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PUTTING MEMBERS IN THE DRIVER'S SEAT

A Collection of Insights from
SURGE Co-Creation



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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, *Putting Members in the Driver's Seat*. 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





Marice Fernando

Manager, Knowledge Management & Member Engagement, Exponent Philanthropy

Marice Fernando is Manager of Knowledge Management & Member Engagement at Exponent Philanthropy, an association dedicated to serving funders with few or no staff. In her role she works to improve the organizations collection, accuracy, and use of data to inform decision making. She also helps members utilize their benefits so they can increase their knowledge, build relationships in the field, and easily identify time and cost savings.

Marice is passionate about supporting the development of community focused nonprofits both locally and internationally and enjoys cooking, baking, and running in her free time.



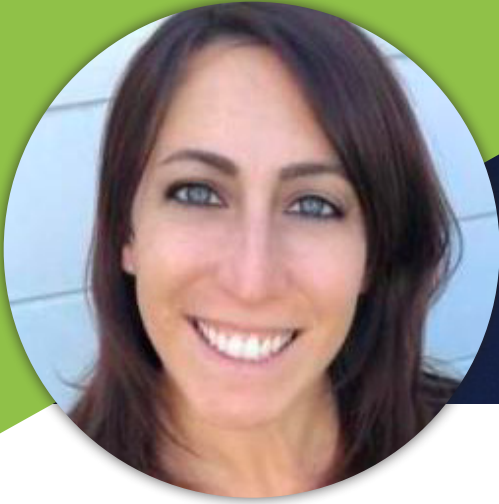


Amy Hager

Director of Communications, Virginia Chamber of Commerce

Amy Hager is the Director of Communications at the Virginia Chamber of Commerce. This former radio DJ has been an association and executive director for a variety of state and regional associations, such as The Bed and Breakfast Association of Virginia, Landscape Contractors Associations of DC/MD/VA and Southern Association of College and University Business Officers, as well as a consultant for associations, sales organizations and technology companies. In 2017 Hager received her Certified Association Executive (CAE) from the American Society of Association Executives and Institute for Organizational Management (IOM) designation from the U.S. Chamber of Commerce Foundation. By bringing her skill sets and strong understanding of organizational management in the communications, technology, membership, and operations sectors to the table for organizations, Hager has developed a track record of success in generating revenue for many non-profit organizations.





Megan Denhardt

President, The Denhardt Group

Megan, has 15 years of experience in developing and managing conferences and events in all shapes and sizes. Her dedication to creating exceptional and memorable experiences for her clients is what sets her apart.

Megan has enormous energy and enthusiasm for delivering high-level content in engaging ways that keep participants tuned-in. She guides organizations in delivering meaningful educational content, implementing unique conferences and events, and designing quality programs that keep attendees engaged.

Whether behind the scenes providing logistics oversight and coordination, or emceeding from the stage, Megan is deeply committed to her clients' success and takes great pride in ensuring her clients are satisfied.

When not planning her next event you can find Megan enjoying the Bay Area with her husband and two adorably sweet children.

Connect with Megan:

www.thedenhardtgroup.com





Chris Beaman

*Director of Advancement & Communications,
Kappa Delta Pi*

Chris Beaman is the Director of Advancement & Communications for Kappa Delta Pi, the International Honor Society in Education, with experience in fundraising, membership, marketing, component relations, strategic planning, and event planning. Chris believes that education is the path to a better future—both for the individual learner and our global society—and that our teachers are responsible for creating the future. In his free time, Chris serves his alma mater, Butler University, on the Young Alumni Board of Directors as Vice President, and he enjoys running, exploring new cities, and eating. Most of all, Chris is a fan of Reba McEntire and has seen her in concert more times than he will admit.



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GUEST SPEAKERS





Corinne Hancock

Keynote Speaker/ Founder MPL

Corinne Hancock is a globally recognized expert in building world-class leaders, effective teams and cultural proficiency, in chaotic environments. With over a decade of international aid and development experience working around the world developing bold leaders, building highly effective teams, delivering medical trainings and delivering medical care.

Corinne translates her expertise from working in chaotic environments into **REAL RESULTS** through **EFFECTIVE** and **INTERACTIVE** keynote presentations, corporate trainings and executive coaching, helping organizations and individuals **THRIVE IN CHAOS**.

Corinne not only challenges the status quo in international development and relief, but also pushes her own participants to achieve growth beyond their expectations. She has worked on over 50 international projects with leading organizations across for-profit, non-profit and governmental sectors such as US Department of State, USAID, Project C.U.R.E., Newmont Mining, Kinross Gold, and many others.

Corinne was on the front lines, building teams in high-pressure, stressful situations around the globe as the Director of Clinics for Project CURE, and as a contracted State Department leadership coach. She brought together multi-generational, multi-cultural teams to create new community based projects, open hospitals and clinics, and deliver medical care in some of the most remote locations on the planet.





Claire Gerin Lajoie

Instructional Designer, Matchbox Virtual Media.

Claire is learning the ropes of virtual conferencing. She assists in the development of documents, processes and methodologies that make *Conversations that matter* possible. She has an undergraduate degree in urban planning from the University of Montréal. In the process of understanding how to retrofit suburbs for the elderly population, she became curious about exceptional teamwork and collaboration. Her propensity to ask profound questions led her to France where she explored and delved into traditional folk dancing, comic drawing and teaching.

Currently living in Montréal, she dances tango, takes care of her garden and is devoted to developing frameworks, methods and various structures that allow individuals to connect, engage and perform as a team. Some of my favorite go-to sites for inspiration have been included on the resource page!



03

THE CASE FOR HUMAN CONNECTION IN A TECHIE WORLD

By Marice Fernando

In today's digital era, the world is changing to favor convenience. Technology and automation give us bots to answer our questions 24/7, personalized messaging, and curated recommendations for what products to buy or shows to watch based on our past interactions. This personalization makes life easier, but **keeping the human connection is also important.**

One outcome of the digital era is businesses, including associations, have access to a lot of data which we can use to make improvements for our members. As the Manager of Knowledge Management and Member Engagement at Exponent Philanthropy, an association for funders with few or no staff, I strive to understand our member interests and needs so we can better serve them. I look for trends through data such as publication downloads, program attendance, and use of member services. My team and I also collect information through conversations with our members, which allow us to know what is on their minds, and suggest resources and services for them accordingly. **The goal of all this is to help them find value in their membership.**

If an association is not staying relevant or adding value to a member's world—their renewal is at risk. We all dread hearing "I'm going to cut my membership." So when budgets are tight, how do we become the "Netflix" (or other subscription you can't live without) someone keeps in their budget? One thing Netflix does well is making it convenient for us; they give us the ability to access a large variety of shows and movies from anywhere, and automatically renew our subscription. While several associations strive to follow this example by moving to auto-renewals, or using bots to provide 24/7 support, **when technology takes over, we risk losing some of that human connection with our members.** Yes, we want convenience, but can that replace a person?

To illustrate why the human connection is so important, I want to share a discovery we made. About three years ago, we started using Salesforce, which gave us the ability to assign member engagement scores based on activity. This new data point showed us our long time members, particularly those that have been members for over ten years, weren't very engaged. It also told us they were the largest segment of our membership that was not renewing. The data identified a red flag—it showed us the what, but not the why.

We needed a person to find out the why, so one of our long time staff members reached out to these members by email, inviting them to a phone conversation. For those who took him up on his offer, we learned these members stayed members despite the lack of engagement (as we define it) because they want to be part of a community. They're not looking for resources, but they do want a platform to share their knowledge and expertise. Before these conversations happened, we thought, "Okay, we'll learn what they want from the conversation and develop new resources to meet their needs and interests." We learned that instead of developing new resources, we need to highlight opportunities for them to connect with other members and give back. Now, at least once a year, we reach out to this group and highlight ways they can share their expertise, whether it is to write a blog for us, serve as a mentor, or submit a session for a conference.

That was a huge "aha" moment for us. The data drew our attention to the puzzle, but **without the human connection, we wouldn't have found the missing piece.**

FROM THE CHAT

“Think about the power of water cooler talk that Netflix generates. How do we get our members talking about us like that?”

- Allen Lloyd -

“I love the idea of recommending social connections to new members to get them engaged in the community early.”

- Tristan Jordan -

“A smaller group of dedicated and invested members is more powerful than a larger group of disengaged members.”

- Aldo Maragoni -

“Make your membership convenient, but not at a huge cost of your own employees.”

- Lisa Campo -

04

**DON'T MAKE
PAYING YOU AN
INCONVENIENCE**

By Amy Hager

After all the work you put in to deliver value to your members, it should never be inconvenient to make membership payment. You need to have options, think about what might make the process easier, and sometimes have something automatic available.

I used to be with the Bed and Breakfast Association of Virginia and we dealt with smaller sized members and those who did not have large cash flows. It was hard for some of them to come up with the money to a large sum for membership one time a year, so we decided it would just be easier for us to charge them every month. Once we broke up the model, if you paid the one large sum once a year, then you paid ten percent less than those that were paying their membership dues monthly. In that way, we were able to kind of subsidize the extra charge for staff time and credit card charges, but there was some babysitting involved; there would be credit cards that get denied because it expired or they got a new card, which we needed to keep an eye on but was easy to see with reports from our credit card vendor.

In another organization I was with, we had a renewal rate between 73% and 78% every single year. When you register for membership, just as with Amazon Prime, you would automatically be in auto-renew. If you didn't want to be on that, we sent an email message to remind members they were on auto-renew and that you can check a box to be removed from the auto-renew option. I think we're all so used to paying our bills online automatically, and just getting fees deducted out of our credit card or checking accounts.

As an association, it makes sense for us to, again, **just make it easy for people to continue to pay their membership.** Being able to be flexible with how we wanted to accept our payments and then also allowing them to just be on auto-renew so they do not have to think about it again. Even if initially someone would not be meaning to renew and stay with our organization, you would then see them log in once a year or twice a year because they did need something from us. And because the membership was already paid, there was no question in their mind that they could just come to our website and get what they needed. If they hadn't paid, I'm curious to know if they even would have shown up.

To summarize, here are a few tips:

- 1. Be flexible with your payment options.** It should not be an inconvenience to pay you money.
- 2. Keep convenience a priority.** When you collect money from your members, you need to think about what would be more convenient for them, although not necessarily for you as the organization.
- 3. Try testing payment plans.** Make it as easy as possible when your members want it, but also make up ways that you think maybe they don't want to pay. Who knows if a monthly payment plan is exactly what they want? Maybe quarterly payments would help with their budgets?
- 4. Consider auto-renew.** It might mean a little bit of babysitting, but it would definitely be worth the extra work.

FROM THE CHAT

“We tend to be guilty of arranging things online to reflect our internal structure. Why should members need to understand your internal departmental structure to find things on your website?”

- Kristov Martens -

“I test important things on my mom in terms of email, asking about a website, etc.”

- Lisa Campo -

“Free to pay the way they like, FOR what they like. This is dangerous at first glance. Better have a well thought-out plan before implementation!”

- Peter Doherty -

“Are we problem solvers for our members? Are our members problem solvers for us? Both? Neither?”

- Chris Beaman -

05

**BE LIKE NETFLIX AND
INSPIRE LOYALTY IN
MEMBERS**

By Megan Denhardt

In this era of convenience, distilling how to serve our members can be a challenge. However, all the big companies we often talk about, like Netflix, Amazon, and Spotify, seem to have already figured it out.

At its inception Netflix tuned into consumer demands and offered its first service of convenience by eliminating the few mile drive to a local Blockbuster to rent a movie. They iterated, fixed the problem and sent it to our mailbox. Then they reiterated and launched the digital platform we are all addicted to these days. **They've changed our habits** by making the barrier to entry as minimal as possible.

Amazon worked similarly. At first they made it possible to get any book you could imagine from anywhere in the world delivered to your doorstep in an affordable and convenient way. Then they expanded exponentially where we can now get just about anything from Amazon. All with the convenience of two-day shipping which we are more than willing to pay for the privilege and ease.

These two companies have changed the game. Amazon has over 100 million members around the world, and Netflix has 98.75 million. These millions of customers are incredibly loyal. While **customers and members aren't the same, since the former means a more transactional relationship, they are both audiences. In this age, customers expect and demand so much because the multitude of options seem endless.** If one meal-delivery package isn't working, customers just try another – with little to no remorse. And yet Amazon and Netflix have managed to inspire loyalty in millions of people and deliver positive experiences that keep them around.

So what can associations learn from them?

1. **Deliver positive experiences.** In Shep Hyken's book, *The Convenience Revolution: How to Deliver a Customer Service Experience that Disrupts the Competition and Creates Fierce Loyalty*, he shares that customers today have higher expectations than ever before. They no longer compare any of our organizations with any specific competitor. Rather, they are comparing us to the best service they have ever had – from *anyone*. So, if we can focus on the 'next time' every time – we create a lifetime of loyalty. Striving to simply satisfy customers is no longer enough. We must go above and beyond.

- 2. Deliver value.** This might mean adopting a certain subscription model. For example, instead of giving members the sole option of paying a-la-carte for one conference, event, or product, perhaps a package fee that allows them entry and access to a certain number of conferences or products might feel more valuable. And bonus: they may want to engage more too.
- 3. Keep barriers low.** Whatever you're trying to get your members to do, make it convenient and easy for them. From automatic renewals to completing a registration forms, keep barriers to entry as minimal as possible so that there isn't much reason not to follow through.

Like Netflix and Amazon's approach to offer convenient, personalized, and affordable access, associations can learn to better serve our members to inspire engagement and loyalty.

FROM THE CHAT

"I know a lot of members who not only think they are in the driver's seat, but own the car."

- Aldo Maragoni -

"Any organization not targeting prospective professionals earlier and adopting virtual/video components is missing the mark."

- Jon Bassford -

"We tend to ask what people want, and they have no idea how to answer that, but they do know what their problems and goals are."

- Elizabeth Engel -

006

THE TRICKY BUSINESS OF UNDERSTANDING MEMBERS' NEEDS

By Chris Beaman

In preparation for my SURGE Co-creation session this past May, I had posed this question to registered attendees about Netflix: “What keeps you coming back? Do you view your subscriptions as memberships?”

One response from Elizabeth Graham caught my eye: “It’s a small price to pay for a service that makes me laugh, relax, reflect, and explore from the comfort of wherever I am.” And I’ve never worked at Netflix or know anyone from the company, but I assume Netflix knows what they are selling. Their value proposition isn’t just a collection of movies and television shows, but as Elizabeth said, it’s laughter, convenience and comfort. And they must know this is what is keeping millions of subscribers loyal to them. Netflix kept a close watch on trends in technology and consumer behavior, and they identified the increasing desire of consumers to be as lazy as possible and comfortable. This meant more walking to the mailbox to get the movies AND ensuring they made it back safe and sound. I’m curious how Netflix figured that out. More importantly, though, I wonder how associations can learn what members want and how they want it delivered.

TAKING ACTION

I think there’s this urgency to move forward when a member or a customer says, “This is what I want.” But, we need to take the time to **draw out additional information and understand the motivation and ideas behind their words**. We shouldn’t make assumptions that we understand the need they’re describing. “Okay, why? Why do you want that? Tell me a little bit more about how this will help you in your work or personal life.” Often, they appreciate the opportunity to expand on their thoughts and opinions.

One easy and obvious way of identifying members’ needs is by asking them. The problem with this is that **members don’t always know what they want**, and so we might identify it, but not quite understand it. That’s why we need to get more details and gain a better understanding of the shape and form the solution that need should take. Within my association, for example, we had been told, “Members want X.” And so we implemented X, but **it turned out what they wanted was a version of X** that we didn’t ask them about. We didn’t say, “Tell me more of what you mean about this. Do you want a cursive X? Do you want the straight line X? What is it about this that really resonates with you?”

Asking “why” is so important because each step gets you closer to the bottom of the need and helps follow their thought process.

For example, members might share they want an online community. But it shouldn't stop there. How do you know what to build for them if you don't ask, "Why?" Although asking "Why?" can sometimes seem challenging or confrontational, you can gently say, "I hear what you're saying, and I appreciate the insight you're offering, but we need to dig a little deeper and understand your needs before we can move forward."

BREAKING DOWN THE NEED

Let's revisit Netflix. You may recall their first value proposition; using a subscription model, they gave customers access to a nearly unlimited catalog of DVDs that could be mailed to them and sent back. Netflix likely hadn't seen this done successfully before, so there were no templates to use in developing a business plan. But, their customers wanted convenience. They knew that because not only it is an increasing societal trend, but they asked. And then they asked their customers, "So what does that mean to you?"

In the late 90's and early 2000's, convenience for movie watchers and entertainment meant not having to drive to the local Blockbuster. We could articulate the idea to send the DVDs directly to our homes, but until the invention of streaming devices, we didn't know we wanted them at the click of a button. We were satisfied until streaming came along.

Netflix has remained relevant by **understanding their customers' desires, behaviors, and needs as well as paying attention to trends that affect their customers.**

Associations can apply the same formula to create a customer-centric approach:

Listen to Understand + Analyze Industry Trends = Creating Value Proposition

Understanding members' needs can be a tricky business, but if we ask the right questions and investigate it more, we might just get somewhere.

07

STAYING FOCUSED ON THE MISSION IN THE CHAOS



By Corinne Hancock

In business and in life, we're put to the test not when things are going right, but **when they get chaotic**. How we react can be **the difference between success and failure**, and determine whether our organization comes together or completely falls apart. The most successful associations can lead their teams and members through challenges and empower them to thrive in the chaos.

I spent my career as an international aid and development worker, working in some of the most chaotic environments around the globe. I developed a chaos framework to help organizations thrive in chaos.

BE PREPARED FOR THE CHAOS

It is one of the most foundational components of the framework. The one thing you can do right now is to evaluate how prepared your association is for chaos, because when it happens, it happens fast. Chaos is inevitable and there would be little to no time to adjust if you and your organization aren't ready when it hits.

DOES EVERYONE KNOW THE MISSION?

I'm not talking about your mission statement. I'm asking if everyone is clear on what you are trying to accomplish for your members. They also need to be clear on each of their roles for achieving that. They need to know what part they play to thrive under pressure. The challenges, expected and unexpected, are going to keep coming no matter what. If everyone is clear on what they're trying to accomplish, it would be easier to get back on track when the chaos hits.

Chaos may be inevitable, but if everyone knows what they should be doing at this moment to accomplish goals, **they won't just survive—they'll thrive**.

09

FURTHER RESOURCES



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

- [Video Series](#): Guilt By Association is a recommended original situation comedy for television!
- [UX Service](#): Have your website's user friendliness judged by a technologically challenged middle age mother.
- [Article](#): 3 Decision to Join Myths and the Reason Members Join Our Associations by Amanda Kaiser
- [Wicked Questions](#): engage everyone in sharper strategic thinking by revealing entangled challenges and possibilities that are not intuitively obvious.
- [Blog/website/book hybrid](#): Conversational Leadership is about the power of conversation, recognizing leadership potential, and adopting an approach living and working together.
- [Training through gaming](#): VUCA training using low-stakes games as a way to build a resistance to chaos.



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