



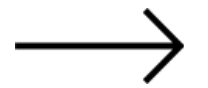
CAUSEIS PRESENTS

Digital Academy for Associations

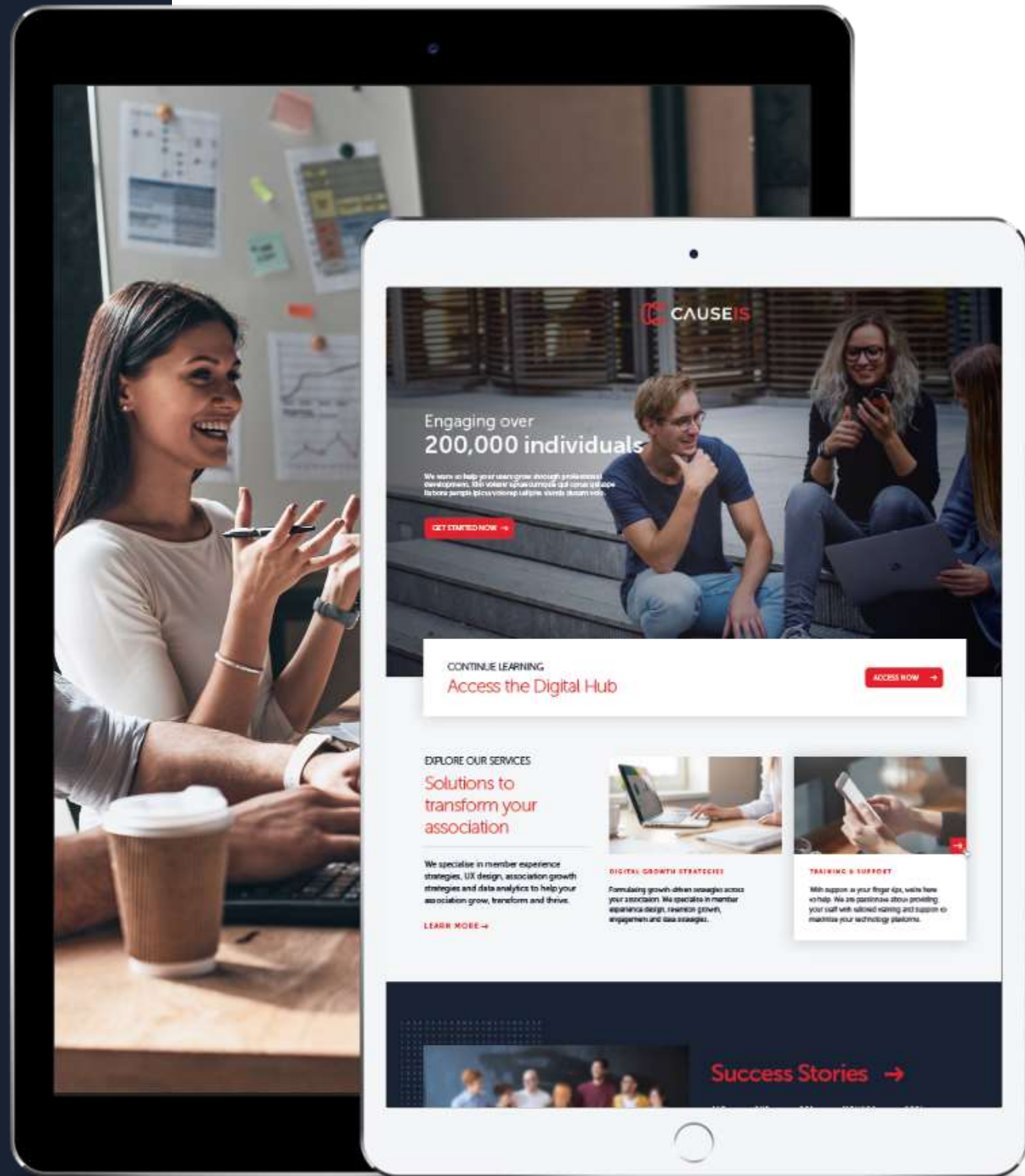
→ Course: MX Strategy: Acquisition
and Onboarding Journeys



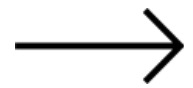
Digital Academy



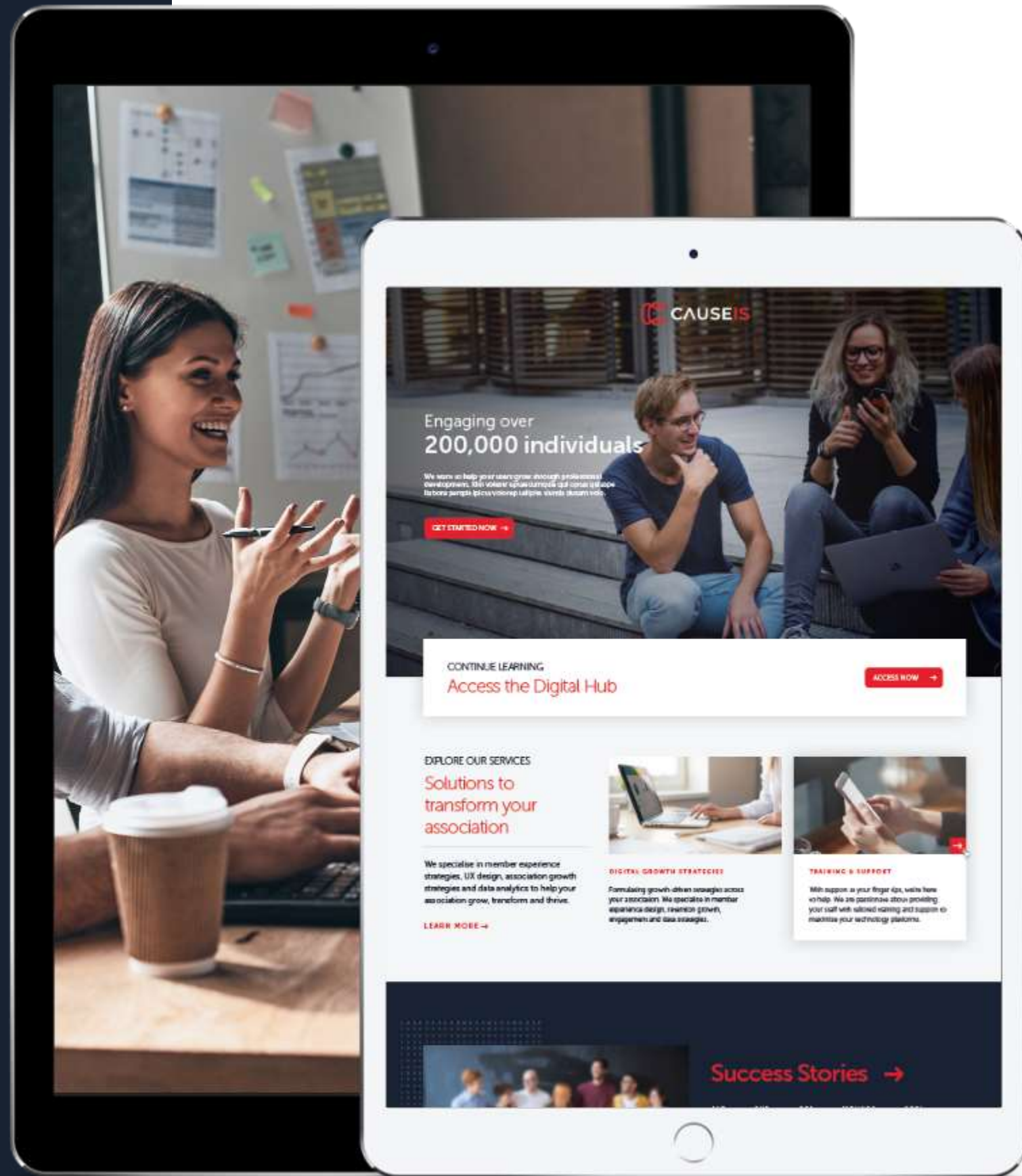
Welcome to the Digital Academy



- Time to focus on your Association Strategy
- Learn from other associations and your peers
- Use Member Experience techniques to shift your strategies
- Consider new culture, innovation and ideas
- Tools and frameworks to help you



About Causeis



Causeis exists to support associations.

We create digital experiences for your members, your staff and your association. Focusing on your growth, Causeis leverages best-in-class technology to enable your strategy and success.

Supported by AuSAE

The home for association professionals.

A place where you belong, connect with others, advance your career and be inspired.

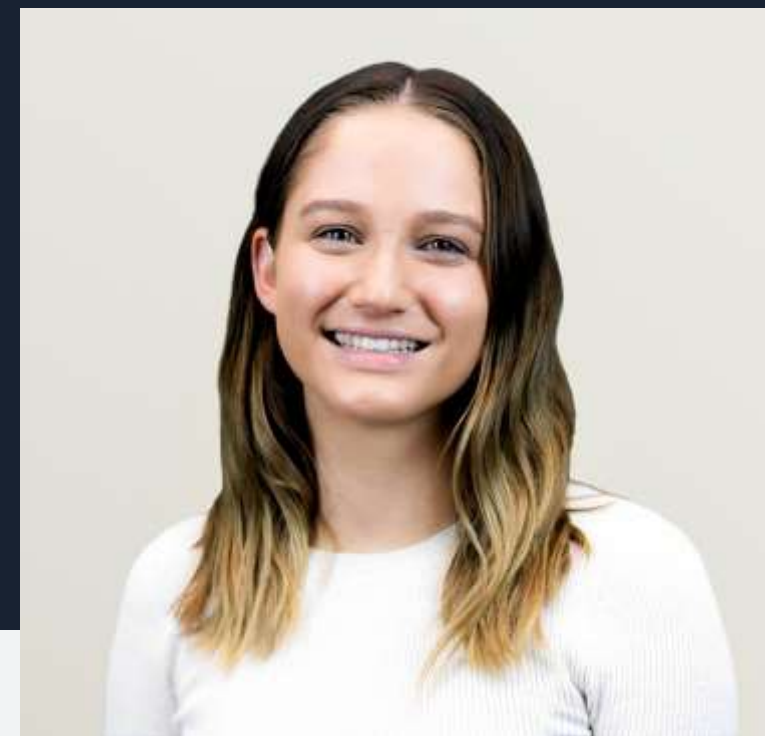
www.ausae.org.au



Presenters & Facilitators



Michelle Lelempsis
Managing Director
Causeis



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Digital Marketing Specialist
Causeis

Maximise your Workshop Experience



Mute as required

To allow for clear audio please mute yourself when presentation sessions are in session. At times we may mute your line if you may have forgotten.

Session recording

Today's presentations are being recorded however to maximise you're sharing and networking the breakout rooms will not.

Presentation Slides

Presentation slides and recording will be distributed on course completion.

Chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat. Share ideas, successes and learnings.

Use your camera

Especially in the breakout rooms, please don't be shy and turn on your camera to increase your engagement.

Update your Name

So that we know who you are, and to let everyone know where you are from – lets rename ourselves to show our full name & acronym

Thursday 12th May

Day 2: Agenda

- Recap of day 1
- Your New Member Journey Map
- 6 Critical Steps for your Acquisition and Onboarding Experience
- Wrap-up

Breakout Rooms

Day 2: Learning & Networking

- Your New Member Journey mapping
- Stage: Search and Discovery
- Stage: Purchase and Post Purchase

Member Journey Mapping to Drive Member
Experience for Growth

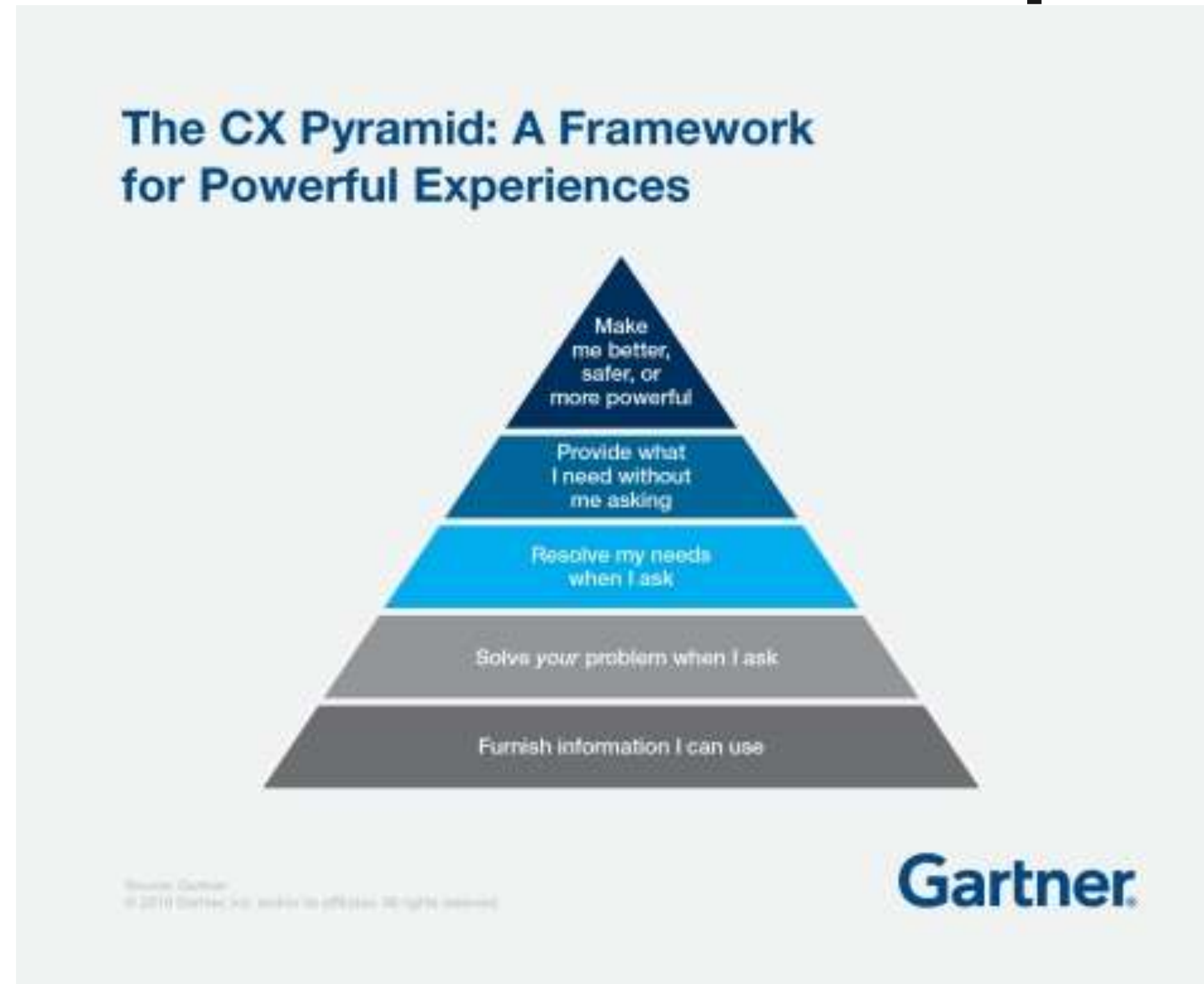
Let's Recap

Customer Experience

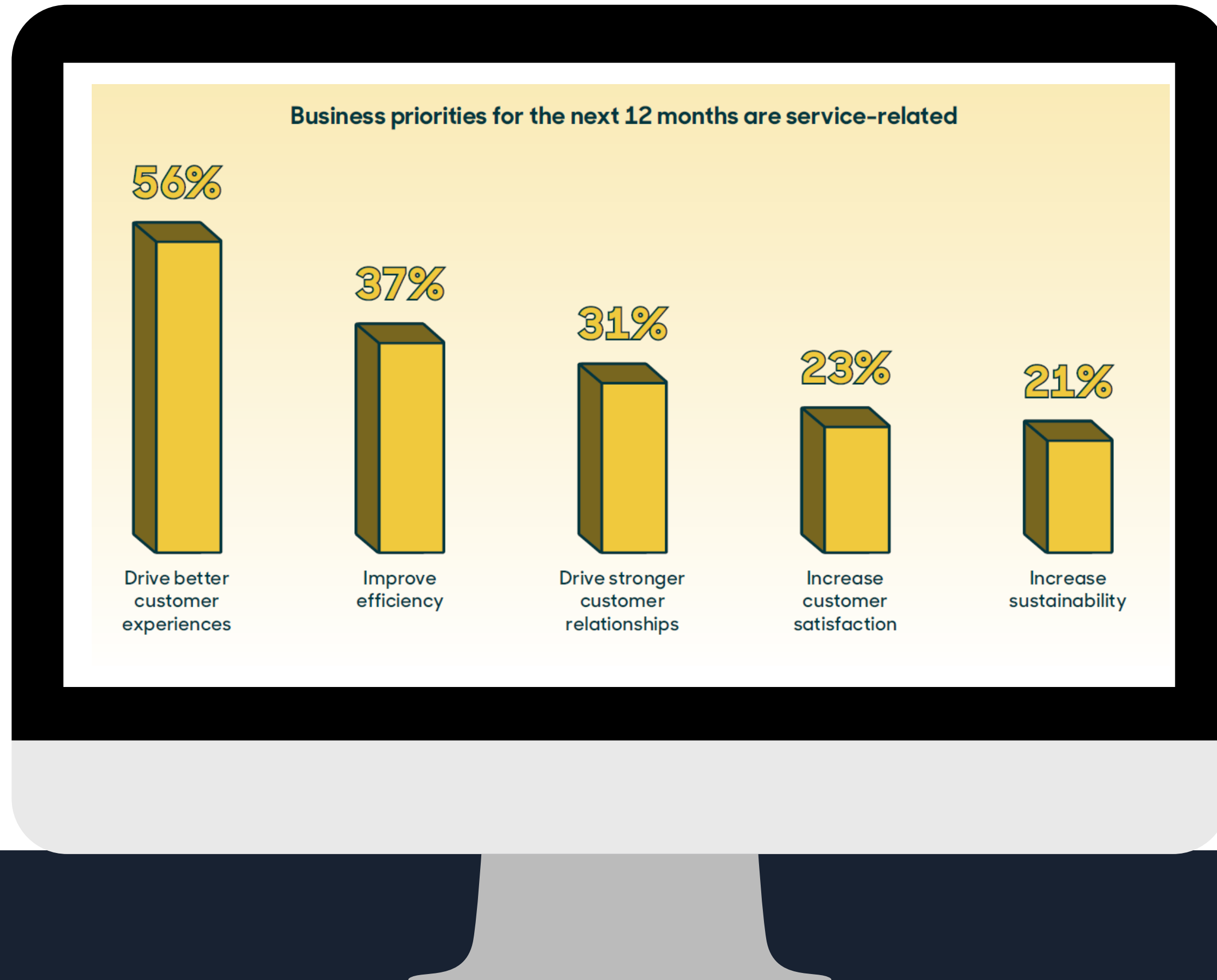
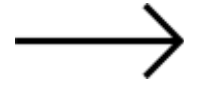
What is Customer Experience?
What is Customer Mapping?



What is Customer Experience?



Why does
Customer Experience matter?



Role Play: Prospect Member



Email enquiry



Phone enquiry



Website abandoned cart

Map your New Member Journey

Steps to consider



How do they find your association?



What data do you collect?



What happens when they join? What happens when they pay? What happens tomorrow?

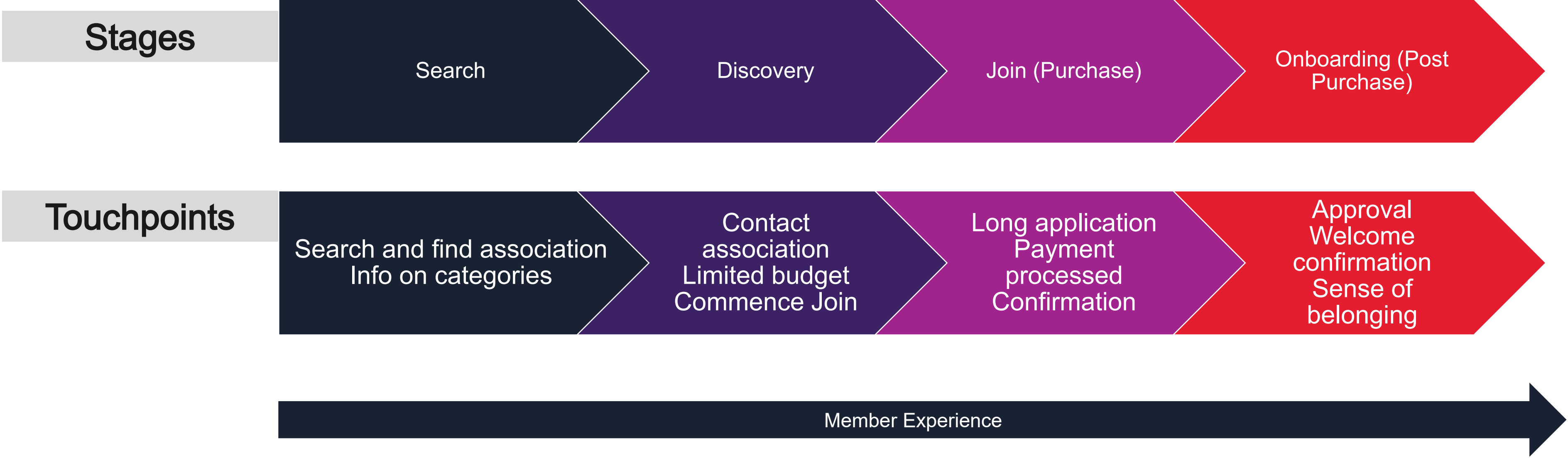


What does it feel like? Why?



Focus on finding your gain and pain points

Pain and Gain Journey Mapping



Breakout Room



10-15 minutes and you will receive a 60 second warning when ending

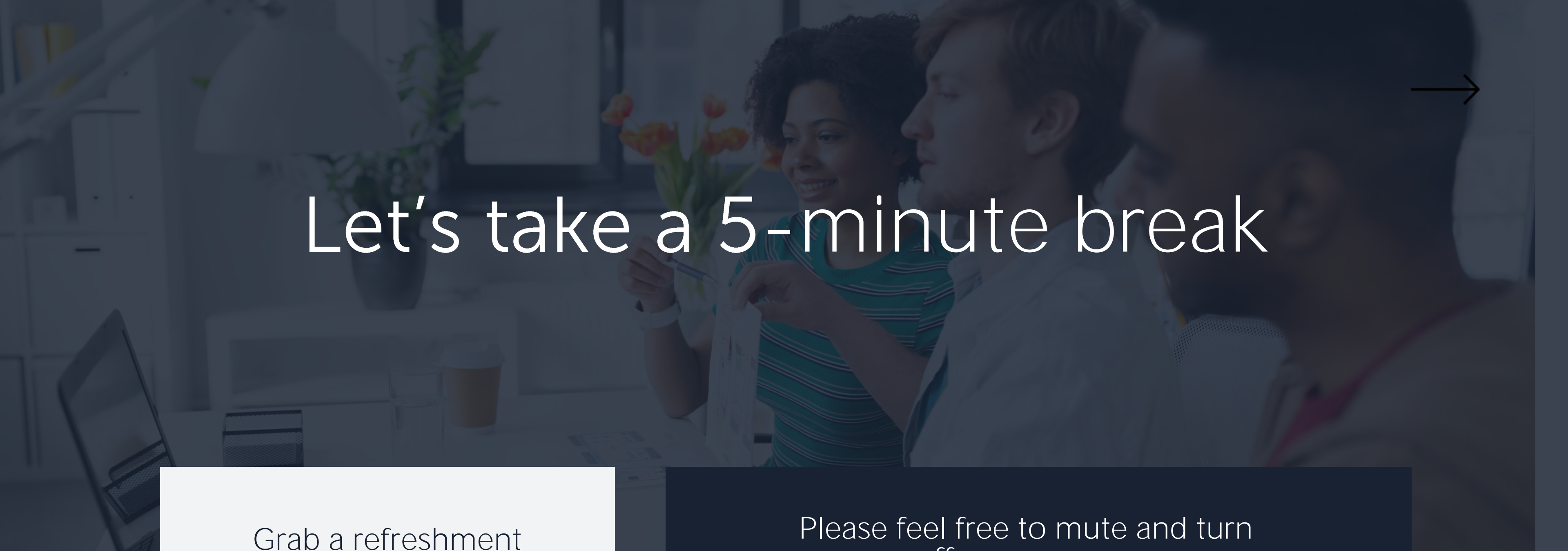


Introduce yourself and your association



Map your New Member Journey

- How do they find your association?
- What data do you collect?
- What happens when they join? What happens when they pay? What happens tomorrow?
- What does it feel like? Why?
- Focus on finding your gain and pain points



Let's take a 5-minute break

Grab a refreshment

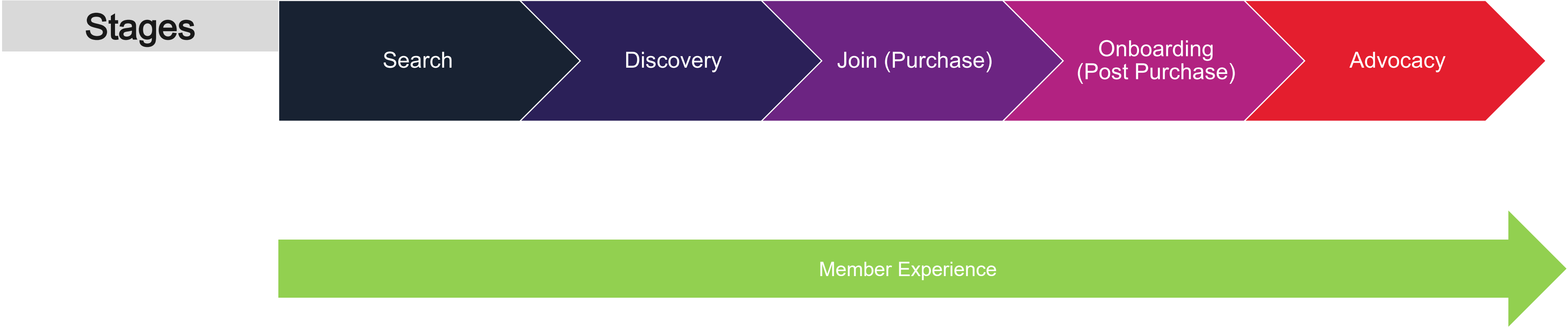
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Don't close the Zoom session

A hand holding a smartphone in front of a wall with colorful sticky notes. The text is overlaid on the image.

Best Practices: Each Stage of the Acquisition and Onboarding Member Journey

Stages of Members Joining



Association Best Practices: Search Stage

SEO: Search Engine Optimisation

- ✓ How well does your association rank?
- ✓ There is no page 2 of Google results
- ✓ Google or peer reviews
- ✓ Contact details

Phase 1: Search



reinsw



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About 635,000 results (0.66 seconds)

<https://www.reinsw.com.au>

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Feedback

<https://www.facebook.com> > ... > Businesses > Real Estate



REINSW



Website Directions Save Call

4.2 ★★★★★ 76 Google reviews

Association or organization

A 3-min walk from the Australian National Maritime Museum

Address: 51-53 Murray St, Pyrmont NSW 2009

You visited 3 years ago

Hours: Closed · Opens 9AM Thu

Phone: (02) 9264 2343

Suggest an edit · Own this business?

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australian computer society



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Read Through the Benefits Of The Program. View More Details.

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People also ask

Australian Computer Society



Professional association

acs.org.au

The Australian Computer Society is an association for information and communications technology professionals with over 48,000 members Australia-wide. Wikipedia

Membership: 45,000+

Headquarters location: Darlinghurst

Founded: 1 January 1966

Key people: Dr Nick Tate (President) Andrew Johnson (chief executive officer)

Subsidiaries: River City Labs, MORE

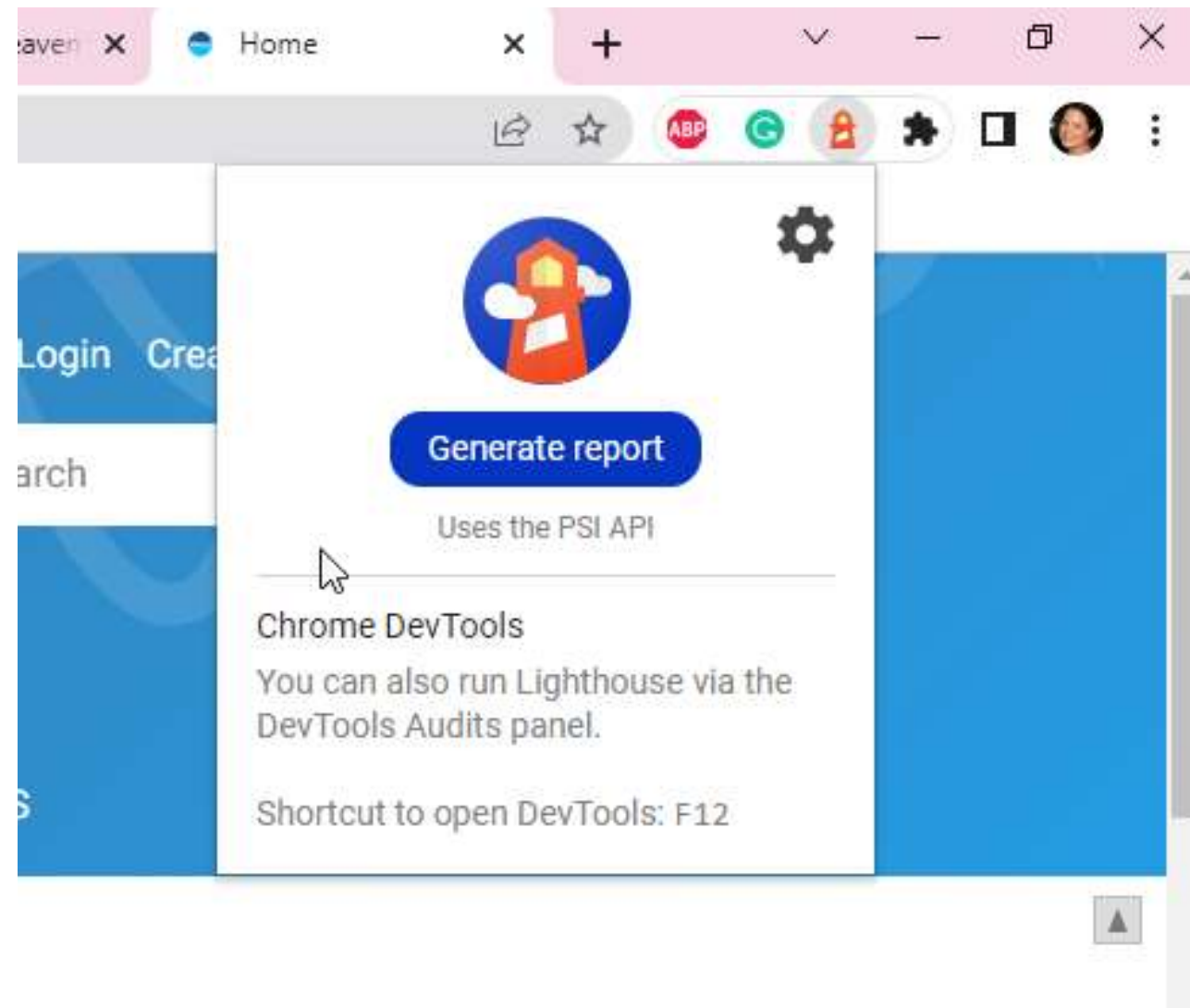
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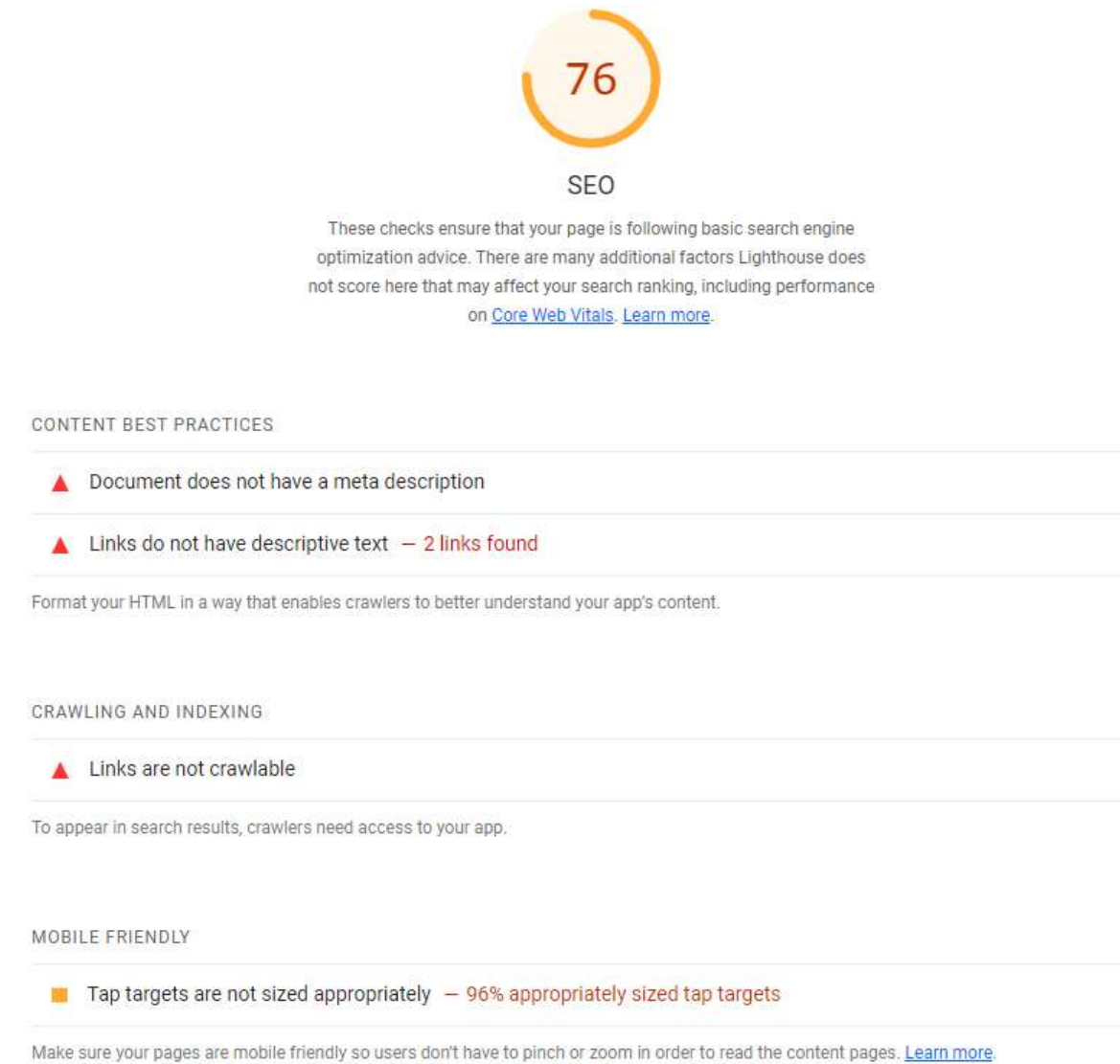
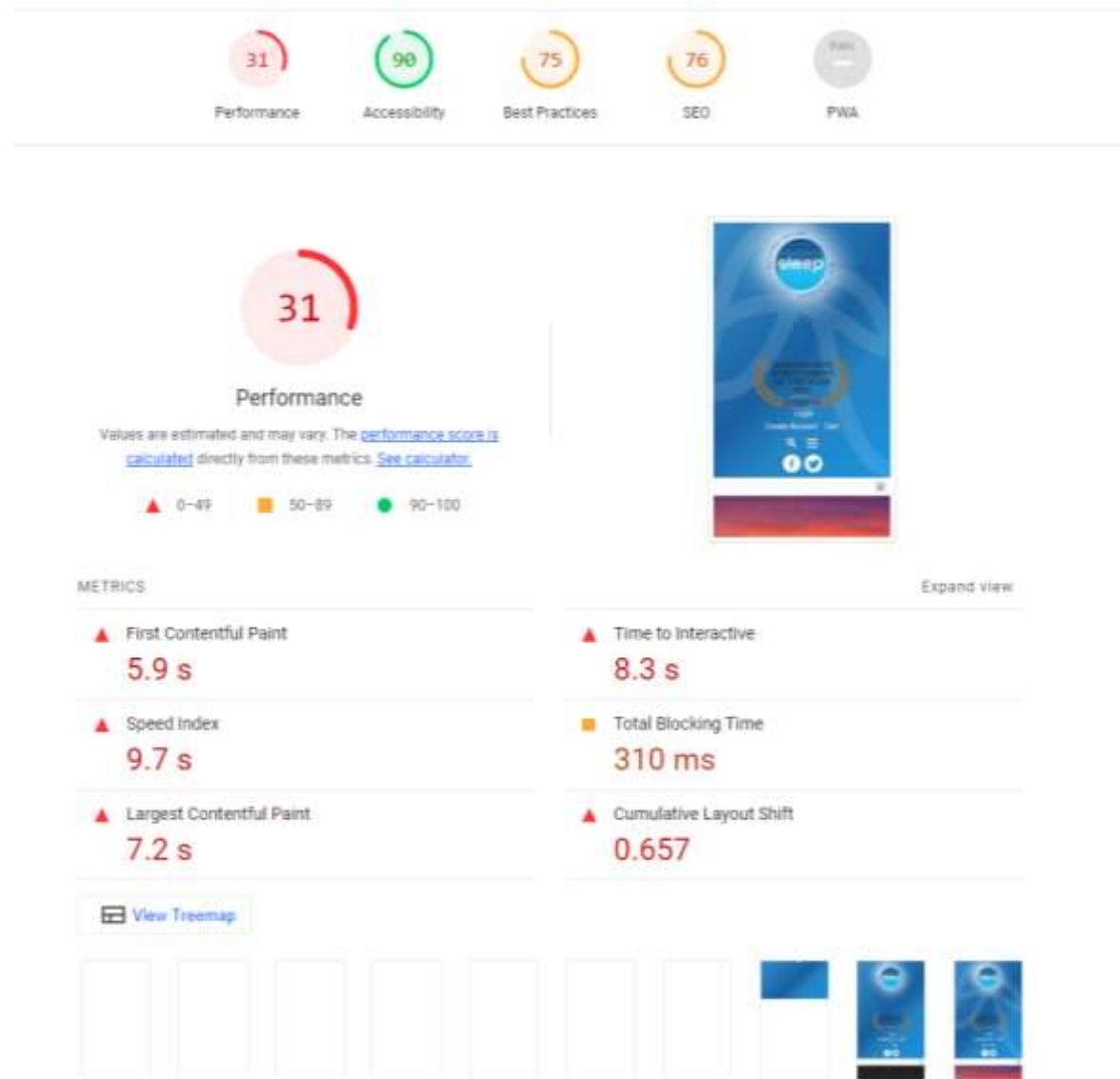
SEO: Google Lighthouse



Download:

<https://chrome.google.com/webstore/detail/lighthouse/blipmdconlcpinefehnmjammfjppmpbjk?hl=en>

SEO: Google Lighthouse

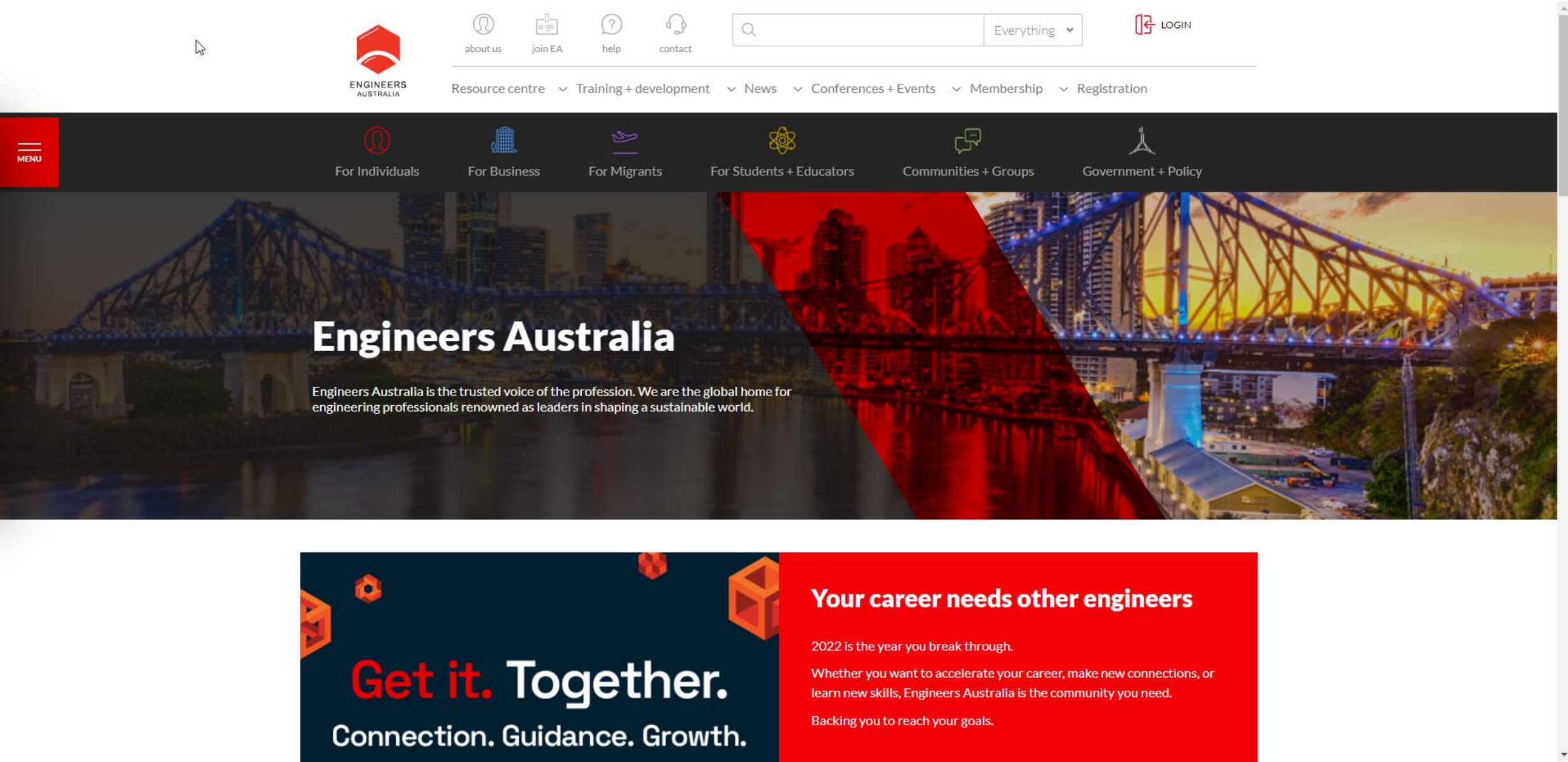


Other Considerations

- ✓ Website cater for prospective members and segments
- ✓ Call to action
- ✓ Download free "member" article
- ✓ Experience of their first contact and impression

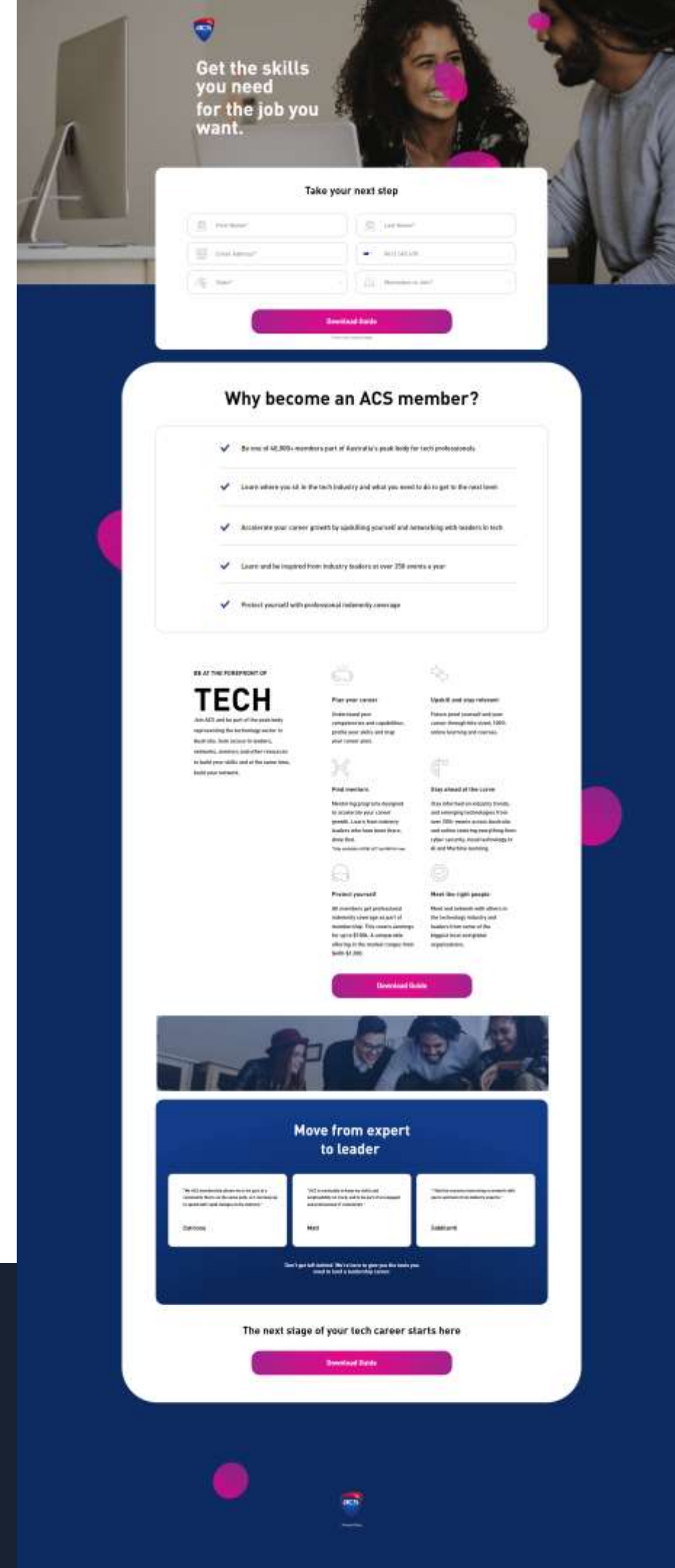
How can you get their contact details?

Other Considerations



Other Considerations

<https://info.acs.org.au/>



Association Best Practices: Discovery Stage

Member Value Proposition

- ✓ Are benefits and your member value proposition clearly defined?
- ✓ Tailored to meet each primary segment
- ✓ Visual aids as well as text
- ✓ Call to action – Request more information or a call back

Member Value Proposition

<https://www.ipwea.org/membership/becomemember>

That's why I'm a member	Web Account	Young Member <small>(under 35)</small>	Member	Retired
	FREE	AU \$180 +GST NZ \$220 +GST	AU \$290 +GST NZ \$330 +GST	AU \$80 +GST NZ \$90 +GST
	REGISTER	JOIN NOW	JOIN NOW	JOIN NOW
IPWEA Asset Management Pathway				
Save \$200 as a Member, on all Asset Management Pathway courses.		✓	✓	✓
Communities of Practice				
Discussion forums view	✓	✓	✓	✓
Discussion forum post	Limited to 10 posts	Unlimited	Unlimited	Unlimited
Online libraries access		✓	✓	✓
Online conference papers		✓	✓	✓
Recognition				
IPWEA post-nominals		✓	✓	✓
Overseas study tour fellowships		✓	✓	✓
Excellence awards		✓	✓	✓
Emerging leader awards		✓	✓	✓
Discounts on conference events		✓	✓	✓
Newsletter				
intouch e-newsletter	✓	✓	✓	✓
Leadership				
Support IPWEA to provide leadership	✓	✓	✓	✓
Build alliances with other members		✓	✓	✓
Voting rights		✓	✓	✓
International Member <small>(excl AU, NZ)</small>	Includes all Member Benefits (excl Fellowships), Receive digital copy of <i>inspire</i> magazine.		AU \$100	JOIN NOW
Student Member	View and contribute to CoP Discussion Forums, Receive intouch e-newsletter and digital copy of <i>inspire</i> magazine.		FREE	JOIN NOW

Prospect Nudging

- ✓ All prospect enquiries – Add to your database
- ✓ Flag as “prospect”
- ✓ Automate prospect journey
- ✓ Use all communication methods

Prospect Nudging



Phone – Outbound call to Prospect

Message – Key message to include asking if they received all their information and if they want to proceed with their join.

Measurement – Outcome of the call, tracked and reported



Email – Outbound Email to Prospect

Message – Key message to include the offer of a trial membership, or free member benefit (e.g event or webinar)

Measurement – Outcome of email would result in an engagement



Mail – Outbound Mail to Prospect

Message – Prefilled form, reply paid envelope with incentive or discounted membership. I.e One month free

Measurement – Outcome if join with promotion

You can't do any of this without the initial contact data in your CRM!

Other Considerations

- ✓ Appeal to various segments
- ✓ Offer a trial of a member benefit (not the entire membership)
- ✓ Consider external call center for outbound calls
- ✓ Pre-fill online forms or PDF forms

Breakout Room



10 minutes and you will receive a 60 second warning when ending



What are the Search and Discovery stages ideas you could improve or implement?



What other ideas or techniques have you seen?



Let's take a 5-minute break

Grab a refreshment

Please feel free to mute and turn off your camera

Don't close the Zoom session

A hand holding a smartphone in front of a wall with colorful sticky notes. The text is overlaid on the image.

Best Practices: Each Stage of the Acquisition and Onboarding Member Journey

Stages of Members Joining

Stages

Search

Discovery

Join (Purchase)

Onboarding
(Post Purchase)

Advocacy

Member Experience

Association Best Practices: Join (Purchase) Stage

Member Experience: Instructions

- ✓ Explain what you need from the member to join
- ✓ How do they get help during the process?
- ✓ Are there any files they need to upload?
- ✓ What could be a barrier to the join?

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Member Experience: Instructions

Steps to membership

There are five simple steps to join Engineers Australia.







JOIN NOW

<https://www.engineersaustralia.org.au/Become-a-member>

Member Experience: Instructions

Fee calculator

This calculator will tell you the fee payable with your application for Engineers Australia membership.

	Grade of membership you wish to apply for	<input type="text" value="-Select-"/>
	Are you eligible for a membership concession rate?	<input type="text" value="-Select-"/>
	Month of application	<input type="text" value="-Select-"/>
	Are you living in Australia?	<input type="text" value="-Select-"/>

Your membership Fee

\$0

[CALCULATE THE COST](#)

<https://www.engineersaustralia.org.au/Become-a-member>

Member Experience: Instructions

Frequently asked questions

HOW DO I CREATE MY EA ID AND ACCESS TO MYPORTAL? +

HOW DO I APPLY FOR A CONCESSION? +

I'M A PAST MEMBER, CAN I REJOIN? +

AM I ELIGIBLE FOR MEMBERSHIP WITH ENGINEERS AUSTRALIA? +

WHAT DO I NEED TO PROVIDE WITH MY APPLICATION? -

In most cases you will need:

- at least one primary identification document such as a passport photo page, driver's licence or copy of your birth certificate
- Degree certificate (testamur) and academic transcript or a previous assessment letter from Engineers Australia (such as a Migration Skills Assessment Outcome letter)
- A current resume or equivalent

Students do not need to provide qualifications documents and graduates do not need to provide a resume or equivalent.

If applying for Fellow you will also need to have support from two current Fellow members of Engineers Australia.

WHAT ARE THE MEMBERSHIP FEES? +

CAN I PUT A HOLD ON/RESIGN MY MEMBERSHIP? +

<https://www.engineersaustralia.org.au/Become-a-member>

Member Experience: Instructions

If you need support with your membership application, we are here to help!

Please complete the below to request assistance

FIRST NAME*

LAST NAME*

EMAIL*

PHONE*  +61 412 345 678

MESSAGE*

QUERY FOR*

SEND

<https://www.engineersaustralia.org.au/Become-a-member>

Member Experience: Simplify the data

- ✓ Assess the need of every single data field
- ✓ Can the data be capture after the join?
- ✓ Can the data be solicited from another source?
- ✓ Do you need all contact data? Address?

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Member Experience: Simplify payments

- ✓ What payment methods do you offer?
- ✓ Can a member sign-up with automatic payments? What frequency?
- ✓ What about non-online payments?

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Member Experience: Simplify payments

The screenshot displays the Australian College of Midwives (ACM) website. At the top left is the ACM logo with the text 'Australian College of Midwives'. The navigation menu includes 'About ACM', 'Membership', 'Professional Development', 'Partner Opportunities', and 'Shop'. On the right, there is a 'Login or Create Account' section with fields for 'Email' and 'Password', and a 'Forgot password?' link. The main content area is titled 'Select Your Membership' and features four membership options, each with a representative image, a title, a description, the fee, and a 'Join today' button with a right-pointing arrow.

Membership Type	Description	Fee
Full Member	For midwives who hold current registration	\$365/year or \$33/month
Associate Member	For midwives who are not currently practicing, other health professionals and people with an interest in midwifery	\$220/year or \$21/month
Graduate Member	For midwives who have graduated in the last six months.	\$210/year \$20/month
Student Member	For students who are studying to gain initial midwifery registration	\$80/year

Plan the onboarding

- ✓ Ask “What would you like from your membership?” or “Why are you joining?”
- ✓ Use a drop-down list of options that can be used for personalising their onboarding journey.
- ✓ Example options:
 - ✓ Networking
 - ✓ CPD Management
 - ✓ Access to content
 - ✓ Education and Events
 - ✓ Career advancement

Planning for when the member JOINS!

Member Experience: Purchased!

- ✓ "Submit" – What happens?
- ✓ Confirmation page should include an immediate next steps
 - ✓ Personalised – Welcome aboard Tom
 - ✓ Welcome
 - ✓ Access your video library now
 - ✓ Set your communication preferences
 - ✓ Contact membership to book in an exploratory zoom

Member Experience: Purchased!

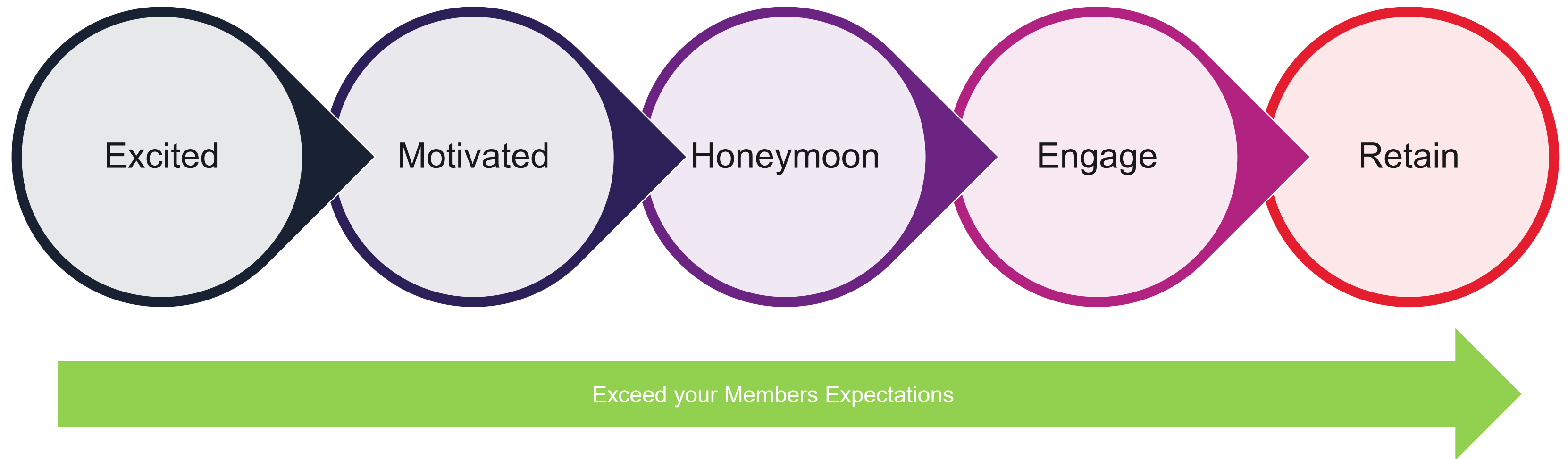
- ✓ Confirmation email should include an immediate next steps
 - ✓ Personalised – Welcome aboard Tom
 - ✓ Welcome
 - ✓ Access your video library now
 - ✓ Set your communication preferences
 - ✓ Contact membership to book in an exploratory zoom
 - ✓ Signed and sent from the primary contact at the association

Association Best Practices: Onboarding (Post Purchase) Stage

Onboarding: Goals

- ✓ Sense of belonging and networking
- ✓ Immediate engagement
- ✓ Retention

Increase Retention of New Members



Excited: Day 1 to 7

- ✓ New member is excited and motivated
- ✓ Send personalized welcome email
- ✓ Drip feed your welcome pack (don't send it all at once!)
- ✓ Call the member to welcome them and register them to attend a new member Zoom onboarding
- ✓ Use the "why are you joining" information to tailor

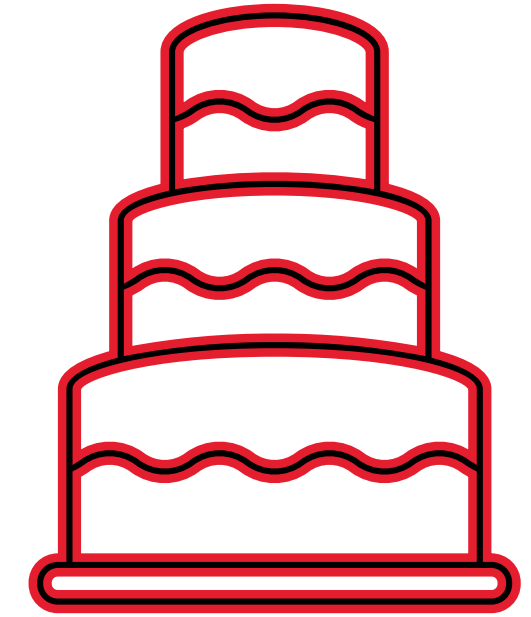


Motivated: Day 14 - 21

- ✓ Nudge the new member to log into their portal and access a benefit.
- ✓ Call the member to invite them to a complimentary webinar or event.
- ✓ Validate that all primary contact details are accurate – i.e no bounced emails, opened, and mobile is completed.
- ✓ Connect with them on Social Media



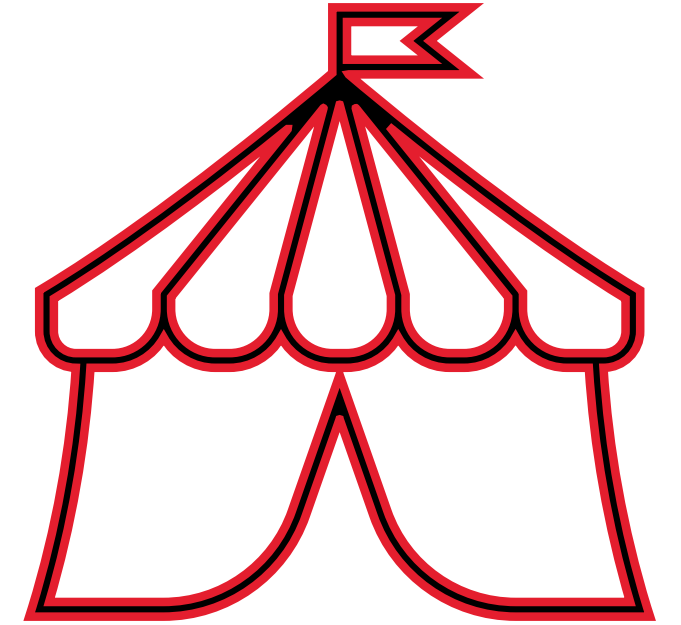
Honeymoon: Day 45



- ✓ Finalise remaining Welcome Kit (due to drip-feeding)
- ✓ Check-in call to seek feedback "How is your membership going?"
- ✓ Email an introduction to member and the education team
- ✓ Introduce your member to your online community

Engage: 3 to 6 months

- ✓ Membership survey to solicit feedback.
- ✓ Analyze their engagement data.
- ✓ Personalized email to push and promote specific content, benefit, webinar or other call to action.
- ✓ Continue to monitor data integrity to ensure details are accurate for maximum communications



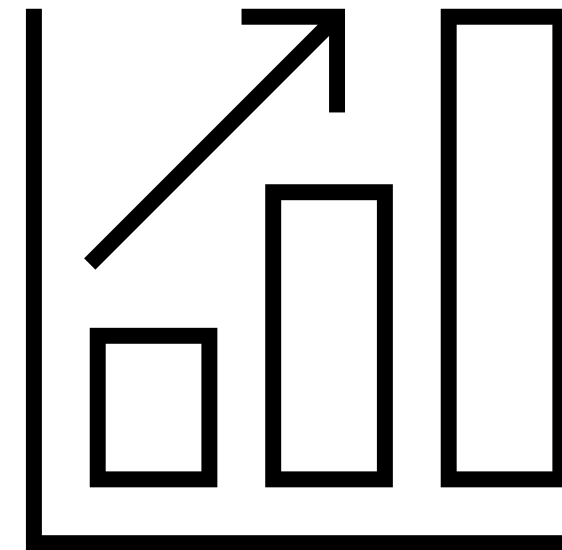
Retain: Up to 3 months prior to renewal



- ✓ Pre-renewal phone call to check-in on member
- ✓ Validate the member data
- ✓ Use their reason for joining for tailoring their renewal message. Continue to access your CPD by renewing your membership.

Measure your Impact & Performance

- ✓ New Members
- ✓ Funnel of Onboarding Journey
- ✓ Renewal and retention metrics
- ✓ Engagement metrics of new members



Breakout Room



10 minutes and you will receive a 60 second warning when ending



What does your current onboarding experience look like?



What else could you implementing into the New Member onboarding journey?

Association Best Practices: Advocacy and Loyalty Stage

Continue their journey

- ✓ Ask for a Google Review
- ✓ Join a Committee
- ✓ Become a Mentor
- ✓ Testimonial – Why I joined?

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Final thoughts and ideas

Customer
Experience

Prospect and New Member
Experience

Journey Mapping

Continue their journey

- ✓ Ask for a Google Review
- ✓ Join a Committee
- ✓ Become a Mentor
- ✓ Testimonial – Why I joined?

Efficient
Effective
Experience



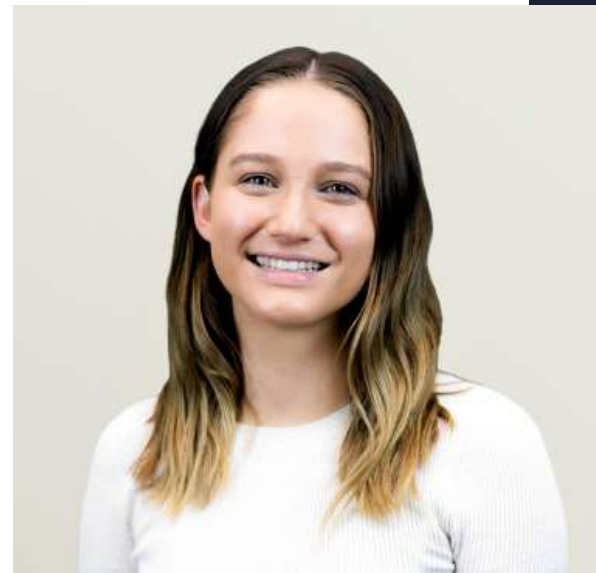
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9:41



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difference!



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