



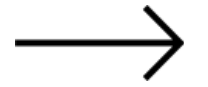
CAUSEIS PRESENTS

# Digital Academy for Associations

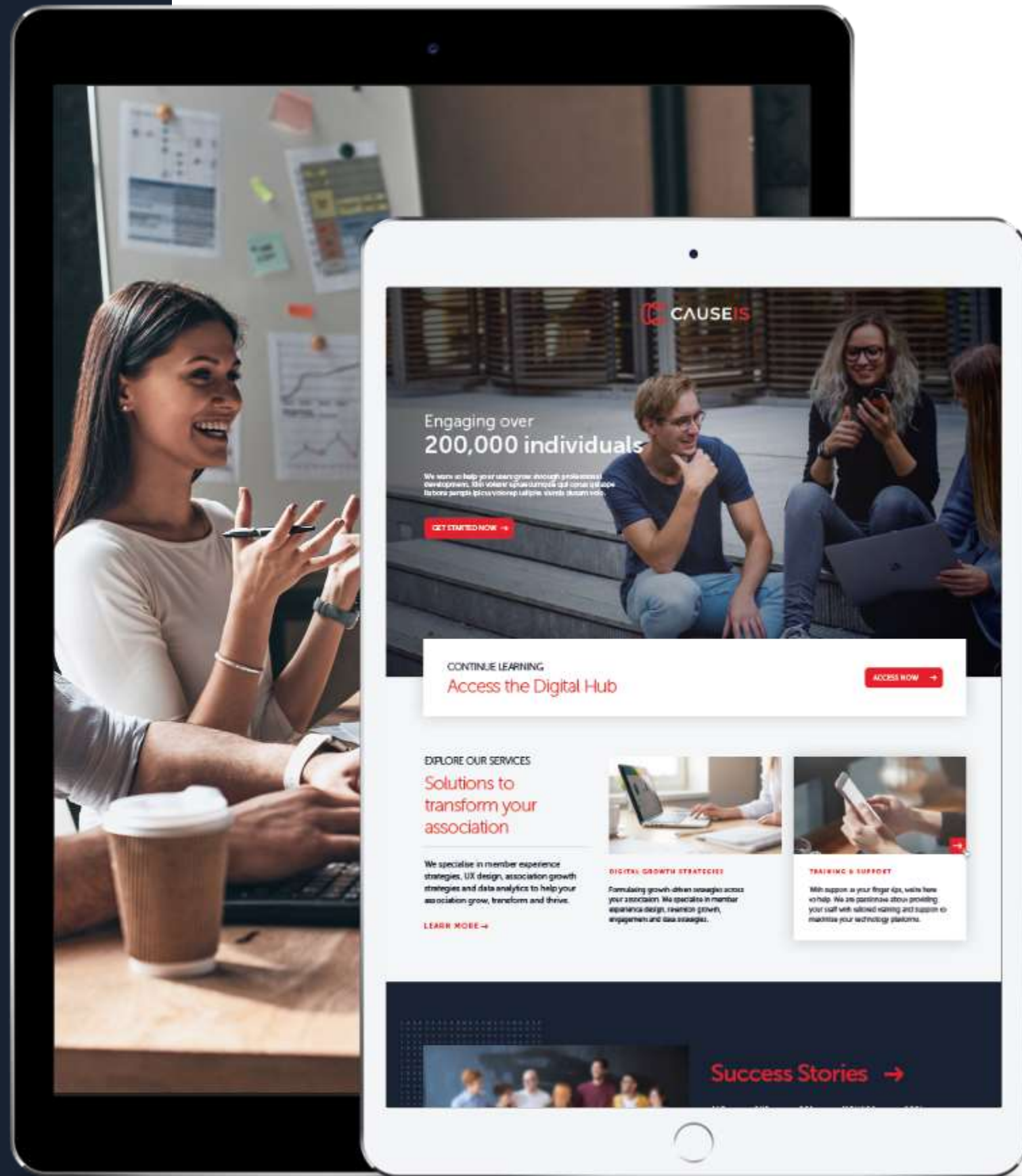
→ Course: Rethinking your Renewal Strategy  
and Member Experience



Digital Academy

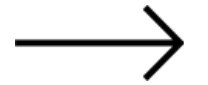


# Welcome to the Digital Academy



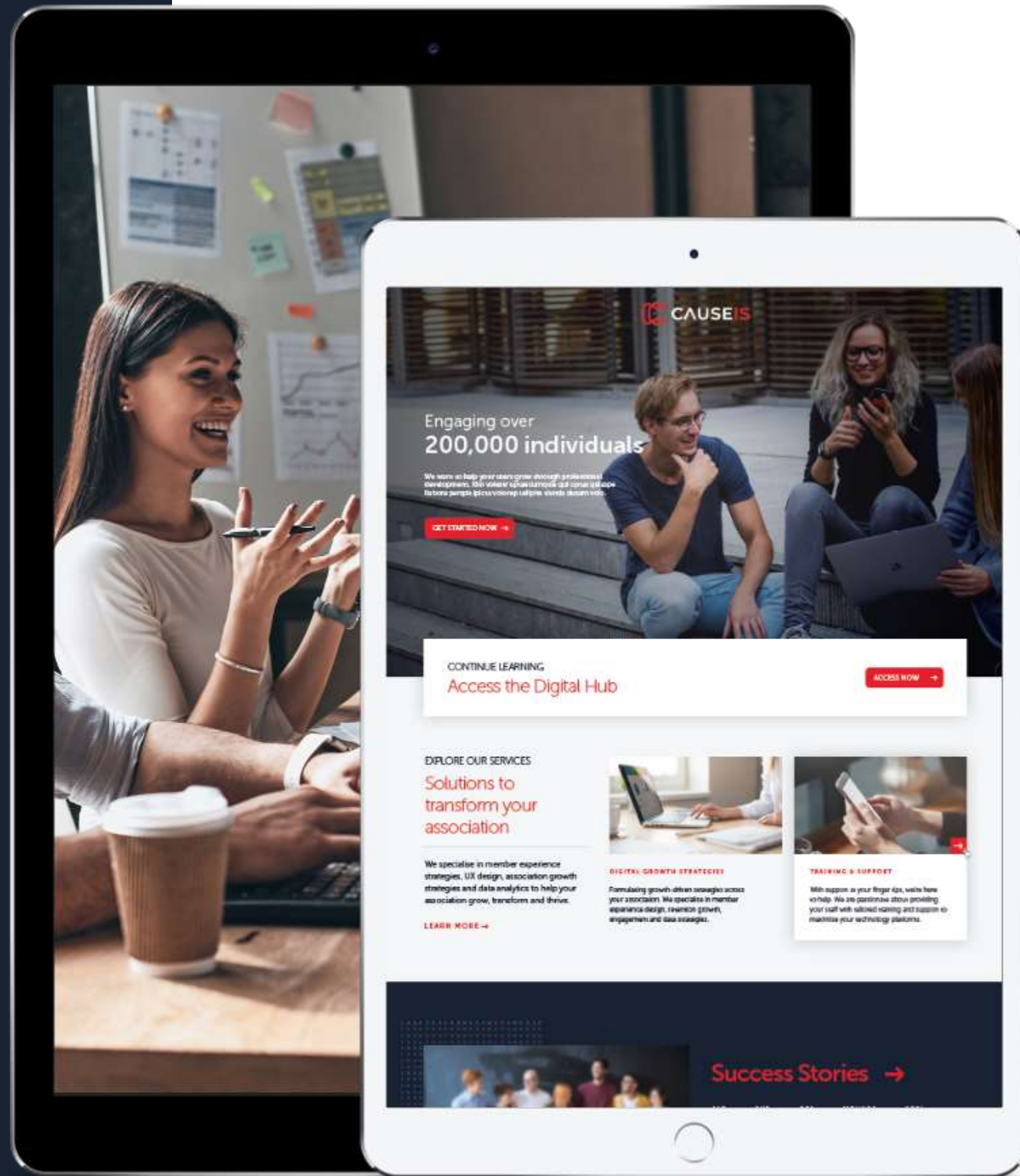
- Time to focus on your Association Strategy
- Learn from other associations and your peers
- Use Member Experience techniques to shift your strategies
- Dedicated Engage iMIS courses to maximise your knowledge of iMIS.
- Consider new culture, innovation and ideas
- Tools and frameworks to help you





# About Causeis

- Causeis is the complete Digital Partner for your association, and we bring a shared vision for your success.
- With unmatched experience in association strategy and technology to draw on, every aspect of our service is centered around the member experience.
- Partnered with global best-in-class technology, we ensure you have all bases covered with Causeis.
- Recently named by ASI as the Global iMIS Partner of the Year.



# Supported by AuSAE

The home for association professionals.

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

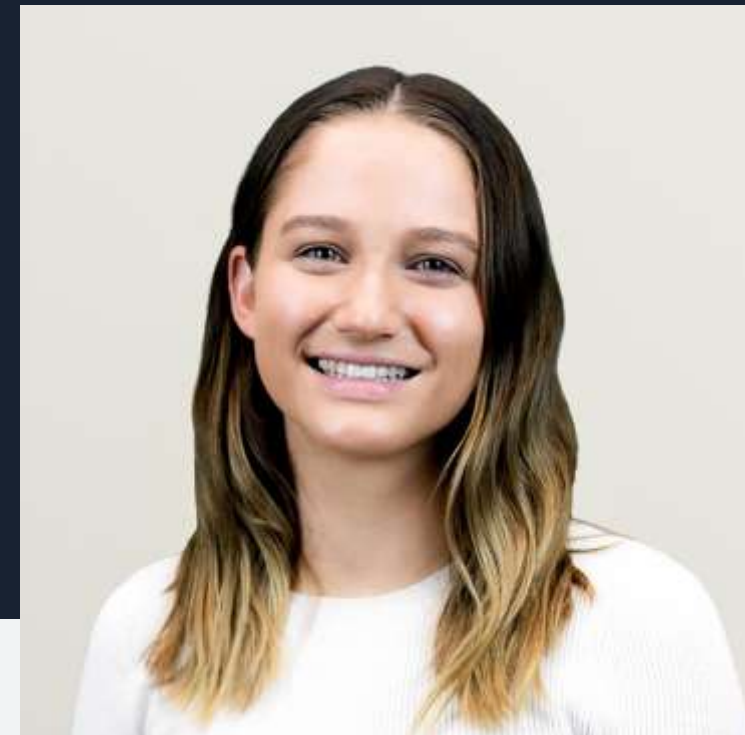
[www.ausae.org.au](http://www.ausae.org.au)



# Presenters & Facilitators



**Michelle Lelempsis**  
Managing Director  
Causeis



**Yolande Smith**  
Digital Marketing Specialist  
Causeis

# Using Zoom and Maximising your Experience



## Mute yourself 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 is not being recorded

To maximise your sharing and networking the Digital Academy is not being recorded.

## Worksheets and Slides

The accompany worksheets and slides will be shared after the course.

## Use the chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat.

Share ideas, successes and even learnings.



Digital Academy

## Turn on your camera

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

Tuesday 31<sup>st</sup>  
May

## Day 1: Agenda

- Measuring Past Performance
- Relevance of Benchmarking Data
- Real Estate Institute of Victoria
- Rethinking your Renewals

# Breakout Rooms

## Learning & Networking

- Assessing past performance
- Ask your members – CSAT and MX
- Communication Strategies

RETHINKING YOUR RENEWAL STRATEGY:

# Let's Get Started



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# Your Renewal Strategy

When you reflect on 2020, how do you remember it?

Innovative

Change

Agility

Stress!

Growth or decline

New systems, projects and technology

# Your Renewal Strategy

Single most important membership strategy to retain and impact your growth opportunities.

If your retention rate is 80% you are churning your entire membership every 5 years!

Let's influence it, let's improve the renewals from the perspective of Member Experience.

# Your Renewal Strategy

What did you do for your last renewal campaign that was different?

Do you have a strategy?

How do you measure its success?

# Your Renewal Strategy

What do you include currently in your renewal strategy?

# Renewal: Do you place emphasis on any of these? →

## Data Management

Is your renewal campaign used as an opportunity to maintain and update data?

## Member Experience

Have you truly experienced the renewal process to feel it.

## Personalised

Communications and content is personalized and targeted.

## Communication Channels

Identify various communication channels to improve reach, delivery and response rate

## Staff Training

Invested in more than one day of staff training on member service, support and improving the member experience.

## Payment Methods

Do you offer flexible payment options? Such as Credit Card, Bpay, recurring or subscription.

## Segmented

Renewals are segmented across your membership to create relevance and improve response rate.

## Renewal Strategy

Have a renewal strategy that is reviewed, implemented and evaluated?

## Data Insights

Can you easily in real-time report on the renewal campaign success.

# Renewal: Do you place emphasis on any of these? →

## Data Management ✓

Is your renewal campaign used as an opportunity to maintain and update data?

## Member Experience ✓

Have you truly experienced the renewal process to feel it.

## Personalised ✓

Communications and content is personalized and targeted.

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Identify various communication channels to improve reach, delivery and response rate

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Invested in more than one day of staff training on member service, support and improving the member experience.

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Renewals are segmented across your membership to create relevance and improve response rate.

## Renewal Strategy ✓

Have a renewal strategy that is reviewed, implemented and evaluated?

## Data Insights ✓

Can you easily in real-time report on the renewal campaign success.

# Your Renewal Strategy

To Reinvent a Renewal Strategy,  
where should you start?

RETHINKING YOUR RENEWAL STRATEGY:

# Assessing Past Performance



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# Past Performance

Before you can rethink your renewal strategy, you need to measure your past performance.

# Past Performance

Measure and review your associations past performance

- Access your past renewal statistics:
- Retention
- New members
- Payment methods
- Time to renew

The average retention rate is 78% for individual and 89% for company membership.

# Membership Retention

Membership Retention is the percentage of members that you retained at the end of the renewal campaign.

Membership retention is a percentage



# Past Performance: Retention

Access the last three years of retention metrics to identify your “baseline”.

Use previous data to identify which common segments were most likely to renew and those least likely.

Use this data to set expectations

# Past Performance: Membership Retention

## OVERALL MEMBERSHIP RENEWAL RATE

	Total (n=691)	Individual (n=311)	Trade (n=200)	Combination (n=180)
Mean	82%	78%	89%	81%
Median	84%	81%	90%	83%

Marketing General Membership Marketing Benchmarking Report 2020.

# Past Performance: Membership Retention

## Renewal Rate

Measures the number of members kept over a given period of time (usually a fiscal or calendar year).



# Past Performance: Membership Retention

## Renewal Rate

Measures the number of members kept over a given period of time (usually a fiscal or calendar year).

$$[5000 - 500] \div 5200 \times 100 = 86\%$$

TOTAL NUMBER OF  
CURRENT MEMBERS

NEW MEMBERS IN  
THE PAST 12 MONTHS

TOTAL NUMBER OF MEMBERS  
IN PREVIOUS YEAR

## Past Performance: New Members

How many members have joined your association since the last renewal?

This group will be the most at RISK segment

Commence a communication strategy to them

# Past Performance: New Members

## RENEWAL RATE FOR FIRST-YEAR MEMBERS

	Total (n=471)	Individual (n=196)	Trade (n=152)	Combination (n=123)
Mean	72%	65%	83%	67%
Median	74%	69%	87%	69%

Marketing General Membership Marketing Benchmarking Report 2020.

# Past Performance: Payment Types

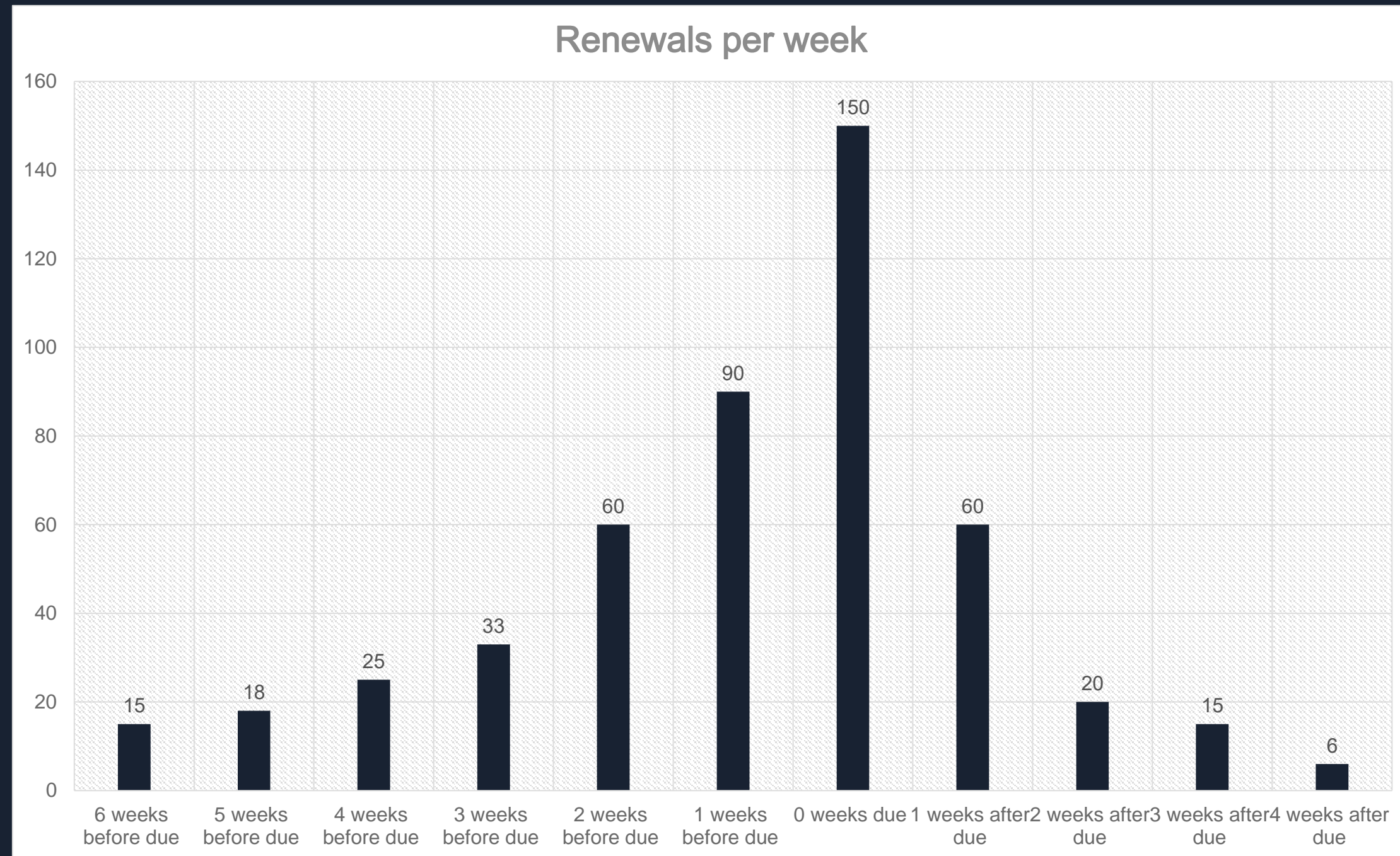
- How do your members renew their membership?
- What is the most popular payment method?
- Why does this matter?
- Correlation to simple, quick and easy payment methods



# Past Performance: Time to Renew

- How many renew **early**?
- How many members **renew before the due date**?
- How many members **renew after the due date**?

# Past Performance: Time to Renew



# Past Performance: Ability to Renew

- How long does it take a member to renew their membership?
- What could prevent a member from renewing?

# Past Performance: Ability to Renew

- How would your renewal process make your members feel?
- How would they rate your process out of 10?
- How would the communication tone and style be interpreted?

# Past Performance: Member Experience

- How do you measure your association's renewal success?
- What strengthens the renewal campaign?
- What failed or frustrated members?

# Breakout Room



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



Introduce yourself and your association



How does your Past Performance measure up?  
What was your retention rate?  
Is your renewal process seamless?

RETHINKING YOUR RENEWAL STRATEGY:

# Guiding Principles to a Successful Renewal Strategy



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# Guiding Principles

- Majority of members want to renew their membership with your association.
- The decision to renew is known before the renewal notice is sent.
- Members are time poor, and renewals must be quick and simple.
- Members have a choice; the association must respect this through member centric communications and tone.

RETHINKING YOUR RENEWAL STRATEGY:

# Benchmarking Data: Insights



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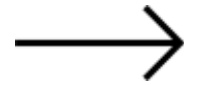
# Benchmarking Data: Insights

The Marketing General Membership Marketing Benchmarking Report 2020.

Member Renewal and Reinstatement Chapter

<https://ausae.org.au/Resources2018>





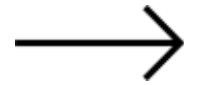
Launch the renewal campaign

# 3 months

39% of respondents commence the Renewal Campaign 3 months before the due date.

### START RENEWAL EFFORT

	Total (n = 726)	Individual (n = 321)	Trade (n = 208)	Combination (n = 197)
Immediately after welcoming	8%	7%	11%	7%
Prior to 6 months before expiration	3%	3%	6%	2%
At 6 months prior to expiration	3%	3%	4%	3%
5 months prior to expiration	2%	2%	1%	2%
4 months prior to expiration	9%	11%	6%	11%
3 months prior to expiration	39%	41%	33%	42%
2 months prior to expiration	19%	19%	17%	21%
1 month prior to expiration	9%	8%	10%	9%
The month of expiration	4%	4%	7%	3%
Not sure	4%	4%	6%	3%

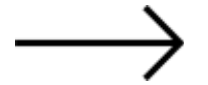


Launch the renewal campaign

25%

25% of respondents end the renewal effort three months after expiration.

END RENEWAL EFFORTS				
	Total (n = 724)	Individual (n = 320)	Trade (n = 208)	Combination (n = 196)
At the month of expiration	3%	3%	3%	2%
1 month after expiration	11%	12%	6%	13%
2 months after expiration	9%	10%	8%	10%
3 months after expiration	25%	22%	26%	30%
4 months after expiration	7%	7%	7%	8%
5 months after expiration	2%	3%	1%	2%
6 months after expiration	11%	11%	13%	7%
More than 6 months after expiration	10%	12%	8%	10%
We don't stop contact	18%	18%	21%	16%
Not sure	4%	3%	7%	3%

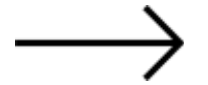


MEDIAN NUMBER OF MEMBERSHIP RENEWAL EFFORTS IN RENEWAL SERIES				
	Total	Individual	Trade	Combination
Email	4	4	3	4
Paid Digital Ads	3	3	3	3
Mail	2	2	2	2
Text	1	1	2	2
Phone	1	1	2	1

Communication attempts

11

11 renewal communication efforts across the duration of the renewal campaign.



Simply forgot to renew

33%

Top reasons for not renewing:

1. Lack of engagement
2. Budget/hardship (trade membership)
3. Cost/ROI
4. Forgot to renew

TOP REASONS FOR NOT RENEWING MEMBERSHIP				
	Total (n = 725)	Individual (n = 319)	Trade (n = 210)	Combination (n = 196)
Lack of engagement with the organization	43%	37%	56%	39%
Budget cuts/economic hardship of company	29%	14%	50%	32%
Could not justify membership costs with any significant ROI	28%	22%	37%	31%
Forgot to renew	25%	33%	16%	24%
Left the field, industry, or profession	25%	30%	11%	32%
Lack of value	25%	27%	21%	25%
Employer won't pay or stopped paying dues	25%	31%	5%	35%
Company closed or merged	19%	2%	45%	18%
Retirement	19%	27%	4%	19%
Too expensive	17%	22%	12%	15%
Student memberships do not convert to full memberships	8%	14%	1%	9%

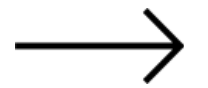


# Let's take a 5-minute break

Grab a refreshment

Please feel free to mute and turn  
off your camera

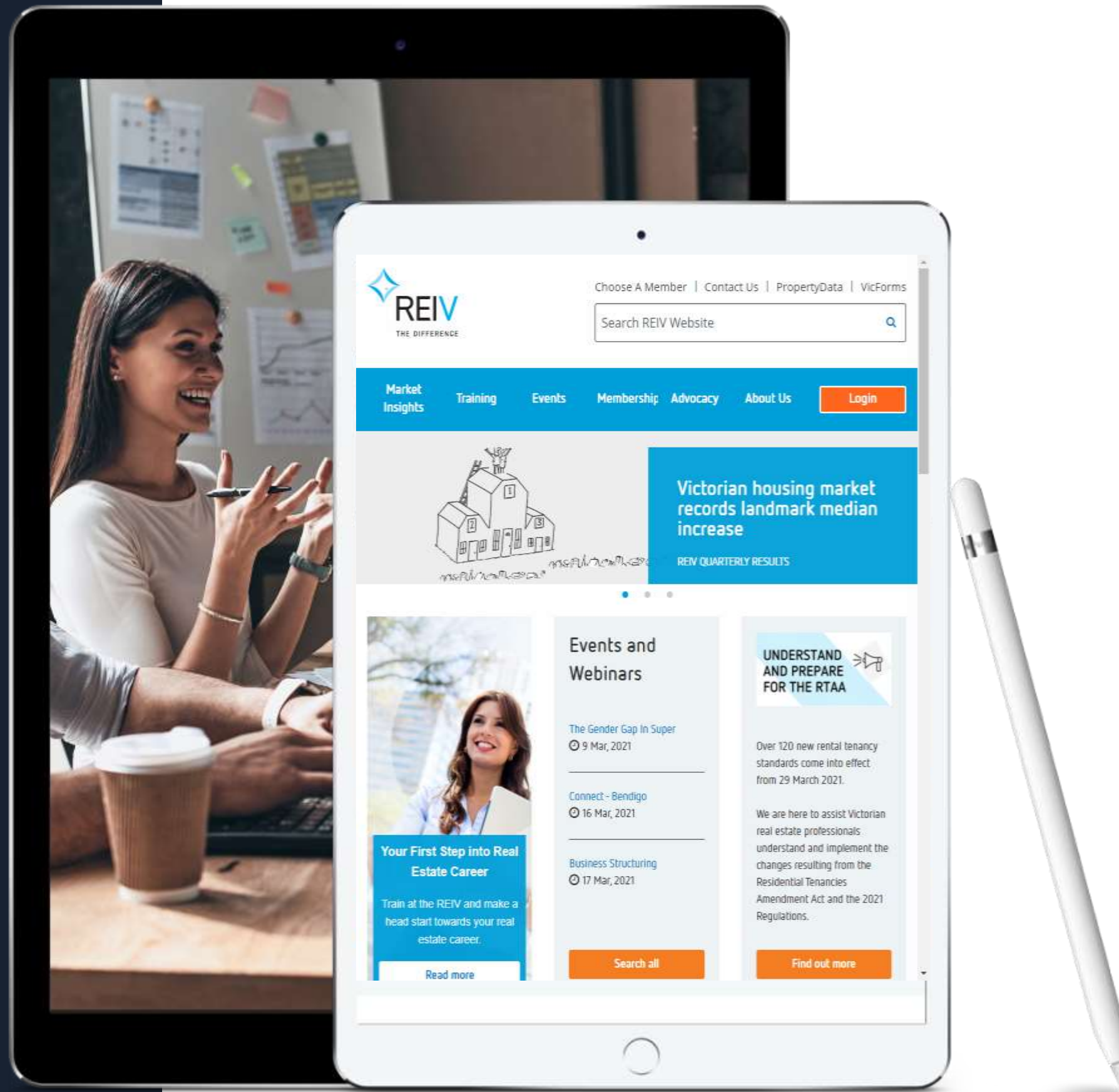
Don't close the Zoom  
session



# Renewal Strategy



Real Estate Institute of Victoria



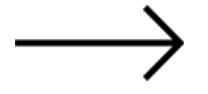
RETHINKING YOUR RENEWAL STRATEGY:

# Member Experience: Journey to Renew



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# Why a Member Experience Matters?



## Culture of Innovation

Member Experience will lead to a culture of innovation and agility.

## Reinvent and shift strategies

Allow your association to think beyond what you do now. Consider how your strategies are member focused to improve their experience and satisfaction.

## Competitive advantage

By focusing on the Member Experience you will gain a better insight, and competitive advantage.

## Memorable Experiences

Create memorable and positive experiences for your members so they feel valued and keep returning.

# Member Experience (MX)

- Effectiveness
- Efficiency
- Satisfaction



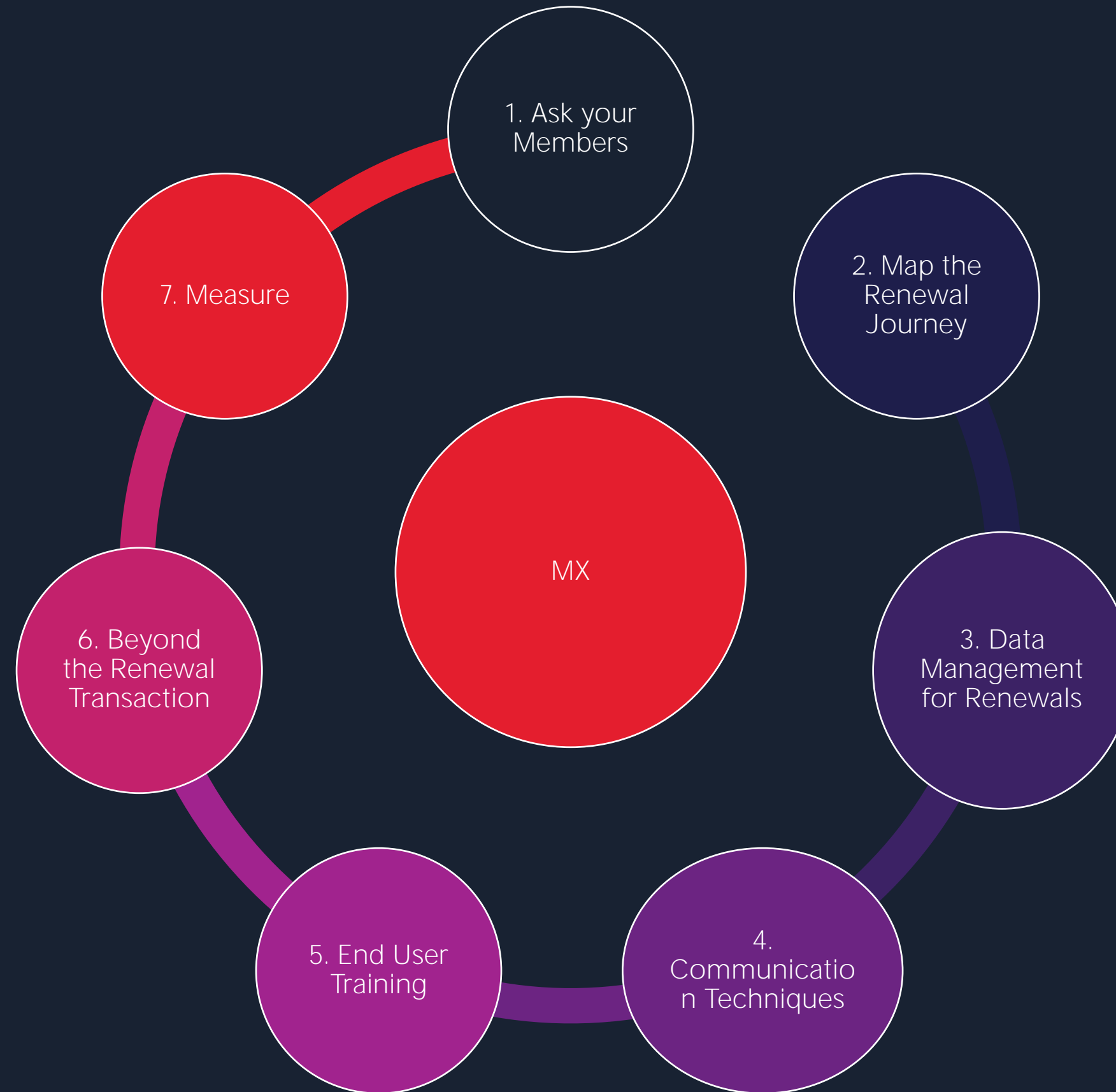
# Member Experience (MX)

- Effectiveness: Can the member renew accurately?
- Efficiency: The member invests minimal effort to complete the renewal.
- Satisfaction: Creates a sense of accomplishment.

# Member Experience (MX)

How do you shift your association to a MX focus?

# Member Experience (MX) for Renewals



# MX 1. Ask your Members

Start by asking your members, committees, staff about your renewals.

You can't have emphasis MX without knowing how your members currently feel.

## MX 1. Ask your Members

Identify a group of members that represent various segments.

Don't forget the members that didn't renew!

Interview them via Zoom about the renewal process.

Ask the right questions to learn about their Member Experience.

# MX 1. Ask your Members



**Effectiveness**



**Efficiency**



**Satisfaction**

# MX 1. Interview



Effectiveness

- ✓ Were you able to accurately complete your renewal?
- ✓ Was your membership category, billing and details correct?
- ✓ Did you receive all information you required to complete your renewal?

# MX 1. Interview



Efficiency

- ✓ How did you renew your membership?
- ✓ Did the process take a lot of effort? (Time, resources, emotion)
- ✓ Was the renewal easy to complete?
- ✓ Were there any barriers to renew?

# MX 1. Interview



Experience

- ✓ How satisfied are you with the renewal?
- ✓ How did it make you feel? Was it a positive or negative experience?
- ✓ Did you feel valued and acknowledged after your renewal of membership?

# MX 1. Ask your Members - Survey

Short survey to specific members

Don't incentivize the response as it could skew results

Identify and measure satisfaction and experience.

# MX 1. Ask your Members - Survey



Survey

How satisfied are you with your renewal? (1 to 10)

How likely are you to recommend membership? (1 to 10)

Did you feel valued and acknowledged once you renewed your membership? (1 to 10)

# MX 1. Ask your Members - Complaints & Feedback

Complaints and feedback are members giving you their perspective of their experience.

Feedback is often dealt with then forgotten.

Feedback should always be retained for future reviewing. Store the feedback in your AMS and review prior to setting the new renewal campaign.

RETHINKING YOUR RENEWAL STRATEGY:

# Map the Renewal Journey



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# MX 2. Map the Renewal Journey

- Identify the steps to renew
- What tasks are there in the renewal process?
- What does the member receive?
- What is a pain or gain point in the process?
- Is the process of renewing the same for every member?
- Duration of the journey?

# MX 1. Ask your Members - Complaints & Feedback

**Pain points** - A pain point is a particular frustration, problem or roadblock experienced by a prospective or current member. These pain points can occur at any or all stages of a member's interaction with an association or, sometimes, before they start their journey.

**Gain points** - Pain points minimise the negative; gain points maximise the positive. Pain points try to overcome a particular frustration; gain points focus on ideal future states.

## MX 2. Personas

If MX teaches us to focus on the Member's satisfaction, efficiency and effectiveness then a persona will help your association identify that each member is different.

Not all members are created equal.

# Personas:

## Jane



Image source: Pexel

## Sarah



Image source: Pexel

## Frank



Image source: Shutterstock

# Persona: Student to Full Member

## Jane



Image source: Pexel

### Profile:

Age: 23

Occupation: Graduate Nursing

Location: Melbourne

### Bio:

Recently graduated from Bachelor of Nursing. Seeking placement in a hospital. Experience in customer service from working while studying.

### Goals:

- Start career in nursing
- Focused on advancing their knowledge in nursing
- To make a salary

### Frustrations or Concerns:

- Impact of COVID
- New to profession
- Lack of career discipline or focus

### Technology Skills:

Internet	High
Desktop/Office	Low
Social Networks	High
Mobile Apps	High
Trust in Technology	Medium

### Daily Brands:

THE ICONIC

YouTube



ASOS  
discover fashion online

afterpay

### Personality:

Social Change	High
Trust	Medium
Innovative Thinking	Low
Adventurous	High

# Persona: New Member

## Sarah



Image source: Pexels

### Profile:

Age: 35

Occupation: Hospital RN

Location: Sydney

### Bio:

RN in a major Sydney public hospital. 7 plus years experience. Switched hospitals to be closer to home 3 years ago.

### Goals:

- Focused on career maintenance.
- Advancing the industry and public health
- Improving patient care

### Frustrations or Concerns:

- Frontline COVID worker.
- Time poor and works non-traditional hours
- Mobile work, so not at

### Technology Skills:

Internet	Medium
Desktop/Office	Medium
Social Networks	High
Mobile Apps	Low
Trust in Technology	Medium



### Personality:

Social Change	Medium
Trust	Medium
Innovative Thinking	Medium
Adventurous	Low

# Persona: Existing / Long Standing Member

## Frank



Image source: Shutterstock

### Profile:

Age: 55

Occupation: Hospital RN

Location: Sydney

### Bio:

RN in a Sydney private hospital. Post-operative nurse. 20 plus years experience. Switched hospitals to be dedicated to discipline.

### Goals:

- Retirement consideration
- In career discipline and position
- Longer term goal to mentor and teach graduates

### Frustrations or Concerns:

- Time poor due to family and work commitments.
- Works traditional hours

### Technology Skills:

Internet	Low
Desktop/Office	Medium
Social Networks	Low
Mobile Apps	Low
Trust in Technology	Low

### Daily Brands:

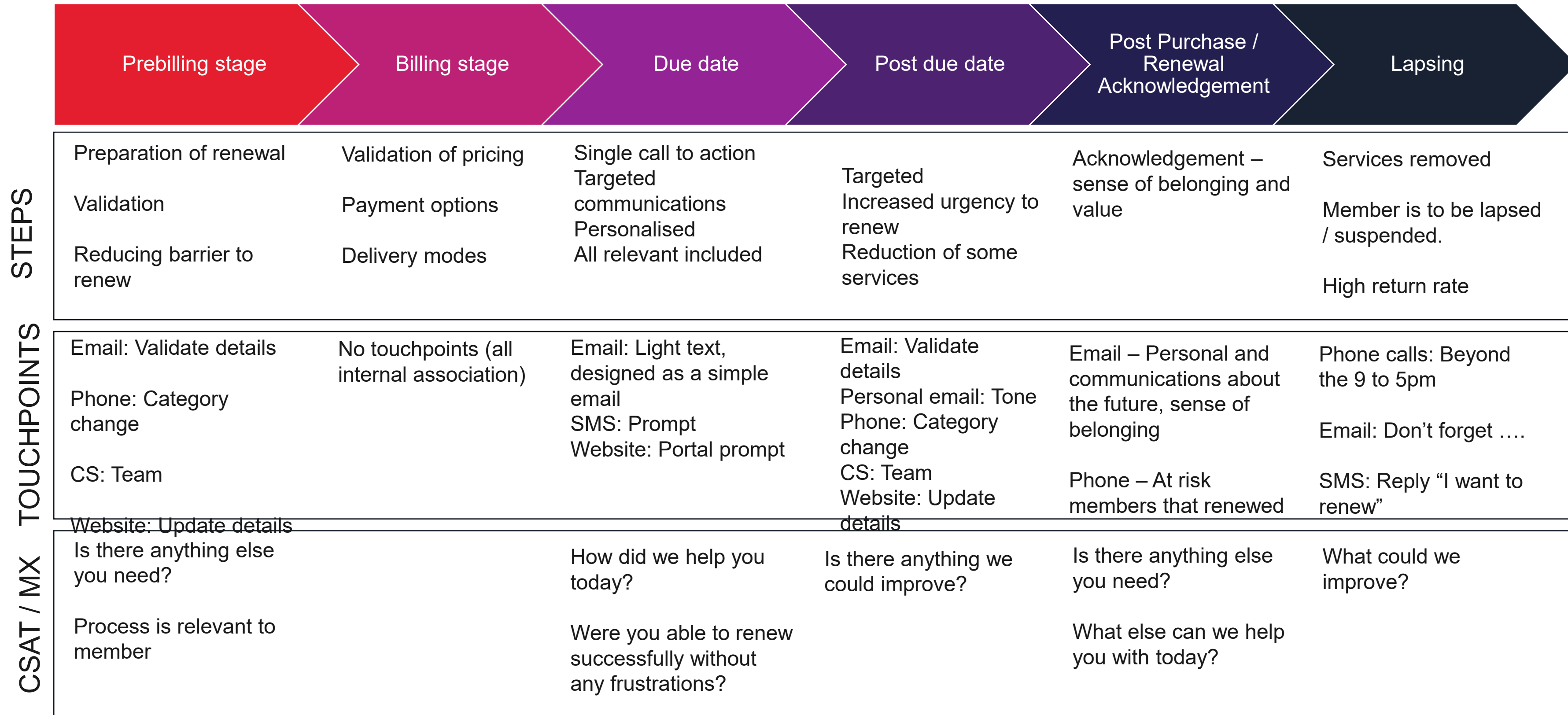
### Personality:

Social Change	Medium
Trust	Low
Innovative Thinking	Low
Adventurous	Medium

## MX 2. Personas

- What other personas could you have?
- Why would they be important?

# Map the Renewal Journey



Within first 14 days



OUTCOME

Thank the member	Join the Community	Incentive a free event attendance	Validate your profile	Sign the petition	Data validation
Welcome them	Download the App	50% of purchase of product	We want to learn more about you	Lobby to your local member	Promote engagement
Invite them to webinar	Login into the website				

TOUCHPOINTS

Email: Welcome and Invitation within 24 hours		Email: Light text, designed as a simple email	Email: Validate details	Email – Personal and communications about the future, sense of belonging	Phone calls: Beyond the 9 to 5pm
Call: Membership		SMS: Prompt	Personal email: Tone		Email: Don't forget ....
Portal: Personalised Alert		Website: Portal prompt	Phone: Category change	Phone – At risk members that renewed	SMS: Reply "I want to renew"
			CS: Team		
			Website: Update details		

iMIS TOOLS

iQA: New Member Joined Yesterday		How did we help you today?	Is there anything we could improve?	Is there anything else you need?	What could we improve?
Process Automation: Email Welcome		Were you able to renew successfully without any frustrations?		What else can we help you with today?	
Process Automation: Alert					

RETHINKING YOUR RENEWAL STRATEGY:

# Data Management



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# Data Management

- Crucial to the success of your renewal campaign
- We found members without a valid email address we're 5% less likely to renew their membership. That's 1 in 20!
- The renewal is NOT the time to validate data.

# Data Management

- Data Management should be part of your everyday culture.
- Our top 10 data points to regularly maintain and update.

# Data Management

- Email addresses – Use your Email Marketing tool to identify bounce backs, or non-delivered. Proactively reach out to your member to update the email.
- Professional or industry updates – Periodically ask members to maintain their professional data via your portal.
- Mobile Phone – More valuable than Work Phone, as it is less likely to change and can be used for text/SMS and phone.

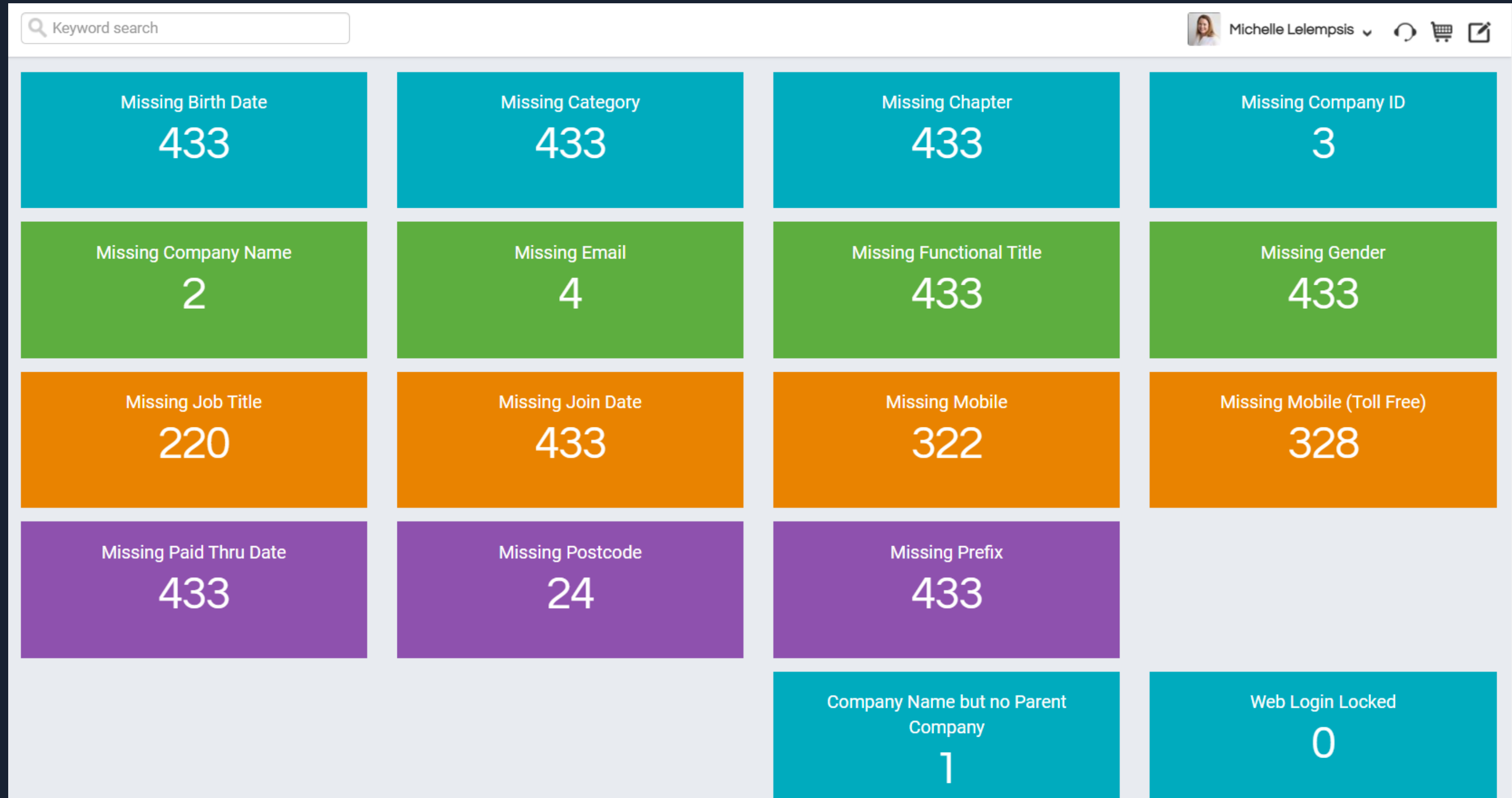
# Data Management

- Membership data that impacts renewal billing – category, type, join date, industry numbers
- Student or Graduates – Can you ask throughout the year if they have graduated? What if you asked for their expected graduation year?
- Conversion of Members to Recurring / Regular Payment Methods

# Data Management

- Identify the data points you have to use for segmentation – practice segmentation.
- Create a minimum data set – What data should every single member have on their profile? Routinely assess and update the data.
- Plan for future reporting – Can you consider ways now to establishing renewal retention reports?
- Member Journey – Establish flags or fields that easily show you what stage of the Journey a Member is at. Prospect, New Member, Renewing and Exiting.

# Data Management



# Data Management

1

2 months prior to your renewal launch

2

Create a competition or incentive to log in

3

Promote via website, portal and emails.



EMAIL

PASSWORD

LOGIN

[Forgot password?](#)

## Update your details

Members are the most important part of ADAQ!

We want you to stay in the loop with the latest ADAQ news, events and updates so it is important that your details are correct and up to date.

We are asking that you update at least ONE detail or verify your details are correct in your Member Portal.

Every Member that makes an update will go into a draw to **win 1 of 3 Visa gift cards (max. value \$500)\***

Every student Member that makes an update will go into the draw to win a **limited-release ADAQ Merch Pack.**

[UPDATE YOUR DETAILS](#)

# Data Management Campaign

- Automation to drive updates: It's been a few months since you've logged in, please check your details.
- Incentive to anyone that updates their data: ETU Victoria gave their members a little lunch esky!
- Teach members to log-in through your email communications.

# Breakout Room



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



Data Management Strategies for Renewals



What strategies could you apply within your association?

What campaigns could you run member facing?

RETHINKING YOUR RENEWAL STRATEGY:

# Payment Methods Matter



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# Payment Methods Matter

- What are the payment methods available?
- What is the most convenient method for the member?
- Do certain segments have specific payment types?

# Payment Methods Matter

- Phone
- Fax
- Mail
- In Person
- Online
- Recurring
- BPay
- Direct Deposit
  
- How would you rank these?

# Payment Methods Matter

Payment Method	Expected Response Rate	How does a member pay with this payment method?
Bpay	30%	Directly without data validation, quick easy and doesn't require association help
Online	20%	Login to pay, automated receipt, can update details at the same time
Recurring payment	10%	Automatic renewal
Etc		

# Payment Methods Matter

- Key considerations;
- Auto-renewal
- Becomes a thank you not “renewal”
- Managing the process
- Validate account details / accounts
- Manage expiring cards
- Create a “follow-up” process similar to this renewal strategy for declines

RETHINKING YOUR RENEWAL STRATEGY:

# Communication Segmentation and Personalisation



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# Segmentation and Personalisation

- Member Experience for Renewals is about Personalisation, Relevance and Targeted.
- Tone and style of the communication is critical.
- Call to action should be simple and clear.

# Segmentation and Personalisation

- Reassess all communications for the language and tone used.
- Acknowledge the change, hardship, uncertainty and ensure that members see how the association is enabling the industry.
- Carefully curate messages to show a sense of community and belonging.
- Rewrite all lapsing and suspension communications.

# Segmentation and Personalisation

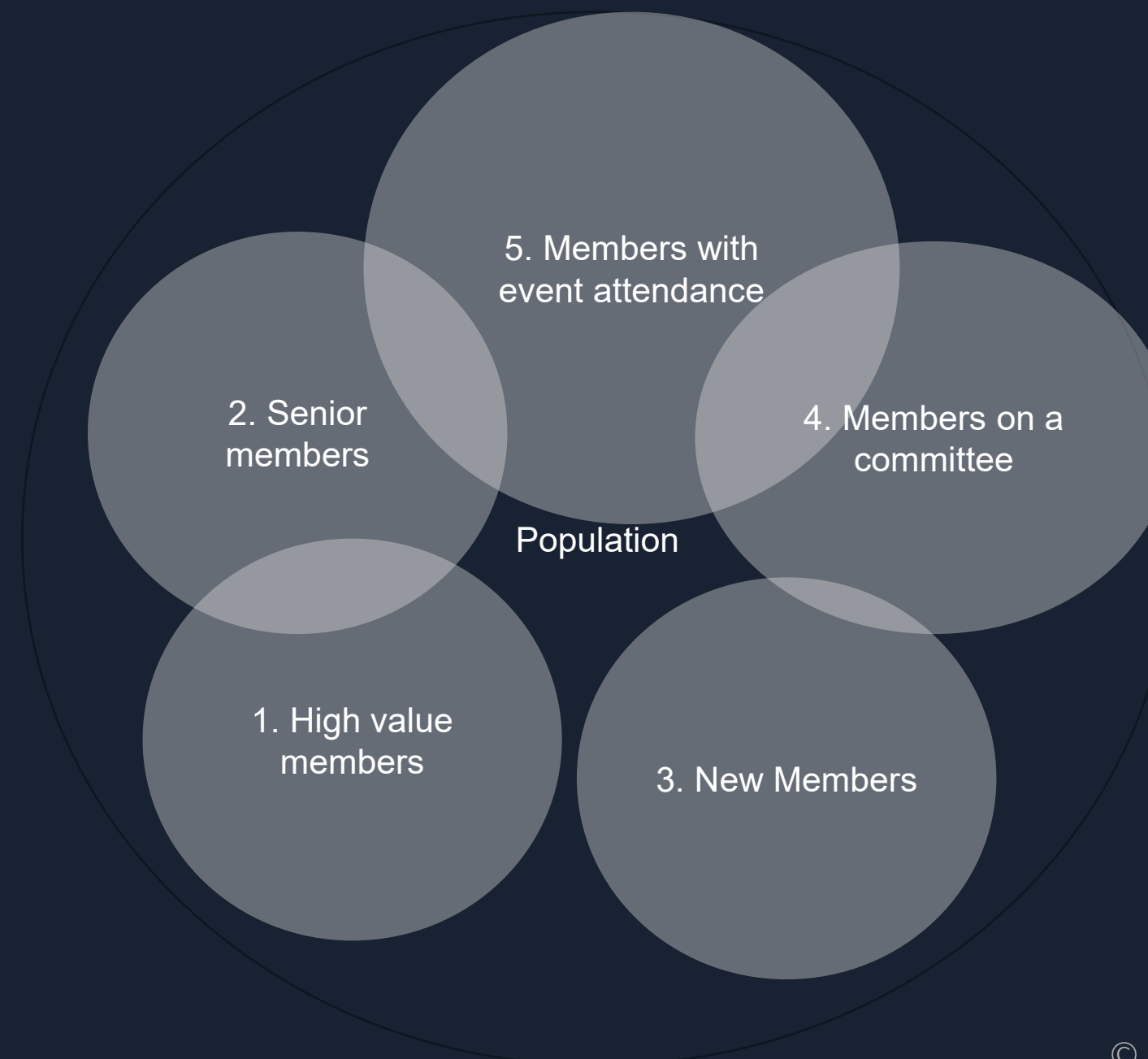
- Personalisation is more than just a merged Name.
- Use data to enable your segmentation strategy to be able to target the right message to the various segments.

# Segmentation and Personalisation

- Renewals can be segmented by:
  - New Members
  - Engagement
  - At Risk Members
  - Membership Type or Category
  - Payment Method

# Segmentation and Personalisation

- Prioritise your segments to ensure each member is accounted for and only fits into one group!



# Segmentation and Personalisation

- Tips for segmenting on database for communications or renewals
- Step 1 – Confirm total members (population)
- Step 2 – Develop segmentation reports (count totals)
- Step 3 – Confirm that all members are accounted for
- TEST: Export to excel and combine all then dedupe
- Step 4 – Final list should be tracked back in your database for future reporting and reminders.

# Segmentation and Personalisation

The screenshot shows the Microsoft Excel ribbon with the 'Data' tab selected. The ribbon is divided into several groups: 'Data Types' (Organization, Stocks, Geography), 'Sort & Filter' (Sort, Filter, Clear, Reapply, Advanced), 'Text to Columns', and 'Data Tools' (Flash Fill, Remove Duplicates, Data Validation, Consolidate, Relationships). The 'Remove Duplicates' button is highlighted with a red box, and a tooltip is displayed over it. The tooltip text reads: 'Remove Duplicates. Delete duplicate rows from a sheet. You can pick which columns should be checked for duplicate information.'

G	H	I	J	K	L	M	N	O	P	Q	R
Call to Action											
Online renewal											
Online renewal											
Online renewal											
Over the phone payment											

# Segmentation and Personalisation

To delete duplicate values, select one or more columns that contain duplicates.

Select All    Unselect All    My data has headers

Columns

- Name
- ID
- Email
- First
- Last
- Company
- Type

OK   Cancel

To delete duplicate values, select one or more columns that contain duplicates.

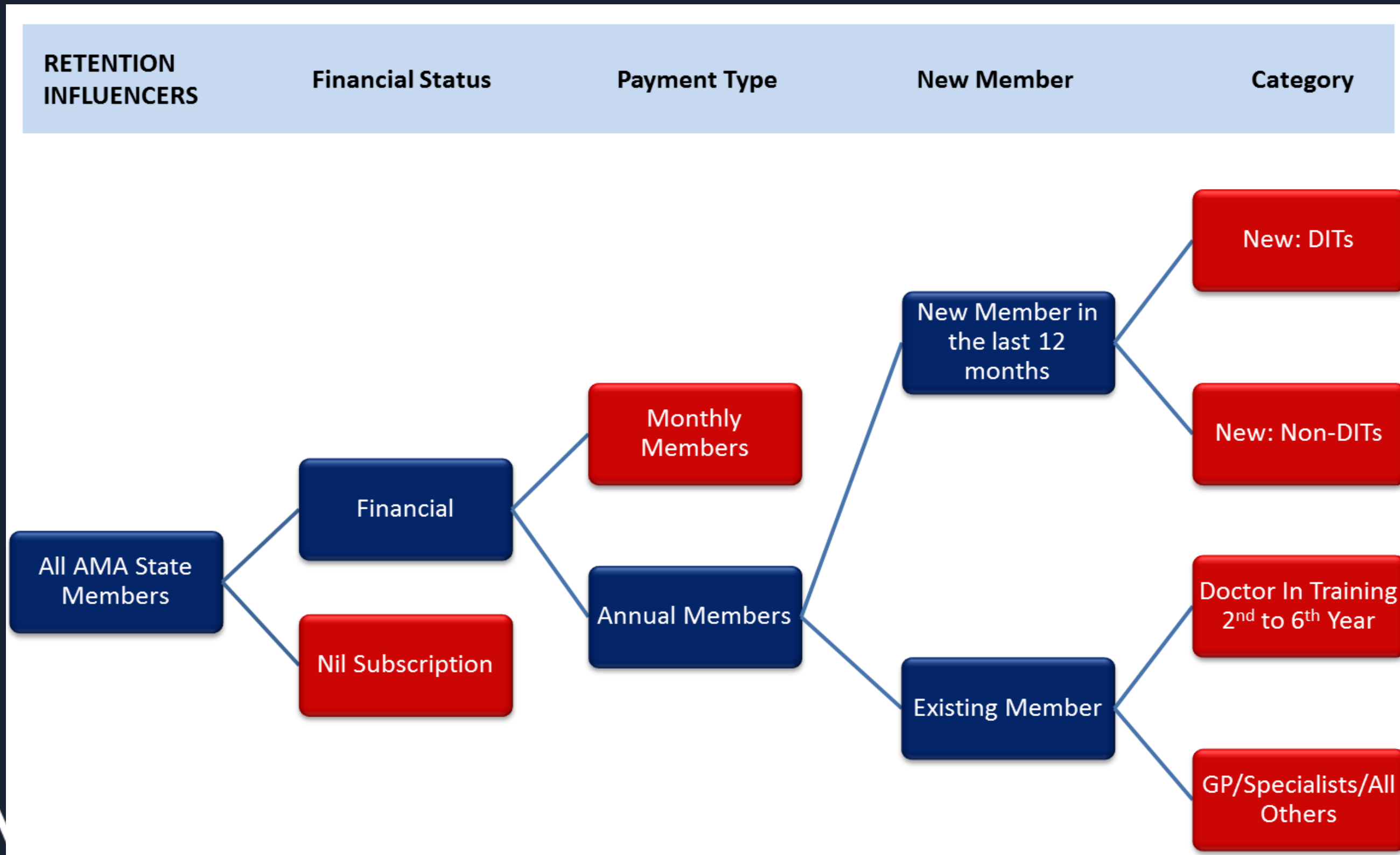
Select All    Unselect All    My data has headers

Columns

- Name
- ID
- Email
- First
- Last
- Company
- Type

OK   Cancel

# Segmentation and Personalisation



# Segmentation and Personalisation



# Segmentation and Personalisation

- Each segment/persona:
- Define every touchpoint and purpose
- Define KPI and response rate
- Define the preferred payment type and means to renew (i.e Online, Bpay, or Phone)
- Track segments/personas against response rates

# Segmentation and Personalisation

Segment / Persona Touchpoint		Timing	Communication Type	Response Rate Goal	Tone	Call to Action
New Members	1st	12 weeks	Email and statement attached	10%	Sense of belonging, valued	Online renewal
New Members	2nd	12 weeks	SMS	2%	Gentle push to check emails	Online renewal
New Members	3rd	10 weeks	Email	5%	Sense of belonging, valued	Online renewal
New Members	4th	8 weeks	Phone	10%	Can we help?	Over the phone payment
New Members	5th	8 weeks	Personal email from phone call	5%	Can we help?	Over the phone payment
New Members	6th	6 weeks	SMS	10%	Sense of belonging, valued	Online renewal
New Members	7th	4 weeks	Email and statement attached	5%	Sense of belonging, valued	Online renewal
New Members	8th	2 weeks	Email and statement attached	2%	Sense of belonging, valued	Online renewal
New Members	9th	Due date	Email	10%	Don't miss out	Online renewal
New Members	10th	Due date	SMS	3%	Don't forget	Online renewal
New Members	11th	Due date	Phone calls being	2%	Commence phone calls	Online renewal and switch to auto
New Members	12th	1 week overdue	Personal email	5%	Let us know when suits and we will call you	Online renewal
New Members	13th	4 weeks overdue	SMS	4%	Reply 1 if you want to renew, Reply 2 if you don't want to renew	Online renewal
New Members	14th	5 weeks overdue	Email and statement attached	2%	Last chance, before we say goodbye	Online renewal
New Members	15th	6 weeks overdue	Email	5%	Notice of expiry, however you can join whenever suits	Online renewal



# Segmentation and Personalisation

- Innovate your communications
- Bounce between platforms
- SMS has a readership of 94%, emails are only about 34%
- You do the hard work not your members.
- Extend your “hours”
- Offer a time to call them back.
- Ask them – 1/ I plan to renew, 2/I don't plan to renew

# Communication: Clear and Simple call to action

- Keep the email simple.
- Do not crowd your call to action with paragraphs of text.
- Tone can change throughout the campaign.
- Members have made their mind to renew before they get the renewal notice. It is based on engagement and MX.

Dear Michelle

Thank you for your valuable support as an ABCD member, particularly over the last 12 months in light of the pandemic challenges we still continue to face – particularly for *industry* businesses and professionals. As a way of ensuring our continued support for the industry at large, we have placed a freeze on all membership fee increases for 2021. Supporting our industry is integral to what we do, with 2020 ultimately being one of the busiest years for the peak body. And we are proud to share some of the incredible accomplishments we achieved on behalf of members, including:

- Mounted a successful industry campaign against tenancy reforms that would have significantly damaged Queensland's *industry* market and created the most onerous *industry* laws in the country;
- Launched one of the peak body's most successful grassroots campaigns against the State's Government's moratorium on evictions to achieve a better balance between tenants and landlords;
- Achieved record levels of media exposure for the *industry* across broadcast television, radio, digital and print;
- Delivered State-wide digital training and education industry webinars throughout the pandemic;
- Provided critical support for *industry* professionals during COVID-19 via:
  - Regular live updates delivered direct from our CEO;
  - The provision of a pandemic toolkit for industry best practice based on the very latest updates from both State Government and Queensland Health;
  - hosted a series of COVID-19 pandemic webinars across all *industry* sectors;
  - worked with the Department of Justice and Department of Housing and Public Works to protect the interests of *industry professionals* during this time.
- Launched a highly targeted state election campaign with calls for *industry* reforms, first *industry* extensions to established *industry* mandatory CPD for *industry professionals* in Queensland amongst others;
- Answered tens of thousands of calls, emails and online queries via our agency advice and property management support channels; and,
- Developed and expanded upon our suite of documents in *Service* as well as successfully launch a new user-friendly website which provides for improved member access to resources and benefits as part of our continuing digital transformation project.

I sincerely appreciate your continued membership with the ABCD in 2021 – your support is absolutely vital in realising the work we carry out every year on behalf of the industry. Your Direct Debit will continue to be debited monthly for your membership fees, ensuring you have continued access to ABCD Member Benefits.

Your Individual Membership for 2021 is \$210, which equates to a monthly amount of \$17.50.

Please note if there are any outstanding fees for this year, we'll also roll this over to 2021 and divide it over your monthly payments so as to maintain your membership up-to-date.

Again, I greatly appreciate your continued support of the ACBD and look forward to you joining us for what's sure to be a radically different year ahead to 2020, as we continue to provide you with the latest in advocacy, education, training and support.

Dear Michelle

Thank you for your valuable support as an ABCD member, particularly over the last 12 months in light of the pandemic challenges we still continue to face – particularly for *industry* businesses and professionals. As a way of ensuring our continued support for the industry at large, we have placed industry is integral to our mission. And we have achieved on behalf of

**Subject: Individual Membership**

**Subject: Is there an acknowledgement after the first payment**

- Mounted a successful industry campaign against tenancy reforms that would have significantly damaged Queensland's *industry* market and created the most onerous *industry* laws in the country;
- Launched one of the peak body's most successful grassroots campaigns against the State's Government's moratorium on evictions to achieve a better balance between tenants and landlords;
- Achieved record levels of media exposure for the *industry* across broadcast television, radio, digital and print;
- Delivered State-wide digital training and education industry webinars throughout the pandemic;
- Provided critical support for *industry* professionals during COVID-19 via:
  - Regular live updates delivered direct from our CEO;
  - The provision of a pandemic toolkit for industry best practice based on the guidance from both State Government and Queensland Health;
  - Hosted a series of COVID-19 pandemic webinars across all *industry* sectors;
- Launched a highly targeted state election campaign with calls for *industry* reforms to protect the interests of *industry professionals* during this time.
- Launched a highly targeted state election campaign with calls for *industry* reforms to established *industry* mandatory CPD for *industry professionals* in Queensland amongst others;
- Answered tens of thousands of calls, emails and online queries via our agency and property management support channels; and,
- Developed and expanded upon our suite of documents in *Service* as well as successfully launch a new user-friendly website which provides for improved member access to resources and benefits as part of our continuing digital transformation plan.

**Tone: Not Member Centric**

**Tone: Is there a call to action**

**Engagement** continued membership with the ABCD in 2021 – your support is absolutely vital in realising the work we carry out every year on behalf of the industry. Your membership has been debited monthly for your membership fees, ensuring you have continued access to ABCD Member Benefits.

Your Individual Membership for 2021 is \$210, which equates to a monthly amount of \$17.50.

Please note if there are any outstanding fees for this year, we'll also roll this over to 2021 and divide it over your monthly payments so as to maintain your membership up-to-date.

Again, I greatly appreciate your continued support of the ABCD. **Tone: Tell me I don't need to do anything** as we continue to provide you with the latest in advocacy, education, training and support.

Dear Michelle

Thank you for your valuable support as an *ABCD* member, particularly over the last 12 months in light of the pandemic challenges we still continue to face – particularly for *industry* businesses and professionals. You stand with 12345 ABCD members supporting your industry.

You currently pay your membership via monthly direct debit, and for your convenience you do not need to do anything. **Your 2021 Membership will continue with no interruptions.**

As a way of ensuring our continued support for the industry at large, we have placed a freeze on all membership fee increases for 2021. Your Individual Membership for 2021 is a monthly amount of \$17.50.

Why not register for our next virtual event, as a member this is free for you to attend. XYZ Name on date.

If you need assistance with your membership or would like to learn more about any of your benefits, please contact myself directly and I'd be only too happy to assist.

Name,

Membership

- Value and sense of belonging
- Clear information
- Encouraging engagement
- One call to action

RETHINKING YOUR RENEWAL STRATEGY:

# Communication Methods



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# Communication: Email

- The simplest form of communication typical email open rates are only 35%
- What about the 65% that don't open it?
- Segmented will improve the open rate and relevance to the member.

*<https://www.higherlogic.com/streamline-your-membership-renewal-process/>*

# Communication: Email

## Segment lists. Increase engagement.

Work smarter with marketing automation to send subscribers more relevant content.



■ = Lists with <500 subscribers    ▨ = Lists with >250,000 subscribers

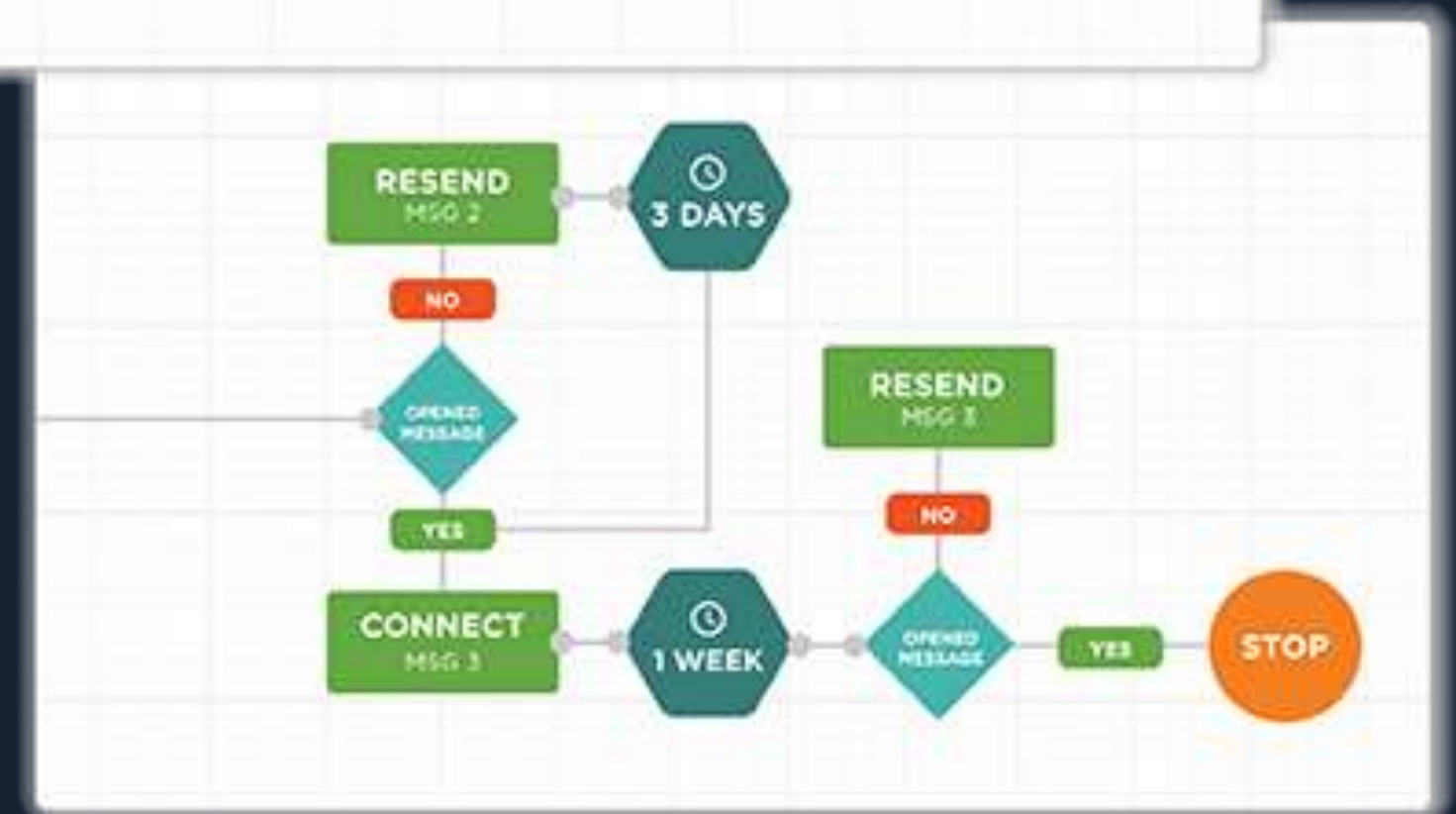
HIGHER LOGIC

# Communication: Email

- Consider Email Marketing Automation



<https://www.higherlogic.com/streamline-your-membership-renewal-process/>



# Communication: Email

- Keep the call to action simple and clear
- Reduce text in the email
- Tone = Sense of belonging and support

# Communication: Mail

- Direct mail is still an important communications channel for renewals.
- Is your address data up-to-date? Especially if more of the workforce are working from home.
- Change of address register

# Communication: Mail

- Simple and clear call to action.
- No need to send a “renewal pack” or instructions on how to renew.
- Include a reply-paid envelope if you accept offline payments.
- Remove any effort or “thought” from the process.

# Communication: SMS

- Simple and clear call to action.
- Change the purpose of the SMS based on timing within the renewal campaign.
  - Early payers – “Keep an eye out, renewals are now open”
  - Closer to due date – “Continue to stand with your 1,200 professionals”
  - At due date – “Your membership is set to expire, don’t lose access to important benefits.”
  - After due date – “How can we help you renew? Reply 1 if you’d like us to call you to take renewal payment.”

# Communication: Website and Portal

- Update your website to promote renewal campaign – especially if you are annual membership cycle.
- Use the portal to push specific alerts to members.
  - Early payers – “Michelle, renewals are now open”
  - Closer to due date – “Renew your membership and continue to stand with your 1,200 professionals”
  - At due date – “Your membership is set to expire, don’t lose access to important benefits.”
  - After due date – “How can we help you renew? Click here to request a call back”

# Communication: The Human Factor

Do not underestimate the human factor and try to add layers of personal touch into your renewal strategy.

- Telephone calls before the renewal campaign, but also during.
- Opportunity to ask how your members are, their impact and how your association can help.
- Offer virtual video conferencing to discuss their membership.
- Acknowledge hardship and have a membership pause available.
- Personalise your own emails out with a real-staff member, their name and contact details.

# Breakout Room



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



What communication strategies do you use?



What types of communication methods seem more effective?

RETHINKING YOUR RENEWAL STRATEGY:

# End User Training and MX:



Digital Academy

# Team Training and MX

Create time to share experiences – Allow membership, events or other business areas to share experiences with each other. What feedback are you hearing from members?

Discuss language and tone – Show how different styles can be used to be “member centric” vs inward facing.

Transparency – Use tools like ZenDesk, FreshDesk or other ticketing tools to manage all enquiries or questions.

# Team Training and MX

Reward and acknowledge – Data management, renewal calls, targets and CSAT!

Formal training is available - <https://www.cxpa.org/home>

# End User Training and MX:

- Reward and acknowledge – Data management, renewal calls, targets and CSAT!
- Formal training is available - <https://www.cxpa.org/home>

RETHINKING YOUR RENEWAL STRATEGY:

# Post Purchase: Beyond the Renewal Transaction



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# Beyond the renewal: Renewed

- Remember to thank them once renewed.
- And don't stop the *MX* or personalisation strategies.
- Consider adopting Member Engagement Scoring to assist in measuring their utilisation of services.
- Adopt marketing automation to increase engagement or showcasing services, resources they may not be using.

# Beyond the renewal: Renewed

- Measure! Now is the time to prepare for the next renewal campaign – CSAT or MX Survey

# Beyond the renewal: Exiting Members

- Allow members to easily resign, leave or pause their membership.
- It is an extremely uncertain period for individuals and businesses.
- If the exiting MX is positive and easy, the member is just as likely to come back when the situation improves.

# Beyond the renewal: Exiting Members

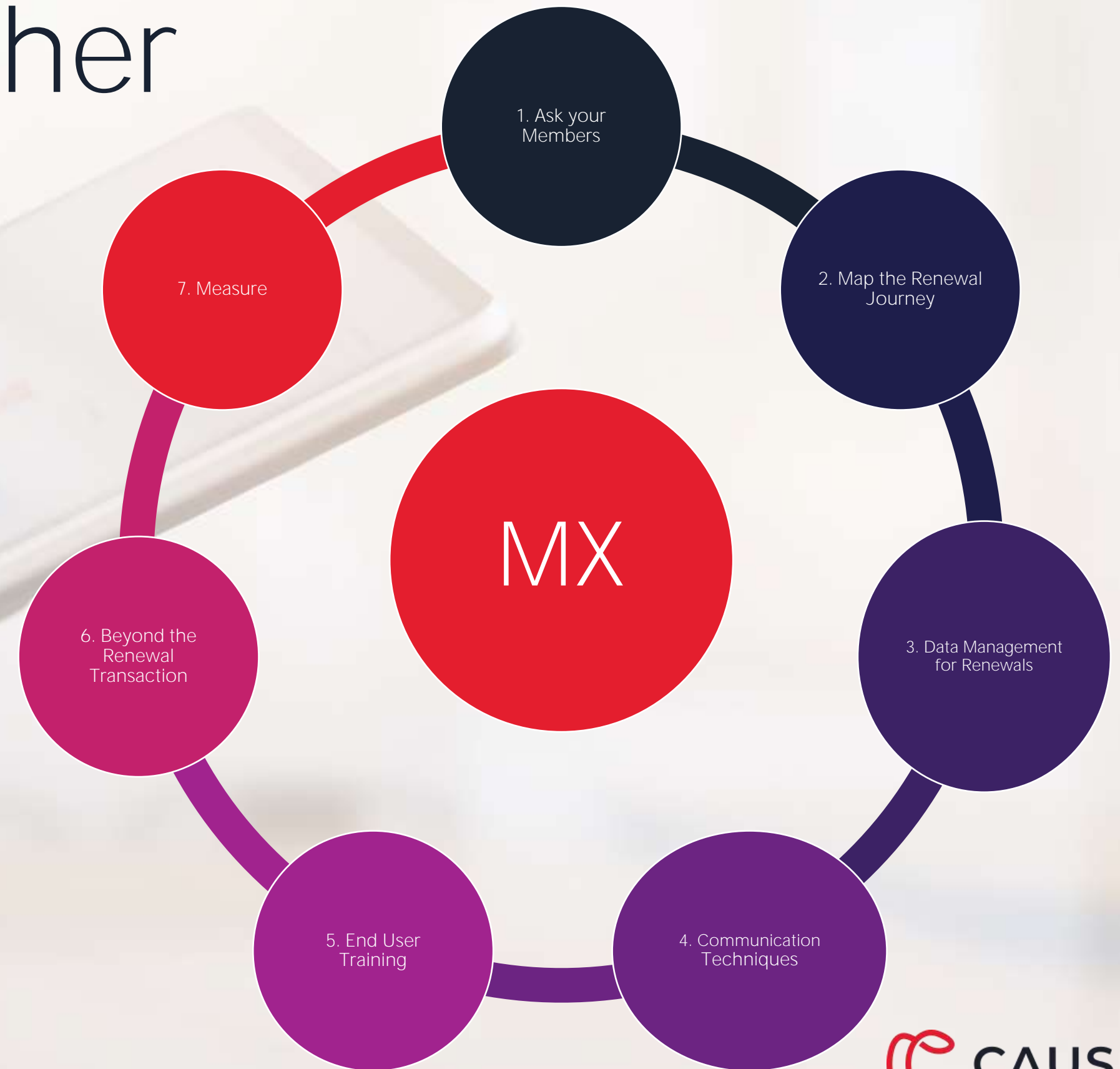
- Continue the conversation with them and include your former members in communications about what your association is doing.
- Invite them back or offer complimentary event attendance.
- Don't forget your previous renewal you did lose 20% of members.

# Beyond the renewal: Exiting Members

- We have seen many associations have a “reinstatement” rate of about 30-35%

# Bringing it all together

What does MX encompass?



# Renewal: Do you place emphasis on any of these? →

## Data Management

Is your renewal campaign used as an opportunity to maintain and update data?

## Member Experience

Have you truly experienced the renewal process to feel it.

## Personalised

Communications and content is personalized and targeted.

## Communication Channels

Identify various communication channels to improve reach, delivery and response rate

## Staff Training

Invested in more than one day of staff training on member service, support and improving the member experience.

## Payment Methods

Do you offer flexible payment options? Such as Credit Card, Bpay, recurring or subscription.

## Segmented

Renewals are segmented across your membership to create relevance and improve response rate.

## Renewal Strategy

Have a renewal strategy that is reviewed, implemented and evaluated?

## Data Insights

Can you easily in real-time report on the renewal campaign success.



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9:41



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