

Member Retention 101:

Your Ultimate Guide
to Keeping Members
Coming Back for More



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Introduction

Your members are the lifeblood of your organization — you rely on membership dues for revenue and, more importantly, they bring your association's mission to life.

But growing and retaining member numbers is also an area where many struggle. As [one Wild Apricot](#) report shows, more than two-thirds (68%) of organizations face challenges when bolstering their membership numbers.

Growing membership isn't magic. It's a set of tools and skills you can put into place now. With this comprehensive guide to member retention, you'll learn:

- ✓ How to create a member roadmap to guide member journeys
- ✓ Why members leave
- ✓ How to create a kick-butt benefits package
- ✓ What type of engagement members expect from your association
- ✓ Tried-and-true strategies to increase renewals renewal processes



What is member retention?

Member retention is the rate at which your organization keeps its members. Essentially, this is the number (or percentage) of members that keep coming back from one year to the next.

For example, say you have 500 members, and 100 leave. That's only an 80% retention rate. That means you need to win over 100 members just to stay at the same level, let alone grow.

What is member renewal?

Unlike acquisition, which focuses on bringing in new and prospective members, member renewal is all about keeping the members you worked hard to recruit.

The number of member renewals you get directly impact your membership retention. The higher the percentage of your member base that renews, the better your retention rate!



“We saw a big drop off on in-person events since the pandemic, so I’m concerned that will impact our renewals for 2023. Our strategy is to keep showing the value of our membership and what they would be losing if they don’t renew. Now more than ever, our members are having to justify every dollar spent. We want to make sure their dollar is valued and provides them with great benefits.”

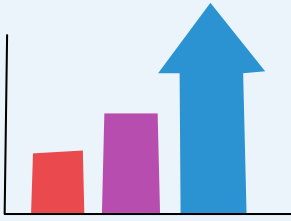
Tawni Phelan, CAE, CMP, Executive Director,
Oklahoma Society of Association Executives



Defeat the drop in member renewals

Last year, more associations saw a dip in member renewals than the year before. That’s why honing your retention strategy is essential.

45% saw a decrease in 2021 **24%** saw a decrease in 2020



Why is member retention important?

Even the most effective recruitment efforts can't keep your association afloat if you can't retain members.

Why is it so essential to facilitate renewals among your membership base? In short: Loyal, returning members are better for your bottom line. They provide a steady stream of revenue for your organization. Additionally, your recruiting efforts cost you far more in effort and actual cash than your retention campaigns.

Keeping a steady number of your current members also makes it easier to create a more diverse member base. Why does that matter? Well, diverse members can share their perspectives and knowledge with newbies. This can make onboarding smoother, add value to new members' experience and create a community that's engaged and matters to them.

Plus: the best marketing is word of mouth. Happy members know potential members, and it won't cost you a thing for them to talk you up just because they're delighted.

Did you know?

Recruitment costs up to **5 times more** than retention


Recurring contributors give up to **4 times more** than one-time donors

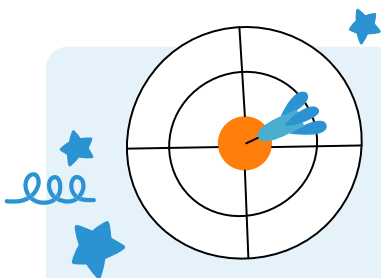
Increasing member retention by even **5%** can boost profits anywhere from **25% to 95%**

What is **good** membership retention?

Member retention strategies look different for every organization—it depends on your growth plan, mission, and member base. But there are some common characteristics of solid member retention efforts.

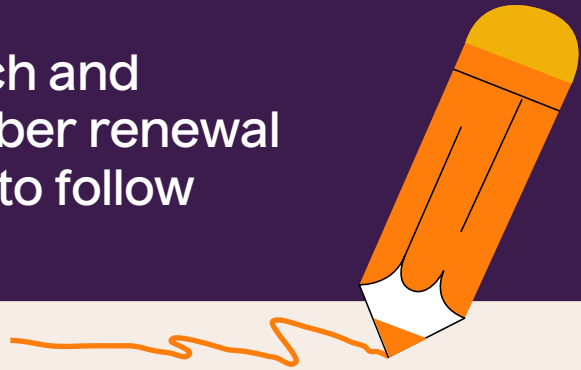
Qualities of good membership retention:

- ✓ **Increase engagement:** Keep members plugged into your organization by encouraging them to participate in activities, board duties, committees, and more. [One report](#)  showed 50% of association executives said lack of engagement was why members didn't renew.
- ✓ **Follow the member journey:** Understand when members are learning about, joining, engaging, renewing and leaving your organization. Make sure your association meets their needs at every stage.
- ✓ **Makes members feel valued:** Delight new members with a [welcome program](#), [member appreciation](#), [referral program](#), and member-only perks and events.
- ✓ **Reduces fundraising stress:** Retention efforts are effective at providing a more reliable revenue source for your organization.



Great, so we've nailed down the key cornerstones of a solid retention effort — but what should you aim for in terms of a retention rate? →

Based on our own research and experience, an 80% member renewal rate is a healthy standard to follow



To help you reach this benchmark (or just improve your retention rate), we'll explore how to:

- ✓ Review your current renewal process data (the numbers don't lie!)
- ✓ Play detective with your member journey to find any gaps—and then fill them!
- ✓ Reach out to former members and ask why they left
- ✓ Build a handy calendar to guide help you engage and retain members all year 'round



Chapter 1: Your first steps

Have you seen a dip in renewals? You're not alone. But don't fret! There are concrete steps you can take to boost it back sky high.

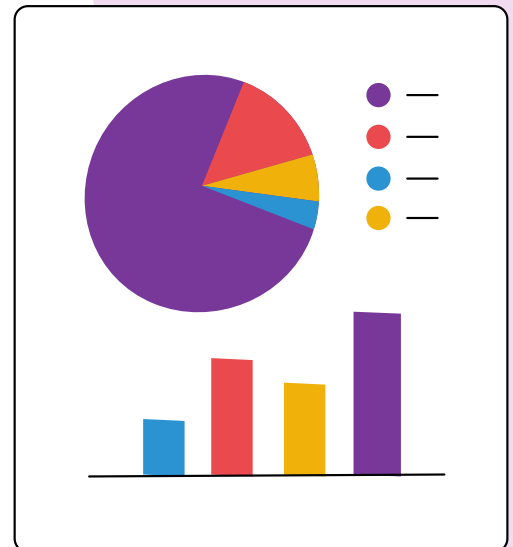
BUT WAIT! Before you start rejigging your renewal program, take a step back. Get a sense of where you are now, and where you're going. Then every change will be purposeful—and every result will be measurable.

Assess your renewal processes and data

Digging into your data is the first step in figuring out your current state and identifying any trends, gaps, peaks or valleys in your retention rates.

Look at your historical data going back the last several years. Look at metrics like:

- **Baseline member renewal rate:** Your average retention rate for the last two years (at least).
- **Timeline for renewals:** Take a look at when members renew the most often. Do members typically wait until the renewal deadline, or are there peaks and valleys? And what efforts might be triggering those spikes?
- **Most effective communication methods:** Do the majority of members sign on the dotted line the day after you send a reminder email? Or does a spate of reminder phone calls create an uptick in renewals?



Take a look at your member database to make sure you're consistently monitoring these details:

- Reason a member joined
- A member's specific interests
- Committees and groups they are interested in or participating in
- The type and frequency of communication they'd like to receive
- Business goals, or what they're looking to achieve by joining your organization
- Date their business started
- What types of events they attend regularly (yours or from other organizations)
- What, if any, events or programs they have sponsored
- What other groups and organizations they are involved in outside of yours
- Their social media profiles



Get feedback: Conduct member surveys

The numbers don't lie, but it's also valuable to understand exactly what your members want. So, make sure you ask them! The logical next step is to fill in any gaps with feedback straight from your members.

You can lean on a variety of channels to solicit feedback from your members, including:

- ✓ A SurveyMonkey survey sent via email
- ✓ A poll distributed through your social channels
- ✓ Questions posted directly on your association website for discussion
- ✓ Questions through your email newsletter

Sample questions:

1. In what industry do you work?
2. What do you need to grow professionally and make an impact?
3. What benefits are you using the most? Why?
4. What benefits should we add?
5. On a scale of 1-10, how interested are you in our current education offerings?
6. What topics do you want to see covered?
7. What modalities do you prefer for education and training (e.g., in-person, virtual)?
8. Which local philanthropic organizations would you like to see us partner with?
9. What makes you happy to be a member?
10. What would you change?

If you want more inspiration for your next member survey, [see our list of 30+ questions to ask](#) .

Your members will love that you're asking for their input—especially if you make it clear that you'll take their feedback to heart and use it to make positive changes for all your members.

Looking ahead: Take the long view

When you think renewal campaign, do you think ad-hoc effort to get members back through the door, or do you think in 3, 5 and seven years?

To really boost member retention, you need to take a 10,000-foot view of your renewal efforts. Here's how.

Set membership goals for your campaigns

Start by setting SMART goals for your campaign—after all, research shows jotting down goals in this framework [makes you 33% more likely to hit those goals.](#)

When it comes to setting SMART goals to retain more members, let's say your current retention rate is 75%. A SMART goal could be to increase your retention rate to 80% over a year with three specific strategies.



SMART stands for:

- Specific
- Measurable
- Achievable
- Relevant
- Time bound

SMART looks like:

- 80% renewal rate
- 5% increase
- Realistic goal based on current rate
- Member retention for a membership organization
- One year



Three campaign strategy examples

CAMPAIGN STRATEGY 1

Mapping your member journey and addressing gaps

1. Forecasted rate increase: 2%
2. Tactics:
 - i. Map the whole member journey (don't worry, we'll outline that below!)
 - ii. Take a look at all the way members engage with your association. Pick one stage to focus on and really drum up member participation! Make renewing as easy as possible (and think about how you remind members to renew.)

CAMPAIGN STRATEGY 2

Sprucing up your member benefits

1. Forecasted rate increase: 1%
2. Tactics:
 - i. Ask what benefits members love (and don't love) in a survey
 - ii. Eliminate benefits that don't resonate with members
 - iii. Add new member-only benefits based on feedback
 - iv. Promote your shiny new list of revamped benefits to all your members on your site, social, email, etc.

CAMPAIGN STRATEGY 3

Show how much you value your current members

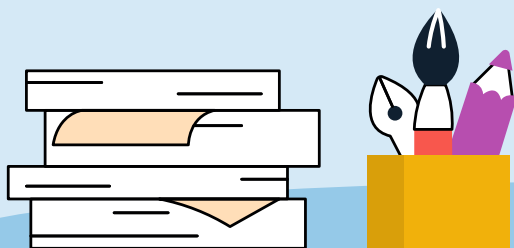
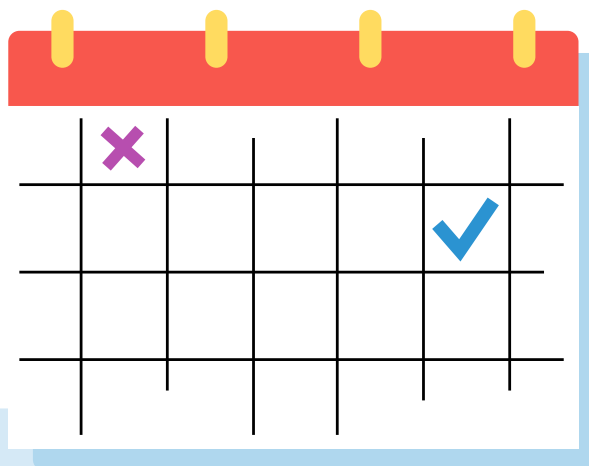
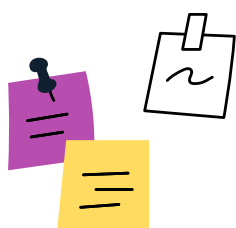
1. Forecasted rate increase: 1%
2. Tactics:
 - i. Plan a Member Appreciation Week
 - ii. Build buzz with a raffle or giveaway (who doesn't love free swag?)
 - iii. Host an awards ceremony where you reward members for their involvement, achievements, or other noteworthy accomplishments!

Create a workback schedule for each campaign

Once you've set some clear goals for specific campaigns and your efforts overall, it's time to put some dates down for your upcoming efforts.

Look at the calendar for the year ahead and start penciling in significant dates you already know—your membership renewal deadlines, for example. Depending on whether those occur quarterly or annually, you can use those as final deadlines to create a workback schedule for your membership renewal campaigns.

So, if your renewal deadline is June 30th, try sending your first reminder emails six weeks before in mid-May versus waiting until mid-June to shoot off those initial reminders.



Chapter 2: Map out your member journey



Think about all the ways your members interact with your organization, from the moment they get in touch, become a member, participate in activities, all the way to choosing whether to stick around.

Mapping out how members get from Point A to Point B here gives you a big-picture view of their experience with you. Then you can figure out how to better serve them (and keep them coming back for more!)

Do you understand the member journey?

It's difficult to wrap your head around every touchpoint your members have with you. That's where [a member journey map](#) can help.

A member journey map helps you do exactly what the namesake suggests — “map” out your member’s entire journey, from finding out about you (maybe from a friend or colleague) all the way up to the decision to stay or go.

When you map out your members’ relationship with your organization, you can see where you’re losing people—and then you can fix it.

Defining the member journey

While every organization’s member journey will look a little different, a member’s [entire experience](#) will include some key stages:

- Initial awareness
- Research and decision
- New member onboarding
- Member engagement
- Member renewal

Member Journey Map



Networking Nora

Nora wants to join a membership organization where she can grow her leadership skills, meet like-minded people in her industry and learn about new partnership opportunities.

EXPECTATIONS

- Ability to compare the reputation and values of different member orgs
- Clear and valuable membership benefits
- Signs of an active community, both online and in-person

Discover

1 Week



Attends an event where she's introduced to an association aligned with her interests

Sees a Facebook ad promoting another upcoming event by this association

Research

1 Month



Visits website and reads about membership benefits

Researches similar associations and compares events, values, benefits

Contacts organization's leadership to learn more

Onboarding

1 Month



Signs up to become a member

Receives welcome email and package including events calendar

Introduced to other members

Engagement

10 Months



Attends events, joins committees, networks with members

Learns more about the organization's initiatives through member communications

Renewal

1 Year



Receives a reminder

Receives a survey asking about her experience with the association and what could be improved

Member Journey Map Template

We've used [this graphic](#) as a roadmap to lay out what your members need at each stage of their journey. Use this as your starting point:

1. Initial awareness

What prospective members want at this stage:

What your organization can do:

2. Research and decision

What prospective members want at this stage:

What your organization can do:

3. New member onboarding

What prospective members want at this stage:

What your organization can do:

4. Member engagement

What prospective members want at this stage:

What your organization can do:

5. Member renewal

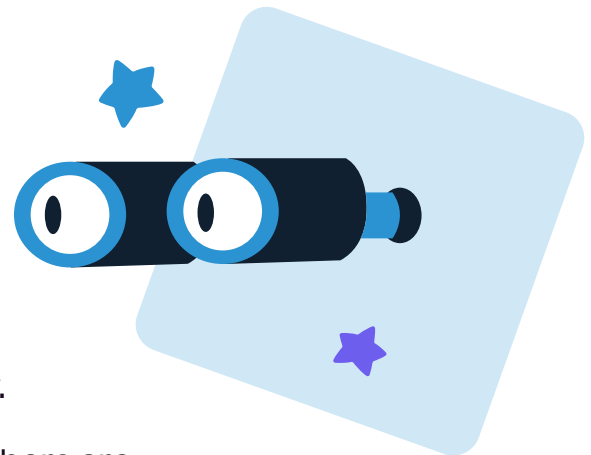
What prospective members want at this stage:

What your organization can do:

How do members find you?

Where the heck are people finding you, anyway? The answer is (as always) in the data. First things first, take a look at your channels:

- **Website traffic**
- **Partnerships**
- **Social media engagement**
- **Email**
- **Virtual events**
- **Direct mail**
- **Live events**



And any other ways you reach out to your community.

When you have an understanding of where your members are coming from, you can meet them where they are!

You can also share details about all your amazing benefits in all the places your members hang out. Start by:

- ✓ **Clarifying your mission:** Shout your mission from the (proverbial) rooftops! Make sure you detail it on your site, social, emails and anywhere else your members communicate.
- ✓ **Promoting your organization:** Your events won't be successful if no one knows about them—so let members know about upcoming activities and events in all the places you typically communicate.
- ✓ **Assessing your channels:** A handful of members may like getting snail mail from you, while the majority prefer email. Figure out which ways your members like to hear from you so you can share the latest news and events in all the places they prefer.

Is joining...easy?

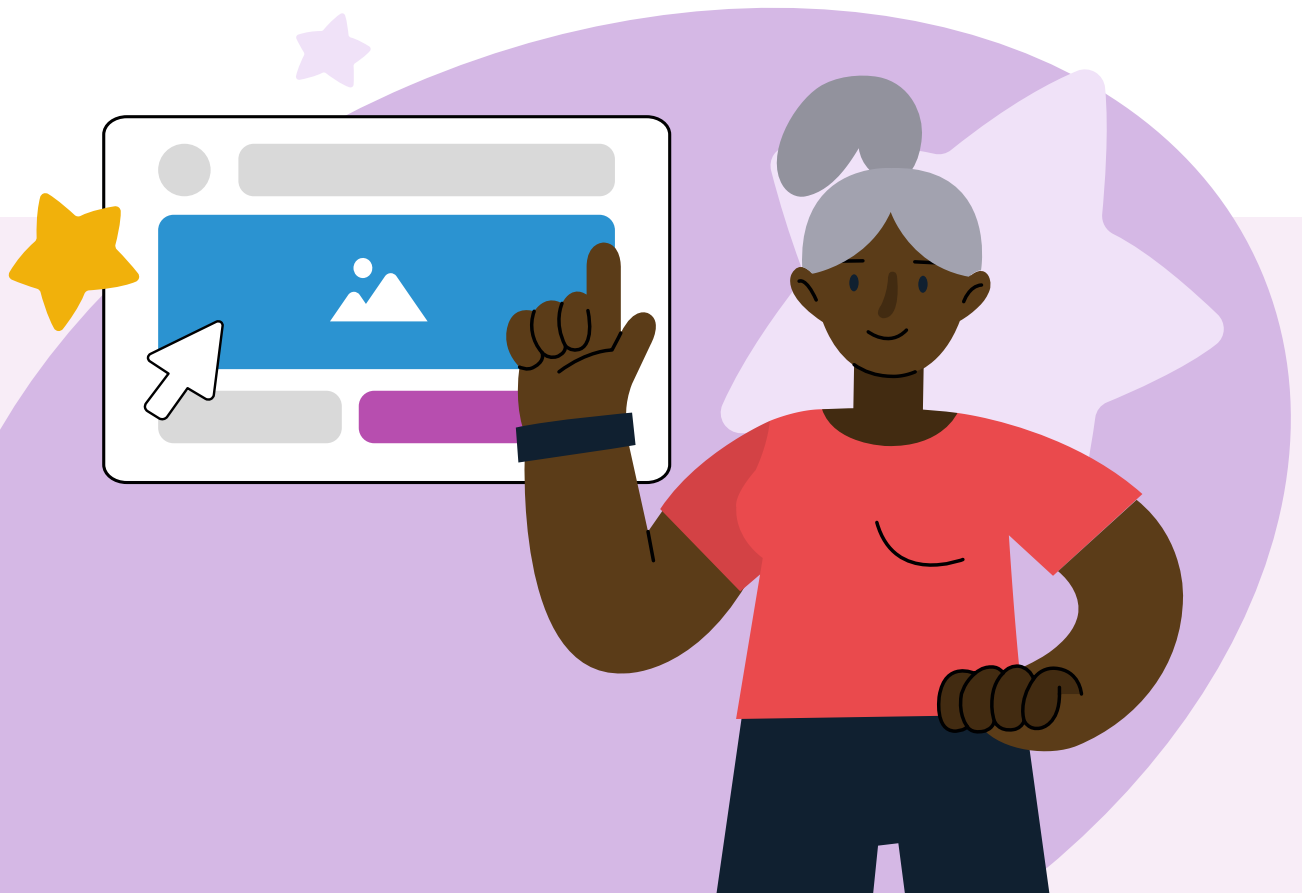
So you know how people find you. Now: it's time to become a member!

You'll want to make sure your website is super user-friendly, and that your calendar of events (and other online info!) is up to date. Here's how.

Tips to make your website easy to navigate

An easy-to-use website (and let's say it: preferably without any coding involved) is a baseline requirement for any member organization.

You'll need to ask yourself: is your website easy to navigate for prospective members? Can they easily find answers to their questions, get an understanding of membership benefits and sign up for membership? Does it have a clear brand? Does it guide members to join?



Make sure to check off the following:

- ✓ **Choose the right membership website builder:** A tool specifically built for member organizations makes it easy to create a site with gated content for members, integrate with your [member directory](#) and spin up member registration pages.
- ✓ **Create a public and members-only area:** The content on your site caters to two audiences: Current members (profiles, forum, education, etc.) and prospective members (home, about, sign up, FAQs). So, build your website with separate areas for each.
- ✓ **Focus on user experience:** Does your website take more than two seconds to load? Does it look cluttered, and is it hard to find what you're looking for? If so, consult an expert who can help you upgrade your website's user experience.
- ✓ **Follow accessibility guidelines:** Make sure your website is accessible with things like alt text for images, transcripts or closed captions for videos, and contrasting colors in the foreground and background. Check out [this guide on accessibility for nonprofits sites](#) for more guidance.

Breakout: Include a calendar of events

Events are often effective at engaging current and prospective members—so, ensure your website has a calendar with important upcoming events for members.

For example, you can include:

- Professional certification renewal dates
- Dues renewals
- Events and meetings
- Community events
- Deadlines for board membership, committee formation and leadership changes

“With WildApricot, we’ve been better able to keep track of our contacts—before we had them on spreadsheets and often lost contacts. Improving our management helped increase our membership, as we can accomplish more and allocate more resources to promoting our club and events.”

Sioux Falls Area Running Club

Create membership tiers



Staying on budget is definitely a concern for your members—and could be a reason they choose to leave. Research showed 23% of target donors “simply didn’t have the money” for their membership.

But providing a few membership options at different price points gives them the chance to keep the benefits they love while staying on budget.

Determine your membership levels

Giving your members a few different packages, or membership tiers, lets them pay only for the things they need. So, let’s take a look at how you can create the right tiers for your members:

- **Make a list and check it twice!** Jot down all your benefits, then put them in groups based on the time and effort each takes to provide. For example: Access to a member forum is easier to provide than ongoing education courses.
- **Ask your members.** What benefits do your members value most? Are there any gaps in your offerings? Send out a survey to ask for their thoughts.
- **Add new benefits as needed.** If you find any gaps, update your list of benefits.
- **Add a value to each benefit.** Evaluate input from your members and the effort each benefit takes to assign an approximate value to each one.
- **Put the puzzle pieces together.** Plan out how many tiers you need, each level’s price and how you’ll transition members to these new tiers.

- **Name your tiers.** Aim for three to four member levels and give them names that reflect the type of members who will get the most use out of them (see example below).
- **Explain your new tiers.** Now, collaborate with a designer to create an easy-to-read comparison table that visually organizes and explains your new member levels.

For example, the [Chicagoland Chamber of Commerce](#) offers four comprehensive membership tiers for business members in their midwestern region.

1. Executive



For members who want to start networking and gain visibility in the business community, this level offers a directory listing, a membership engagement consultation and invitations to more than 100 networking events.

2. Premier



If you want to get more involved, these members can join committees and councils, potentially sit on event panels and attend premier luncheons.

3. Leadership Circle



On this level, members can flex their leadership skills (much like the name would suggest). Members have the chance to lead committees, spotlight their CEO/executive on the chamber's digital channels and join Board of Director meetings.

4. President's Circle

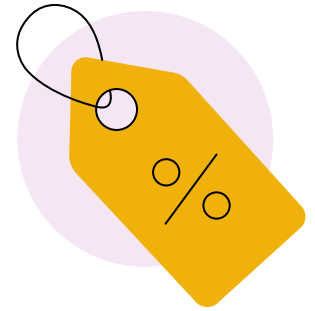


This level offers the most prestigious benefits, including one-on-one time with the association's CEO and a personal invite to the chairman's luncheon.

Offer incentives and perks

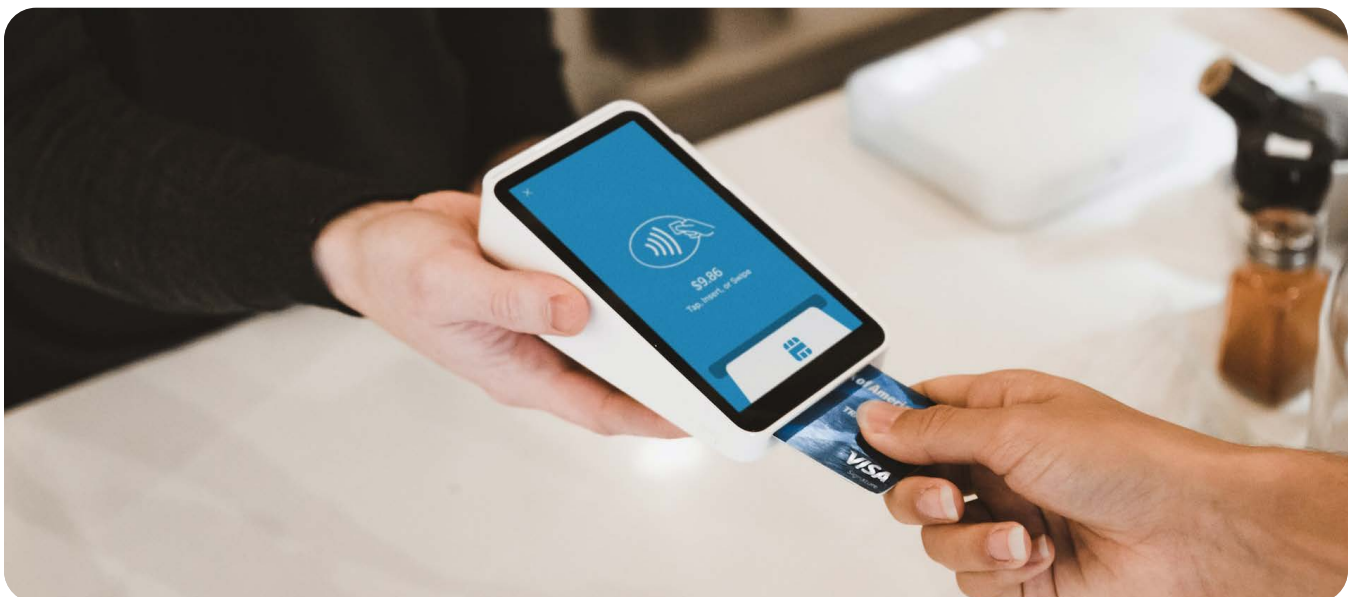
Everybody loves a bargain—including your members. So, give them discounts or incentives to nudge them to renew faster.

[Our Membership Marketing Report](#), other associations are already using these financial perks to encourage renewals, like:



- Conference or convention discounts (54%)
- Product discount, coupons, voucher (31%)
- Dues discount for the first year (45%)
- Free trial (32%)
- Monthly or quarterly installment dues (39%)
- Member referral incentives (19%)
- Additional months free, e.g. 15 months for the price of 12 (36%)
- Free gifts or premiums (19%)
- Multi-year dues discount (34%)
- Money-back guarantee (19%)
- Drawing or contests (14%)

Use your association management software to create an early bird discount directly into your renewal form. That way, if they renew by a certain date, you both win. You get certainty, and they get a discount.





Chapter 3: Get curious about why members leave

In a perfect world, every single member would renew year after year. While it's great to aim for a perfect renewal rate, it's not realistic—you're always going to have folks who go their own way.

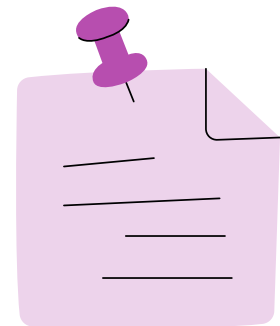
So, part on good terms! Rather than letting lapsed members leave without a word, take an interest and ask why they're leaving. Then act on that feedback. Address any gaps in service those departing members clocked and you'll make existing members happier—and maybe even win back lapsed members!

Top reasons members don't renew

While there are lots of reasons members don't renew, the [membership marketing report](#) found that member organizations see a handful of common reasons.

Here are the top reasons members don't renew, including some of the usual suspects plus a few surprises:

1. Lack of engagement with the organization: **52%**
2. Forgot to renew: **34%**
3. Lack of value: **34%**
4. Left the field, industry, or profession: **33%**
5. Employer doesn't pay dues: **25%**



But here's the great news: As you can see from the list above, the top three reasons are all problems you can solve.

For example: While more than half of people said departing members left for greener pastures due to disengagement, you can take steps to reel them back in—and we'll outline those below.

The same applies to the other top two reasons. Your members are busy (just like the rest of us) and it's easy for renewal deadlines to slip their minds. To keep members from simply forgetting to renew, create and schedule [several renewal reminders](#) via snail mail and email to go out in the weeks leading up to the deadline.

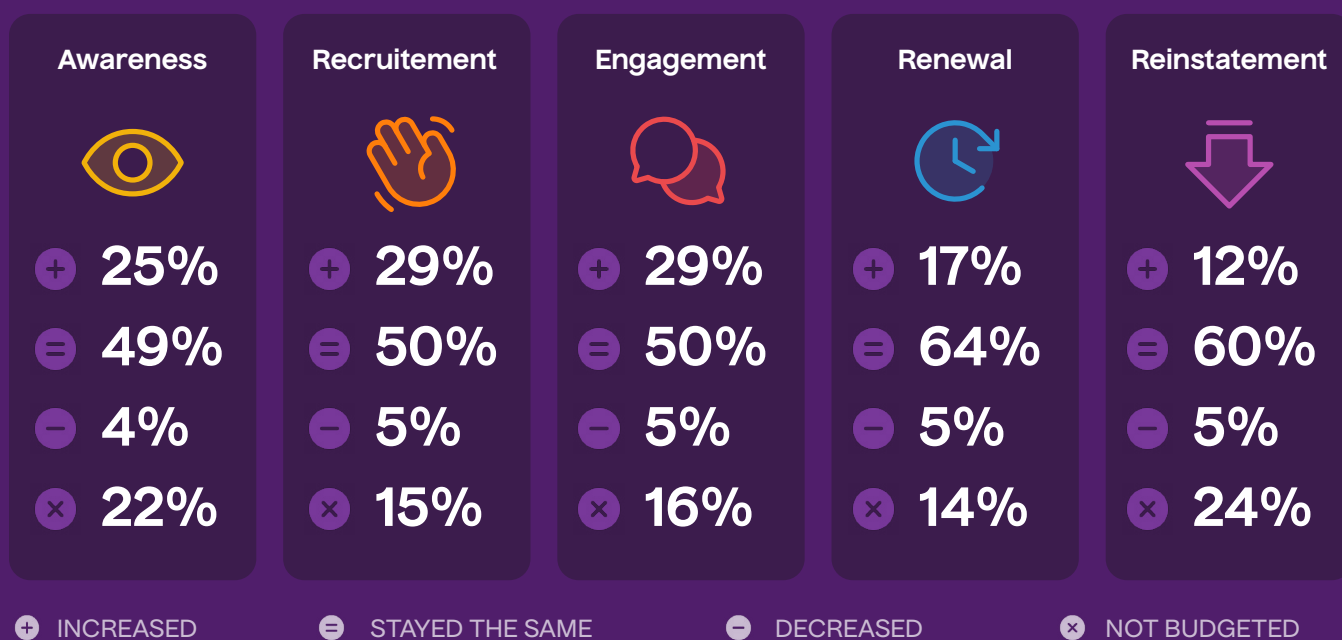
If you have (and clearly promote) a [unique value proposition](#), and highlight your most beloved benefits, you can also combat people feeling like your membership isn't valuable.

Connect with disengaged members before they say goodbye

An ounce of prevention is worth a pound of cure—which is why it's important to plug any leaks in your benefit bucket that led to members leaving.

More organizations now know consistent, ongoing engagement with members is what boosts their retention rate and keeps it high. The [membership report](#) shows almost a third (29%) of organizations spent more money on engagement efforts year-over-year.

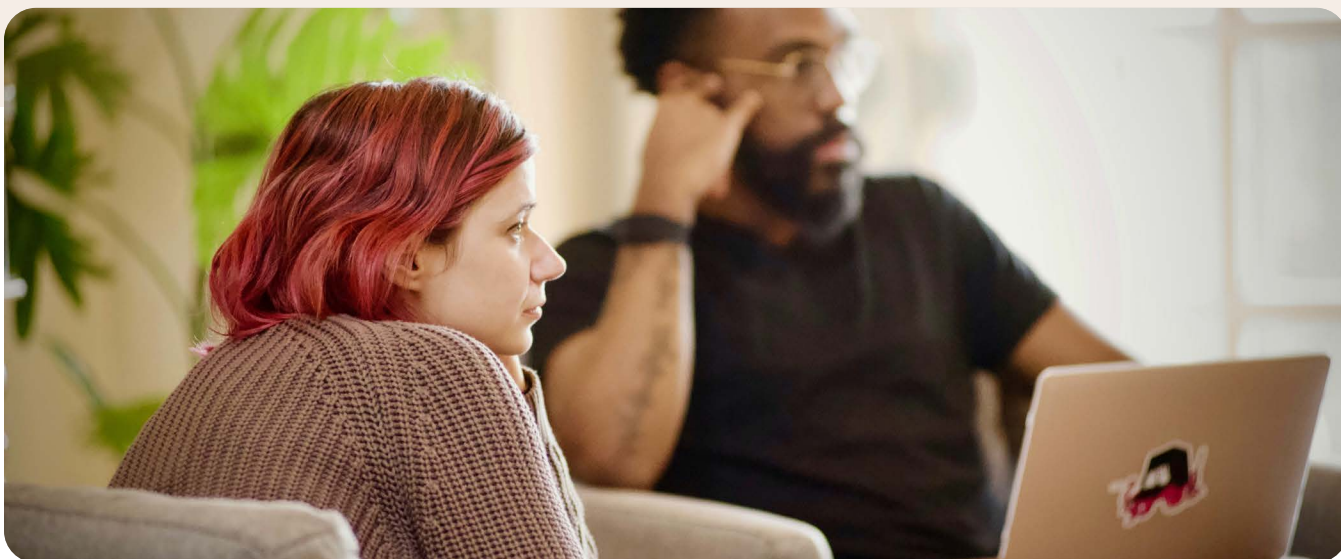
How has the budget changed from last year for each stage of the **membership cycle**?



Source: [2022 Membership Marketing Benchmark Report](#)

Part of curbing member departures is to learn the signs! Here are some symptoms that your member isn't plugged in:

- **Keeping quiet.** A member who was previously in touch doesn't respond. Or, if they show up to an event, they're withdrawn.
- **Pulling a disappearing act.** Once-active members might suddenly vanish from the roster of your upcoming events.
- **Leaning out.** A member on their way out the door may drop activities with your organization's board or organizing committees.



So, how are other organizations keeping members active and engaged? The [benchmark report](#) spills their secrets:

- Wrote an outline of all the benefits a member received if one foot is out the door. This is handy when members question the value of their membership.
- Added more member-only and free-to-members professional development webinars and workshops.
- Created more whitepapers and infographics chock-full of important data members can share with the C-suite.
- Waived membership dues to anyone recently laid off or going through a financial hardship.
- Published peer-to-peer testimonials showing how the association had helped member businesses and the industry.

Conduct an exit interview

When a member decides to move on, don't just let them ride off into the sunset without a sendoff. In the final weeks of their membership, set up a time [for an exit interview](#).

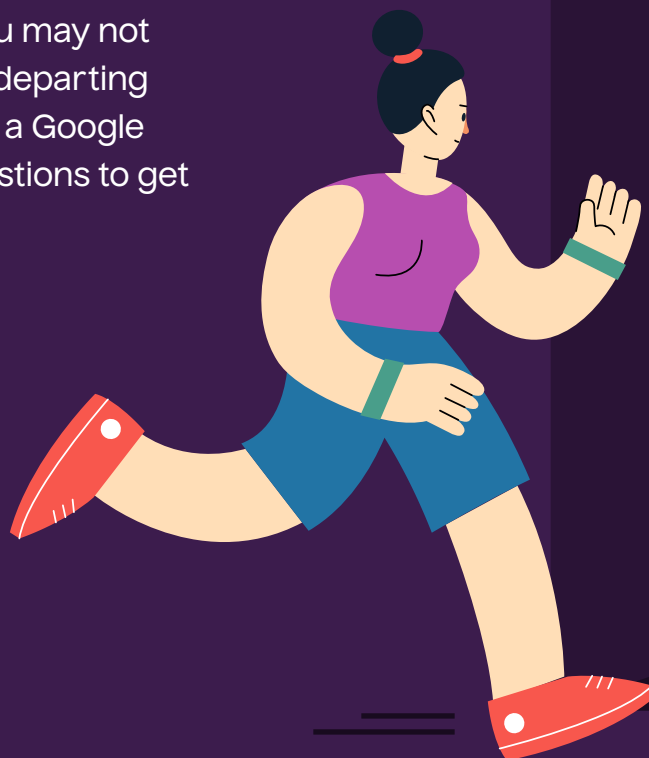
We get it—those exit interview conversations can be awkward and uncomfortable. That's why many member orgs put them off or don't do them at all. But the pros of exit interviews far outweigh these cons.

For example, you can:

- Discuss exactly why members aren't renewing
- Take steps to address any issues that come up in your chats
- Connect with that member one last time
- Let departing members know you valued their time with your organization



If you're a smaller organization, you may not have time to personally call every departing member. You can send off a link to a Google Form or similar tool with a few questions to get the answers you need.



To make sure you're gleaning the right details from your exit interviews, here are a few questions to consider:

- ✓ What brought you to our organization initially?
- ✓ What groups/activities were you involved in?
- ✓ What is your main reason for leaving?
- ✓ Are there any other reasons for your leaving?
- ✓ What did you like most about our organization?
- ✓ Would you recommend this organization to a friend?
- ✓ Would you be interested in attending any of our programs or events as a guest rather than as a member? (If a member is leaving due to financial reasons, this is a good way to still stay engaged with them even after they leave.)

Engage lapsed members

Coaxing lapsed members to return to the fold takes far less time and effort than recruiting brand-new members. Sometimes, former members just need a reminder of why they signed up for your organization in the first place.

To re-engage former members, try these tactics:

- **Stay in touch.** Keep members posted via your email newsletter about all your upcoming events, educational resources, and goings-on with your organization.
- **Offer a grace period.** If someone's membership has recently lapsed, send [template emails](#) to let them know they have extra time to renew.
- **Offer a discount.** Everyone loves a bargain, so send them an offer to discount member dues, event registration, a free webinar, or a free copy of an industry report.

- **Allow them to customize their membership.** If you have multiple member levels, guide lapsed members to a tier that better suits their needs and budget.
- **Launch a broader win-back campaign.** Create an email series to win back lapsed members. If you did exit surveys, highlight the benefits lapsed members discussed.



Research shows 48% of organizations give members two to three months for a grace period.



Chapter 4: Build member benefits that sparkle



You and your staff work hard to plan events and nurture relationships with your members. But if the perks of membership don't resonate, all your efforts could be in vain.

Are your members getting everything out of their membership they need? And do they even know about all the various benefits available to them? In many cases, the answer to both of those questions is no.

Give your members what they want

To make sure you're meeting (or exceeding) your members' expectations is to delve deep into what they want out of their benefits. Learn why they joined in the first place and whether what you currently offer matches up with their interests and goals.

To get this kind of intel, send out a member satisfaction survey annually or every six months. Some of the questions you can ask include:

- What initially led them to sign up for membership?
- What benefits resonate deeply with them?
- What could they live without?
- What's missing?
- Which programs need more development?
- Are they aware of all their benefits?
- Do they feel like your member benefits are competitive?



Providing the right benefits can go a long way to help you retain more of your valued members. Some examples of popular benefits member organizations might add to their list include:



Networking opportunities



Member coupons, discounts, and incentives



Mentorship programs



Industry breakfasts



Association or organizational awards



Member of the month



Member spotlights
/features



Contests and challenges



Member coupons, discounts, and in



Local and community partnerships



Corporate partnerships



Volunteering and community service projects



Career advice and support



Member directory



Job board



Online member community or forum



Accessible event calendar



Free virtual events



Education resources (in-person and online)



Member conference



Professional certifications

Create your resource library

Member-only content gives your member base the opportunity to learn new things, stay up-to-date on new practices in their industry, and learn better ways to do their current work.

Additionally, many industries require ongoing education or training to stay current with the local licensing organization. Use a [learning management system](#) to create elearning courses and training to help members meet these requirements.

Even better: You only need to create these courses once, and they'll keep bringing in revenue for the foreseeable future.

Your organization can fill all these needs (and drive home your ongoing value) with comprehensive resources for your members. Content in your resource library can take on many forms, including:

- A member blog
- Member newsletter
- Recordings of speaker sessions or panel discussions
- A monthly or quarterly publication
- Weekly videos
- An industry-focused podcast
- Educational webinars
- E-learning courses



Chapter 5: Engage your members to keep them coming back

When it comes to retaining and engaging your members, optimizing your [member experience](#) is everything. That's why your organization needs to regularly examine how it engages with members during their entire lifecycle, what's working, and what isn't.

Welcome new members: Onboarding

When new members join, you'll need a process in place to get them ramped up. So, it's important to design an onboarding process that empowers and inspires your members to get involved. In turn, this will improve your organization's [retention rates](#) and help you grow your community.

To create a successful onboarding program, you can:

- **Create a welcome email series.** New members need to know about upcoming events, where to find helpful resources, how to access the online community and more. Send this info over four to five emails to [welcome new members](#).
- **Send new member onboarding materials.** Help get new members up and running with web articles, digital booklets and videos compiled into a thorough [welcome package](#).
- **Introduce newbies to your community.** Introduce new members on your social channels, in member spotlights, at a networking event or in your mentorship program.
- **Invite new members to upcoming events.** Make participation easier for newcomers by extending personal invites for your organization's next event.

Communicating with and engaging your members

To keep your members plugged into your organization, find a way to engage members every day using one or more touchpoints. While that may be a tall order, remember, a lack of engagement is one of the top reasons that lapsed members chose not to renew.

According to the [membership marketing report](#), the most common channels organizations engage with **new members** vs. **tenured members** are:

Email Series

44%
NEW

48%
TENURED

Membership Profile

53%
NEW

40%
TENURED

Online community

40%
NEW

36%
TENURED

Social media

40%
NEW

38%
TENURED



When chatting up your members, some tips to keep in mind:

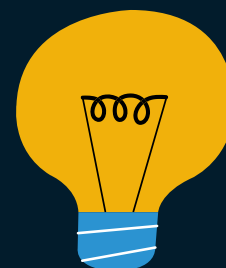
- Don't always "talk at" your members in your communications—encourage two-way dialogue
- Get their feedback and thoughts through your social channels, member forum and newsletter
- Regularly ask for their input—for example, [ask for their feedback on recent events](#) you've hosted
- Check in at least annually via [a member satisfaction survey](#) to make sure your benefits meet their needs

Have unforgettable events and programming

Events and programming that target your members' interests and help them achieve their goals will inevitably be popular—and keep members coming back. As a result, the right events can go a long way to help you retain your members.

Ideas for in-person events

Many professionals join member organizations in order to connect with others in their industry. And in-person events are one of the top ways you can help members connect while also keeping your members plugged into your organization.



A few ideas include:

- Conferences
- Networking events
- Luncheon
- New member mixer
- Happy hour
- Industry speaker panel
- Q&A with industry leader
- Fun run for charity
- Professional headshot photo session
- Trivia night

“Before using WildApricot, we couldn't successfully host events like webinars. WildApricot made it possible to track event registrations from our email campaigns. Our membership engagements have skyrocketed thanks to this platform.”

Canadian Associations for Supported Employment

Ideas for virtual events

Virtual events can increase the accessibility of your association's offerings, making your experiences available to those with disabilities who may be unable to travel. Additionally, when you provide a convenient opportunity that appeals to a broader range of people, you boost the membership value your organization offers.

Some ideas include:

- [Virtual conference](#)
- **Webinar**
- **Virtual networking event**
- [Speed-dating style networking](#)
- **Live-streamed award ceremony**
- **Q&A with industry leader**
- **Themed happy hour**

Virtual events: Are members over them?

Research shows that virtual events have seen a huge spike in the past year! Looks like, they're not going anywhere. So include them in your programming strategy along with hybrid and in-person events.



+66%

Webinar
attendance

+66%

Professional developments
meetings online

+60%

Public social
networking

Personalize your member experience

Personalization helps members feel like they're more than just a name on a list. It can tip the scale enough to turn a new member into a loyal, lifetime one. And providing a personal touch to simple interactions with members can make them feel valued.

For example: When sending personalized emails, marketers saw a [20% boost in sales](#) and a [26% increase in open rates](#).

While email is one channel where you can customize your interactions, you can personalize the member experience in multiple ways:

- **Tailored member-facing website:** Keeping members engaged in different ways through a personalized website shows you appreciate them by meeting them where they are.
- **Personalized emails:** Use your membership management software to segment your members based on geography, interests, length of membership or many other tailored factors. Then you can send targeted emails based on those criteria.
- **Handwritten notes:** Did your planning committee put together an amazing networking event recently? Or did a group of volunteers go above and beyond on a community service project? Writing a round of thank-you notes can show your appreciation.
- **Personal invites to events:** If there's an upcoming event that would appeal to a specific group or members, send off a customized invite. Extend a personal invitation for them to attend via email or phone call.



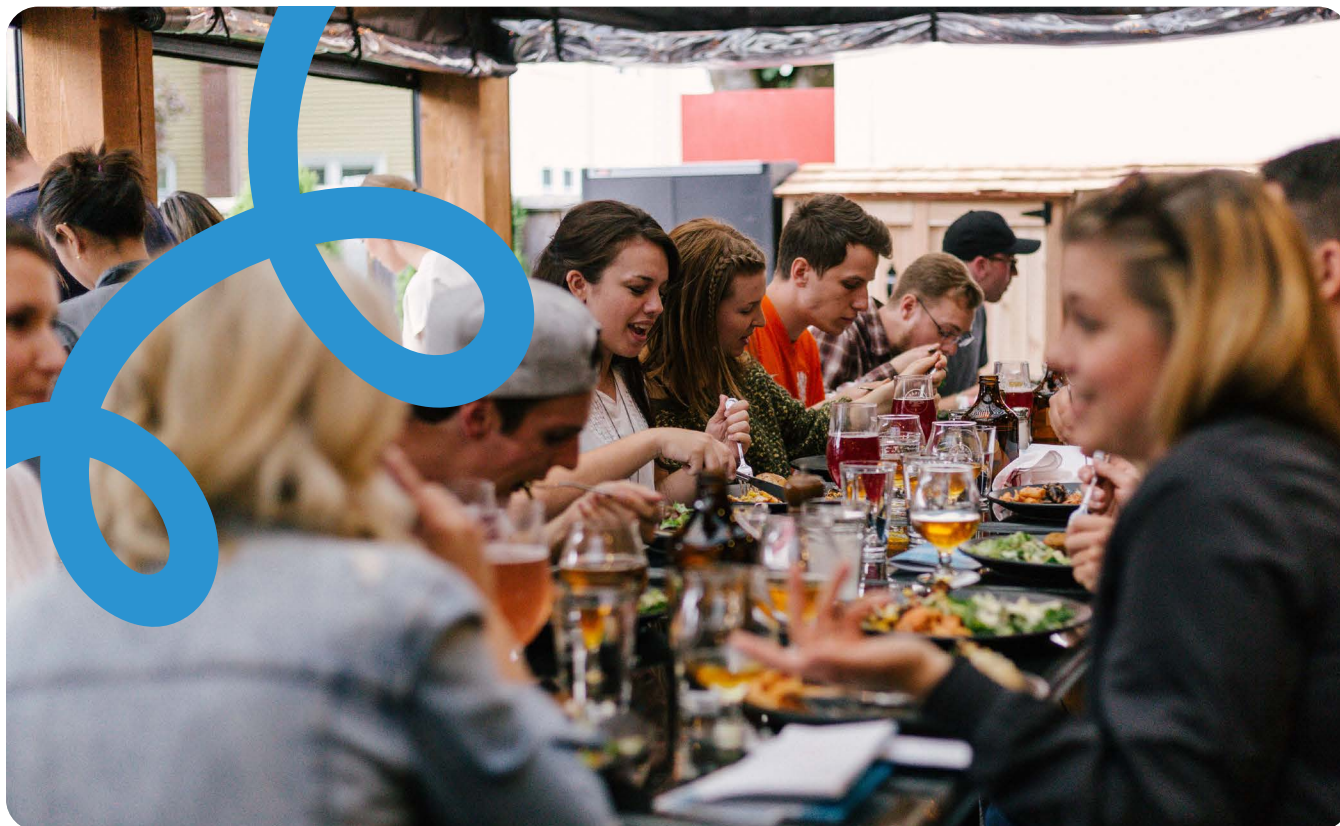
Express gratitude

When your members feel appreciated, they're more likely to stick around. Almost 9 out of 10 (89%) customers say they're more likely to make another purchase after a positive customer experience.

So, celebrate your members from day one! Send a personalized welcome letter to set a positive tone from the get-go and thank them for joining. You can even send new members perks, such as gift cards or free merchandise.

Here are a few ideas to take your member gratitude to the next level:

- Start an appreciation day or week, to centralize your appreciation efforts
- Do random drawings or hold a raffle
- Host an awards ceremony
- Plan a happy hour or ice cream social



Chapter 6: What to do when it's time to renew

Prepare your members for renewal by starting early. Begin crafting your renewal communications weeks ahead of the deadline.

A strategic round of emails, phone calls, and/or direct mailers can go a long way to increasing your retention rate. And here's how you can maximize the impact of your renewal reminders.

Communicating with your members

While it's essential to let your members know when it's time to renew, not all of your members prefer to communicate the same way. That's why it's important to know what communication channels your members favor—whether that be email, phone calls, direct mail or otherwise.

Spread your message about renewal reminders far and wide across a combo of channels.

Based on the [membership marketing report](#), associations communicate across a variety of channels, including:



Email



Paid Ads



Text



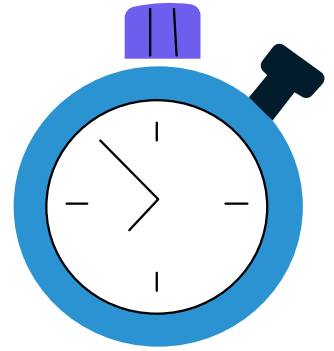
Mail

And [research shows](#) that nearly all associations use email to deliver renewal reminders (98%), but many also use phone calls (57%) and old-fashioned snail mail (55%).

If you want some help writing your reminder emails, here are [three renewal letter templates for you to use](#).

Offer timely reminders

Now that you understand how you should communicate with your members about renewals, when is the best time to do so? To help you nail the timing, you may want to take a look at your renewal cycle.



Your renewal cycle refers to when the renewal deadline rolls around for members.

- With **annual cycles**, you reach out to all your members at the same time.
- With **rolling renewals**, you set up a series of messages (maybe start with an email, then a mailer, then a phone call) to auto-send when members are approaching their unique membership anniversary.

Pros

- Associations with renewal rates of 80% or higher are more likely to use a fixed calendar date for renewals
- It's easier for organizations to keep track of upcoming renewal deadlines
- It's simpler to plan renewal campaigns

Cons

- Some members prefer the flexibility of renewing on their rolling anniversary
- This can be more challenging for organizations to track

However, the right membership management software can help you monitor and schedule renewal reminders even with rolling renewal deadlines.

[MemberClicks](#) is built for growing member organizations, like associations and chambers of commerce, to automate tasks and boost engagement and revenue.

Regardless of your renewal cycle, create a schedule with multiple reminders for your members. For example:

1. Send the first email six weeks out
2. Follow up with another email at the four-week mark
3. Send a direct mailer two weeks prior to their membership expiry date

For more help writing those reminders early and often, check out our [tips on improving your membership renewal letters](#).

Automate renewals

You can take the manual work out of renewals by allowing technology to do some tasks for you (and your members). The right tools allow you to automatically send your renewal communications at scheduled intervals and even allow members to auto-renew their membership.



Auto-renewing memberships

Your members are likely just as busy as you are—they're stretched thin between all their professional and personal commitments. Setting up auto-renewals on membership takes one more thing off both your to-do lists.

With auto-renewals, you:

- Slash admin costs tied to renewal follow-up and processing
- Remove the burden of renewal from your members
- Ensure your relationship is continued with minimal (or no) disruption

To allow members to auto-renew, use your [membership management system](#) to give members the option to [automatically renew their membership each year](#).

With the MemberClicks [dues payment solution](#), you can:

- Add dues payment functionality to any new or existing website
- Offer one-click renewals to members via email, your website, or their member profiles
- Generate automatic dues payment invoices

Automating renewal communications

Using a [membership management system](#) like MemberClicks, you can also schedule some of your crucial renewal communications. That includes reminder emails, transactional emails to confirm dues payments, and follow-ups for lapsed members.

Leverage MemberClicks to create and schedule emails like:

- Automated, personalized reminders about dues payments
- Reminders for an upcoming membership renewals deadline
- Send reminders to lapsed members to boost retention

“What I like most about MemberClicks’ member management software is that it is very automated. I can set up several emails and have them scheduled to go out throughout the renewal process. That saves me time as a one-person shop and we have had more success in retaining our members with more touches during the process.”

Tawni Phelan, CAE, CMP, Executive Director
Oklahoma Society of Association Executives

Chapter 7: Your month-by-month guide to retention

While keeping members coming back for more is a year-round job, we've made it easier with a month-by-month plan going from welcoming new members through celebrating their membership anniversary.

Month 1: Welcome

After a new member joins your organization, give them a warm welcome. Send a welcome email, give them a quick phone call, or post a shoutout on social media or in your newsletter.

If you choose to send a [welcome packet](#), include:

- A welcome letter
- A list of membership benefits
- A calendar of upcoming events
- Your business card with contact information
- A quick reference sheet about your organization
- Information on membership costs, levels and due dates
- Branded swag

Month 2: Engage

In month two, schedule an email or phone call to let newbie members know how to plug into your organization. Do you have an upcoming networking event? Or a particularly helpful webinar coming up? Highlight these gatherings and personally invite them.



Month 3: Check-in

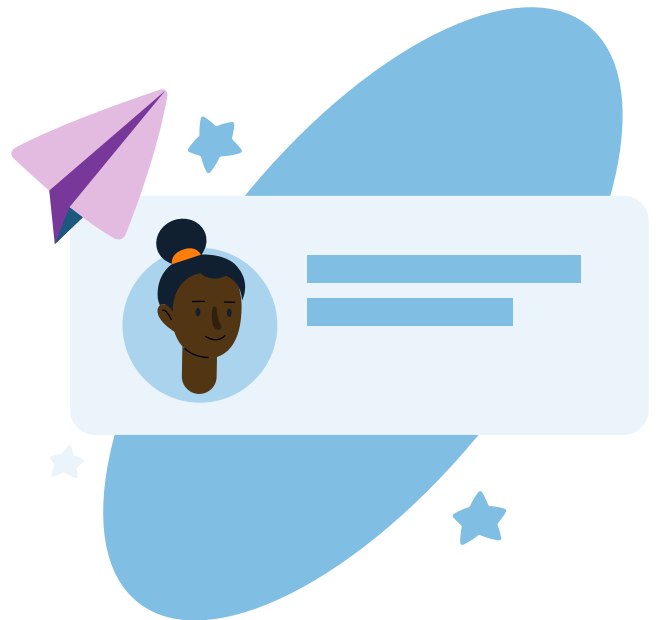
Your new members should be getting into the swing of things. They'll be better acquainted with your organization and may have attended an event or course. They're approaching the 90-day mark, which is an ideal time to do a quick check-in.

Schedule an email or, if you have the bandwidth, make a call to ask if they have any questions. A quick check-in maintains an open channel of communication in case they have any lingering concerns.

Month 4: Provide

Your members made it through their first quarter! Hopefully, they're plugged in and participating in events, committee activities and more.

For month four, follow up with an email focused on their interests. For example, if they mentioned networking on their application, let them know about an upcoming speaker panel.



Month 5: Mentor

Pair up your newbie member with an established member to be a mentor. The mentor can show them the ropes in both your organization and also their industry. Established members can help newer members take advantage of benefits, expand their network and build camaraderie.

Month 6: Survey

New members are halfway through their first year! Assess whether they're plugged in [or at risk of lapsing](#). Review the member's event participation, engagement during orientation and contribution to the mentorship program.

Month 7: Connect

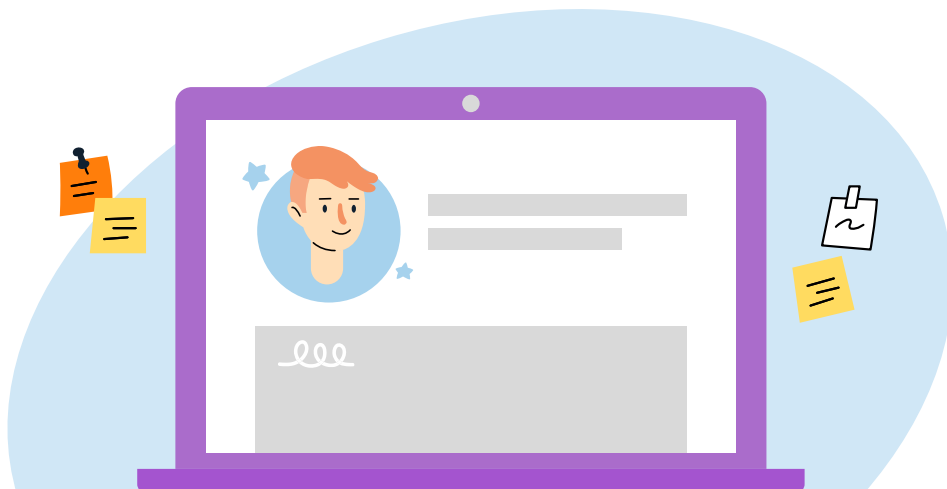
In the second half of the year, strengthen your connection with:

- A handwritten note thanking them for their membership
- A phone call to see if you can help them with anything
- A personal video message telling them about a new benefit they'd enjoy



Month 8: Highlight

Consider creating a [member spotlight](#) for your new members to show your appreciation. Write up a brief profile and share it in your newsletter, on your social channels and on your organization's site.



Month 9: Encourage

This is a great time to encourage your newbies to take on more responsibility within your organization. That could take shape as serving on your board, participating in a committee, being a mentor to newer members or joining the next volunteer project.

Month 10: Demonstrate

Membership renewal efforts often start 90 days before the deadline. So, your retention efforts will start kicking into high gear at this point.

Demonstrate the value of their membership by:

- Sharing a list of things your organization has accomplished this year
- Including member testimonials in emails about why they're involved
- Publishing data on how your organization has helped members succeed

Month 11: Renew

It's only a month before their membership lapses, so this month, focus on [membership renewal emails](#). These will remind members to renew and give them instructions on how to do so.

Month 12: Celebrate

It's the final month of your retention plan—so, it's time to celebrate! Create an event to celebrate your organization's milestones with members, send out thank-you cards or any number of light, fun activities to bond your members together as a community.



Conclusion

While boosting your retention rate may seem daunting, you're not in it alone. You can use tools like [WildApricot](#) or [MemberClicks' member management software](#) to automate some of the emails, announcements, and other retention initiatives to save you precious time and resources.



Personify partners with associations, chambers of commerce, charities, event organizers, health and wellness facilities, educational institutions and other purpose-driven organizations to help them manage and grow their communities.

For organizations large and small, our association management, member engagement and event solutions help you streamline operations and identify opportunities for growth and connection.

[Learn more about us](#)



Small budget? No sweat! WildApricot is a simple, user-friendly solution for associations, nonprofits, clubs and other membership organizations. Save time and grow membership as you automate tasks to manage members, payments, your website, events, and more.

[Start your free trial](#)



Our cloud-based membership software helps growing associations, chambers of commerce and other member-based organizations automate tasks, boost engagement and generate revenue in one central platform.

[Book a demo today](#)

Thanks for reading!

