

TRANSFORMING YOUR MEMBERS' EXPERIENCE

5 Top Tips for Success

EQUANTIIS

TRANSFORMING YOUR MEMBERS' EXPERIENCE

This paper is for membership professionals who are looking to transform their members' experience and drive growth.

For such organisations, increasing member engagement, recruitment and retention are the top priorities to enable future growth. The key to unlocking these objectives is to fully understand and satisfy your members' needs.

An additional challenge for membership organisations, is to develop new ways of attracting and interacting with the next generation of members. The way in which Millennials interact with membership bodies is different to how their predecessors do, and organisations need to rapidly adapt and embrace new technology to stay ahead.

By fundamentally understanding member behaviours, wants, needs and desires, you will gain the insight needed to implement successful changes, which in turn will give you the competitive edge needed to truly demonstrate your value and ongoing relevance.

For a decade, Equantiis has worked with various membership organisations to help them drive transformation and this paper shares what we've learned along the way.

From challenges faced to solutions shared, we'll walk you through five top tips to achieve success and improve the member experience.

THE TRANSFORMATION CHALLENGE

Meeting Membership Expectations

Unsurprisingly, the top goal for membership organisations is to increase engagement with their member base and demonstrate more value to retain and ultimately recruit new members. However, there are many reasons as to why these organisations struggle to meet this goal, and many areas within the business need to change in order to reach it. It is often really hard to join up all the data, processes and systems to do this.

To understand how to engage deeper, a detailed understanding of your members is pivotal in knowing where to start. A true 360-degree view of members is required to understand who they are, what they need, what they're doing and ultimately how they want to engage. Armed with this knowledge, strategies for deeper engagement can be developed and the ability to demonstrate true value becomes easier

What's holding organisations back from achieving a 360-degree view?

To get this 360-degree view of the member base, organisations must harness their data to gain the insight into their member profile and behaviours. Data must be leveraged often in new ways to gain this understanding, but there are almost always hurdles in the way

Siloed data & Legacy systems

Siloed data and legacy systems are a huge setback for many membership organisations. To meet the expectations of the 21st Century member, data silos must be identified and connected. The impact of siloed data is far reaching, and more often than not, siloed data points to a siloed culture where departments are working independently and not sharing their data.

When data is scattered across disconnected legacy systems, and teams do not communicate effectively, this poses a serious barrier to data analysis as it becomes a huge effort of manual work across the organisation to standardise this information and put it in a format where a business can actually gain any useful insight. The impact? The potential of data is not leveraged to the advantage of the business making a 360-degree view of the member practically impossible.

Not only do we have the huge disadvantage of under-utilised data, but we also have the huge risk of a data security breach. Usually, when data is siloed and sits in various legacy systems, there is no overarching control or governance of how data is gathered or accessed. Many employees may collect their own data and store this on non-approved platforms. This then becomes a serious GDPR or cyber-security concern because data could be easily compromised.

THE TRANSFORMATION CHALLENGE

Leadership and Culture

One of the main barriers to transformational change is the leadership of the organisation. Often, leadership teams are risk averse and lack the technical knowledge and understanding to optimise the opportunity of digital to drive transformation and growth.

Usually, when leaders are risk averse, the organisation structure is also too rigid with needless bureaucracy in place which means decision making is too slow to adapt to the raised expectations of the modern member.

The problem here is that this stringent, risk focused approach trickles down the hierarchy and creates a culture of sporadic work and inconsistent investments, happening at various times, rather than a strategic sustained approach whereby all teams and departments are aligned to a single unifying vision.

At Equantiis, we have worked with many organisations to help them transform their businesses through meaningful, structured, transformational change. It must start with the mindsets of individuals within the company to understand that leveraging technology must be a business led initiative.

TACKLING THE MEMBERSHIP TRANSFORMATION CHALLENGE

5 Top Tips and Case Studies to Achieve Success

1. First You Must Wear Your Members' Shoes

Many organisations do not know their members sufficiently well enough to meet their expectations and drive the experience. An amazing experience never happens by chance and it takes a coordinated effort internally to achieve this. The member experience is therefore often left to chance. Obviously, retaining and recruiting members is crucial and pivotal to growth and so understanding the journeys your members take and how you can improve their overall experience is an essential activity you shouldn't ignore.

The starting point to understanding members and their journeys is to create a member journey map. This is a visual representation of the journey your members experience at every touchpoint, the points at which they interact with your business. Touchpoints can be online and offline and so it's important to make sure they are consistent across all channels.

The journey map will enable you to step into the shoes of your customers, whether they're prospective or existing ones. It uncovers the stages which need the most attention. You may be good at generating the leads, say via inbound or outbound marketing, but falling short of converting those leads to customers. This may indicate that lead information is not being handled in the right way. Maybe it's getting lost because there is no CRM or LMS system in place making it very difficult for sales teams to keep track of the enquiries they've responded to. This is an example whereby the map has revealed the blockers, and helps you prioritise and concentrate efforts and investment on the issues and changes that will deliver the most value.

One organisation that has developed an in depth understanding of their members' journey with the help of Equantiis is the Royal British Legion (RBL). Whilst the Legion has a healthy membership base, it was concerned about future retention rates and wanted to understand what the experience was like for members across the different stages of the membership journey.

Case Study



Defining a Roadmap to Stabilise Retention Rates

Equantiis worked with the Royal British Legion's membership team to develop task maps for key parts of the membership journey from initial discovery of the Royal British Legion, through to renewing membership.

By holding various workshops during the process, we documented the current processes behind the membership journey in order to enhance the experience.

Each part of the journey highlighted the touchpoints along the way and an emotional score was attributed to each touchpoint to highlight whether a member had a positive or negative experience. This experience mapping approach enabled us to identify numerous opportunities to improve the internal processes which manage the member journey and therefore build out a positive member experience from start to finish.

To gain further insight into the art of the possible, we worked with RBL's mailing, distribution and customer service provider, which helped influence the development of future processes.

The Result

Equantiis identified a number of improvement opportunities across 40 internal processes. The Legion was able to make immediate changes to some key processes to reduce the time it takes to action member requests and to transfer information internally. This freed up resource to focus on initiatives that add real, meaningful value to improve the member experience.

Equantiis ultimately developed a change roadmap for RBL to enhance the member experience which focused on the changes related to systems, data and culture.

TACKLING THE MEMBERSHIP TRANSFORMATION CHALLENGE

2. Technology Change must be Business Led and Start at the Top

Any technological transformation project within the business must start at the very top; the leadership team. Before implementing any new technology, there's a lot of work that needs to be done internally first. If this work isn't carried out, then the investment and effort that goes into implementing technology won't get the buy-in nor the return on investment it requires.

Often, the needs of different departments can appear to be misaligned. The conflicting priorities within an organisation are usually arranged by business function, rather than being driven by the customer experience.

It is therefore essential that the need for technology change is mapped back to the organisation's goals and desired outcomes. Setting the Vision and Principles for any change ensures the right level of alignment right at the start of the project.

This foundation also makes sure that your programmes align to your business strategy and your commercial strategy, and that you have a communications plan in place with the change management approach figured out before you begin. Key questions include: Have you defined the measures of success? How does the organisation measure value? Is the organisation ready for change?

It's imperative that all key stakeholders are aligned when a change is on the horizon, and all eyes will turn to the leadership team for inspiration, support, and direction. Change is unsettling at all levels of the organisation and as such, alignment and unity across the organisation is fundamental.

Case Study

Stabilising a downward trend of declining memberships?

One of our clients, a global membership organisation, experienced a period of declining membership and engagement, and urgently needed to stabilise and stop this downward trend.

With a strategic objective to grow their membership in a difficult economic climate, Equantiis was approached to help build out a strategy to support this objective. The strategy had to be built in a short period time and our client needed support to create a Membership Value Proposition (MVP) that put the end customer at the heart of the programme.

The first aspect of this work was to create Vision and Principles that would guide the strategy and help the organisation understand where they wanted to get to, while recognising the constraints they also faced.

The Vision and Principles were used throughout the project to govern the strategy and guide decision making.

Using the Vision and Principles, Equantiis helped develop the Membership Strategy by building both external and internal perspectives.

External View

Focusing externally first, we helped our client identify the core membership base, creating personas for three audience segments, for both current and prospective members. Via this process, member needs and unmet needs were captured, which influenced the overarching Value Proposition.

Next, a member experience mapping exercise was undertaken to unpick the way that members are currently serviced, identifying where the challenges lie and various opportunities for improvement.

The next part of the external view was to carry out market analysis to explore competitor organisations' offers and positioning. This gave our client a thorough understanding of where their current offering sat within the market, and highlighted new product development that was required to meet the unmet member needs. This was supported with a commercial model and plan for launch.

With the newly defined membership offer, Member Value Propositions (MVP) were created for each core audience segment. Using this information, a member engagement plan was created for retention and acquisition campaigns.

Internal View

Armed with the relevant information about member needs, we built out the new pricing structure, and developed new, fit-for-purpose fee options and discounts, removing legacy payment options that were obsolete.

With ambitious targets for growth, retention and acquisition targets were modelled to support the business over the next five years. Using all of this analysis, Equantiis built a Transformation Roadmap for the next three years, detailing the activities, budgets, resources and timelines ready for our client to successfully action against.

TACKLING THE MEMBERSHIP TRANSFORMATION CHALLENGE

3. Plan for Success with the Right Skills and Capacity

When embarking on a change programme, organisations must consider the skills and capacity of their internal organisation. Many organisations place huge importance on digital transformation projects, yet they underestimate the internal effort required to deliver these programmes successfully. This is a very common problem.

More often than not, organisations ask existing staff to take on project roles without back-filling or supporting their BAU (business as usual) work. It's also important to consider critical events such as other projects and busy periods including renewals, annual conferences and council meetings.

Such projects are much more effective when the staff involved are provided with a dedicated project space and resource separated out from BAU activities.

Successful projects diarise staff project time or backfill roles to free up key staff. When completing a business case, organisations should include a detailed and complete budget for all resources, specialist skills or by backfilling key staff.

The Change Management element of a project focuses on the people affected by the project. It's often the part organisations forget about and so, ends up being a core reason as to why staff are less engaged and invested in the project, and ultimately, this adversely affects the project's success and delivery of benefits.

Case Study



Equantiis client, the Electrical Contractors Association (ECA), had internal operating and technology issues that were impacting the standard of services provided to membership customers and therefore negatively impacted profitability. As such, they wanted to replace their core business systems across all functions of the organisation.

As their partner, we challenged their initial approach of moving straight to replacing technology and proposed to develop a Transformation Strategy that focused first and foremost on the member experience, which then influenced the new technology needed to deliver the desired experience.

We helped them identify the required skills and capacity to execute the strategy successfully. This included a thorough discovery phase, where the deliverable was a business case that outlined the current challenges and recommended solutions, along with a timescale, budget and resources required to successfully deliver the project. This approach provided a wealth of information to the ECA Board and enabled an informed decision on how best to proceed.

TACKLING THE MEMBERSHIP TRANSFORMATION CHALLENGE

4. Find the Right Partner & Super Charge Delivery

When you go through the thorough process of procurement for a service or system, you are looking for a technology Partner in the truest sense. This is a relationship that should last for years, and with this in mind, choosing the right supplier is a critical stage in any transformation programme. For example, making a short-term decision maybe on price will have a negative impact in the long run.

Finding the right balance between working with a supplier harmoniously, as well as being able to hold them to account at the same time, is fundamental to ensure this investment gives you the return and results you're aiming to achieve.

So, how do you strike the right balance? Define all the essential criteria you would expect from a supplier, remembering that an effective partnership is how you will take your business to new levels.

In person chemistry meetings are really important. We have often seen that during the procurement process, on paper the supplier may be the forerunner. Yet when it comes to meeting their team in person the dynamics simply aren't there.

With the right partner, this is what can be achieved:

Case Study



The British Association for Shooting and Conservation (BASC) was formed in 1908, and to this day remains the UK's largest shooting membership organisation. BASC engaged Equantiis to help build a Member Centric Digital First strategy that would overcome the issues they were facing.

BASC had a number of ambitious targets to deliver against its strategy. The highlights included increasing and retaining members, improving standards and driving operational efficiency.

Over time BASC's business systems had failed to meet all of the business objectives, along with the CRM and member portal coming to its end of life. This resulted in lengthy manual processes and a lack of trust in data and forecasting, which in turn delayed key business decision making.

Recognising that technology was only part of the challenge, BASC had acknowledged the need for a business transformation that would help the organisation realise its overall objectives

It was therefore essential for this challenge not to be seen as a technology project, but to build out a long-term business plan that focused on the wants and unmet needs of BASC's members and stakeholders.

Using Equantiis' proven methodology for delivering Digital Strategies, we undertook important activities such as customer experience mapping and a complete review of internal business processes to identify the core essential technology requirements.

Choosing a Technology Partner

Equantiis ran a fully independent guided procurement process under an Invitation to Negotiate (ITN) framework for a replacement CRM system and membership portal that would allow BASC to contract successfully to a fixed price implementation.

The procurement was sent out to appropriate solution providers that focus on the membership sector offering a variety of different technology platforms. Following the procurement process, we shortlisted providers that deliver "out the box" products which served the objectives of the long-term plan. As part of this process, Equantiis prepared the Invitation to Tender (ITN), Supplier Briefing, Supplier Presentation day, facilitation of procurement with the BASC team and suppliers, review and scoring of responses, and due diligence to the point of partner selection and contract negotiation.

The Result

Equantiis rapidly mobilised a team to get the transformation project moving in order to deliver the end-to-end engagement within just 6 months.

BASC realises the benefits of implementing an integrated CRM by focusing staff on high value activity, as well as integrated ways of working and sharing of information between functions to reduce the effect of siloes, better use of data and being more proactive.

By taking a member-centric and people-centric approach first and foremost to build a successful, future proof digital strategy, BASC knew this project was much wider than just an IT project.

The insight gained has provided valuable information for them to make positive changes.

TACKLING THE MEMBERSHIP TRANSFORMATION CHALLENGE

5. Being Ready for Change

There is a risky belief that technology alone will solve all the problems within a business. As outlined in this paper, to realise meaningful change and achieve the results you want, business wide operations and processes, as well as gaining a clear understanding of your members, must come first to build out a future proof strategy that will last.

At the recent Equantiis' Digital Leaders' Summit only half of attendees had a transformation strategy and just over a third had a vision for future change. A strategy must govern the way in which we approach any transformation project, so without one, efforts are likely to go to waste.

The starting point must always be the strategy, which is the plan for delivering the overall Mission and Vision of the organisation.

Case Study



How you build a digital strategy for growth?

The Chartered Governance Institute is the qualifying and membership body for governance with over 125 years' experience of educating and supporting governance professionals. It provides professional development services, guidance and thought leadership, and champions high standards.

The Institute engaged Equantiis to provide an independent review of their IT infrastructure to help them understand how it would need to change to enable their future strategic planning.

Equantiis concluded that the Institute faced the following challenges:

- Siloed business functions*
- Multiple data sets exist across systems and spreadsheets.*
- The production of management information is time consuming*
- Stakeholder management information was stored departmentally*
- Some processes still relied on paper*
- A complex infrastructure due to integrations between multiple systems managed by limited IT resource.*

During the course of the review, it quickly became apparent that if the Institute wanted to grow its membership and services, focusing on technology alone would limit that vision.

A new way of working was essential to ensure the customer was at the centre of all initiatives, and multiple new processes and capabilities were needed to deliver it.

The Solution

Equantiis undertook a second phase of work with key teams to understand the current customer experience and how it was impacted by the technical infrastructure. This involved developing a series of customer personas and the key task journeys they undertook, for example, registering for an examination programme.

Switching the focus meant that we were able to develop a strategy for change from the member and student perspective rather than a technology perspective. By switching the focus and dedicating time and energy to improve their experience, it quickly became apparent how students and members interact with the Institute. This approach highlighted the pitfalls and positive elements, and the opportunities for improvement that could be solved via new technology.

The Result

The Institute understood that in order to succeed, an 'organisation wide change programme' was required.

Using our proven approach and sector experience, Equantiis was able to build not only a digital first strategy for the Institute which focused on underpinning the corporate objectives of growth, operational efficiency and most importantly enabling the best possible customer experience, but also a solid business case which secured the necessary funding from the Institute's board.

FINALLY, WE NEED TO REDEFINE WHAT WE MEAN BY DIGITAL TRANSFORMATION

Digital Transformation can be an unhelpful, and often ambiguous term. It can get in the way of delivering change and the benefits your members are looking for. For instance, in our experience it sets the bar and expectations too high and ends up being unachievable.

The alternative way to approach a business wide digital transformation is by looking at it as a transition rather than transformation. Transition describes the change journey and an approach where you make incremental rapid and iterative changes to deliver practical improvements and gain immediate benefits.

This is a journey that takes your organisation from being fundamentally analogue by design to one that is digital design.

KEY TAKEAWAYS & CONCLUSIONS

In this paper you will have learned that to achieve success via a digital transformation, focusing on your member experience and internal processes is pivotal to deeply engage members and see those membership numbers grow. A clear vision for change backed up by robust leadership is also an essential pre-requisite to deliver any change programme.

It's crucial to remember that technology won't solve every problem, and to become aware of internal processes and current ways of working that inhibit growth, whether new technology has been implemented or not.

By remembering that technology is an enabler and owned by the business, you'll be able to choose a supplier that has expertise in business transformations and who as a partner endeavours to implement real, meaningful change across all areas of a organisation.

Remember, technology doesn't define your strategy. Your strategy defines your technology.

So, arm yourself with knowledge and insight into your members' needs via key experience mapping activities, build out the change strategy, and implement the necessary technologies to support the growth you want to see.

LET'S

TALK!

Call: 0203 376 7447

Email: hello@equantiis.com

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