



Facing the Future of Membership: A Worksheet

*“How do you stay a leader and not become stale or confuse loyalty with inertia?”
— Robbie Kellman Baxter*

When Robbie Kellman Baxter first released “The Membership Economy” in the spring of 2015, her goal was simply to prove a “massive transformation” was happening with and to the way organizations reached their customers.

“This new approach was really relevant and applicable to any number of different kinds of organizations,” she said.

That approach? Membership.

While it’s been a method for gaining and retaining customers for associations for as long as they’ve been around, the idea that you could bring in members for other types of organizations was — and remains — revolutionary, so Baxter’s first message was simply to connect the dots. The lessons in “The Membership Economy” tracked how subscriptions, community building and utilizing things like “freemium” models could be part of an organization’s business.

But now, as organizations get on board with those methods, in her new book, “The Forever Transaction: How to Build a Subscription Model So Compelling Your Members Will Never Want to Leave,” Baxter tackles how these organizations can evolve.

“In this book, we went from ‘huh?’ ‘to help!’” Baxter laughed. “People are like, ‘what are you talking about, Robbie? And by the way, I don’t want to sit next to you and hear about it,’ to ‘oh my God, can I sit by you because we have this problem and can I just run it by you because here’s what’s happening at our organization?’”

In the several years since Baxter’s first book was released, she came to see organizations as landing in one of three categories on their membership journeys: Launch, scale or lead.

“The biggest area where I see associations struggle is the last area,” she said. “... How do you stay a leader and not become stale or confuse loyalty with inertia?”

When “The Membership Economy” was first released, Baxter remembers giving a talk to about 25 association executives who bemoaned their industry’s notoriety for failing to move or change quickly.

She likened their frustrations to a nautical metaphor: “A tiny speedboat with just the driver can be much more agile than a giant cruise ship or cargo ship with a lot of valuable cargo. You can’t make a fast turn because it’s heavy and it takes a while, and even if you had enough gas to move fast, there’s a good chance the ship will tip. ... One of the really valid reasons that change is hard is there are a lot of people on the boat, and you don’t want to lose them and you don’t

want to hurt them, and it takes a while to bring them along, but at the same time, there are little tiny speedboats that are going after tomorrow's cargo."

But there are ways to combat that inertia, to train your organization to think more like a speedboat and less like a cruise ship. Here's how:

- 1. Ensure those in governance are considering tomorrow's members.** Often in associations, governing bodies are comprised of people who feel they have "waited their turn to be in charge," so by the time they are, they're not necessarily in touch with "tomorrow's members or tomorrow's members' concerns." The issue, then, is when programming and content isn't "relevant enough to drive acquisition of new members or to keep new members once they join," she said. Today's potential members have far more information and options for networking and professional development than did potential members 20 or 30 years ago, so an association's offerings have to reflect those changes to stay relevant.
- 2. Sunset irrelevant features.** In one striking example, Baxter recalled a conversation she had about five years ago concerning a staffer at one association. This staffer, Baxter said, handled faxing. "They're like, three of our members, including two in our governing body, prefer to receive certain documents via fax, so they had two reasons for not giving up fax service: One of them was they had a guy who worked in the organization and that was a part of his job and he liked to do it ... and the other thing is two people on the board insisted on getting things via fax," Baxter said. "If you take a step back on both and say, we're here for our members, is either of those decisions in the best interest of the membership, the future health of membership, whatever the mission of the membership is? We all know it's not. But, in the moment, the loud voices of your own employees or of your most powerful members can sometimes tip your hand to make choices that aren't the best choices."

Let's talk about tomorrow's members.

First, let's evaluate how your organization is engaging with tomorrow's members. Tally up your answers to each question on a scale of 1 to 5, five being the highest/most engaging.

1. How many current, active programs does your organization have to engage with high school or college students?

2. How many current, active programs does your organization have to engage with young professionals, ages 25-35?

3. Rate your organization's current membership population in proportion to the number of young professionals who are involved in your association's interest or field (ex. about 17 percent of American dentists are under the age of 35, so a dental organization should reflect about 17 percent of its membership under the age of 35) ____
4. Does your organization have a person whose role it is to exclusively consider engaging with current or potential members under 35? If yes, add 3 to your score. If no, add nothing. ____
5. Does your organization have a person in a position of power or influence (as a staff member or position on the board)? If yes, add 3 to your score. If no, add nothing. ____

What's your total score? ____



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How'd you do?

- 18+ points: Your association is clearly thinking about what it'll take to engage members for the future. But make sure that this stays a priority by ensuring younger members have a voice in your organization's decision-making.
- 11 to 17 points: You're getting there. Your association has likely had conversations about the importance of engaging younger members, but you haven't yet put your money where your mouth is. It's time to get serious about the future.
- 10 points or less: You've got a lot of work to do. Luckily, your first steps are clearly defined. The hard part will be getting buy-in from the key people in your organization. Be sure to talk about bringing in new voices as a way to energize the membership base.

Brainstorm ways to engage with new members:

Now, you might be wondering how you'll have time to tackle any of these new initiatives. That's exactly why we'll talk about sunseting features.

In some organizations, we've heard of association staffers getting together to discuss every single content piece and program they produce and having to justify why it needs to continue getting produced in the future. And yes, we mean every single thing, from the email newsletter to an annual awards program.

While that may not be necessary for every organization (but if you want to do it, go for it — but let us know how it goes!), the general idea of taking stock of the things you're doing and what you could let go of is vital to staying relevant and having the time to tackle new, experimental, innovative projects.

To find some of these extraneous projects, start by asking yourself:

Is anyone in your organization tasked with personalizing the delivery or production of any piece of content simply because the recipients want it done that way? If so, what are those projects, and what's the size of that recipient group?



Are there any programs or content pieces that your organization produces that have had waning readership or participation? If so, what are they and what are the ways you've explored updating the delivery method?

Do you have any programs or content pieces for which you cannot point to a measurable goal? What are they?

If you answered yes to any of the above questions, then it's time to start whittling down the projects you're spending time on at your association. All projects that are considered important enough to take up your time should have:

- A demonstrated want or need from your membership or stakeholders, especially for new content.
- A measurable goal to illustrate completion or fulfillment.

Remember: In order to innovate, we must experiment and try new things. But just like the old suggestion to maintain an orderly closet by taking one thing out for every new piece of clothing you put in, think of your time in the same way. If you want to make some additions, you'll have to carefully consider what you remove, as well.



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