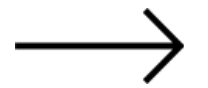CAUSEIS PRESENTS

Digital Academy for Associations
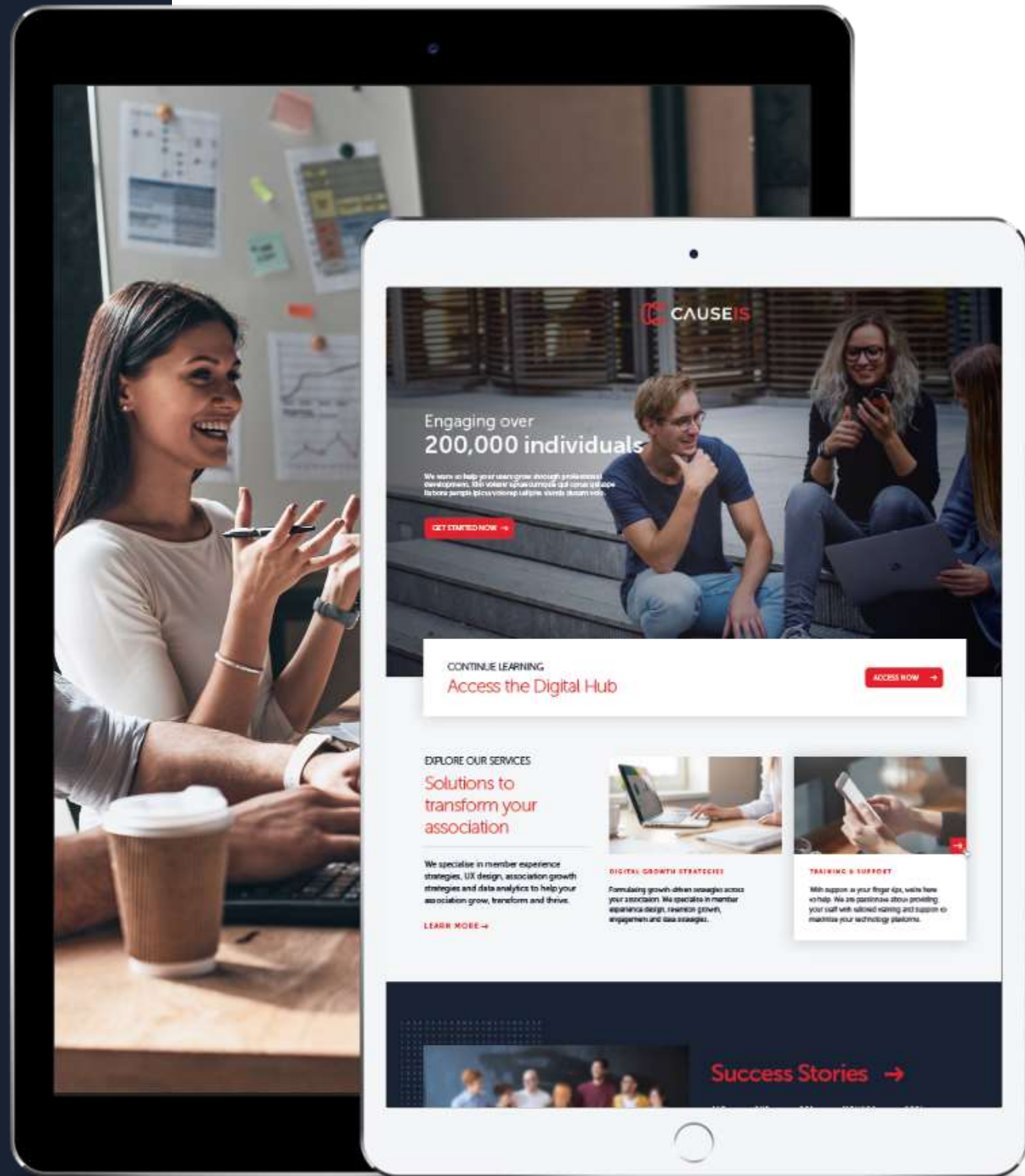
Course: MX Strategy: Acquisition and Onboarding Journeys
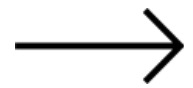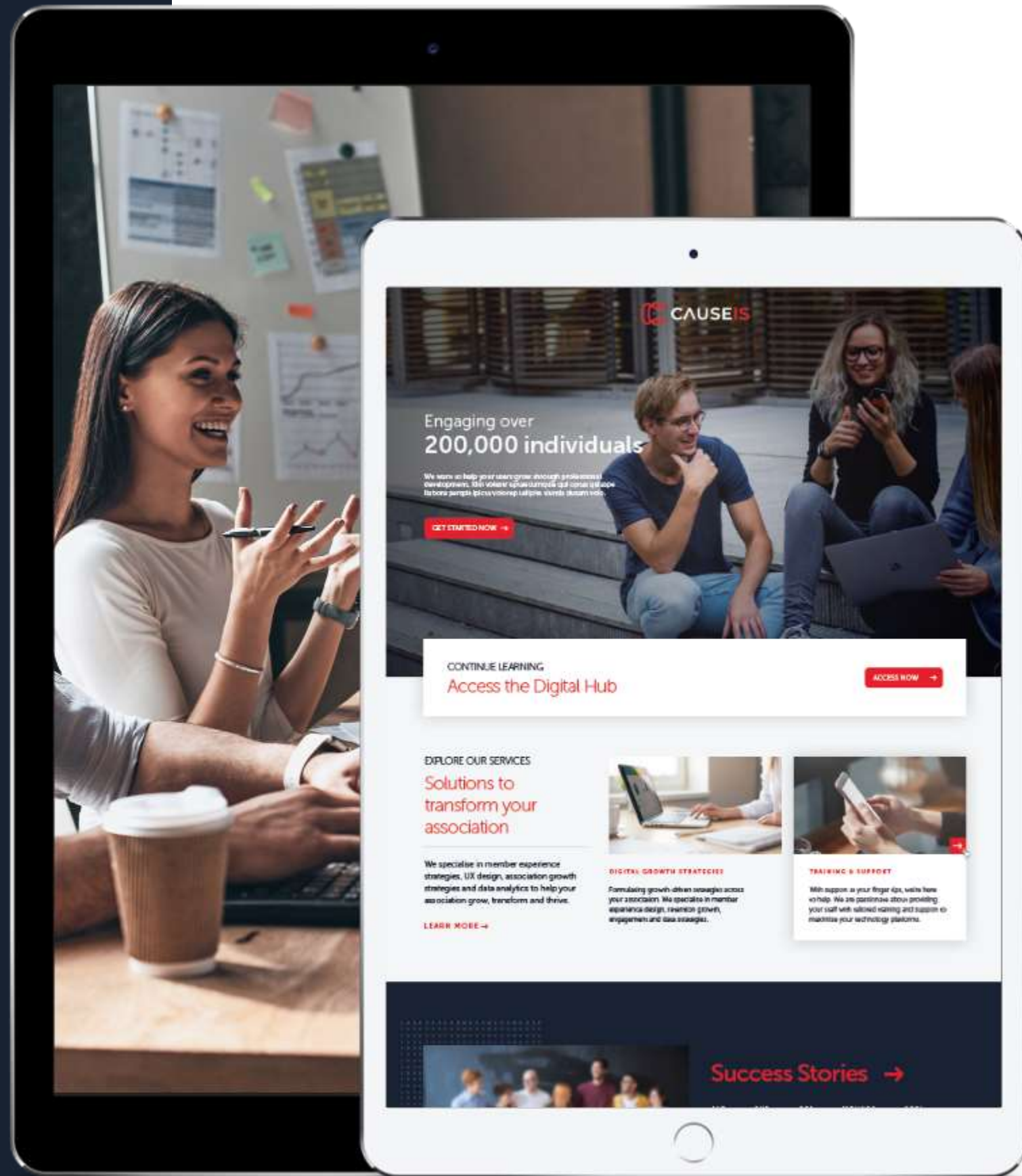
Welcome to the Digital Academy

- 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

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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.

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Supported by AuSAE

The home for association professionals.
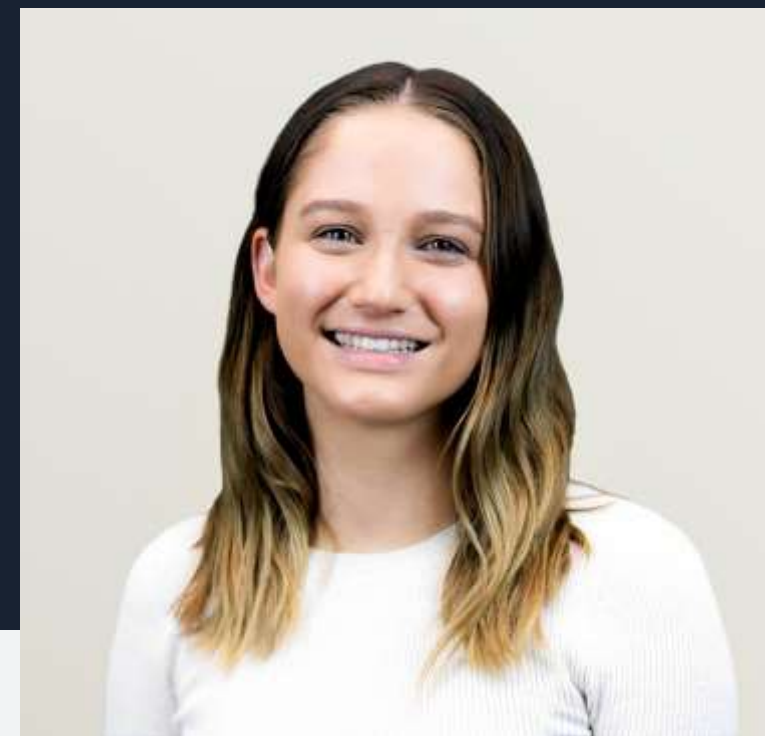A place where you belong, connect with others, advance your career and be inspired.

www.ausae.org.au

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AuSAE
The Australasian Society of Association Executives

Presenters & Facilitators

Michelle Lelempsis

Managing Director

Causeis

Yolande Smith

Digital Marketing Specialist

Causeis

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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

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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

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Breakout Rooms

Day 2: Learning & Networking

- Your New Member Journey mapping

- Stage: Search and Discovery

- Stage: Purchase and Post Purchase

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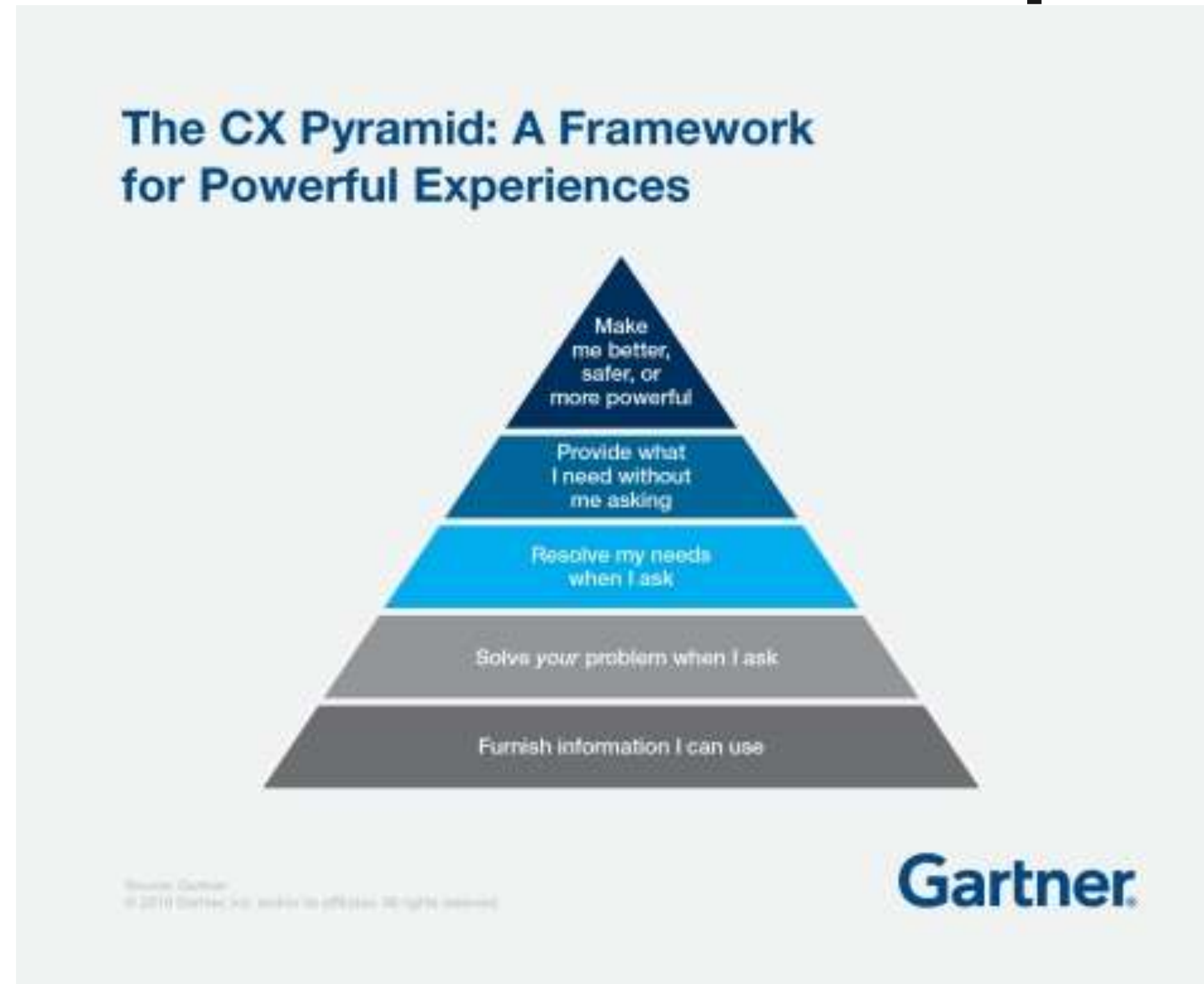Member Journey Mapping to Drive Member
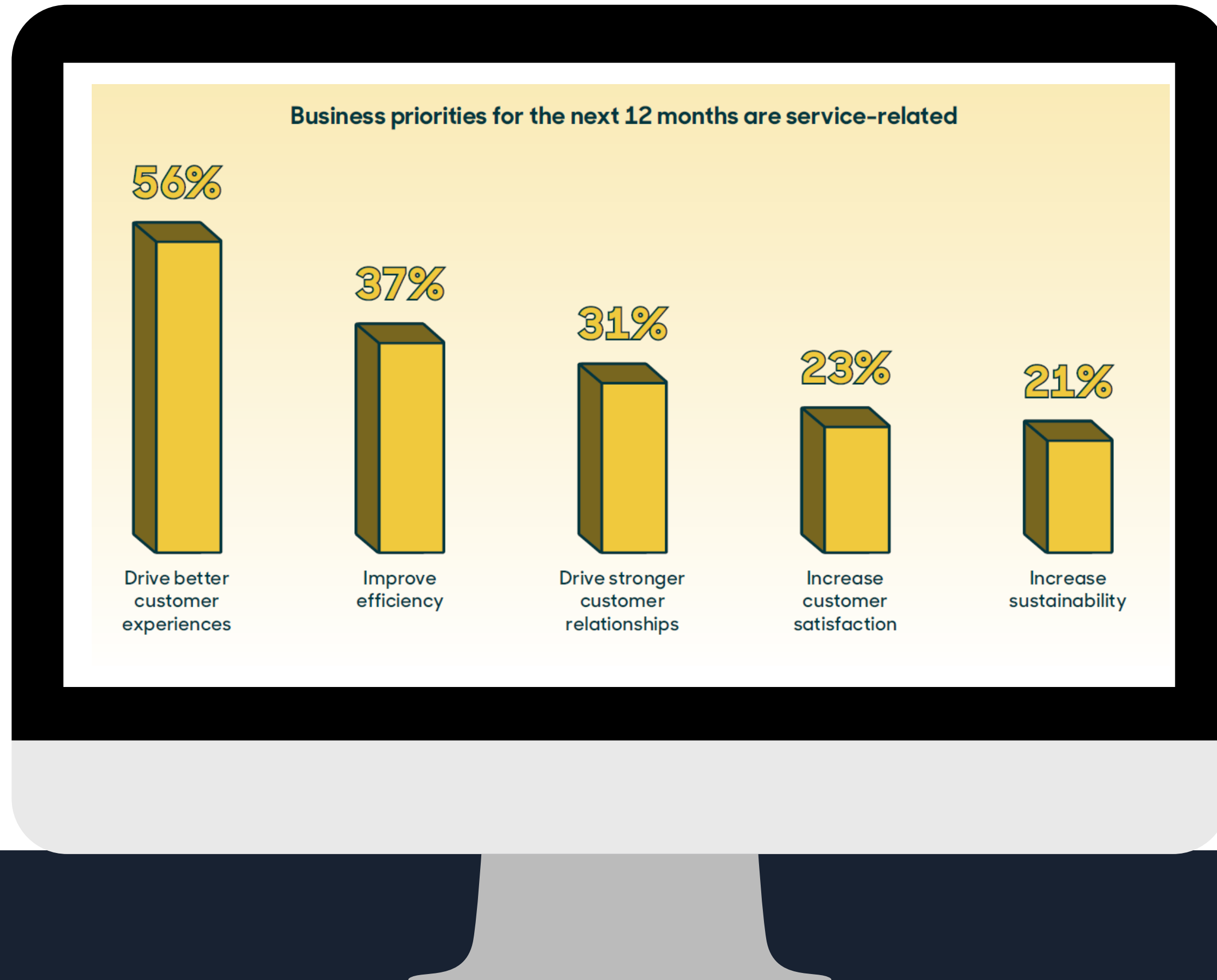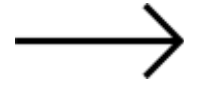Experience for Growth

Let's Recap

Customer
Experience

What is Customer Experience?
What is Customer Mapping?

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What is Customer Experience?

The CX Pyramid: A Framework for Powerful Experiences

- Make me better, safer, or more powerful
- Provide what I need without me asking
- Resolve my needs when I ask
- Solve your problem when I ask
- Furnish information I can use

Gartner.

Why does
Customer Experience matter?

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zendesk

Business priorities for the next 12 months are service-related

56% Drive better customer experiences

37% Improve efficiency

31% Drive stronger customer relationships

23% Increase customer satisfaction

21% Increase sustainability

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Role Play: Prospect Member

✓ Email enquiry

✓ Phone enquiry

✓ Website abandoned cart

Map your New Member Journey

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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

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Pain and Gain Journey Mapping

Stages	Search	Discovery	Join (Purchase)	Onboarding (Post Purchase)

Touchpoints	Search and find association Info on categories	Contact association Limited budget Commence Join	Long application Payment processed Confirmation	Approval Welcome confirmation Sense of belonging

Member Experience
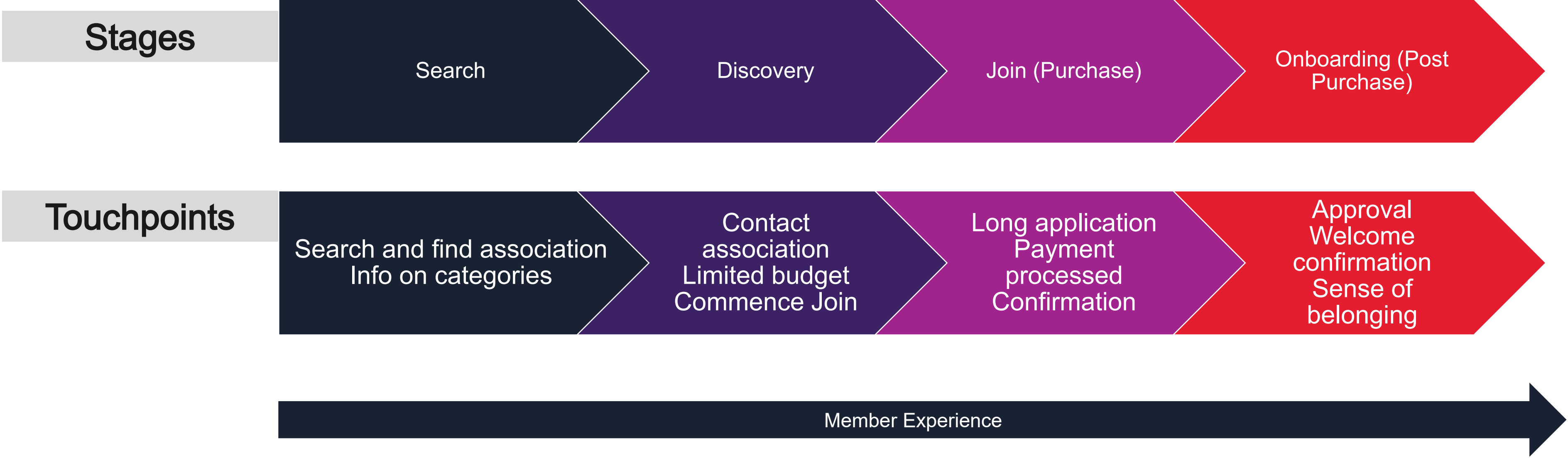
Breakout Room

10-15 minutes and you will receive a 60 second warning when ending
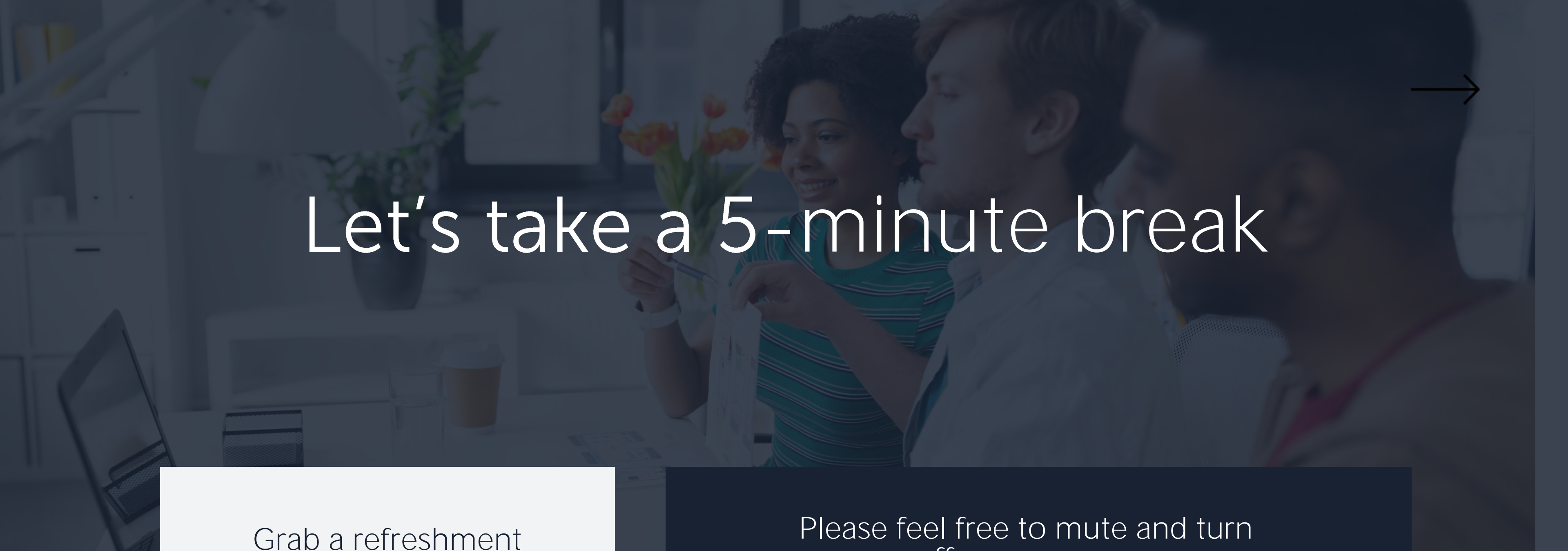
Introduce yourself and your association

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

Please feel free to mute and turn off your camera

Don't close the Zoom session

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

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Stages of Members Joining

| Stages | Search | Discovery | Join (Purchase) | Onboarding (Post Purchase) | Advocacy |

Member Experience

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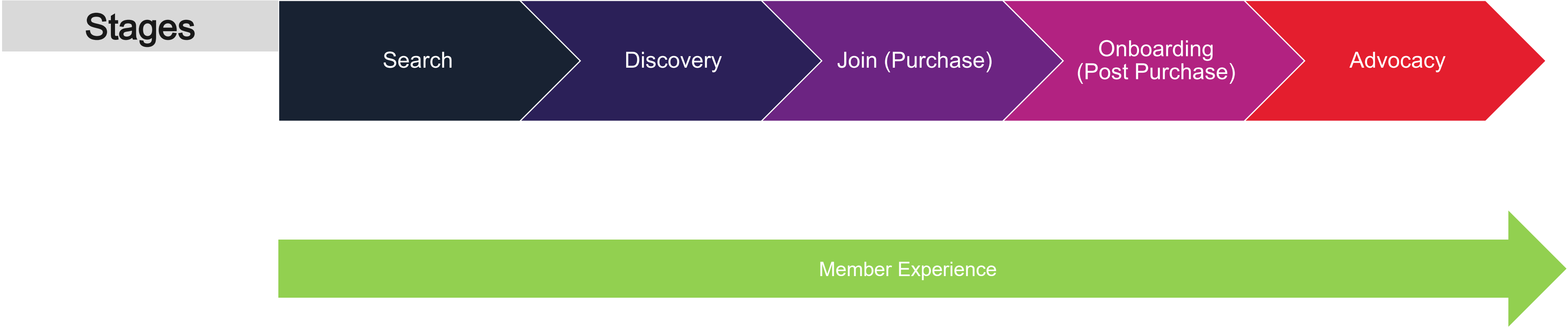
Association Best Practices:
Search Stage

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SEO: Search Engine Optimisation

✓ How well does your association rank?

✓ There is no page 2 of Google results

✓ Google or peer reviews

✓ Contact details

SEO: Google Lighthouse

Download:
https://chrome.google.com/webstore/detail/lighthouse/blipmdconlkpinefehnmjammfjpmpbjk?hl=en

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SEO: Google Lighthouse
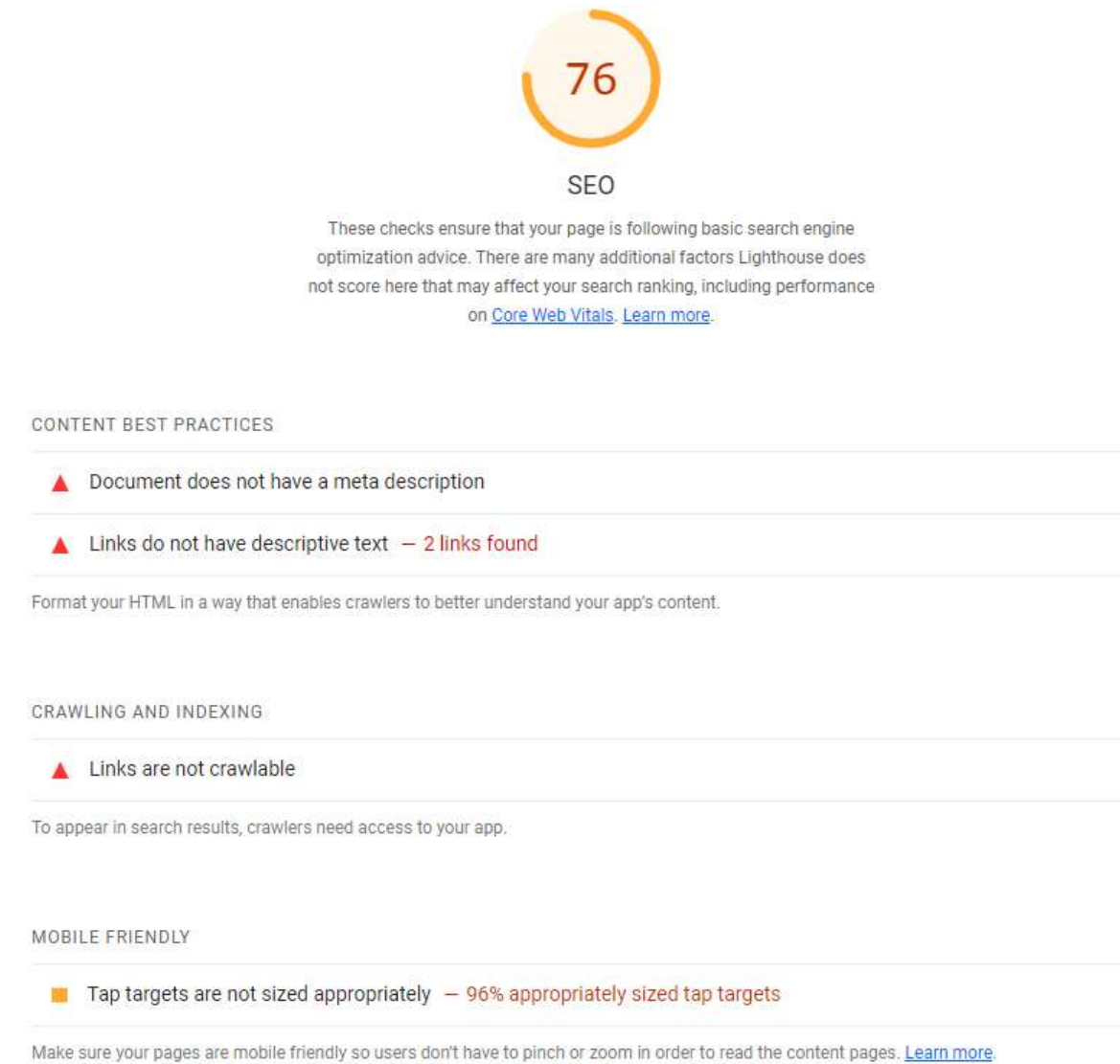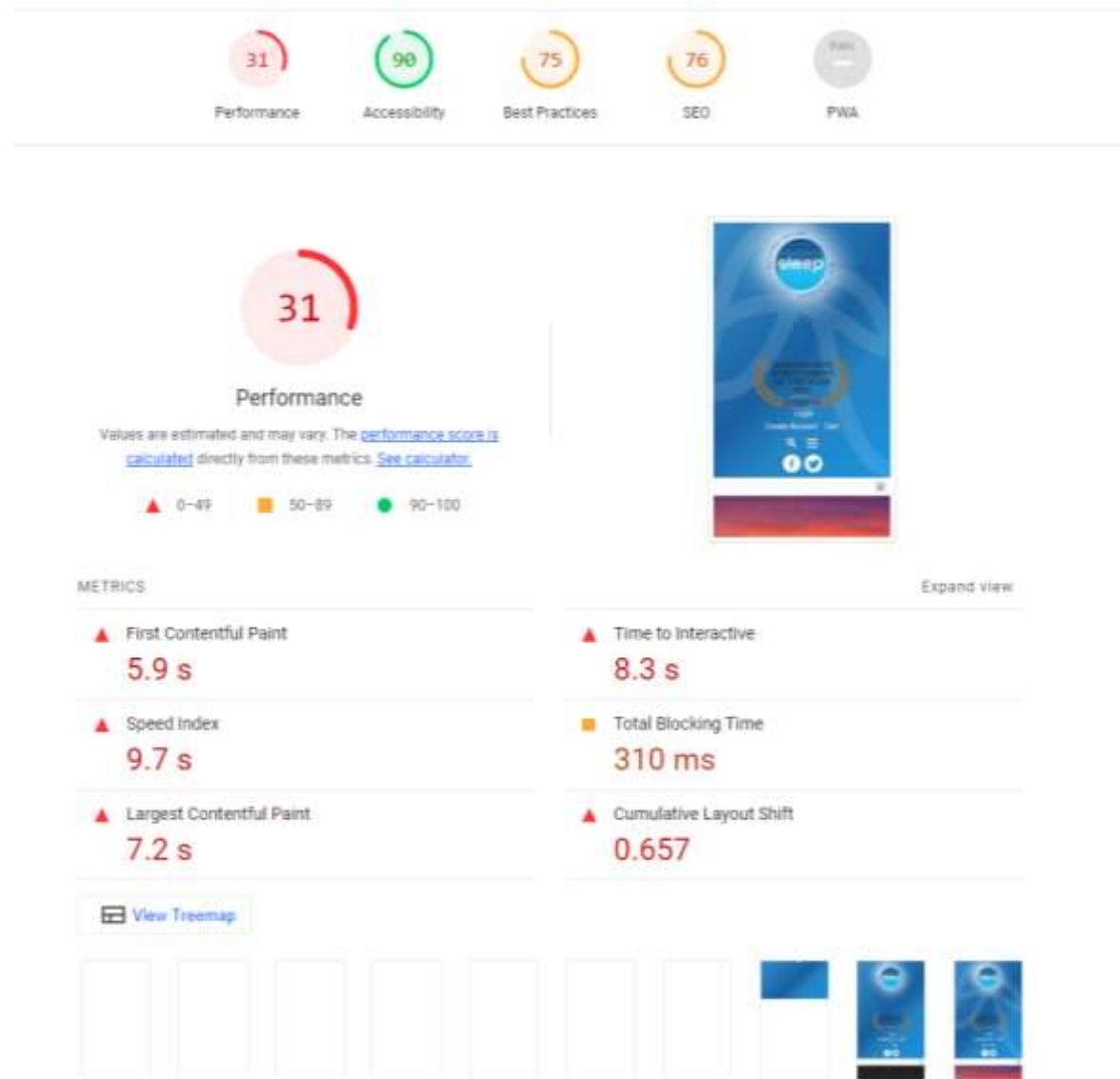
Other Considerations

✓ 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?
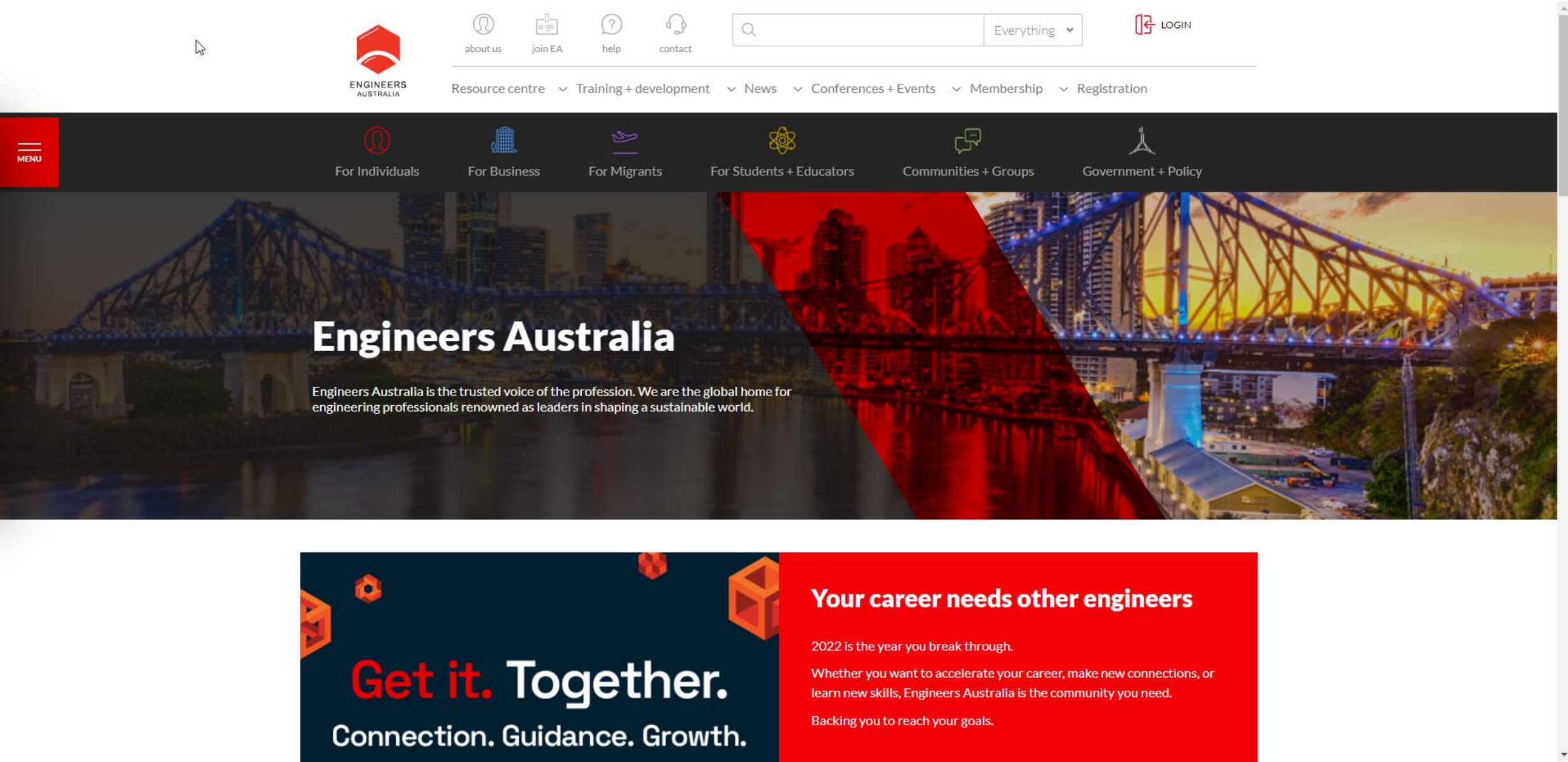
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Other Considerations

Other Considerations

https://info.acs.org.au/
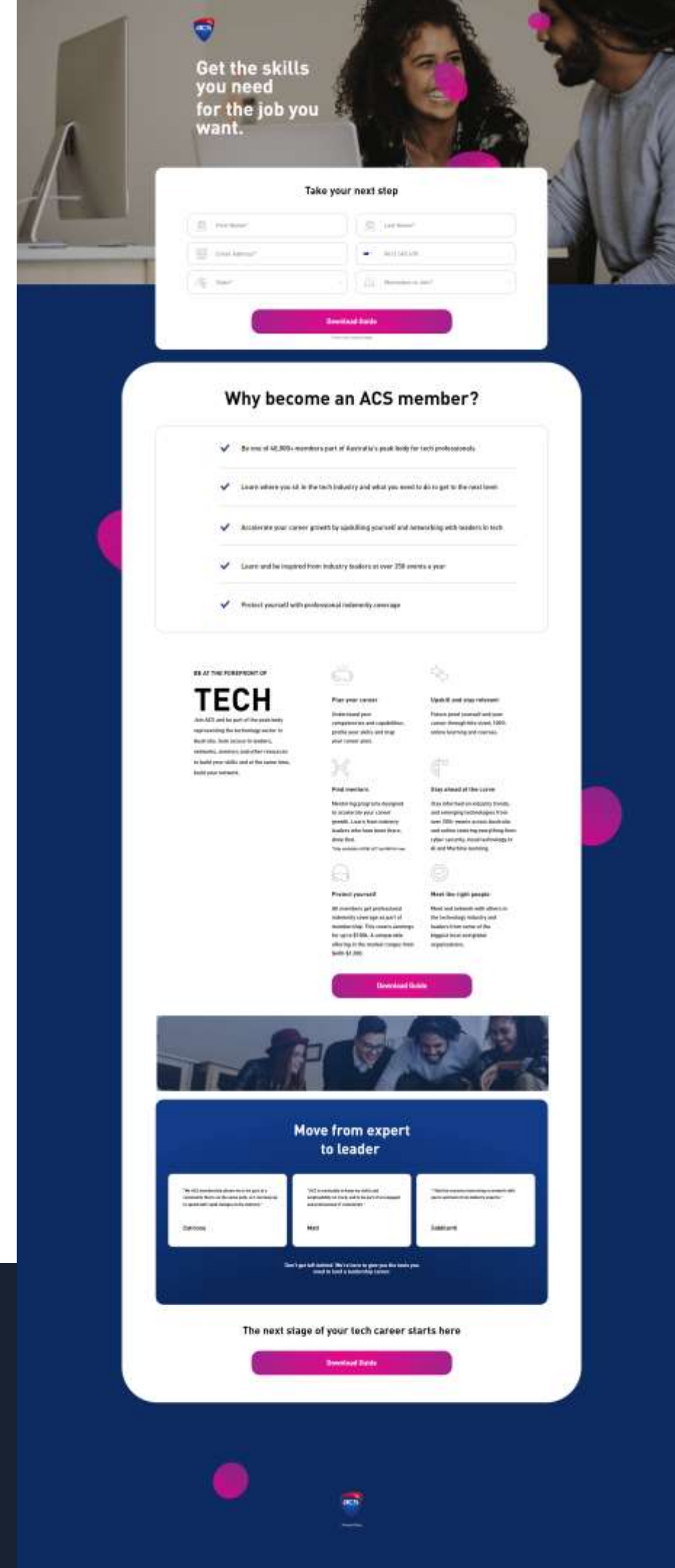
Member Value Proposition

- ✓ 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

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Member Value Proposition

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

Prospect Nudging

- ✓ All prospect enquiries – Add to your database

- ✓ Flag as "prospect"

- ✓ Automate prospect journey

- ✓ Use all communication methods

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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!

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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

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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?

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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

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

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Stages of Members Joining

| Search | Discovery | Join (Purchase) | Onboarding (Post Purchase) | Advocacy |

Member Experience

Association Best Practices:
Join (Purchase) Stage

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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.

1 Create an EA ID
If you don't have an EA ID, you will need to create an account and register for a password in order to progress.

2 Confirm your membership type
Identify your Occupational Category and select your Membership Grade.
If you are unsure if your engineering qualification is accredited, check our list of courses.

3 Submit your application for membership
Photo ID and evidence of relevant engineering qualifications is required.

4 Pay membership fee
Membership fees are calculated on a pro-rata basis.

5 Membership confirmation
Welcome to the EA Engineering Community.

JOIN NOW

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

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Member Experience: Instructions

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

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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

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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*

- Select - ▾

SEND

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

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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

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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 personlising their onboarding journey.

Planning for when the member JOINS!

✓ Example options:

✓ Networking

✓ CPD Management

✓ Access to content

✓ Education and Events

✓ Career advancement

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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

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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

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Association Best Practices:
Onboarding (Post Purchase) Stage

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Onboarding: Goals

- ✓ Sense of belonging and networking

- ✓ Immediate engagement

- ✓ Retention

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Increase Retention of New Members

Excited → Motivated → Honeymoon → Engage → Retain

Exceed your Members Expectations

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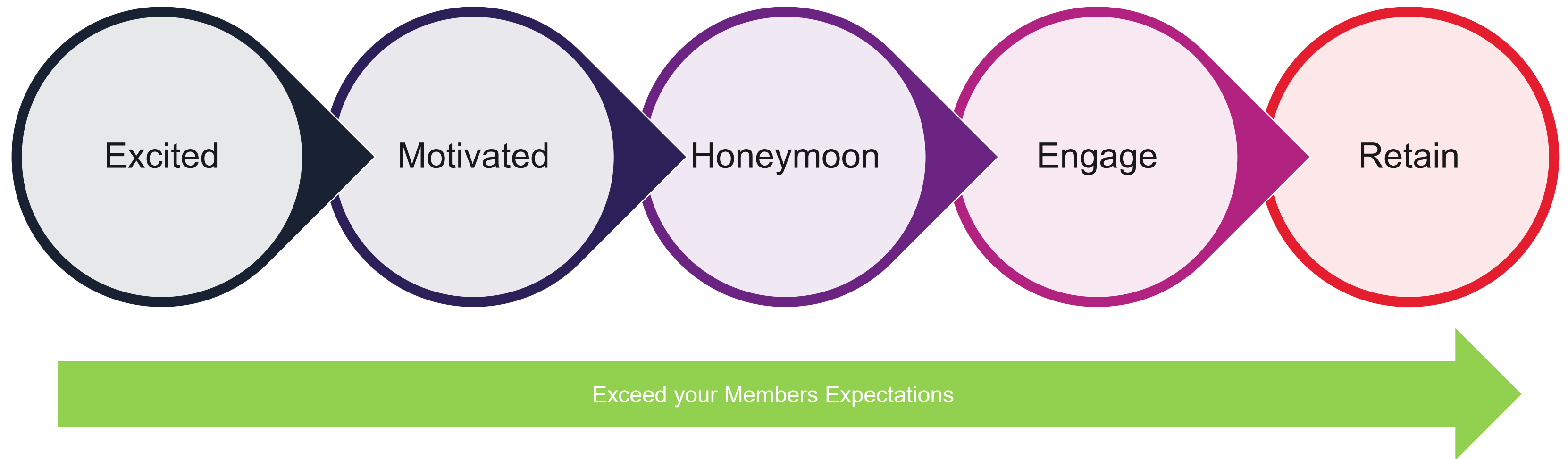
Excited: Day 1 to 7

✓ 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
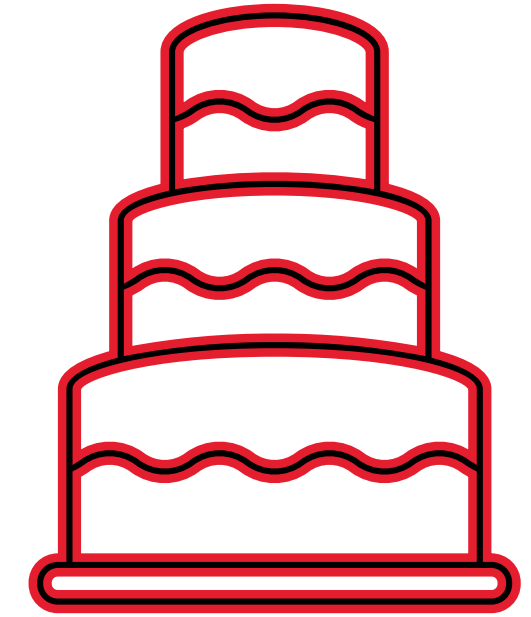
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Motivated: Day 14 - 21

- ✓ 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

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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

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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

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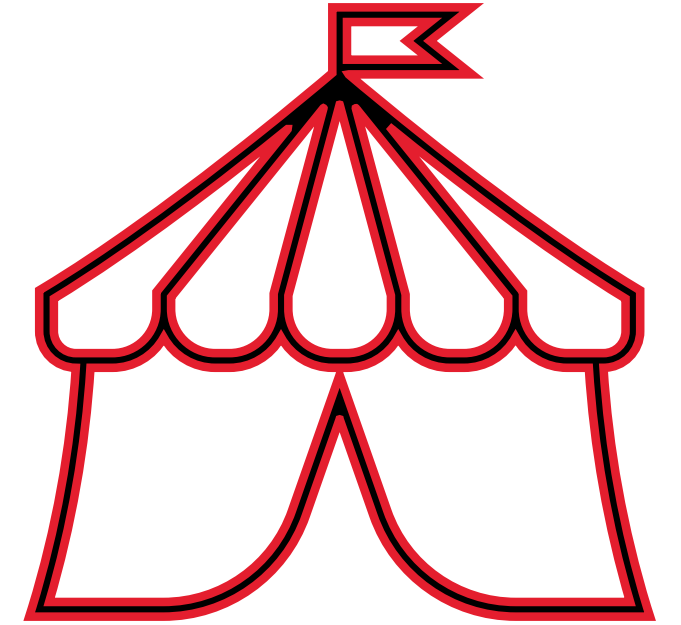
# Retain: Up to 3 months prior to renewal

✓ 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.

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Measure your Impact & Performance

- ✓ New Members

- ✓ Funnel of Onboarding Journey

- ✓ Renewal and retention metrics

- ✓ Engagement metrics of new members

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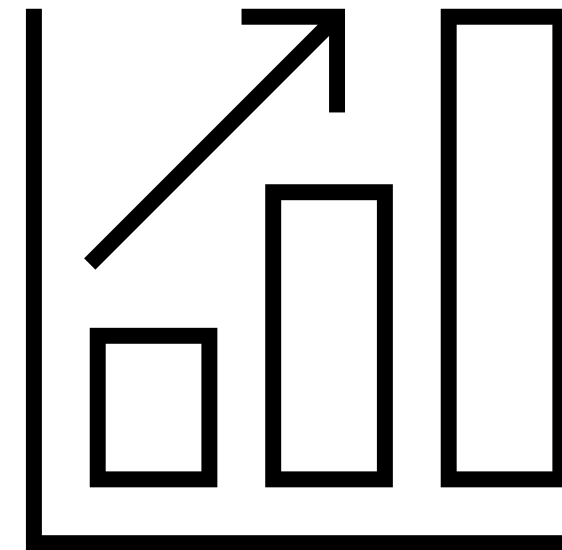
Breakout Room

✓ 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?

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

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Continue their journey

✓ Ask for a Google Review

✓ Join a Committee

✓ Become a Mentor

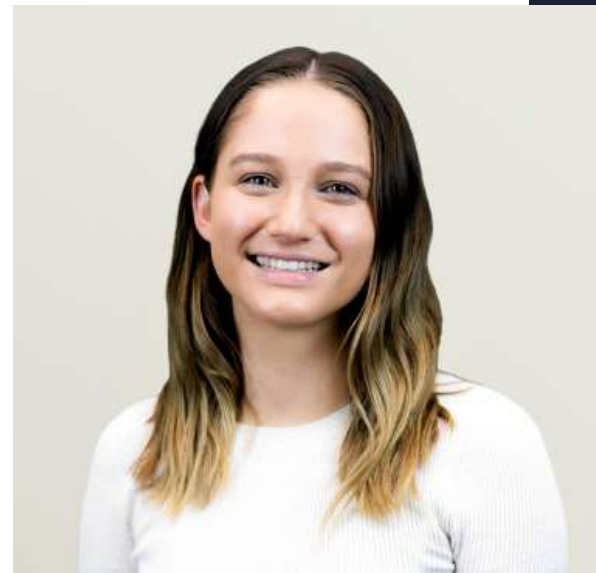✓ Testimonial – Why I joined?

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in linkedin.com/company/causeis

🐦 twitter.com/causeis