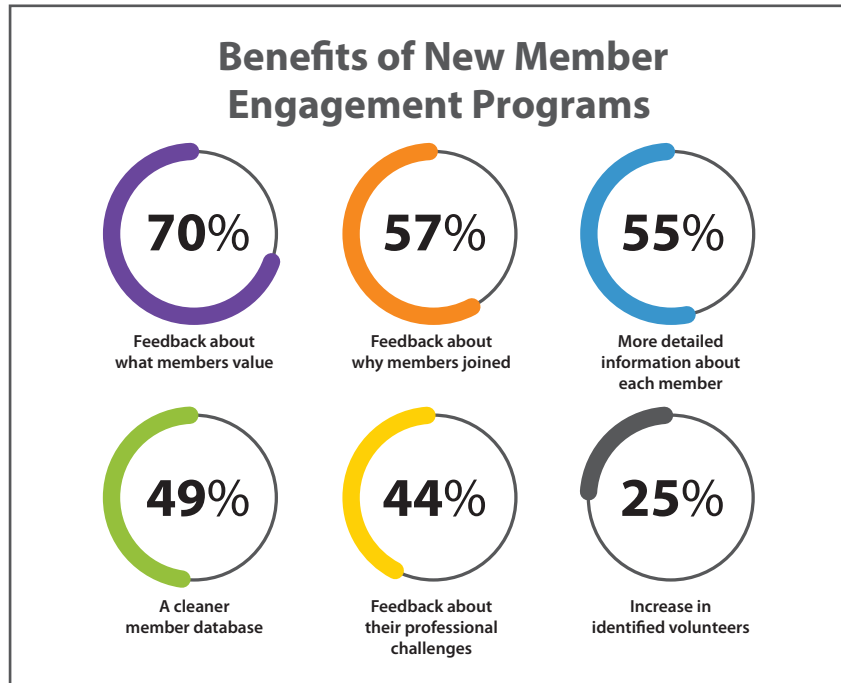


Local/state and national associations show the biggest difference in new member renewal rates after program implementation.

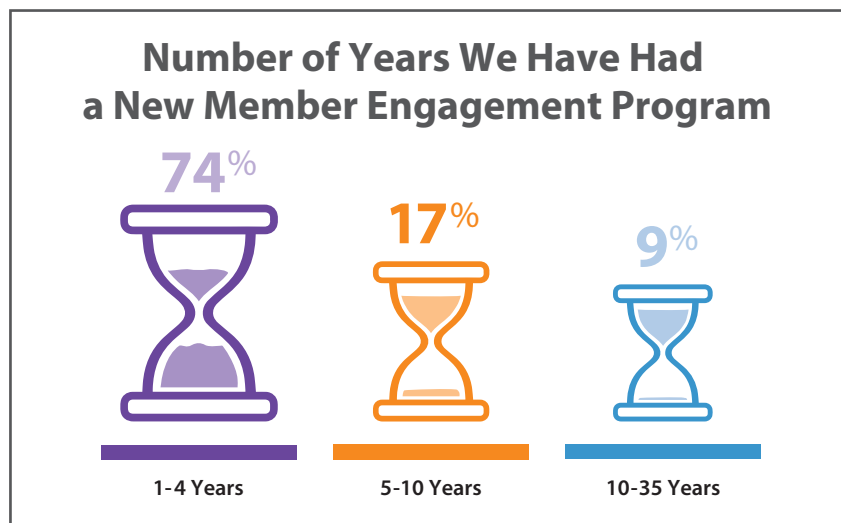




Not only do new member engagement programs increase renewal rates, but associations also receive many other benefits as well.



Formal onboarding, orientation, and welcoming programs are new to many associations. Most respondents (74%) reported having started their plans in the last four years.





However, if your association does not have a plan, you are in good company, and it is not too late get started.

In the following report, you will find details of what makes the best new member engagement plans tick. Packed with both the hard data from the quantitative survey and stories pulled from qualitative interviews with association professionals, we attempt to cover all aspects of new member engagement programs to provide you with a research report, actually a guidebook, you can use as your one stop shop!





Why We Conducted This Study

Amanda Kaiser has talked with over 343 members as a qualitative researcher for the association community. Somewhere around the 200th member interview, Amanda noticed a striking pattern. Engaged members indicated their initial experiences with the association significantly influenced their high level of engagement. Within the first three days to three weeks they received friendly, helpful, much-needed value, they said. This pattern holds true for associations large or small, across industries and professions served. Immediate value received upon joining prompted a high level of life-long engagement. The responses from engaged members were very different than the answers from the less engaged members who uniformly didn't realize value early in their membership. Instead, they said, the association grew on them over time.

Since members' stories so strongly pointed to the importance of the first three days to three-week window of opportunity, Amanda wondered what associations were doing to onboard, orient, and welcome members. Discovering the most successful new member engagement tactics, she reasoned, could help associations develop programs targeting our most at-risk members which would significantly increase member engagement.

ENTER DYNAMIC BENCHMARKING

While working on another association industry research project, a client of Amanda's mentioned the unique functionality of the Dynamic Benchmarking Platform where respondents can easily filter benchmarking data to see how they stack up against their peers. Lisa Vivinetto, Dynamic Benchmarking's CMO was also interested in helping the association industry, and it was not long before they decided to partner and bring this project to life.

MORE THAN A DOZEN FORWARD-THINKING ASSOCIATION PROFESSIONALS SIGN-ON

Amanda and Lisa began by asking the community, "who has a great new member onboarding, orientation, or welcoming program?" Referrals came in and right away 13 association professionals signed on as respondents for the first, qualitative portion of the study. In hour-long phone conversations, respondents shared the tactics they use, why their program is set up the way it is, what worked and did not work, and the outcomes they can measure.

Then, our team used the results from these conversations to write the questions and answers for the second, quantitative portion of the project. With all the upfront legwork done, the big question soon became, how do we let association professionals know about this study?

12 RESEARCH PARTNERS SUPPORT THIS STUDY

Lisa and Amanda started talking to some of our contacts in the industry telling them about the study. Right away the contacts saw the potential, and soon the duo had twelve industry partners join in supporting the study.

The moment the study went live the industry partners launched into action connecting their members and customers to the study. Deep gratitude goes to:

- *Higher Logic*
- *Association Success*
- *NE/SAE*
- *.orgCommunity*
- *CalSAE*
- *Greenfield Services*
- *ISAE*
- *Association Chat*
- *AMC Institute*
- *High Road Solutions*
- *MemberClicks*
- *Scott Oser Associates*



148 MORE PARTICIPANTS RESPOND

With all that outreach in the association community, it was not a long wait. Very quickly responses started to come in, and in what seemed like record time, over 100 professionals responded to the survey.

As of early December 2017, 148 participants added their data to the platform for a total of 161 study participants. If you are one of the study respondents, we thank you and encourage you to head [back to the platform](#) where you can see how your individual results compare to those of your peers.

NOT YOUR MOTHER'S RESEARCH REPORT

You might notice that there are elements in this report you don't usually see in industry studies. Sprinkled throughout this document, you will find quotes from association professionals interviewed for this study. They share anecdotes that bring the data to life as well as detailed step-by-step processes to help get you started. In addition to the quotes, you will also find three videos. These videos delve further into the data making the insights more complete and actionable. Finally, this is not just a static survey. Respondents can filter their results in the platform to see how they compare to their peers. [Visit the Dynamic Benchmarking website](#) if you'd like to participate in the study and get access to personalized and interactive results.

Because of the generosity of both the survey respondents and research partners we are pleased to distribute this report to the association community for free. We don't just hope you like it; we hope you love it!

We hope this report gives you tons of actionable insights. We sure did learn a lot. Thank you for your interest and support in this research study!

Lisa Vivinetto
Dynamic Benchmarking
Chief Marketing Officer

Amanda Kaiser
Kaiser Insights LLC
Chief Path Finder



Your Guide to this Guidebook

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Your Guidebook to New Member Engagement Plans

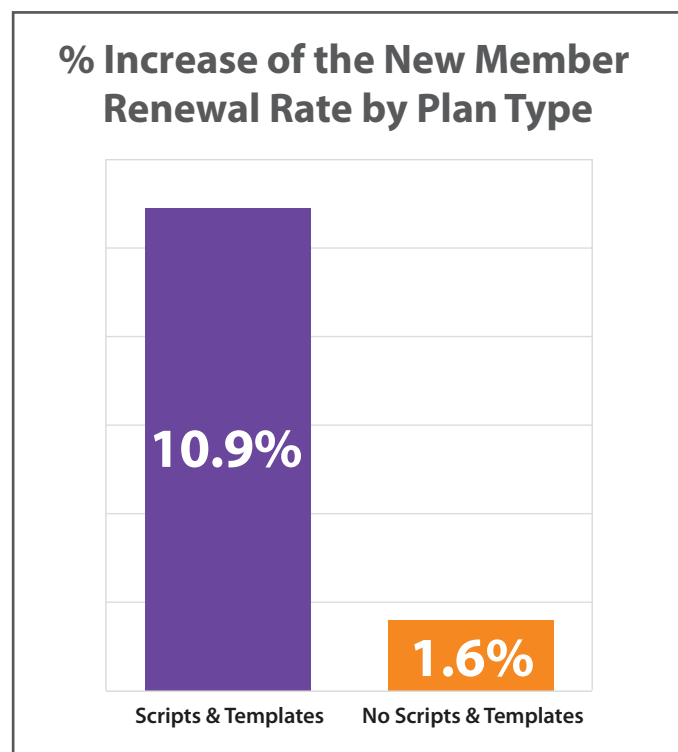
Whether you are planning a new member engagement program for the first time or you are improving on a current program, think of the data and stories in the rest of this report as your guidebook. This report uncovers everything from the strategies the most successful programs rely on to the details of each tactic used.

3 Tactics that make new member engagement programs successful

If we are going to invest in a new member engagement plan, we want it to be GREAT! Right? How do we make sure it is great? First, write a detailed plan, the more detailed, the better. It doesn't matter if you document your plan in Excel, Pages, or on Evernote, it just can't be solely in your brain. Second, give it time. Association executives reported they implemented their plan, learned from the results, and continued to try new things based on what they learned. Testing and iterating early on works and the results show that the older the plan, the more successful it is! Finally, make sure you have enough staff assigned to do the job.

DETAILED PLANNING

When the onboarding, orientation, or welcoming program has a comprehensive plan including scripts and templates the plan is more likely to be successful.



The planning stage usually lasts three to nine months depending on the complexity of the program. The initial plan may take a day or two to map out but crafting emails and letters, writing scripts, applying templates and graphics, and including all the stakeholders takes time.

“The planning phase probably took us six months. A lot of that was working with our internal partners. We wanted to make sure everyone was comfortable with the approach we were taking.”

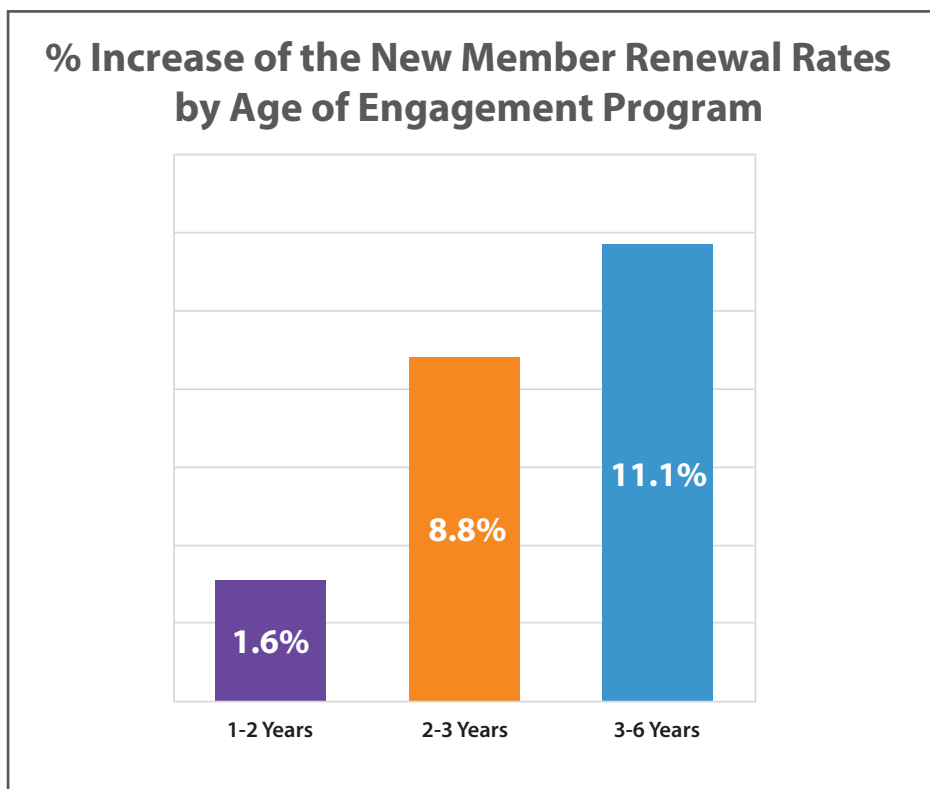


POST-LAUNCH PROGRAM REVISIONS

During phone interviews, respondents indicated that even after program launch the planning was never really done. Program managers often review the metrics they do have and use those insights to play with frequency, tactics, and targeting. We see that the longer associations have their new member engagement programs in place, the better the results, telling us that frequently iterating works.

So, don't panic if you don't see significant positive results in the first months or even year. Most programs show better results after year two, likely a result of post-launch tweaks.

“It takes a full 12 months to figure out if the program is working. We'll look at renewal rate and see if we see a monthly trend. I can't just rely on a month. I need to look at a series of months to see if there is a trend.”



What kind of tweaks should we make? Some revisions focus on the frequency of touches or how long we continue to connect with the new member actively.

“We've been adding new touch points as we've gone along. The 6-month touch is new this year.”

“Our touch points go through 6 months. I'll extend this as the program gets older.”

“We've just added phone calls to new members too.”



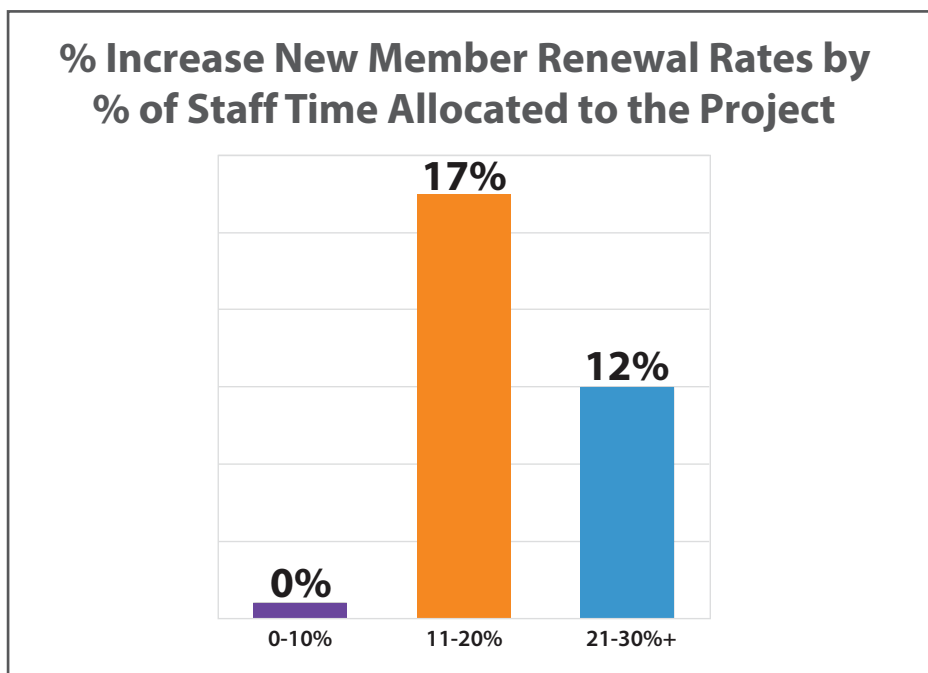
Program revisions can be prompted by member feedback.

“We ended our postcard mailings because they didn't get measurable attention. We've made a few tweaks to the welcome email based on member feedback.”



STAFF TIME AND ATTENTION

You will see later in the report that these programs tend to carry a low financial cost, but they do require lots of attention. When 0% - 10% of staff time is devoted to the new member engagement plan, new member renewal rates hold flat. To make the plan effective, you will need to allocate at least 11% - 20%, maybe up to 30% of the staff's time to the program depending on the size of your association. The smaller the association, a greater percentage of staff time is devoted to managing the program.





Developing or Revising Your New Member Engagement Plan

Okay! So now we know what makes new member engagement programs successful, but what about the nuts and bolts? What precisely should you include in your plan? From goals, to tactics, to measures, we have you covered!

SET YOUR GOALS

Association professionals rely on new member engagement processes to help them achieve three top membership goals:

1. rebuild their membership numbers,
2. convey value to members, and
3. create a better experience for new members.

Most associations started a new member engagement program in response to a threat hoping the program would help them rebuild their membership. “We started an onboarding program because we saw retention rates were starting to drop,” said one CEO. Some association execs noted competition, “at my association, the members are in such a fractured industry. There are 10 other associations for them”. One respondent even said, “younger professionals were going to create their own association. I needed an onboarding program that proved value to them so they would come to our association”.

Helping new members experience immediate value is a significant unrealized opportunity for many associations. One respondent said of the association’s marketing, “we’re pummeling people with promotions without getting any value messaging out,” and this comment reflects very similar comments that many others made. Respondents also noted that members only know about a few of the many benefits available to them. “We have a lot of hidden resources that members are not using,” and “we had a focus group, and so many members said, “we didn’t know you did that.”

Providing each member a high level of value is necessary, but members also stay for the experience, “we felt like we had to set the tone for their relationship to the association.” And, “it’s not just about the numbers, we want our members to be happy and excited about renewing,” was a theme running through the interviews. “We want to build the bottom line, and we want to do it in a way that makes our members feel great about the association.”

CREATE RULES FOR YOUR PROGRAM

Many association professionals say their new member engagement program wouldn’t be successful without a few rules. Top of the rule list is not asking new members for more money, “no asking them to buy anything extra in the first few months of membership. Early career members are extremely price sensitive. So, we discounted the things we wanted them to want.”

Many also talked about how critical it is to keep “communications from becoming a dumping ground. Onboarding needs to be digestible chunks of information. Like, three tips on what you need to do today.”

Not only should communications be short, but they should also focus on value, “All of our touches to new members will be about the value they receive not about the benefits we provide. A welcome email can’t just be a list of meetings. No, each email or call has to focus on the value they’ll get.”



PLAN MESSAGING AND TONE

Most membership staff test their messaging through trial and error. Some use A/B testing. If you have the resources, it is better to conduct member research at the outset and let the insights inform your new member messaging strategy, “we found out what their challenges were by career stage through a mix of qualitative and quantitative research. I would then anticipate their problems and send the resource. We could do this beautifully because we had the research results that said exactly what they needed by career stage.” Also, “Find out what your members are coming to you for. What is attracting them? Once you know this, you can get them value, and you can get them down that path faster. Not everyone is coming for the same thing. Start with the first thing they want as a hook. Then stick more hooks in them later. You don’t have to tell them everything at once. And you don’t have to just make them aware of just the one benefit they came for.”

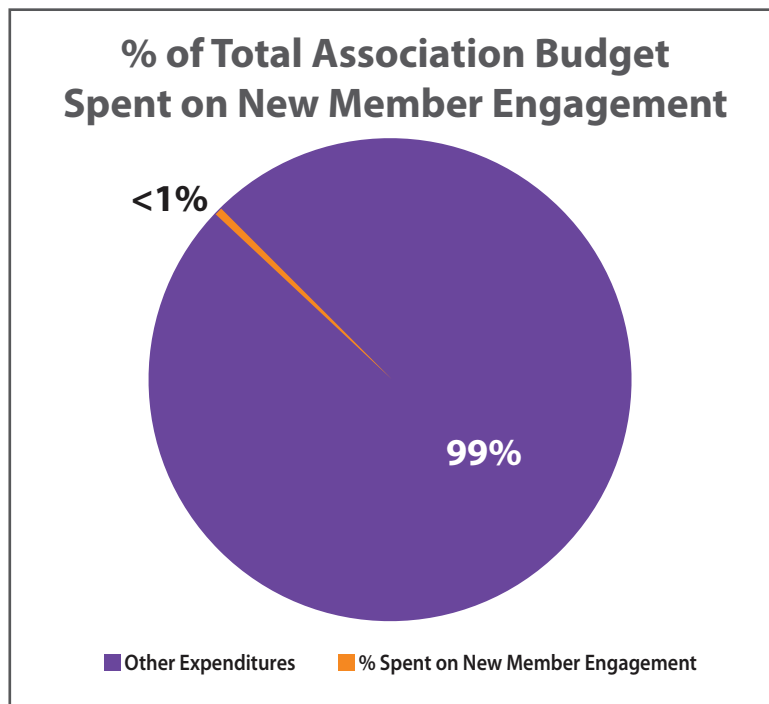
The content is essential and just as important, but often overlooked, is tone, “in planning we felt the messages should feel welcoming and warm and help the recipient feel like a part of the organization.”

ALLOCATE RESOURCES

You don’t need a big budget

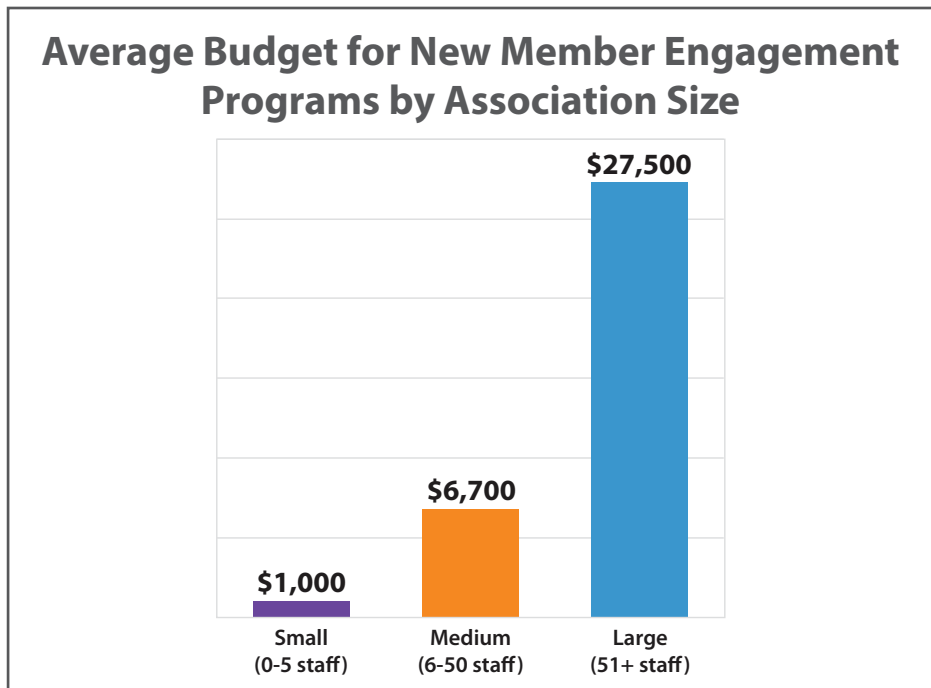
Most respondents have a total program budget between \$750 and \$15,000. These small budgets include only variable program costs, not fixed costs such as staff salaries and software fees. Many associations allocate their new member program budget to things like postage and promotional materials.

Further, we found that most associations were spending less than one percent of revenue on these programs. This is good news for cash-tight associations.





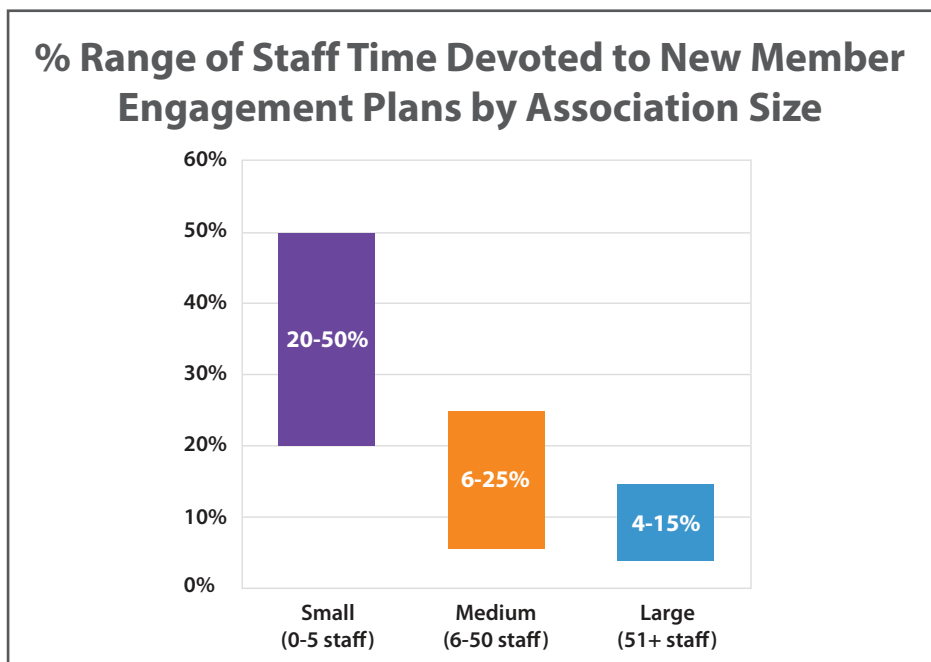
However, budgets do vary by association size.



For associations that do need a separate budget to run the program, some found it hard to get that approval. “It has been difficult getting any additional budget passed since there’s no direct, measurable impact immediately. We might not see the effect in year one.”

But, you do need staff time

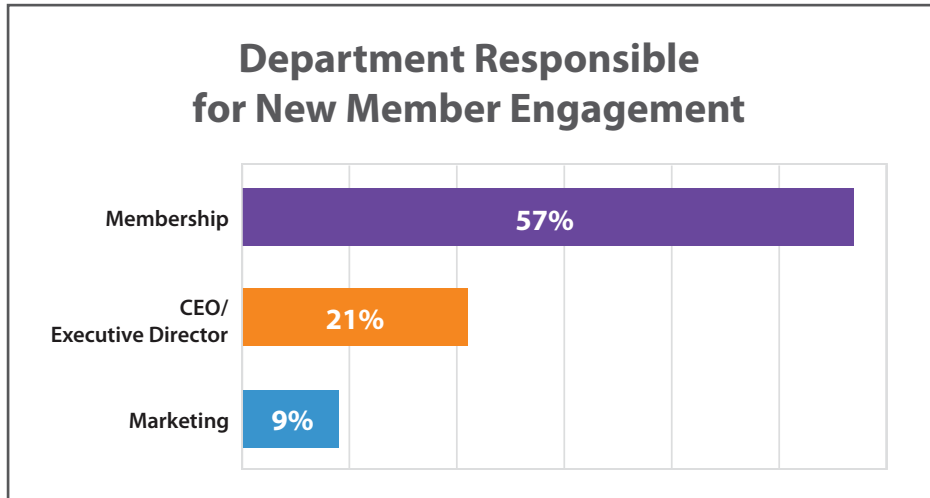
More than 10% staff time allocation overall makes new member engagement plans more successful. But time devoted to new member engagement also varies by size of association:





Who is responsible for new member engagement?

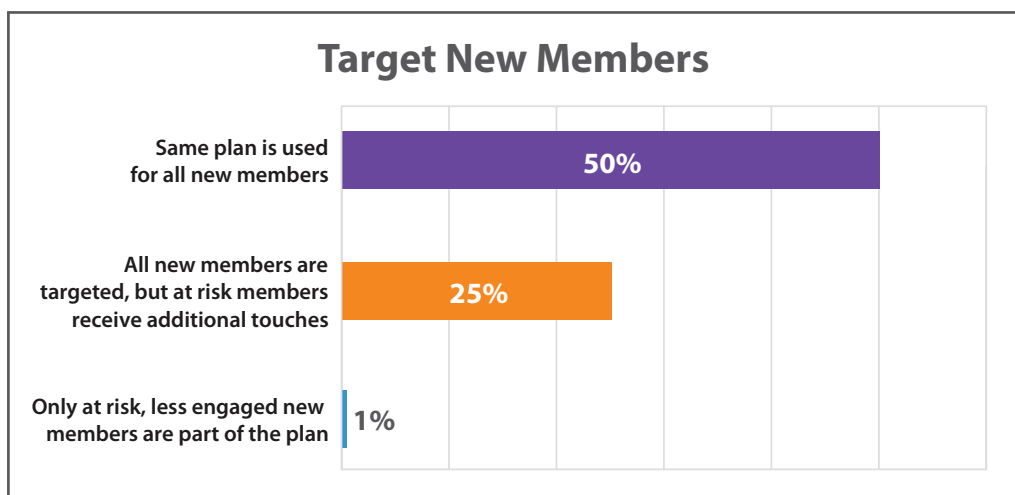
New member engagement programs most often are conceived of, managed by, and administered by the membership department, except for relatively small associations where the CEO and the staff co-manage the process.



DECIDE ON YOUR TARGET AUDIENCE

Which new members to target?

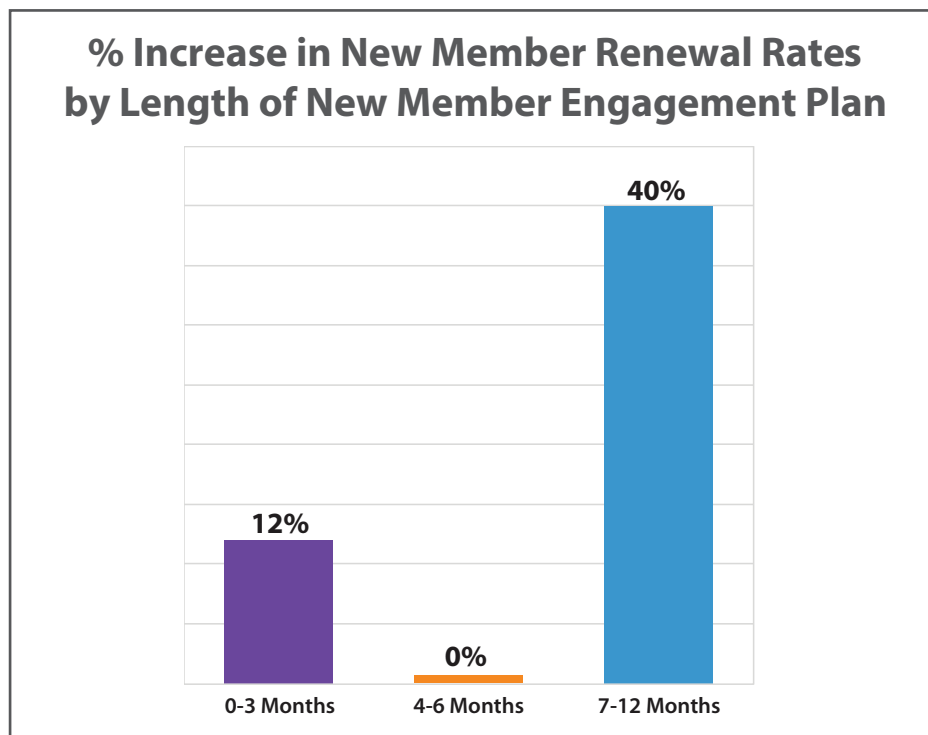
Most associations use the same new member engagement plan for all new members. Fewer include all new members with additional touches for at-risk new members. Only one association reported that they only targeted at-risk new members. Interestingly this association had a 50% new member renewal rate before they implemented their engagement plan five years ago and today the renewal rate is an astonishing 70%. Unfortunately, this insight is barely directional at best, and in the years to come, we will be looking forward to a larger sample size of respondents, maybe then we will get a better understanding of those who only target at-risk new members.





How long should the new member engagement process follow members?

Most associations follow new members between five and 12 months. But the data show that plans that last seven to 12 months are best.



While duration influences program success, some association professionals don't worry about the span of time the plan follows new members, but focus on the level of risk each new member carries by their measurable behavior.

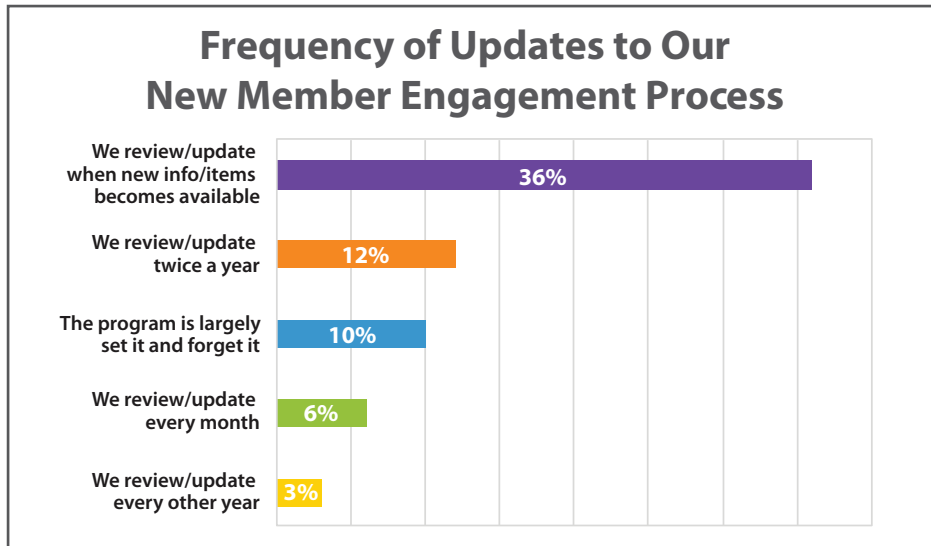
“*Ideally, an association has the data and means to determine how long a new member is at risk, and as a result, this number varies. Note it could also be milestone-based, rather than time-based, such as a new member is no longer considered at risk once they've attended an event, participated in the online community, and accessed a resource from the association like a research study. However, you also need to be thoughtful about that, because someone could get really excited about their new membership and do all those things within the first 24 hours, but I don't think any membership professional would say that person is no longer at risk! But if a member hit those milestones in three months, we could feel more confident in their membership health.*”

“*We think about onboarding as a time variable thing. If someone has a high engagement score, we'll not pay as much attention to them. We go and look at those with a lower engagement score, and we focus there. If someone hasn't used their free conference, they get special promotions. We might follow them for a year or three years depending on their level of engagement.*”



KEEP REVISING YOUR PLAN

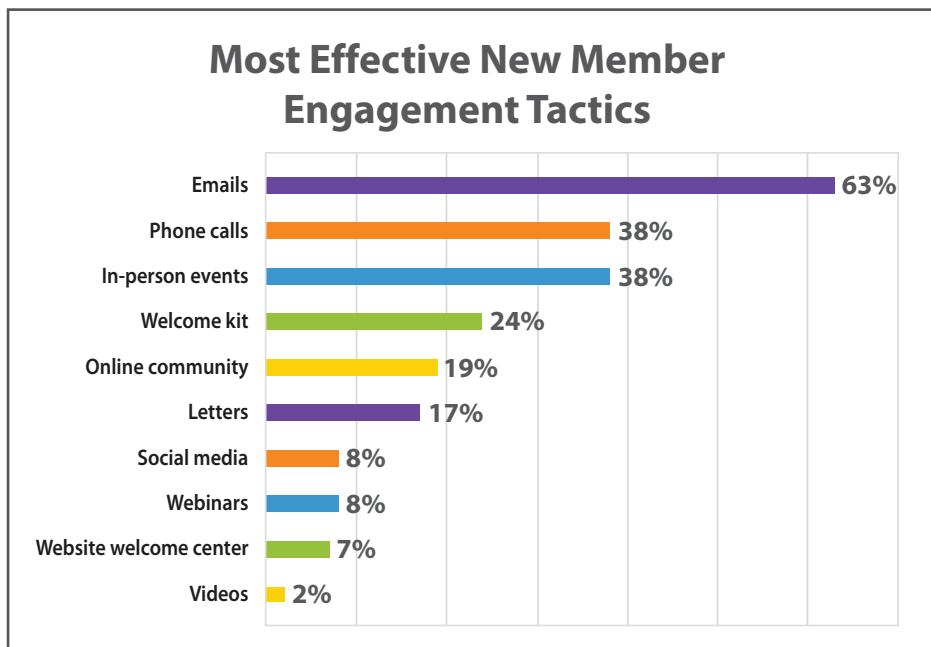
Don't set it and forget it. Most association professionals update their plans at least once a year if not continuously, every time there is something new.



THE BEST TACTICS TO USE

It is very challenging for association staff to quantifiably know what specific tactics are driving positive new member engagement metrics. We can see if the program overall is working after two to three years, but when using multiple tactics, it is difficult to know which of the tactics are driving results.

When asked to indicate their most effective engagement tactics, associations rated emails, in-person events, and phone calls at the top of the list.





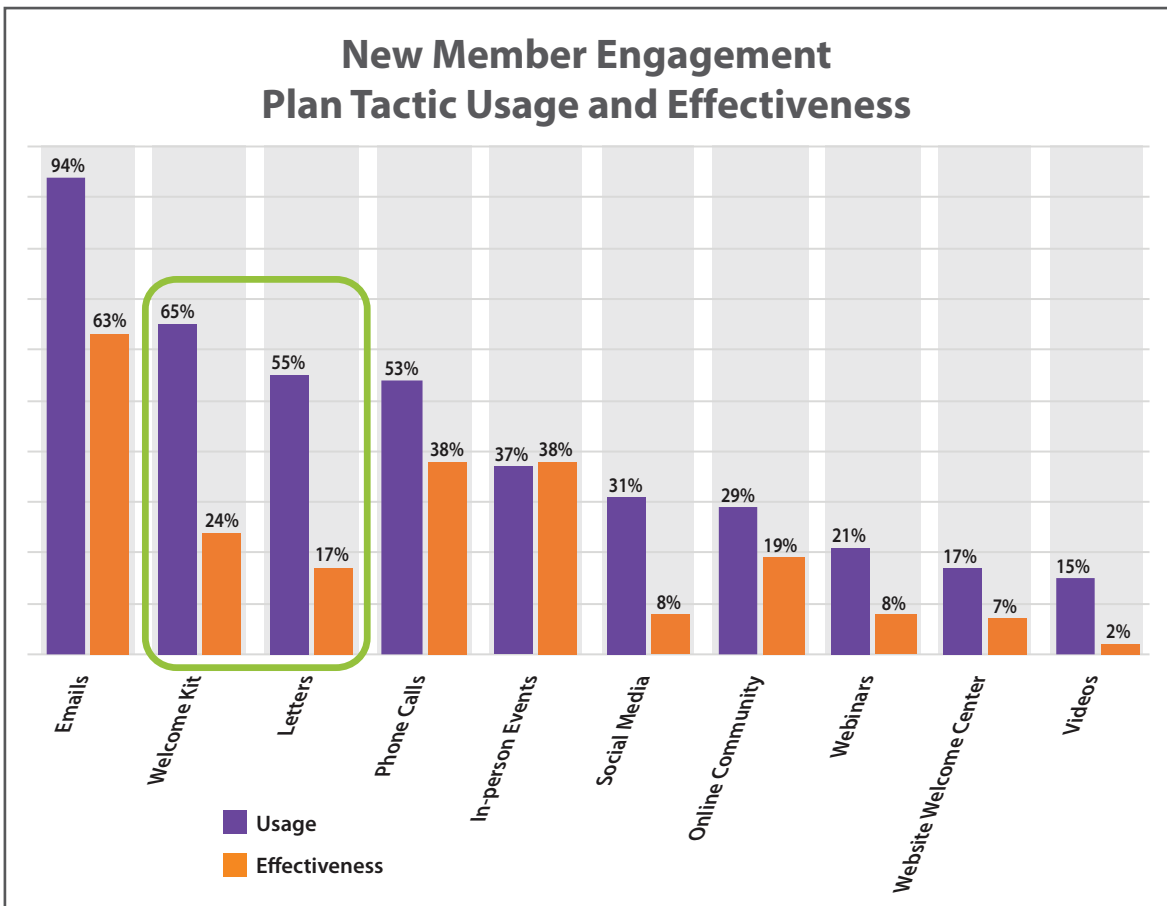
Interestingly 28% of respondents rated social media as the least effective tactic for engaging new members. The poor ranking for social media seems counter-intuitive because of the high usage of social media by young professionals who are likely to be new members. We guess that because of the nature of social media, it is difficult to isolate the metrics and understand the effectiveness of the tactic on new member engagement, especially without an elaborate marketing automation platform.





Usage and effectiveness

The most significant gap between high usage for the tactics and rated effectiveness are for welcome kits and letters. In other words, most of us use them, and most of us do not think they are all that effective.

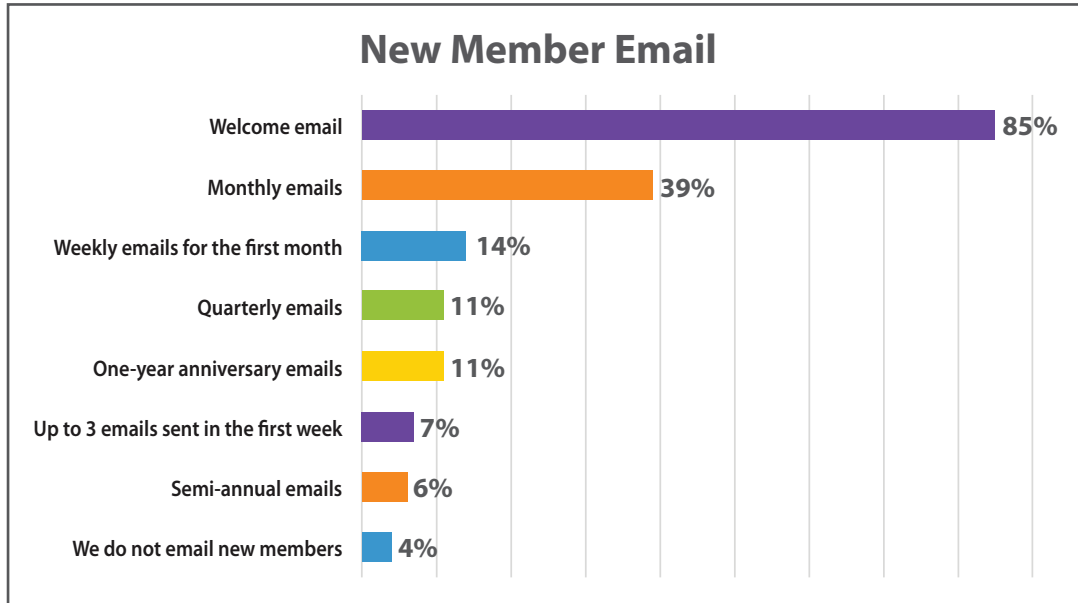


There is a significant opportunity to boost the effectiveness of mature new member engagement programs by evaluating both the welcome kit and letter tactics. Can we revise them and test them until they increase significantly in effectiveness? Or perhaps, should we stop doing them to make room for another promising tactic?



Emails

As we saw previously, respondents rated email as the most effective program tactic. Nearly every association (96%) sends at least one special new member email and likely that email is a welcome email (85%). Fewer (39%) send monthly, and fewer still send emails with more frequency.



Example Email Plan:

“As soon as the person pays dues that is the start of their membership. They get a welcome email, and it comes from me. The message has four bullets telling them how to get involved, access the peer network through the community, link to staff page, and that you’ll be getting the magazine. It’s an action-oriented, go do this. The next one is from the CEO. He talks about getting involved, specifically sign up for a committee. The next email is from me, and that’s all about the education events we do and here’s a discount for new members. All of these are weekly emails in the first month. The next email is from the marketing director and is about the community, how to access, and join in. The next one is a promotional email and it’s about our certificate program and offers a discount, and they have a month to use it. At six months, they get an email from the CEO, and it notes they have been a member for six months, do you have any questions or concerns? Members do feel it’s a personal email from him and they feel great about it.”

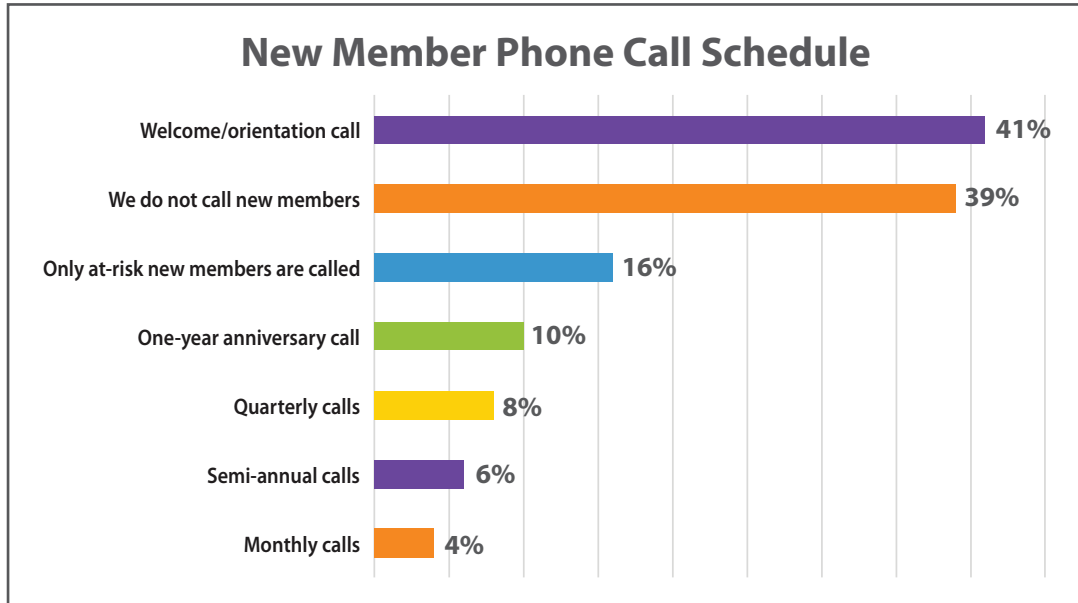


All indicators show that a well-crafted email plan works, however, there is a dark side to our reliance on emails. “What’s worrying me is the sustainability of email as a marketing channel. It’s hard to get someone’s attention in email and deliverability is a challenge. Every day there are spoofing attempts. There’s a lack of trust from email senders. We’ve had some bad actors copy our emails and send them our members, and we’ve had to go out to members with a message that said, ‘if you got this message it’s not from us.’ So, we’ve spent a few years moving members to email, and now email is a mess.”



Phone calls

Respondents rated phone calls as the second most effective program tactic. More than half the respondents (61%) report their new member engagement plan includes phone calls with a welcome/orientation phone call being the most popular.

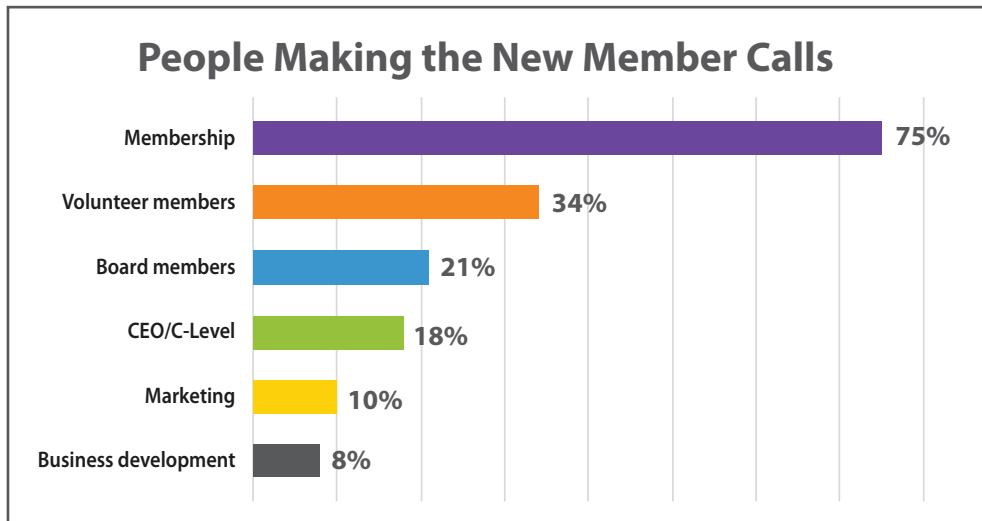


Example Phone Call Plan:

"I'm supposed to complete orientation calls with at least 80% of our new members. I love that we have so many new members I can do so many orientation calls. I want them to consider this a concierge service. These are 30-minute calls. Of the 30 minutes, I spend 15 minutes letting them tell me about their company and role at the company so I can help connect them with other members like them. Also, I say, go through the directory and tell me who you admire and I'll make those introductions for you. This creates stickiness. I also ask things like, what are your challenges? Why did you join? I follow up after this call the same day or within 24 hours with an email. I might send them webinars that they might want to watch based on what they say. Or sometimes I'll say we're conducting research on that issue you just spoke of right now. When the report comes out, I'll make myself a note to get you the report to you, so you don't have to remember to go looking for it. Two-three weeks later I send an email asking them if they've had a chance to look at the member list so I can introduce them to someone they want to meet."



In most associations (75%), the membership staff makes these calls.



Phone calls are time-consuming in large part because it is difficult to get ahold of a new member.

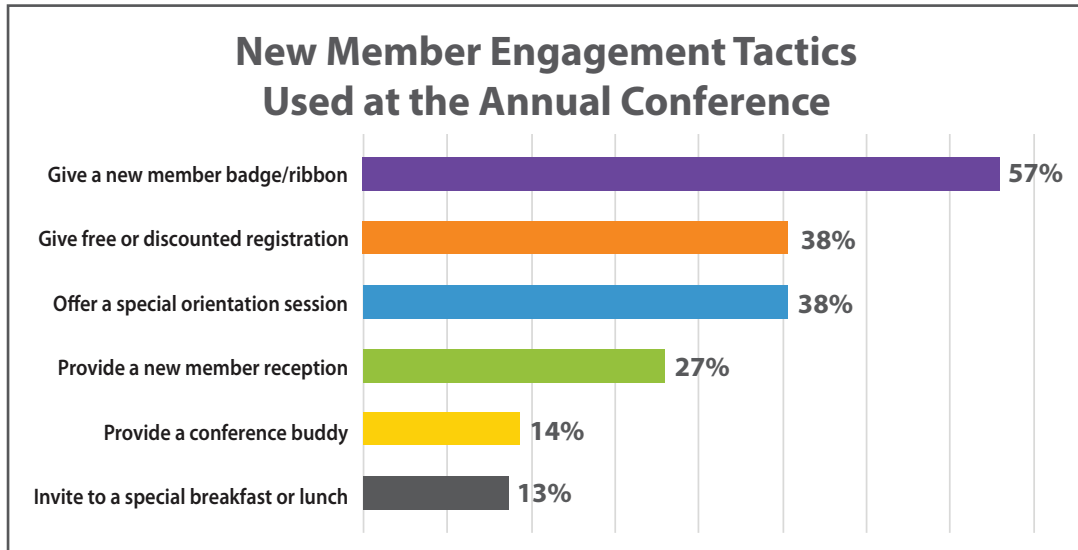
“We want that personal call, but it’s so hard to talk to them. When you make that call, they might be talking to a customer, and it is hard to get them to call you back. We have to convince them we are not looking for more money. We are not trying to make them volunteer. We just want to help them. We are making on average three calls to get each new member on the phone. Recently we decided to send an email if we can’t reach them, and sometimes we get a call back from that.”



In-person events

The best-performing programs include new member engagement tactics at in-person events. Furthermore, respondents rated new member engagement at in-person events as effective as phone calls.

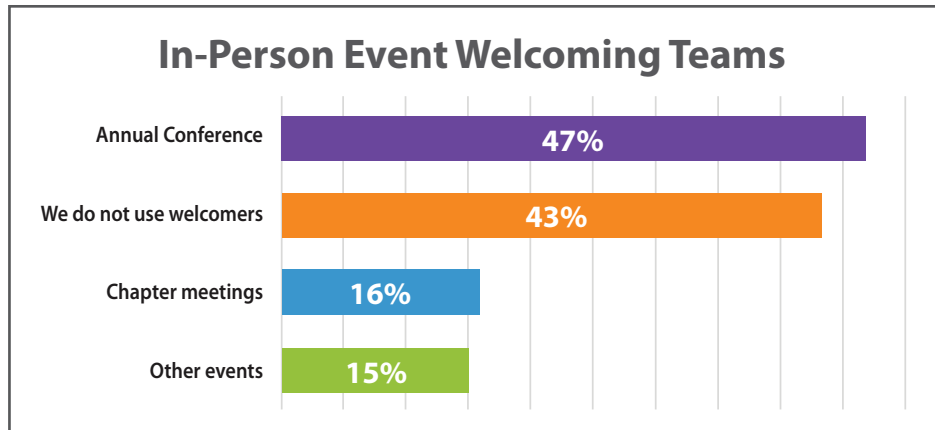
70% of respondents do something special for new members at the annual conference.



Example In-Person Event Plans:

"We just started this, this year. We do a first-time conference attendee orientation before the conference. At the end of the conference, the same people get invited back to give feedback and ask questions. I co-lead those sessions with a board member. This is a great chance for us to connect with new members who might otherwise be lost in the crowd. It's a great chance for us to get their feedback."

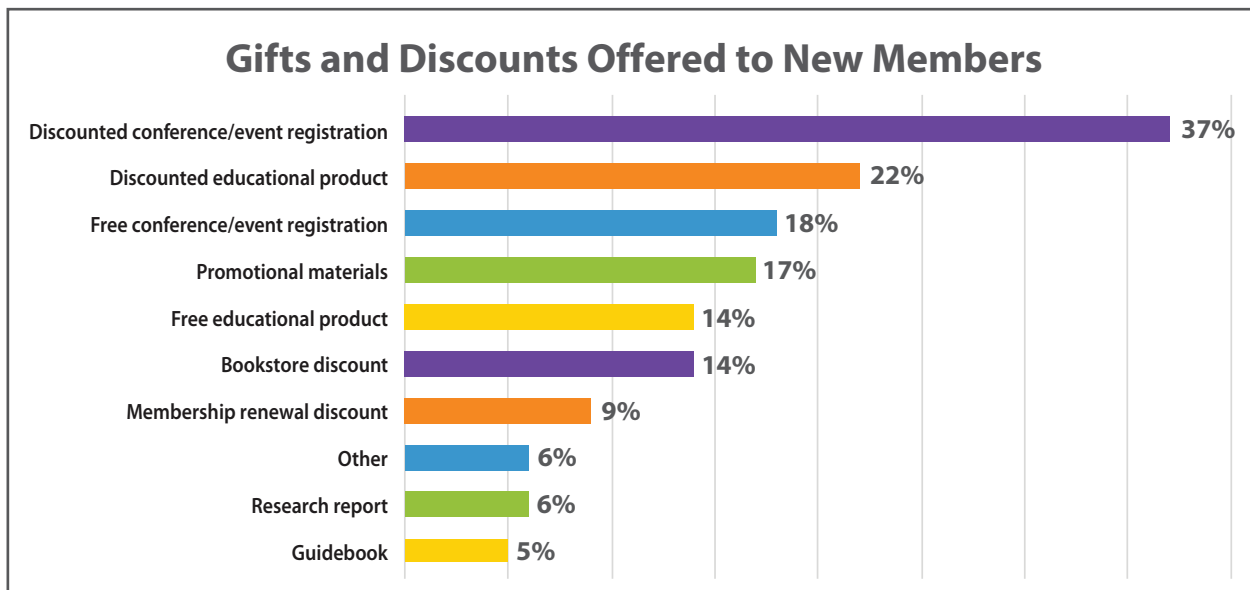
"At the conference, we assign buddies to new attendees. Right now, we have 70 first timers going to this year's conference! I send a message out to the board, membership committee and veteran attendees going for years and ask them to let me know if they want to be a buddy. I try to match up an executive member with another executive member that way they are peer to peer. Or people from the same area of the state. I encourage the mentor to contact the first-timers before the conference to welcome them and offer to meet up onsite at the conference and pick a time. Some will take them to breakfast. Most will check in with their new attendee a few times during the conference. These buddies give the new attendees so much great information about our association."



Samples, gifts, and discounts

57% of respondents give a gift or discount. Top performing programs tend to focus on sampling their offerings and benefits by giving guidebooks, educational products, discounts or free registration to the conference or another event, bookstore discounts, even a free research report.

Most respondents give discounts to new members for conference or event registration.



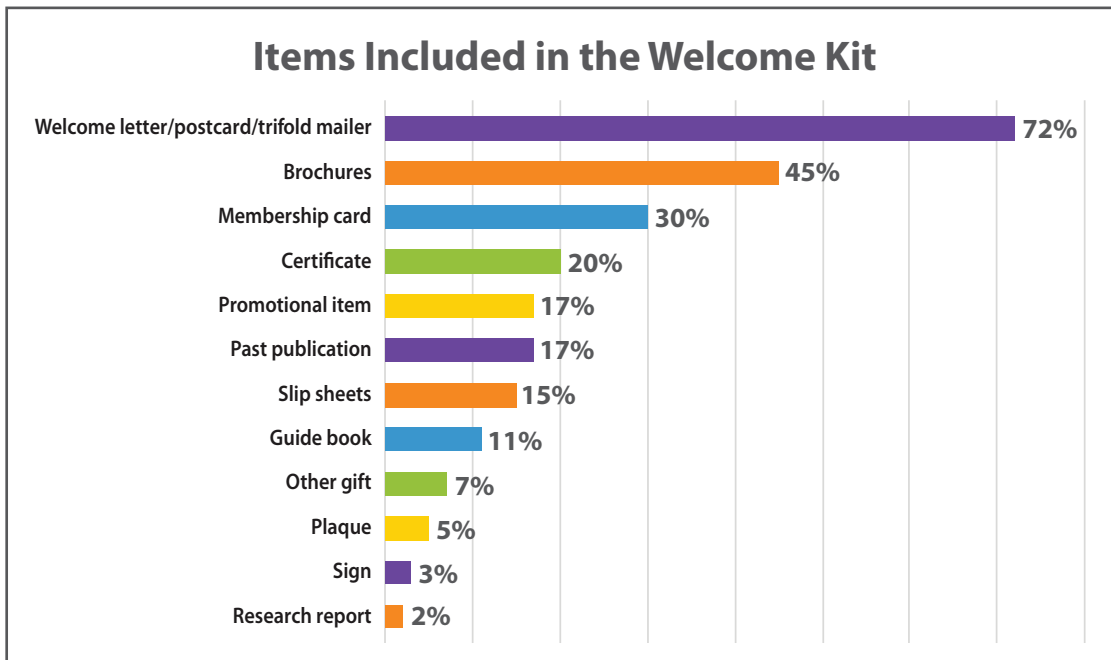
Example Gift Plan:

“One month before the student graduates we send them an email that includes a link for their updated contact info. If they update their profile, they receive a free educational product from us. It has a value of \$300 and awards them CE credits. This program is super useful to them, and it shows the value of the organization.”



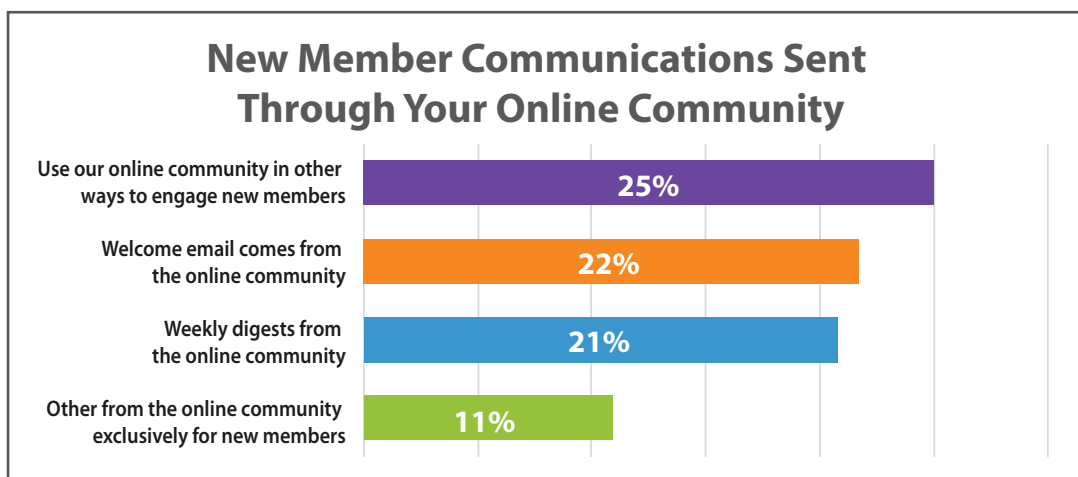
Welcome kit

Welcome kits are used by 78% of the respondents, with 72% sending a welcome letter, postcard or tri-fold mailer. Most respondents consider welcome kits to be minimally effective.



Online community

Using the association's online community in the new member engagement plan is a less used tactic (48%), perhaps because using online communities in this capacity is somewhat new. Associations are, however, doing some interesting things with their online communities as it relates to new member engagement.





Here is how one association is leveraging their online community to engage new members.

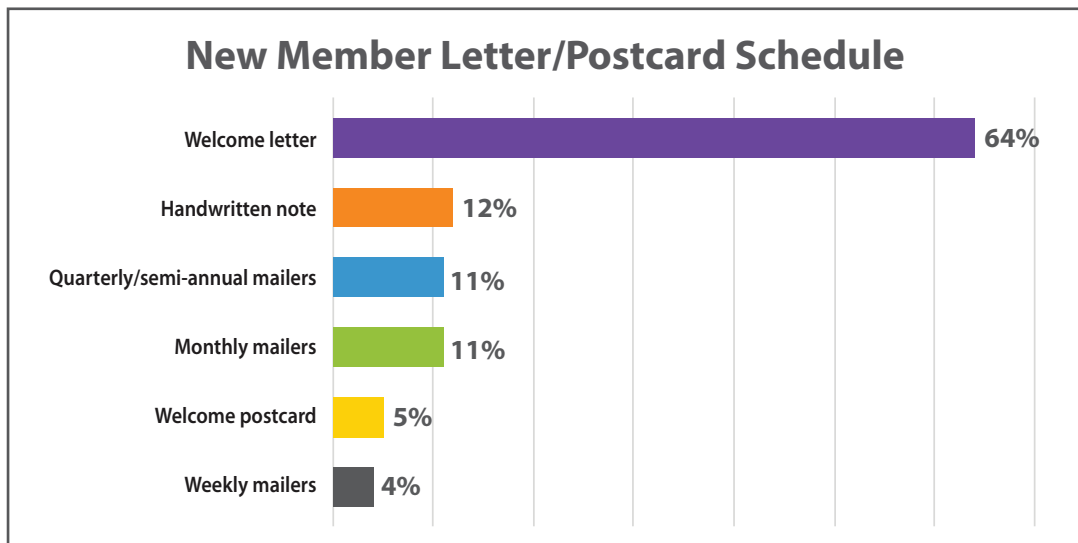
Example Online Community Plan:

“When someone becomes a new member, they get two welcome emails. One is generated from the database asking them to check out the calendar of events and update their profile. They also get an email from our online community platform. This is a welcome to the community piece and also asks them to update that profile. Right now we are also beta testing messages through our online community like encouraging them to go to an email thread and introduce themselves.”

Letters

Many associations send new members letters (67%), but most consider this tactic to be minimally effective. We suggest that associations with letters as part of the new member engagement strategy measure this tactic and improve their effectiveness.

Of the associations sending physical letters, welcome letters are the most popular.

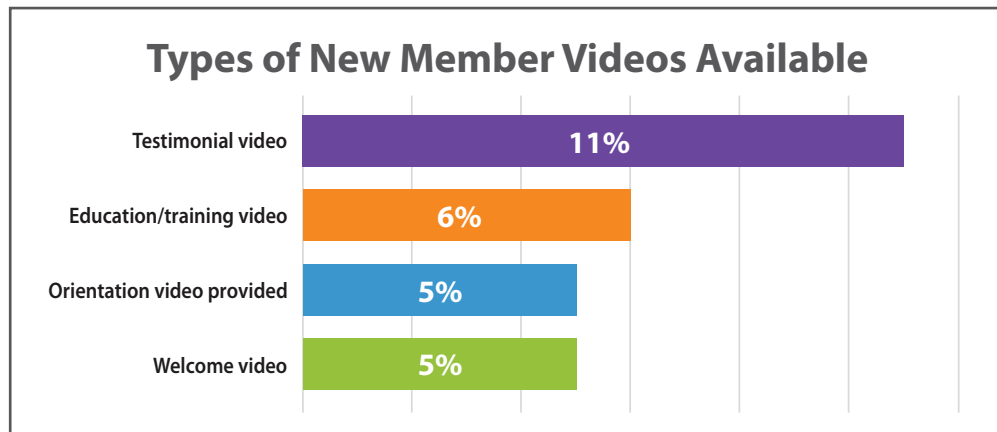




Videos

Videos produced for new members are rare, only 22% of respondents indicated they use this tactic. And videos did not rate well for effectiveness overall, probably because of the low average view rate reported. However, the new member engagement plans that included video as a tactic significantly grew their new member renewal rate.

Of the associations producing videos for new members, they have on average two videos available for new members to view. Videos for new members focus on these themes:



TECHNOLOGY AND OTHER ROADBLOCKS

The hardest part of implementing a new member engagement program is managing limitations of technology. These programs are complex, and without an email automation system, the staff is creating huge Excel spreadsheets to track who gets what message each month. Even with email automation, the startup can be challenging, “we had some bumps in the road initially sending the wrong messages to the wrong people. We confused people and had to apologize.”

Databases and AMS systems do not always do what we need them to do. Many membership execs reported that they managed much of their program manually and it was extremely time-consuming for them. Additionally, having good data is an issue. For example, “we have people who have been members, and then they come back. Do we treat them as new members or no? We don’t have IT staff, so it’s hard to get good queries. We run the risk of referring to long-time members as new members.”

But the biggest issue with technology and data is measurement. “I can pull on join date, but I can’t pull new members in a separate list so I can’t measure retention of first-year members.” And, “our database doesn’t allow me to pull the retention rate. I cannot rate or link engagement with retention.” Also, “I don’t know how we will measure the success of this program. I can’t get a true retention number out of the system. I can’t link something like going to an event with retention. It’s driving me crazy!”



Aside from issues with data and technology the biggest issue respondents reported was scope creep. New member engagement messaging works when it is simple; showing only one solution at a time. Here is what is tough for program managers, “scaling it all down. We like to promote everything a lot. So, it was focusing on one thing per email. The email has to be brief. That took some time getting everyone to stop adding things.”

The messaging also works best when there is a natural drip, drip, drip progression and the program does not become a dumping ground. “It’s so easy for other departments to see this as a channel for their messages. Scope creep is a problem for initiatives like this.” It also works best if we are not asking new members for even more money right after they joined.

“All the non-dues revenue departments pushed back on this – they wanted a bigger part of the new member messaging. We had to bring in the data to say new members are not the ones buying from you. You are not going to lose any sales because of this program.”

Finally, like with any new initiative, time is an issue for time-starved association professionals. “We were asking ourselves, how do I get this done on top of what else I’m already doing? So, getting buy-in was hard.”

MEASUREMENTS

So how do we know if we are doing this right? Measure the program! Yes but, measuring your new member engagement plan’s effectiveness might be tricky. “It’s a tough time in associations because members are aging. I could do a great job with the onboarding program, and we’ll still drop 1% of the membership. First, retention is hard to measure with new members. The calculation is a bit wonky. Also, I think, onboarding is a piece of the puzzle but not the whole story. It’s not the only thing that effects renewals. Membership is a disposable expense. If someone has to pay a car payment, they will do that and not pay dues.” Or, “We really cannot measure retention because our supplier side rotates so, so fast and it’s not because they don’t like us. It’s because they change jobs. They also rotate member companies, so the AMS looks at them like a new membership, but they are not really.”

There are a lot of moving parts in your membership environment on a macro level that make it hard to track the effectiveness of a new member engagement program specifically. Additionally, we see a whole host of other measurement tracking issues within a program on a micro level.

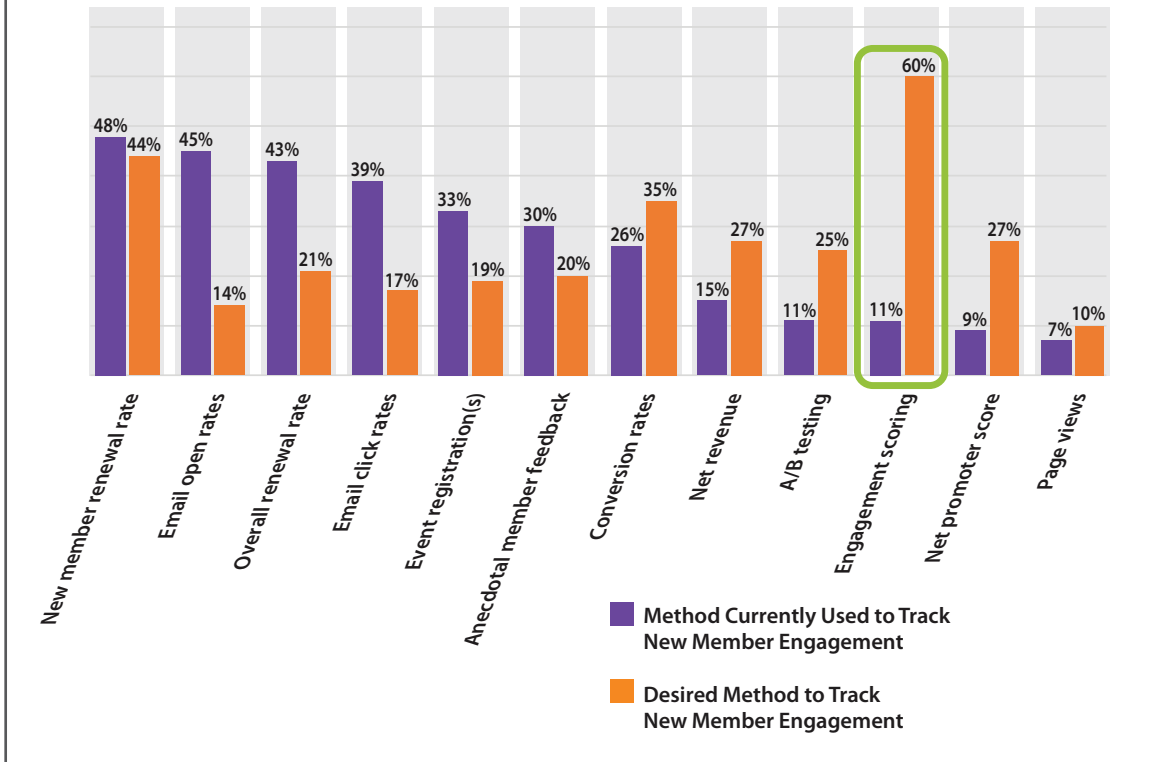
“I can’t translate an open or click to a specific action which is really frustrating not to know what member action came from each communication.”

“We can’t directly correlate these tactics to the engagement numbers. Except for maybe with conference registrations. But overall this is the right thing to do.”

Of the associations who are tracking, they might be tracking the program overall with engagement scoring or new member renewal rates, or they are tracking individual tactics like email opens or event registrations. Here are the measurement methods associations are using now to track new member engagement versus the methods associations want to be using to track new member engagement.



The Difference Between How We Measure and How We Want to Measure



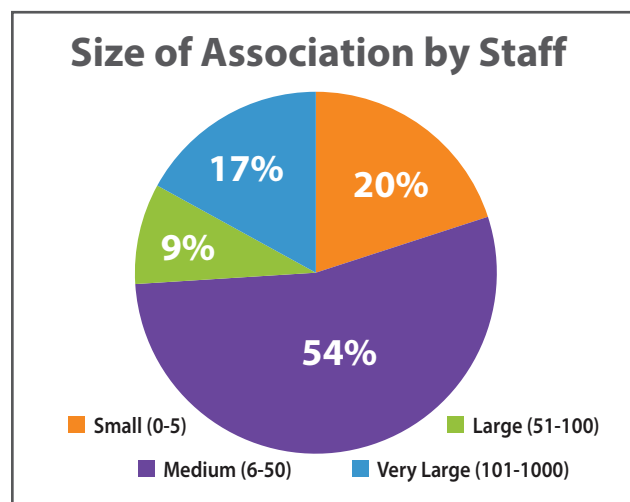
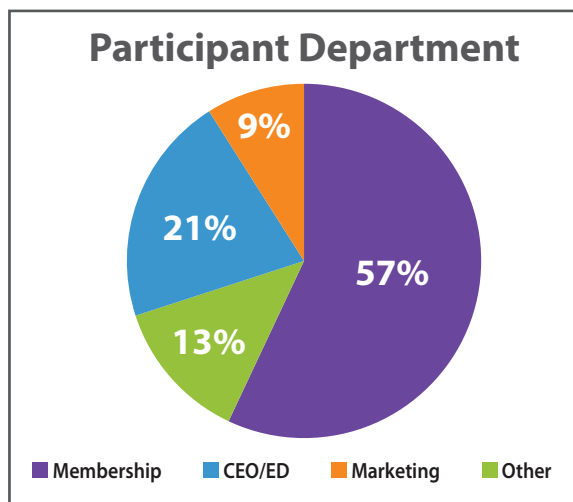
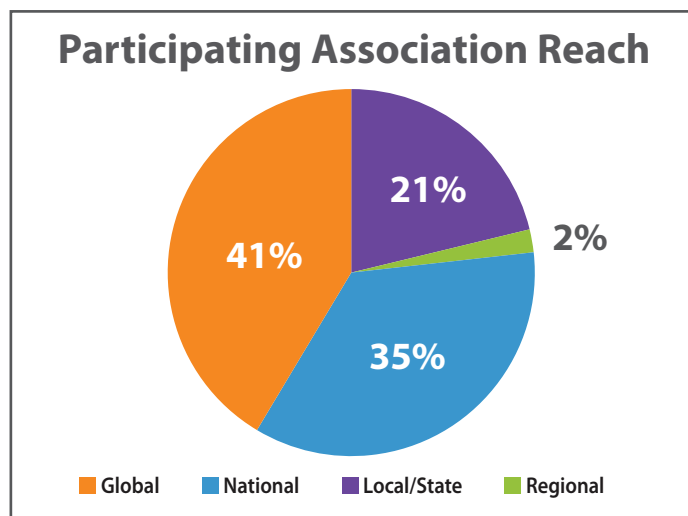
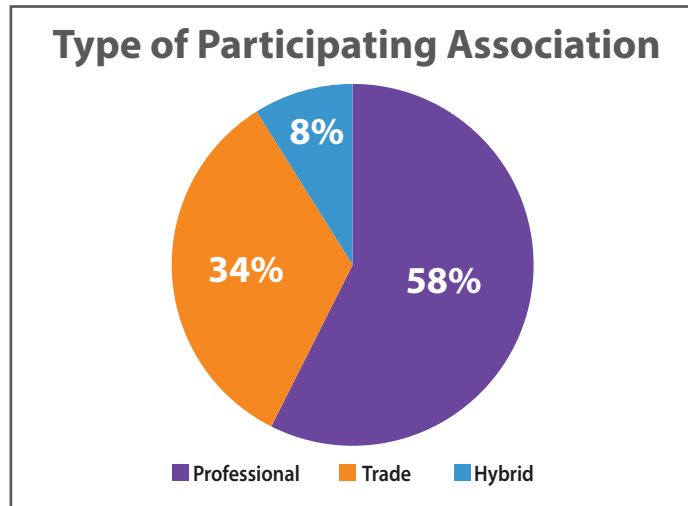
Most of us want to use engagement scoring, but very, very few do engagement scoring.

Engagement Scoring Plan

"We are also segmenting members by engagement. We have an engagement score if you will. An "A Member" is a mega member. A "C Member" just renews. We also have identified "Prospects" those we can move up to a mega member. More than half of our membership is in the bottom two categories, those who are not fully engaged. We also do propensity modeling. For example, this person bought the convention in the past so likely they will buy it again, so we'll communicate with them differently."

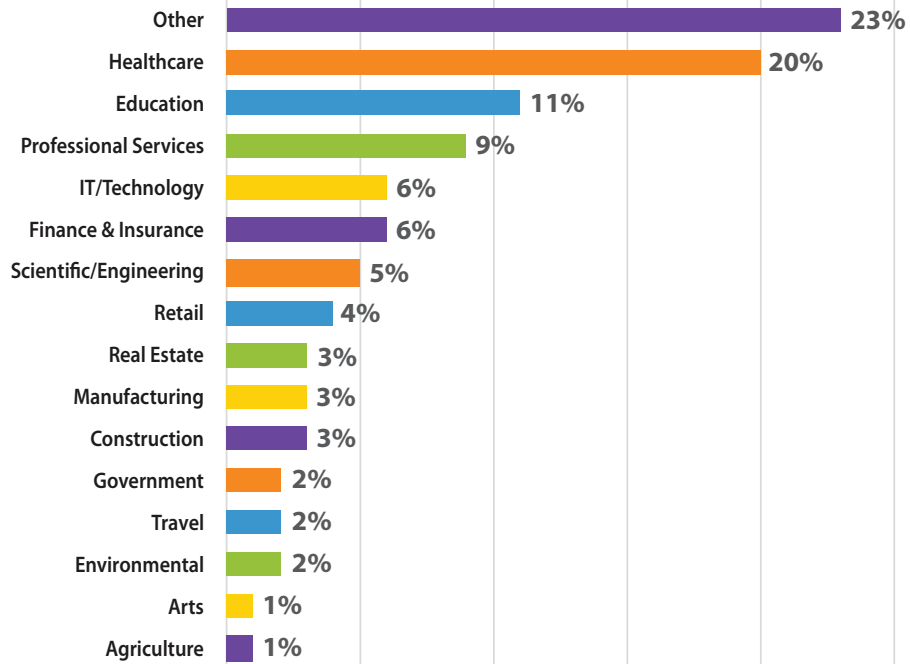


Respondent Profile

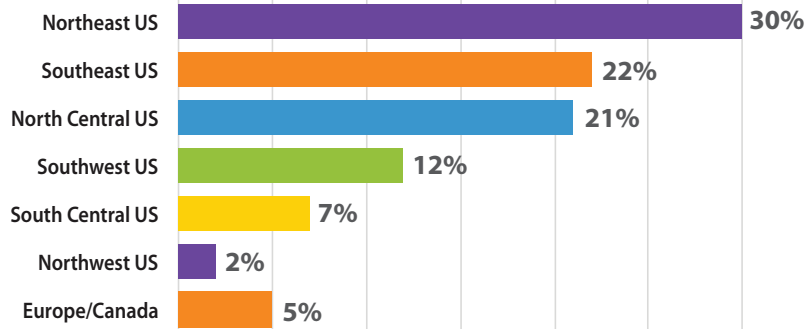




Participating Association by Industry



Association HQ Location





Methodology

In this mixed-method two-phase study, we first conducted 13 phone interviews with specially selected respondents who had a fully implemented successful, new member engagement program. The results of the qualitative interviews were used to inform the second phase of the study; writing the quantitative survey and programming the Dynamic Benchmarking platform. Included in this report are results from both phases of the study.

Find Out More

Oh no, is this the end of the report? It is, but there are more data and insights available to you.

TAKE THE SURVEY

It is not too late to still take the survey and capture comparative data from associations just like yours! *Participate now.*

CUSTOMIZE YOUR DATA

Are you one of the participants who contributed to the study? Thank you! The platform is ready for you. *Head on over* and enter your login information. You will be taken right into the study, then check out the Comparisons and Reports tabs. Filter by association size, type, and reach to have the platform return customized data just for you!

HAVE A QUESTION ABOUT THE RESEARCH?

Contact Amanda Kaiser
Amanda@KaiserInsights.net

SHARE THE KNOWLEDGE AND LET US KNOW WHAT YOU THINK!

Find us on Twitter!
Amanda Kaiser is *[@SmoothThePath](https://twitter.com/SmoothThePath)* and Lisa Vivinetto is *[@lisavivinetto](https://twitter.com/lisavivinetto)* and *[@DynamicBench](https://twitter.com/DynamicBench)*.

BOOK US TO SPEAK

There is even more data we would love to share with association leaders. Book us to speak and we will reveal the four strategies the top 20% of the best performing new member engagement programs use. Learn how they get the most out of each tactic and hear the unconventional ways they engage their new members.



Our Special Thanks

THE ASSOCIATION PROFESSIONALS WHO GAVE THEIR TIME TO BE INTERVIEWED

Pete Alles, Vice President of Member Services and Marketing, National Fluid Power Association
 Patrick Haller, Director, Membership and Member Services, National Business Aviation Association
 Karen Hansen, Membership and Programs Manager, Radio Television Digital News Association
 Amalea Híjar, Program Director, Growth, Manufacturers Alliance for Productivity and Innovation
 Sarah Lampson, Executive Director, Canadian Association of Research Administrators
 Maggie McGary, VP, Strategy & Audience Development, 5:00 Films & Media
 Kerri McGovern, Director, Membership, American Society of Interior Designers
 Leslie Miller, Membership Manager, National Fluid Power Association
 Hester Ndoja, Vice President, Membership and Development, Florida Society of Association Executives
 Scott Oser, President, Scott Oser Associates
 Kathy Ridley, Director, Meetings & Membership, Illinois State Dental Society
 Mike Skiados, CAE, Director, Membership, American Speech-Language-Hearing Association
 Melissa Walling, CAE, IOM, Director, Membership, Association Forum

The 148 participants who joined us in the online survey

OUR RESEARCH PARTNERS



And all of our association community contacts who helped us make this study a reality.

RESEARCH TEAM

Amanda Kaiser, qualitative researcher & report author
 Lisa Vivinetto, quantitative researcher
 Holly Maki, program manager
 MaryAnn Pfeiffer, marketing & design



About Us

Dynamic Benchmarking

PERFORMANCE MATTERS

Dynamic Benchmarking is a New Hampshire-based startup that delivers real-time benchmarking and data analysis solutions with the features and capabilities of custom software in a format that is easy to use and quick to deploy. Founded by a team of women entrepreneurs, Dynamic Benchmarking combines powerful, web-based technology with unparalleled industry expertise and customer care to provide best-in-class, peer-to-peer data comparison for small businesses, associations, large enterprises and any organization looking to tap into the knowledge of the crowd. Dynamic Benchmarking builds web-based solutions that are flexible, scalable and allow for meaningful comparison of financial and operational performance in a dynamic and interactive manner.



Website: DynamicBenchmarking.com

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Kaiser Insights LLC

Associations want to improve member engagement, and many are trying strategies and tactics to boost engagement with mediocre success. This is because they are missing one key ingredient; they are not capturing the voice of their members. Our members' voice is not something we can get at with a member needs survey, at the conference, or even in a board meeting. But one powerful member research method can fully and accurately reveal what is in your member's hearts and minds.



Kaiser Insights LLC is a qualitative member research firm owned by Amanda Kaiser. To date, Amanda has conducted over 343 in-depth member interviews for large and small, trade and professional associations. Through these conversations, she comes to understand members' goals, challenges, and worries then translates these insights into strategies that exponentially improve member engagement.

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