



DRIVING PARTICIPATION

WITH BETH BRODOVSKY

SESSION 155

FUELING EXCEPTIONAL NEW MEMBER EXPERIENCES

WITH AMANDA KAISER

BETH: Hello, I'm Beth Brodovsky. Welcome to Driving Participation. Today I am thrilled to bring back a guest that I have loved, have learned so much from. I have Amanda Kaiser from Kaiser Insights back with us today. She was my guest way back in our first year, maybe. She's back on [episode 37](#) and she was talking about the type of research she does and why it's so important to get insights from your community for growing your brand and understanding your brand and how she goes about doing it. So Amanda has been researching and speaking and doing amazing things since we spoke originally and she now has a new ebook that captures a lot of the things that she's learned across hundreds and hundreds of interviews with members at associations. The thing I really like about Amanda is where her research focuses on associations, I have seen in her process and in the kind of insights she creates, it is so true for any type of organization and as many of you know, I use the word "member" for lots of things. It might mean your students, it might mean your donors. When you're trying to bring a community together and gather them and keep them involved in participating they're basically like members, and so I'm so thrilled to have you back Amanda. Thanks for joining me today.

AMANDA: Thank you, Beth. I'm delighted to be here.

BETH: So this is so exciting. So I don't have to ask you, normally I would say I ask everybody what does the word participation mean to you and how does it help organizations thrive. So I'm gonna ask that to you in a little different way. In your years since we've spoken, in the years that you've been doing all of your amazing and interesting research, what have you learned about participation from the interviews you've done?





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AMANDA: That's a really great question. The moment you said the word "participation," I equated it to engagement. A lot of the research that I do tries to discover, uncover why members engage and why they don't engage and I think participation is very synonymous.

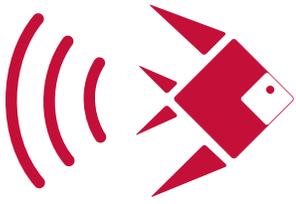
BETH: The way we usually call it, we usually say here that to us, participation means taking engagement and bringing it into action. You probably have seen this, too. There's engaged people that are mentally engaged and following you and like you, but don't ever actually do anything.

AMANDA: Yeah, yeah. Absolutely. In the association world, we do have that sort of continuum of engagement. We talk a lot about at one end there's sort of the checkbook members. Every year they write a check even though we don't actually see them physically engage. We're not necessarily seeing them come to events. They might spend a little bit of time on the website, but they're not volunteers and then that continuum sort of continues to move up. Then when you're talking about members that engage and participate, those are the folks that are coming to chapter events and conferences and those are the folks who are becoming mentors and they're spending time on the online community. Then all the way up at the very highest level of participation and engagement are those folks who volunteer their time and maybe even eventually become leaders of the organization.

BETH: Right. So why don't we start off by talking a little bit about just what your research is in case anybody hasn't heard [episode 37](#), which I highly recommend you go back and listen to, you have a really unique take on who you choose to interview and why. I think that it's important as we begin this conversation to ground ourselves in that because of what comes out of your process. So can you talk a little bit about what you do and why you do it that way?

AMANDA: Yeah, absolutely. So I am a qualitative member researcher. There are a lot of quantitative means to go look at data like surveys and data out of your





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database, and that is not what I do because the survey kind of will really tell you what's going on. It will tell you that maybe not enough people are coming to your conference or it will tell you that membership is falling, but it won't necessarily tell you why, and so what I do is qualitative, and I do in-depth member interviews because that is one of the most efficient, complete, effective ways to get the "why" answer for associations. What I'm looking for with qualitative is I'm looking for members' stories. I'm looking for the context. I'm looking to understand their worries, their challenges, their problems, their experiences with the association and when I understand that context, then I understand why. I understand why they're behaving that way, why they are engaging or why they aren't engaging, why they're joining, why they're not joining, why they continue to come back to the conference or why they're not. So a lot of associations come to me and they already know their what. They already know that no members are engaging as much as other members are engaging or they know that engagement is falling off or they know that their attention rates are going down. So they know their what. What they don't understand is the why, and once I help them figure out the why, then we can actually do something about it.

BETH: That's what I love about your research because in the branding work that we do, in the effort of driving participation, it's amazing. We see the exact same thing. We see people who understand what they do and they love to talk about how they do it, but they don't know their why. They don't understand it and mostly it's because they survey their members and so that gives them great answers, not that that's not valuable, but it's a big missing hole of understanding the purpose behind it.

AMANDA: Yes, yes.

BETH: When organizations come to you, what problem are they trying to solve? Like what do they ask you to do? What are they looking for you to find out about their members?





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AMANDA: Sure, so association professionals, when they come to me, they usually frame their goal, their research goal in a couple of different ways. They'll say, "We're about to embark on a five-year strategic plan, and we know that this strategic plan needs to be fundamentally different than any other strategic plan we've ever done before. We want to get a lot closer to our members." So those are the kind of folks that hire me. Or sometimes people will come to me and say, "Our membership marketing has been very benefit-driven, but we really need to understand their stories so that we can write that marketing message that really resonates with them. It gets them on a visceral level. It makes them feel that we're one of them." So they'll come to me for those reasons. Then the other reasons are we were just talking about association professionals will come to me and say "our attendance numbers are trailing off. People are not renewing, people are not engaging" or they'll say it in a different way. We'd really like to boost engagement or we'd like to boost retention and attraction and so they'll come to me for those reasons as well.

BETH: Right. So you've been doing this for a number of years and you have quite a few interviews under your belt now. Right?

AMANDA: That's right. Three hundred and thirty something. I think it's 332 plus I probably did another 9 so 341 I think. It's always an evolving number.

BETH: Oh I'm sure, I'm sure. I'm assuming all kinds and all sizes of organizations. Right?

AMANDA: That's right. Trade associations, professional associations. I've interviewed university presidents, CEOs, entrepreneurs, CFOs. All kinds of, media planners. All kind of interesting folks.

BETH: It's funny. When you started this, did you realize that all of these answers were going to start to reveal some other truths to you?

AMANDA: Yeah, no, no. I should say no. When I started this, I was doing custom





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research for my clients and so my clients would come to me and we would discuss first what their research goals were, and I've even had potential clients where I've said, "You know what? The question you're asking is something you could get with a quantitative survey, and so you should go pursue that in a far more economical way," but for the folks that come to me with these really big questions, thorny questions, strategic questions, that is perfect for qualitative, and so I sit down with them and say, "Yes, I can answer these questions." So at first it was really interesting work for me on a project-by-project basis and then gosh, I probably got a couple hundred under my belt and I started saying to myself "now this is really interesting". It doesn't matter what kind of company you work for, whether it's a small company or a large company. It doesn't matter the nature of the association or what type of member you are or what profession you're in or what industry you're in. There are, I started seeing patterns across all of the interviews that I did and so I started looking very, very carefully at what members said it was like to be a member. So again, those patterns hold true. It seems association to association, industry to industry, profession to profession, and there definitely are some variations, but what I keep pulling forward are the big insights, the ones that seem to be true of most everybody and that's what I've been talking about in my blog and also now this ebook.

BETH: Let's talk about that. One of the things I definitely want to point everyone to, and we'll give you the links to them at the end, is that Amanda has an amazing blog and she's just released an ebook that pulls together a lot of these findings. So from a top level, what are some of the big insightful trends that are more like "Oh my gosh, isn't this interesting," that it doesn't matter whether you are a manufacturing association or a cancer society, that seem to be true?

AMANDA: Yeah, the whole focus of the ebook in particular, and it's my first attempt to say, "Hey, here's one of these really amazing patterns," and what I wanted to do with the ebook is sort of maybe debunk some myths, some commonly held myths that we have in the association industry. So this ebook





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is really all about why we have the new member process upside down in associations.

BETH: Talk about that a little bit.

AMANDA: OK, thanks. Yeah, so you know, I do think that new member process is upside-down. I think that associations are largely speaking, are much more sophisticated in their whole retention and renewal processes than they are necessarily at an onboarding process. In fact, a lot of associations don't have a new member onboarding process. Now the reason why I think this is upside-down, why our effort is sort of needs to be more frontloaded is because in interviews when I talk to members, they actually talk about how their renewal decision is very much tied to those first couple of days of them being a member.

BETH: Even years later?

AMANDA: Yes, exactly. So this is kind of a really interesting thing. Members who stay members for a very long time, if I talk to them and ask them questions about when did you experience value in your membership, they actually can pinpoint that moment generally speaking. If they had a very, very strong first impression and what I've also noticed is very strong first impressions correlate to much stronger engagement for the life of the membership. So essentially what they say, even 10 years later, is "I remember that first webinar. I remember that conference that I went to. I remember a staff person called me, and it was in that moment that I realized that this was the association that I should be in and this membership was gonna be valuable to me." That happens really early in their membership. It might be three days, three weeks or three months and so that's why I think we have it backwards. They're busy deciding whether they're gonna engage and renew very early in their membership, but we're trying to retain and get them to renew at the very end of that first year of membership. I think we might have our funnel upside down.

BETH: That's so interesting. So you're saying that the experiences that they have





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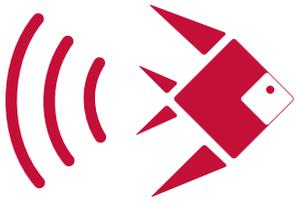
like after the initial process of getting indoctrinated into the organization, doesn't matter if it's a year later or three years later, none of them count as much as this memory of something that happened early on.

AMANDA: Yeah. I think the way they explain it is slightly differently. I think with the way they explain it, well the way they explain it to me is, this is the process that I've been able to pull out of the stories that they've given me. Essentially they join and then that member will follow one of two paths. Either they immediately start to ignore the association or they test engagement. When I say test engagement, they all try a benefit or maybe they don't try a benefit, but maybe they just spend some time on the website or maybe they don't do that, but they actually decide they've got a question and they reach out to staff. Now depending on how that test goes, when they sort of dip their foot into the water, they'll either make the decision right there that this is the association for them or they'll go and they'll test again. They'll try another time to dip their foot into the water. Now if those don't go good, they'll start ignoring the association. If they go well, then they continue to follow the rabbit hole of engagement. They'll test again and again and again and meanwhile they're becoming more and more and more engaged.

BETH: Oh, that's so interesting. Is there anything that you've seen associations be able to do to support this, to help this actually happen? You know, who is doing a great job with new member experiences?

AMANDA: Yeah, absolutely. So I've come up with a number of strategies that a lot of associations are not necessarily employing, but are really, really strong ways to support new member engagement. Again, if you engage them early you engage them for life. So I really love the idea that in the first three days, the first three weeks, the first three months, we want to be focusing a lot of effort on engaging them. Now I want to give you a little bit of a background here because it will give you some sense for what the solutions are. When new members join,





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they're essentially asking themselves two questions, and they may not be asking it verbally. What they're really doing is kind of asking subconsciously, but one question is they're wondering can you solve the problem that I'm having right now. That's one question, and that leads to value. You know, if we say, "Yes, we know what your problem is and we can solve it right now," that means that we're able to give them value. So we understand what their problem is, we're able to communicate to them that we understand what their problem is and we have the solution. It also means that the solution we have is the correct solution that they actually need. The second question they're asking is, "Am I in the club? Is this association an association for people like me?" and so that's the second question they're having, and this all goes to first impressions and member experience. So when they are asking themselves this question, they're assessing whether they belong there or not. "Are these people likely to be friends of mine? Are they like me? Are they having similar problems that I am having? Is the association as professional as I am? Does this feel like a comfortable or inspirational place for me to be at?" So those are the first two questions that they're asking themselves unconsciously and the associations that win are the associations that can tell the story and deliver value and deliver those experiences, and so the member says, "Absolutely yes. I'm in the club and yes, I'm gonna get value." The other question that they're asking themselves is, "I have committed to this association either with my time, money or attention. Did I make a mistake?" So if they can answer affirmatively to those other two questions, "Is this the association for people like me?" and "Yes, I'm gonna get value here because they're solving my problem," then they'll say, "No, I did not make a mistake in joining this association." If one of those two things is missing, then they'll start to say, "Oh no. I think I made a mistake in joining," and nobody, nobody likes to feel like they made a mistake.

BETH: Now interestingly enough you said the word "value" a number of times. In the work that I do, and I don't know if you see this, too, I find that people talk mostly in features and benefits. I find when I look at most organization's materials that their features and their benefits are kind of the same thing, that the benefits are sort of association-designed benefits or a way that somebody can use one





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of their features. They don't kind of get deep enough into value. So can you talk a little bit about sort of the difference between features and benefits and value, and what value really means to a member and how can an organization get to that point where they're speaking to the outcomes that their members want to see?

AMANDA: Yeah. Value is a really interesting thing. I'm glad you brought this up because I think that, I know that talking to members, they have a really hard time linking value. So this is sort of a perpetual problem for association professionals. They'll say, "I don't understand. The member joined and now they're ignoring us. I don't understand why they would join and then not do anything." What's going on there is the member is not linking the value. They've got problems, the association has solutions, but there's no link in there. I think what happens is associations tend to be very passive. They have developed all of these benefits, they've developed processes and systems and it's all up on the website for any member to use, but there's no link there. What I think of it is more of a story. There's no storyline where we, the association professionals, are saying to the members, "We understand your problem. This is why you're frustrated. This is why the problem is a problem." We bring color to their problems that they are drawn in and they say, "Yes, yes. This is exactly my problem. These are my people. They know me," and then, that's the first half of the link. The second half of the link is then telling the story for why the association's solution is the solution that they need. That is not, I guess there's features and benefits in there, but there's also outcomes. There's also stories around what this means for you. If you are to use this solution, it's easy or it's hard, but it's worth it. There's a lot in there beyond features and benefits. I feel like it becomes a story. It becomes much more of a conversation and with that link, that link between the members problems and the association's solution is missing a lot of the time.

BETH: And that's exactly like you said all my favorite trigger words. You said why, why, why and that's exactly how we see it too, that it's so much easier when you talk about features and even benefits, they're talked about so much from





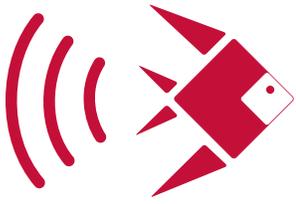
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a tactical way and it's like here, we're going to execute these things and you have access to this, but they don't look at what we call the terminal outcome. You know, the value-based outcome. You have access to training materials. That's still a feature. The benefit of that is you got a promotion. That's actually a benefit. That's the outcome of the problem that they're trying to solve, and so I find it so interesting. This is one of the reasons I really wanted to bring you on is to help people see that this is such a critical difference. I was just talking to somebody yesterday on the phone about the problems and in this case it wasn't an organization. It was a school, a college at a university and they're trying to do more fundraising, and she was saying we're gonna fix all this because we don't do enough. We don't do enough. We have more materials we need to get out. More, more, more. We need to do more touches, more things. In the middle of all of that, there was some discussion about not really understanding what was special, not fully understanding what people wanted. In talking about that, you realize that you can do a lot more. You can spend a lot of money doing executions. You can create email campaigns for your members. You can send out the most wonderful renewal brochures, but if you don't hit that place where they connect to the value, it's not gonna create that synergy. It's going to be a lot of effort that won't add up to what you want it to.

AMANDA: Yeah, yeah, and with new members it's especially critical. So new members are coming in and they are a blank slate and one of the things that I think we assume is that new members know why they joined, but generally new members were recommended to the association by somebody else, somebody that they trusted. So somebody that they trust and respect said, "Hey, you ought to be a member," and they said OK. They don't know what they're going to receive. They don't know the value of the association,* and so they join and then this window of opportunity opens. So during that window of opportunity they want to learn more. They're all in. They're curious. They want to be to have proved to them this association wasn't a mistake to join. They want to know how it's gonna benefit them. They're open to meeting other people. So we've got this window of opportunity, but the window of opportunity only stays open for a very short period of time.





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BETH: About how long?

AMANDA: I think for most associations, it's three days, three months or three weeks. It's a short period of time for some members and some associations, and that's the window of time that we've got to make that link. We've got to create this really wonderful, great first impression or great first experience, and we've got to explain value. It's not that we need to explain value of the whole association. Here's your 15 benefits. That's not at all the kind of value that we need to explain. We need to just show value with one thing. We need to say OK, new members typically have this problem. New member, here's your problem, and here's the solution. Those are the two things that I think we have to do during that window of opportunity.

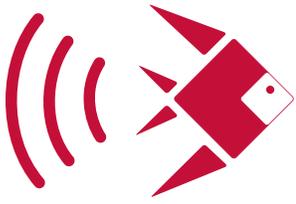
BETH: So it really does come down to understanding your people and what their problems are and what they're looking for.

AMANDA: Yeah.

BETH: Of course I have to ask the obvious question. So how do you know for your members whether you better get something out there in three days, three weeks or three months?

AMANDA: Yeah, I use that 3-3-3 as a framework to explain that window of opportunity, that it's happening very quickly. So I think that there's a number of things that we can do within that three day, three week or three month framework or window of opportunity, and what I'm finding as I'm talking to more association professionals that have really dynamic and amazing onboarding programs, that they're very much having in the front end of things rather than say, some associations have a numbering program where there's one touch every month or every three months, but it seems like the onboarding programs that are heavy towards the first 3-6 months in communications are actually doing a lot better. So let me give you some ideas about what some of these successful associations are doing.





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BETH: Oh yes. I'm sure everyone that's listening is going to tell me what to do. So as you go into that, I have a question in that. So we're talking about this frequency. Does what you say in these touches matter versus the frequency of it? I'm looking at like what's the content versus the frequency. What's the priority?

AMANDA: Yeah. So the frequency is I think going to depend on who your new member is and what they're looking for. So I think frequency is going to vary depending on association, what gives them value without giving them say email fatigue or touch fatigue.

BETH: If the stuff is perfect, if you got diagnosed with cancer today, is there any amount of information you wouldn't read. So if your stuff is exactly right and hits the value spot, frequency becomes much less of a problem.

AMANDA: Yeah and that leads to the power of the content. So I think that the content needs to be spot on and the associations that are doing the really great story, the really great messaging, they understand their members really, really well and so that's a bit of a different mindset. That is taking the mindset of I am going to write the messages and I'm gonna write the content that our members really need to hear versus I'm going to sit down and write the content that the association wants to tell. So it's like swinging yourself around and putting yourself in the shoes of a brand new member and saying, "OK, this is the way our new members generally feel. This is what our new members are generally struggling with." Our new members might be new to the profession, they might be new to the industry, and therefore these are the problems they're typically encountering and so from that point of view I can now start to write messages or I'll have conversations with them or offer a webinar to them or write a web page for them that meets their needs.

BETH: Right, and the thing I think is so, like you think it would be obvious, but it's not because everybody thinks that they know their members. Everybody that we would talk to would say just talk to the executive director or the CEO or whatever.





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They know, they know. So if you're wrong and you're out there blasting these messages to them about value and it's not hitting it, like what kind of damage does that do?

AMANDA: Yeah, in research our members ignore us pretty quickly. So this is what new members will say to me. They'll say I read about the first 3-5 emails from the association, and then I start to ignore them. Think about your own behavior. If you are like me, you probably get anywhere from 100-200 maybe more emails a day, and of all of those emails, there's a finite amount that we can actually read and read in detail in its entirety. Maybe it's 20 or 30 or 40. So that means that two-thirds or more of our emails we're filing pretty quickly into trash or to read later. So what our members are doing is they're reading the first couple of emails and saying, "Oh yeah. This is exactly what I need." This is of value to me or they're reading the emails and they're saying, "Ha, this might be interesting." It might be something that I will get to later or I don't really understand what's going on in this email and why it even matters to me and so I'm going to trash it. The problem is if they trash your emails right at the onset, they start forming this mental model in their mind that the association's emails are OK to trash. So that's what happens. They see your name show up. They see the subject line and it automatically goes in the trash. They have the best intentions. Someday when I have more time, I'm gonna read these emails, but someday doesn't happen because we never have more time.

BETH: Not to mention that it teaches technology what you want. So the more you trash emails or don't read them, people don't realize that it actually sends back to the ISP that's actually sending them that says you're not reading them. If you're not reading them, even if you've waitlisted them, even if you say you want these to come into your inbox, the more you throw it into trash, the more you're telling your system that you don't want to see this and it will start putting them there before it even hits your in box.

AMANDA: Exactly. Exactly, yeah so there's a lot of danger.





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BETH: Technology follows life.

AMANDA: Yeah, and there's super huge danger in treating your new members like every other member. If you just send them the same old message that everyone else gets, they're likely to ignore it because they don't understand how it applies to them and when they ignore early on, it really starts that practice of ignoring, which isn't great.

BETH: Right, exactly. So I have to ask you the big question as we are close to wrapping up here. What can people be doing differently? What are some strategies? We've talked about the tactics. We talked about we can email. We can do things three months. How can people change their thinking, change their mindset around engagement in a way that's going to help them engage better?

AMANDA: Hmm, one of the practices that I like to do when I'm talking to clients and then sometimes working on facilitating with their boards, taking the research results to the board and actually start thinking about how this translates into strategy is something that I call imaginative empathy and you would think board members are members, but generally board members are quite removed from the average member. They're uber-members. They really, really engage.

BETH: We call them zealots.

AMANDA: Yeah, yeah. So they're different from the average member and so this works for them too. Imaginative empathy, it is taking people on a story of what it is like to be a new member. Can you imagine that you are brand new to a company. Your boss signs you up to go to a conference. You're at the conference for the very first time. You don't know anybody. You're new to the profession, you are new to the industry. How does the whole experience feel? The first day you're walking down that concourse and you're looking for registration, but you see no signs and for a second you have this panic attack that maybe you're completely in the wrong place. How does that feel? So imaginative empathy is a practice of





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exploring what it's like to be in somebody else's shoes and really striving to put their shoes on, their hat on, looking at the association or looking at the industry, looking at the profession through their eyes. That's really powerful.

BETH: I love that. That's so great. I have to ask everyone that question now. That's one of the things that we're starting to see in our work. You can have a handle on the tactics, and if you have a strategy, but you never actually implement it, it doesn't get you anywhere. If you have a bunch of implementation, but you don't have a strategy, it will definitely get you further than just having a strategy, but when you can put the right mindset, the right thinking behind the right actions, that's where things really start to take off. One of the things I say is it's the difference between the story with a lowercase "s" and a Story with a capital "S." You know, it's like every organization needs stories to communicate and connect people with, but if you haven't figured out what your upper case story is, that hub at the center of your communications, that why, you're just gonna end up churning and churning and churning and kind of stuck at this place that you're talking about where you're at the end of the model and you're trying to beg people to stay rather than invite them to participate. Amanda, this was fabulous. I always love talking to you. I always learn some things. Guys who are listening, Amanda's content is wonderful and I highly recommend your blog and this new ebook which really gathers together the highlights from all these insights that Amanda has learned from these hundreds and hundreds of interviews that she's done. Amanda, can you direct people to the blog and to where they can download, and this ebook is free. So just grab a copy and read through it. It's definitely gonna be worth your time.

AMANDA: Absolutely. So it's smooththepath.net is my website, and if you go under Resources, there is the New Strategies for Member Onboarding, Engagement and Retention ebook. So you can just go in there, grab that ebook. I don't capture names or emails or things like that so you can just run in there and grab it completely for free, no strings attached, and I'd love to have you read it. It gives three really strong strategies and tactics for how to engage your new





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members far more quickly, how to show them value very quickly, how to curate those really amazing first experiences. All of the ideas are tried and tested by some really great associations who are very, very successful in this space. So you're gonna get why this is important and the strategies and tactics for how to actually implement this.

BETH: Great. The last thing I want to say is Amanda's focus is on associations, but trust me when I tell you, this methodology is not just for associations. If you have donors, if you have members who buy tickets from you and you're a museum or a theater. If you are a charitable organization and your members are actually your donors, figuring out what you need to share with them and at what pace and how to take somebody that goes from their first engagement with you to becoming your participation sweet spot. You'll learn amazing things that will be helpful for you. Don't get shaken off by the fact that it's currently directed for the associations. Everybody should grab a copy of it. Amanda, thank you so much for coming back. Every time we get together in person and hang out or talk online I learn so much from you. I really appreciate you sharing your new insights with both me and our whole nonprofit community here. Thank you so much for joining me.

AMANDA: Thank you, Beth. I really appreciate it.

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