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DRIVE MEMBER LOYALTY WITH PERSONALIZED EXPERIENCES & PREDICTIVE ANALYTICS

A Collection of Insights from
SURGE Co-Creation



The *Drive Member Loyalty with Personalized Experiences & Predictive Analytics* session is sponsored by Community Brands.

Community Brands is the leading provider of cloud-based association software. Through innovation and technology, the company empowers more than 100,000 clients and partners to succeed faster, grow stronger and achieve social good. Two of our fastest growing Membership Management solutions include Nimble AMS (built on Salesforce) for mid-large sized associations and YourMembership AMS for small associations.

Organizations adopt Community Brands software to manage memberships, career centers, learning, accounting, mobile giving, peer-to-peer fundraising, donations, admissions, enrollments and events. Using these solutions, customers of all sizes create meaningful and lasting experiences for their members, donors, students, and volunteers.

Learn more and get in touch [here!](#)

Thanks to our partners, who convene to further
the association profession!



INTRODUCTION

The following pages house the results of an industry-wide virtual collaboration.

SURGE Co-Creation assembled association professionals from across the globe to harness collective knowledge, through a virtual conference focused on transformative ideas and designed to maximize social learning.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own thoughts. We have now assembled some of the best insights from these conversations into a body of knowledge for the benefit of the entire association community.

This eBook, one of the eleven-part SURGE series, delves into the session, *Drive Member Loyalty with Personalized Experiences & Predictive Analytics*. It includes themes from the speakers' conversation, snapshots of ideas from guest speakers, contributions from attendees, links to further resources, and more.

Thank you to all who participated – and if you missed it, go to the **SURGE Co-Creation** [event page](#) to watch all the sessions for free, at your leisure!

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01

FEATURED SPEAKERS





Sigmund VanDamme

*Membership Software Evangelist,
Community Brands*

Sig is the Membership Software Evangelist for Community Brands with the focus of thought leadership thru public speaking and writing. Sig has been working with professional and trade associations for over 26 years and is inspired by being part of the association community. Sig was the founder of NimbleUser which was acquired by Community Brands in 2017 and frequently speaks on the culture of innovation, association technology trends, and the human aspects of technology interactions. He has presented at CESSE, ASAE Tech, AMS Fest and a variety of user conferences.





Tristan Jordan

Executive Vice President, Careers & Education Solution, Community Brands

Tristan Jordan oversees Community Brands' Careers and Education Solutions businesses, which ensure that associations, publishers and corporations provide world-class continuing education, professional development and training, as well as job opportunities to millions of professional members, users, partners and customers. Through the products and services of YM Careers, Crowd Wisdom LMS, and Freestone live event learning, Community Brands has helped organizations generate hundreds of millions of dollars in recruitment advertising and online training revenue. Employers around the world tap into organizations using these Community Brands platforms to recruit highly trained, highly qualified, hard to reach talent. Tristan leads an amazing team responsible for revenue, product road map, development, the customer experience, and most importantly, ensuring that delighted customers stay on the cutting edge of these rapidly evolving technologies. Tristan previously ran JobTarget's job board platform business, as well as Revenue Solutions for YourMembership, both of which exist today as part of Community Brands. Prior to that he was a Vice President at MasterCard Worldwide, and had an extensive career helping technology companies grow.





Erin Shy

Executive Vice President, Nonprofit & Event Solutions Community Brands

As EVP of Event Technology, Erin Shy drives the vision, strategy, delivery, and support for Community Brands event tech product portfolio, enabling our association customers to more effectively achieve their missions and reach their members through world class events.

Erin comes to Community Brands from Abila, where she served as Senior Vice President of Product, and drove the vision and strategy for the Abila product portfolio. Over the course of her career, Erin has worked with hundreds of organizations, consulting on various methods to elevate their business practices using innovative technologies.

She holds a Bachelor of Arts in Middle Eastern Studies from the College of William & Mary. Erin is a frequent speaker at national and international conferences, including the Association of Fundraising Professionals (AFP), Association for Advancement Services Professionals (AASP), and Nonprofit Technology Network (NTEN). She serves on the board of the Giving Institute, and regularly volunteers with various causes, including refugee services, as well as STEM (Science, Technology, Engineering, and Math) and leadership programs for young women.



02

GUEST SPEAKERS





Marissa Bankert

Executive Director, Central PA Independent Electrical Contractors (IEC)

Marissa Bankert, is the Executive Director of the Central Pennsylvania Chapter of the Independent Electrical Contractors (IEC) located in Mechanicsburg, Pennsylvania. The IEC is a network of Chapters throughout the US that focus on merit shop electrical and systems contracting with over 3,300 contractor firm members throughout the nation. As Executive Director, she has been an innovator in continuing education, apprenticeship, and membership growth. Her goal is to grow associations by making them more profitable, recognizable, and fun!

Marissa has grown to love association management after first serving as a community outreach director for a non-profit and then as a membership director with other associations. In all roles, Marissa is dedicated to making each organization better for all involved in the association from members to staff. With the IEC she has increased apprenticeship enrollment, members, profits, staff, and partnerships. She has also implemented new governance, policies, and created a pre-apprenticeship program for high school students and others interested in the electrical trade.

Marissa was recently elected Vice President of a newly chartered chapter of NAWIC (National Association of Women in Construction) and serves as Secretary for the IEC National Executive Directors Council. She serves on IEC National's Membership and Professional Development committees, various workforce development committees throughout the regional footprint of her organization and serves her community through work with the United Way. Contact Marissa at execdir@centralpaiec.org.



03

PERSONALIZATION: CREEPY OR CONVENIENT?



By Sigmund VanDamme

Have you ever Googled “How to download your Facebook data” or “How to download your Google data”? Well, I have for some of my Google data. They’ll tell you where you were on what day, doing what. You’ll find every single photo. I was appalled.

But then I thought about how I can go on Chrome, type two letters and how it will bring up the URL I’m looking for. I wouldn’t want to lose that; I would be willing to give up some privacy or chance digital paranoia to have that simple convenience. That being said, when it comes down to companies asking for this data on us, **there has to be value provided for it.**

BE MORE RELEVANT AND LESS ANNOYING

To me, personalization has often been referenced as getting that “Dear Sig” at the top of an email instead of being addressed with something generic like “Dear User”. That’s really only a minor part of it. **Personalization has more to do with relevance** or sending things that are relevant to the receiver. That means that in addition to writing “Dear Sig”, they’ll also put some things that state that they have some information about me. But it’s really more about making sure that what they’re sending me is relevant and not sending me things that are not relevant.

When the things you are getting are relevant to you, they are much less annoying than being bombarded with promotional images, emails, or texts that have nothing to do with you. I’ve heard people complain about some of the ads they were shown on Facebook, and I wasn’t sure what to think. I have bought more things than I would want to admit from such ads. I don’t mind them because they are actually stuff I’m interested in. Whether I click on them or not, I’m not bothered by them. I won’t start creating negative mental associations with them like I might if they hadn’t been relevant to me.

PERSONALIZE TO ENGAGE

If you think about the way that someone typically starts engaging with a professional trade association, **it's all about taking**. They go to your website, start taking stuff off of it, looking at the content. Eventually, they will think to go to your event, sponsor something, or get a certification.

We want them fully engaged. We want them to eventually want to give back, become a board member, or lend a helping hand. The goal is to get them from **this stage where they are only taking from you to where they're giving back**. The goal is to make them feel strongly about the organization. That starts with giving them what they want, what is relevant or interesting to them. That starts with paying attention. The more they want to interact, the better, because every single touchpoint should help form an attachment to the association.

So is personalization creepy? I'd say it definitely is, but when there is value, sacrificing my privacy for convenience is a trade-off I'm willing to have. Is it the same for you?

FROM THE CHAT

“We have 15-20 data audits (simple queries) we run manually on a monthly basis to correct customer/member data used for personalization. Other audits are scheduled to run automatically to update data where appropriate through SQL stored procedures.”

- Keith Gentry -

“Don’t want the virtual handshake to be akin to a mugging in a dark alley.”

- Dennis Sadler -

“We have started using LinkedIn to keep track of our members and also ask for a personal email address as an alternate so we don’t totally lose someone if they leave their company.”

- Jennifer Richards -

04

PERSONALIZATION DRIVES LEARNING EFFICIENCY AND EFFECTIVENESS

By Tristan Jordan

The personalization of learning for individual professionals will be one of our best weapons in the war against the growing knowledge gaps that plague today's workforce. As the pace of change in the workforce accelerates, workforce readiness requires ongoing lifelong learning. **Today's employers are battling a skills gap** as the pace of learning has lagged the pace of change for required skills. Fortunately, **associations today can leverage their databases and technology** to help close this gap by creating learning experiences that maximize the learner's time and efficiency when meeting learning objectives.

Associations are the leading provider of secondary education after colleges and universities today, which is often among their most important value propositions. Some of this education is compulsory, and some is elective. But in both cases, whether a professional wants to learn a new school to stay competitive, or needs to pass a high stakes exam to remain certified, the time it takes to learn competes with many other priorities. Consider a surgeon who has to find time outside the operating room, patient consultations, and research to study for an upcoming board exam that is required to maintain her credentials. That takes a lot of work and can be stressful, especially when balanced against the need to deliver life-saving procedures.

How valuable then would a learning system be that could cut this preparatory time down significantly, while still delivering the same preparedness? Fortunately, this is the direction of today's learning systems, and they are transforming how we learn by making sure **our time and attention is maximized to fill knowledge gaps**. Often it's through the use of assessments, personalized remediation and recommended content. But increasingly the use of algorithms, benchmarking against peers, and analyzing other aggregate data are driving recommended and personalized learning content and paths that are more accurate and effective. Today's learning programs are able to essentially tell the learner: "Look, if you have to pass this exam in eight months, here are the things you're strong and weak at, and here is exactly where you should spend your time to best prepare. And if you spend your time outside of these areas, you're not using it wisely." It will prescribe for each learner a personalized program of learning, pulled say from a database of 10,000 questions and answers, choosing the right 1500 in the right order to best fill their learning gaps. Imagine the value to that busy surgeon.

Even more interesting is that the systems are starting to, through the use of measures such as a learner's own confidence ratings, assess where these doctors and surgeons think they're strong and weak. They correct them when they're own evaluation of skills is wrong, preventing the common mistake of gravitating toward study where an individual is already strong. It's all through the use of data, and a true gift to members.

Predictive analytics are also getting more sophisticated. Here's an example of how we apply them through associations to propel members forward in their careers. We recommend learning content and courses to professionals based on the type of jobs people they look at on association job boards, and the type of content in the resumes they upload. We are now able to link the association's course library with job requirements, and can say to members "If you want that job, here's are courses or certifications the association offers that will make you more qualified for it." Likewise, when a member invests in the association's learning and certification programs, we can also recommend jobs and career paths that now make sense for them, that propel them upwards. These linkages, between learning and career growth solidify the investment the members make with their association. They create members for life.

And finally, let it not be overlooked that **not all personalization should be driven by technology**. A thank you note or a personal following up on a conversation you had at a meeting are equally or more impactful. When it comes to learning however, technology is now allowing associations to create personalized learning experiences at scale, giving members the gift of time. What is more valuable than that?

FROM THE CHAT

“Personalization is impactful because it hits our emotions, syncs directly to our specific human DNA.”

- Susan Noell -

“Sometimes, I wonder if extreme personalization could take away from the feeling of living an experience together and having a common organizational culture.”

- Claire Gerin-Lajoie -

“Really, clean data is the foundation for everything that we’re talking about here. If you don’t have your database properly cleaned up, you can’t segment your marketing or even reach the people you are trying to serve.”

- Jennifer Richards -

05

USING PERSONALIZATION TO STOP CHOICE OVERLOAD

By Erin Shy

The question of how to get the best out of a database has been plaguing associations for years. We see some organizations treating their data like precious storage, while others see it more as a playground.

I think your database is like your garage. You wouldn't want everything just thrown in there haphazardly that it makes it too difficult to find what you need later. As long as you can keep it neat and organized, you'll be able to navigate. Even if you don't need some of your data today, you want to keep it with the knowledge that it might be useful in the future, particularly when you are looking to personalize.

YOUR DATABASE AS YOUR PLAYGROUND

I'm the Executive Vice President of our events solution group, and we once worked with an association that was tracking attendees' session information of an event they had. They wanted to know who attended what sessions for continuing education credits, which made perfect sense.

However, they were discarding the information about who left the session early, because that wasn't information they felt they needed right away. They later found out that if they had kept that information, they could better personalize custom tracks in the future. For example, they could use the data on which sessions an attendee left early in the past to suggest topics that aren't related to those past sessions. Therefore, **you sometimes need to treat your database like a playground to discover new patterns that could be of use to you.** As long as you're not recording data in a way that's messy and that makes it hard to retrieve it, it can help you down the road, even if you don't necessarily have a specific idea for it today.

FOCUS THROUGH PERSONALIZATION

Associations can stop choice overload by staying focused on member needs and personalizing options. There is a famous [study](#) from 2000 that found that choice can actually paralyze the consumer, or in our case, a member. The study involved selling jam at a food market on two different days. On the first day, they had 24 different kinds of jam, while on the second day, consumers were limited to 6 choices. The result was that while

the first day with more jam flavors generated more interest and more people came to the table, the second day with the much fewer number of choices was more successful. **The chance of converting interest into purchase increased tenfold with fewer choices displayed.**

What this shows is that although choice is appealing at first sight, choice overload can really generate the wrong results. If we can focus through personalization and focus their options to what is relevant to our members, we would really get their attention. Whether it is membership options or types of events to attend, **if we limit the choices to what they truly need, we have a better chance of accomplishing what our Call to Action aims to do.** So use your database wisely and your members (and your staff) will thank you for it.

FROM THE CHAT

“If we went back in time and told ourselves what today would look like in terms of behavioral tracking and privacy online, we would have wanted to run for the hills, but today we generally accept it.”

- Tristan Jordan -

“My goal is taking the creepy out of personalization and making it valuable.”

- Mark Kibble -

“Part of people’s anger is a lack of choice. We are either EXPECTED to trade our privacy for convenience or we don’t decide at all, someone else decides for us.”

- Holly Wells -

006

STARTING OFF RIGHT IN CREATING A POSITIVE BUSINESS CULTURE



By Marissa Bankert

There is nothing strange about wanting to make a good impression on your first day on the job. But when it's your first day in the position of a leader in an organization, you especially want to set the right tone and let it be known that you're approachable, open to concerns, ideas, and questions, and willing to put in the extra effort to get employees comfortable working with you. This also applies to when it's someone else's first day, and you want to put them at ease about their interactions with you.

Here are my three tips on how to start creating a positive business culture around you from Day 1:

1. BE TRANSPARENT FROM DAY 1 AND REALLY MEAN IT

That means letting employees know that they can ask any question without fear or hesitation. Even if that question is odd, there is a way to handle that. Of course, you don't want to disclose anything that they don't need to know or understand at that moment. If it's something that especially strikes as odd or unprompted to you, it's good to ask them **why they are asking that question** because this may lead to uncovering valuable information. Maybe there is something you haven't thought of that they've discovered as a part of their job description that can be helpful to everyone. Therefore, by letting employees know you're open to receiving questions, and also giving information they need to have to do their job well, you're showing them **it's important to you for them to feel like they're truly a part of the team.**

2. LEARN THEIR COMMUNICATION STYLE

What I mean is that we have a ton of different generations in the workforce, and **everyone has their own preferences on how they want to communicate.** You need to identify that. For example, I love an email. That's my favorite thing, but that might not be true for some of your newer employees. Maybe a phone call or even a text message is the best way to reach them. And it's completely okay to mix those things; it's okay to send someone a text saying you just sent them an email and that you need it answered in the next half an hour because you're trying to schedule a meeting, for example. Making the effort to fully understand employees' desired way of communicating shows them that you care about how they work best, but it also helps you know when you are trying to get a response quickly.

3. REMEMBER THAT THE WORKFORCE IS CHANGING

Back in the day, everybody worked because they had to work. They needed that paycheck, and they mainly worried about whether or not they were going to be able to keep their job. It's different today. In today's workplace, people are really concerned about what the job has to offer to them, including things like continuing education. People are interested in growth. **They want to know they're invested in an organization that is also invested in them**, and that wants to make them into better and more productive people. So you need to let them know right from the start what opportunities exist for them, that you care about them, and that the success of the association or company is completely based on whether the staff is growing on a personal level and achieving their goals as well.

Starting in a new business environment can be daunting, but at least you know three ways on how to start off on the right foot and deliver the important messages.

07

FURTHER RESOURCES



During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about predictive analysis' impact on member loyalty. We've compiled them into a list here.

- [DemandTools](#): is an enterprise capable suite of data quality modules to control, standardize, verify, deduplicate, import and generally manipulate data, and boost administrator productivity.
- [Pathable App](#): is an integrated mobile event app with features that drive higher adoption rates and more engagement, such as searchable attendee directory, private messaging, discussion forums, personalized agendas, and interactive maps.
- [Lightning Data](#): solutions easily integrate into Salesforce for an automatic connection to updated data that supercharges your sales and marketing efforts.
- [InLoop](#): is an AI-powered content curator and publisher for associations to deliver personalized content to their members while driving engagement.



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