

# Making Membership Matter

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# I.M.P.A.C.T FRAMEWORK

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# Why this matters now

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## 50%

of associations report flat or declining membership

## 11%

describe their value proposition as 'very compelling'

## 25%

have no documented engagement plan

## 4 yrs

engagement has topped the priority list — still unsolved

## The sector is at an inflection point

- We are guessing what members want instead of asking, many haven't surveyed in 2–3 years
- Google, LinkedIn and YouTube have quietly replaced us as the first port of call
- Tech debt is costing members: portals benchmarked against Netflix and Spotify, not peers
- AI conversations stall at exploration foundations (data, journeys, policy) aren't ready
- Younger members aren't a pipeline problem, they're a product problem

# I.M.P.A.C.T FRAMEWORK

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## Insight

Language  
that resonates  
understanding  
what  
members  
really need

### Membership Experience

Mapping  
the moments  
that foster  
belonging

### Proposition

Aligning  
value with  
members'  
evolving  
needs

### AI, Automation & Analytics

Smarter,  
faster decisions  
built on data  
you trust

### Collaboration

Internal  
teamwork as  
the engine  
of external  
success

### Take Action

From insight  
to action – your  
plan to create  
impact

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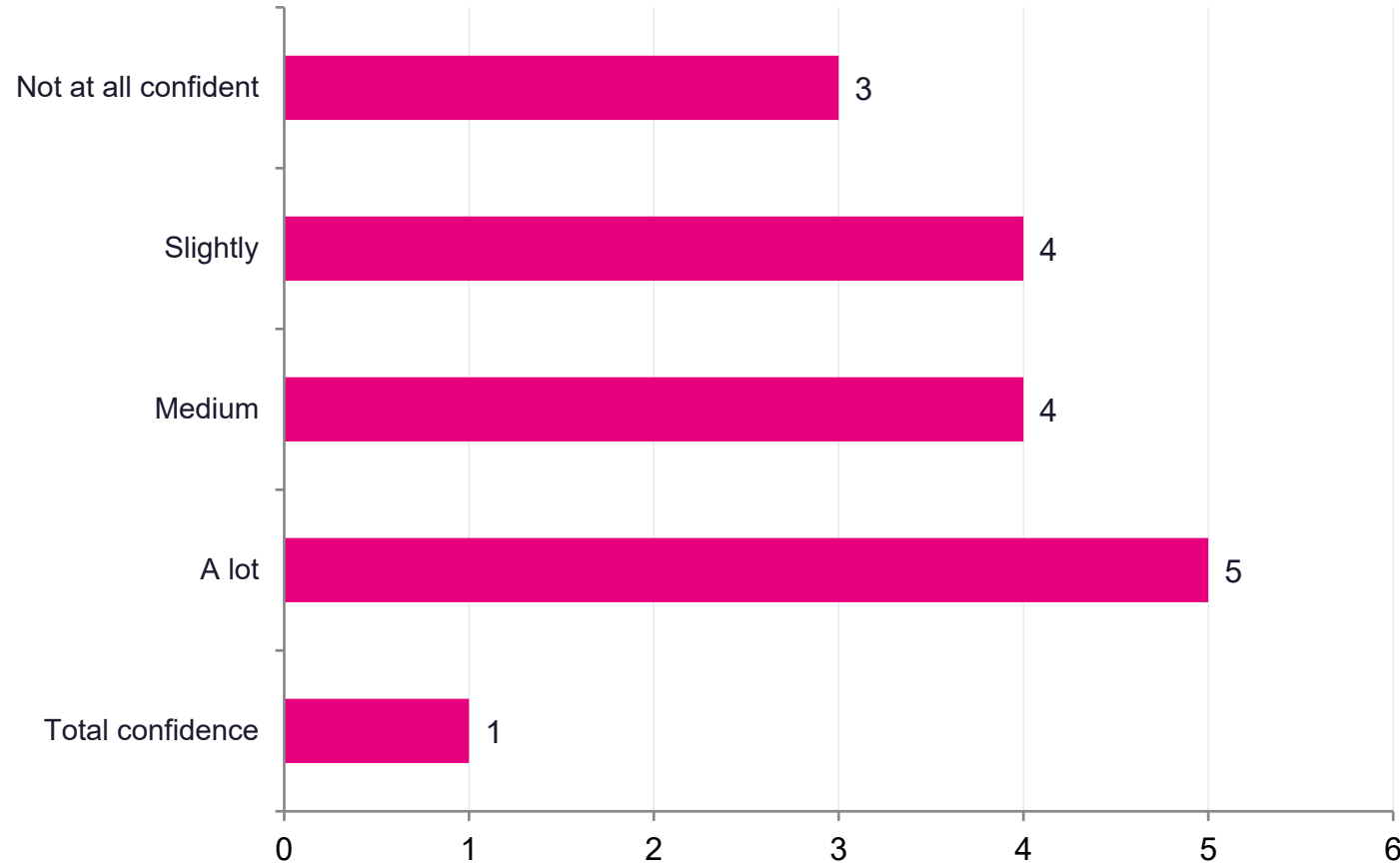
# Making Membership Matter

AWC 2026 | Delegate Session Input

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Q1

## How confident are you that your association articulates member value in language your members would use themselves?



**35%**

say 'A lot' or 'Total Confidence'

**18%**

have 'No confidence' at all

## Q2 Which touchpoint creates the strongest sense of belonging, and which is most likely to lose them?

### BELONGING

Annual conference / in-person events (x8)

Member forum / online community

Renewal reaffirmation of benefits

First live event attendance

Peer exchange & contribution opportunities

Sustained initiatives & shared values

### RISK OF LOSING THEM

Passive renewal process (invoice only) (x5)

Long gaps with no communication

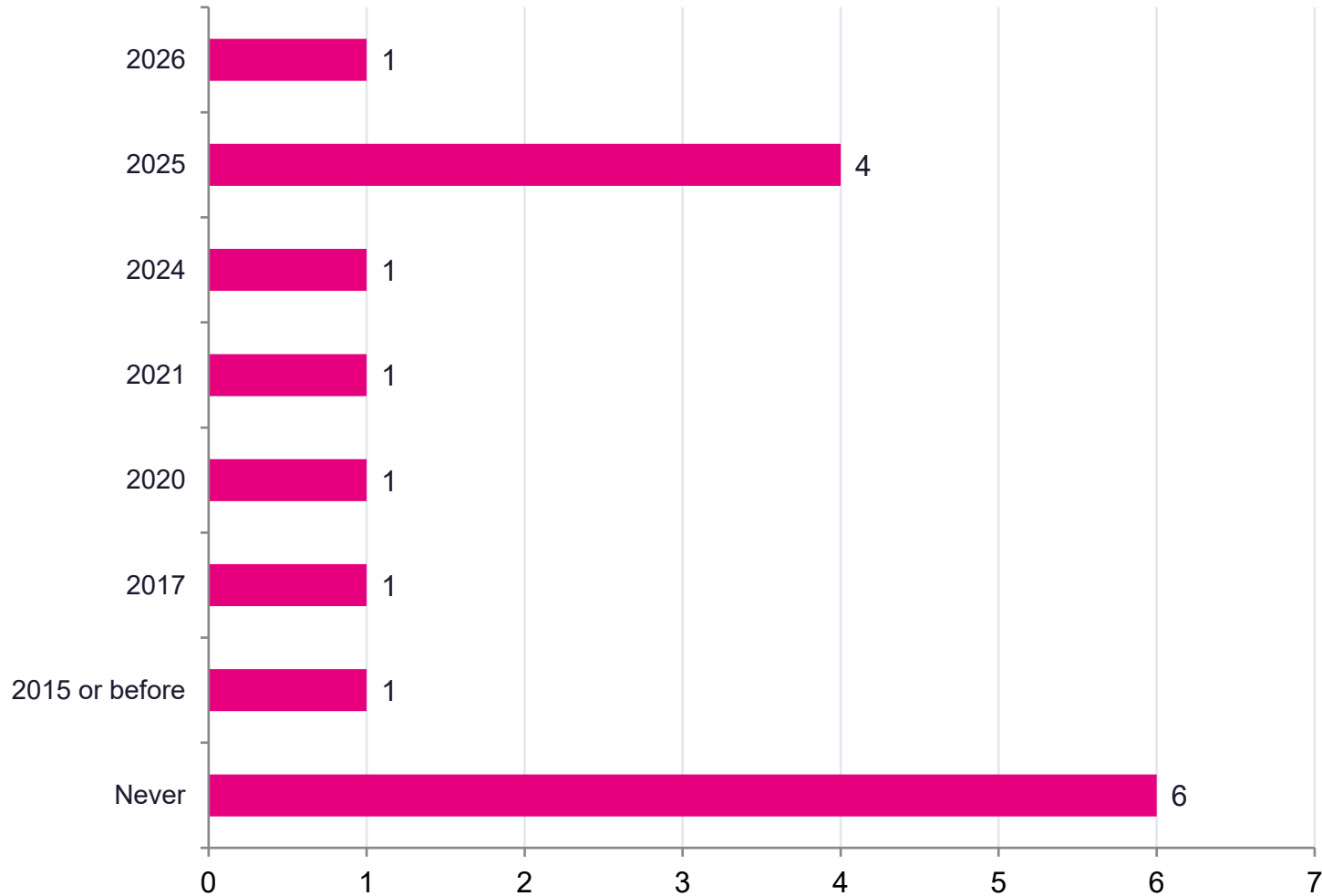
Online governance / finance meetings

Too much change to how things are done

Low engagement before renewal

4 respondents were 'not sure'

### Q3 When did you last retire or replace a member benefit because it no longer delivered value?



#### Key Insights

**35%**

have NEVER retired  
a benefit

**24%**

acted in 2025

**6%**

last reviewed in  
2015 or earlier

## Q4 What triggered the decision to retire a member benefit?

*(Responses from those who had retired a benefit)*

### Internal cost vs usage

*"Internal cost compared to usage"*

### Members didn't use it

*"Members did not use the benefit"*

### Low take-up / subscription

*"Low subscription"*

### Survey showed low value

*"Survey and it came out as very low value"*

### Loss of relevance

*"Loss of relevance for the companies"*

### Membership structure change

*"Membership structure change"*

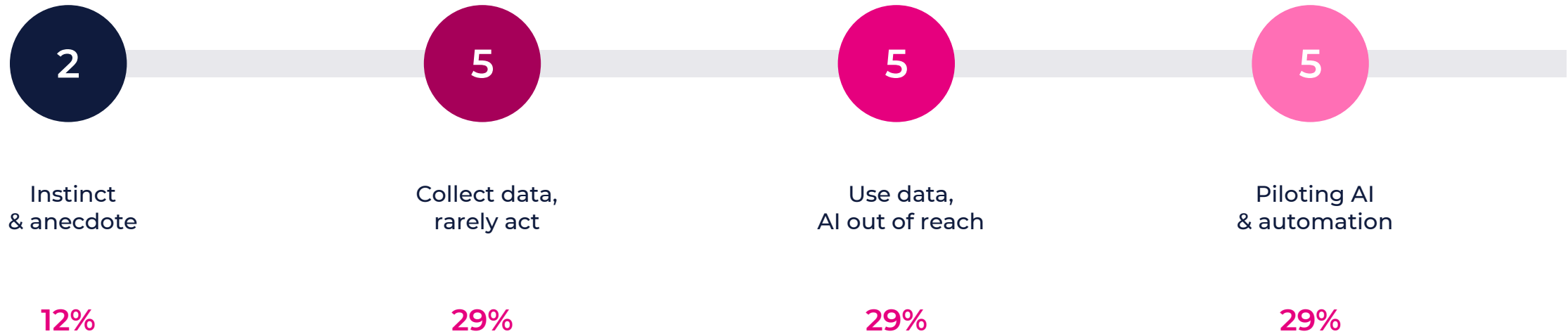
### External decision (e.g. journal went digital)

*"RAMP stopped its printed version of the journal"*

### Funding removed

*"We no longer have funding for it"*

## Q5 Where do you currently sit on data and AI?



### Key Insight

A striking three-way split: equal numbers are stuck in data collection, using data but not yet AI, and actively piloting AI.

Only 12% rely purely on instinct but nearly 30% are collecting data they never act on.

## Q6 What's holding you back from the next stage?

### Time & Capacity

7 mentions

*Time and safety concerns | Time to set up automations is the greatest challenge | Very small team — we cannot work on current affairs and invest time on the rest*

### Skills & Knowledge

5 mentions

*Not knowing how to use it. Time to learn | No experience with AI | Resources and lack of expertise and experience | Knowledge on how to level up*

### Resources & Funding

3 mentions

*Data protections, time, people and fund constraints | Absence of this need at this stage of association journey*

### System Readiness

2 mentions

*We're on a journey to better utilise CRM, website, App — AI is the next stage thereafter | Shared knowledge and tools*

## Q7 Internal collaboration: triumphs & cracks

*Describe one moment where teams delivered brilliantly together - or where a member fell through the cracks.*

✓ Flagship conference - record revenue, +10% exhibition attendance. Team work was exceptional.

✓ Coordinated lobbying action secured a specific regulatory change for members.

✓ Brought communications in-house - silos slowly being eradicated across all departments.

✓ World Water Congress 2025: membership, comms, events, governance & finance aligned around a shared objective.

✓ Successfully renewed a whole cohort of 5-year members through focused internal collaboration.

✓ Instagram GRWM and behind-the-scenes content at events created belonging and FOMO.

⚠ IT system failure caused invoicing chaos for months - external provider went AWOL for over two months.

⚠ CRM redevelopment: a 3-year, £500k project to get every team working on the same system.

## Q8 What is the single biggest membership challenge you'd most like this session to help you solve?

9

### Member Engagement

53% of respondents

*Raise engagement · How to engage extremely busy members*

3

### Value Articulation & Communication

18% of respondents

*Dynamic, automated communication members actually read · Articulating the value in supporting professional development*

3

### Membership Growth

18% of respondents

*Increase the membership · Require more new members*

2

### Retention & Benefits

12% of respondents

*Retention tactics, generation gap · Prioritisation of member benefits*

# Key Themes

## Engagement is the #1 challenge

*53% of respondents cite engagement as their biggest membership problem*

## Benefits need active curation

*35% have never retired a member benefit is everything still earning its place?*

## The renewal moment is the biggest risk

*A passive, invoice-only renewal process is the single most common member loss point*

## AI: willing but not quite ready

*29% are actively piloting AI but 29% collect data they never act on*

## Collaboration drives results

*In-person events, shared goals and cross-team alignment are the clearest success stories*

# Insight

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# The language of influence



What keeps the member  
awake at night?

# What do members care about most right now?

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Growth

Risk

Talent

Transformation

Stakeholder value



# What 'value' means to different groups

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## Audience

## What they care about

## Value lens

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CEO

Business growth,  
ESG impact, reputation,  
strategic advantage

How do you help us lead,  
stay ahead, or avoid risk?

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Functional Lead  
(e.g. ESG, Ops)

Execution, operational ROI,  
credibility

Do you give the tools,  
insights, or frameworks  
I can use?

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Strategic  
(e.g. Chief of Staff,  
Comms)

Internal alignment, messaging,  
external positioning

Will this elevate our brand or  
message in the market?



# Aligning with members priorities

# Framing language of influence

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## Language that resonates with CEO's

- Strategic alignment
- Collective influence
- Return on involvement
- Future proofing
- Accelerating transformation
- Peer-to peer dialogue
- Measurable outcomes
- Industry leadership, not just participation

*“membership provides access to useful groups.”*

*or*

*“membership gives you a seat at the table to shape the industry’s direction – not just follow it.”*

# Translating services into impact

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## Networking events

Peer-to-peer insight exchange on key risks

## Research and intelligence

Data to inform strategic decisions

## Policy

Stronger voice in shaping regulation



# Framing language of influence

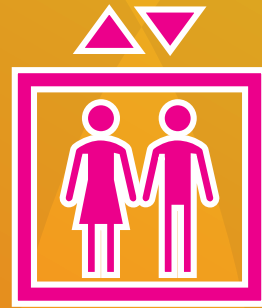
Lead with **why** it matters to them, not what it is

Use **peer momentum** “CEOs from X, Y, and Z are already part of this”

Show **outcomes, not activity** “members shaped G7 discussions,” not “members attended a session”

Keep it **brief**, CEOs want clarity, not detail

Transactional	Strategic
We'd love for you to attend our next meeting	This meeting is where CEOs are setting the industry's joint sustainability targets
You'll hear interesting updates	You'll help define the agenda others will follow
We'll share what we've done so far	We'll co-create action plans to shape what happens next



# The elevator pitch

# Weak vs strong

## Weak pitch

**(activity-focused, vague)**

"We've got another steering group meeting coming up. It would be great if you could attend so we can update you on the workstreams and share some of the progress that's been made. We'll also review some reports and have time for discussion. Your input is always appreciated."

Problems:

- Talks about meetings and updates, not outcomes
- No link to CEO priorities
- No urgency
- Value is unclear – “your input is appreciated” is weak

## Strong pitch

**(outcome-focused)**

"Next month's steering meeting is focused on regulation changes that could **impact profitability** across our sector. Several of your **peers** have confirmed attendance, and we'll use the time to agree the coalition's response so our industry has a unified voice with policymakers. **Your input will directly shape how we influence government and protect the commercial interests of your business.**"

Strengths:

- Anchored to priority: risk + profitability
- Uses peer influence (“your peers are attending”)
- Creates urgency (upcoming regulation)
- Clear value exchange: protect commercial interests

# Your 2-minute pitch should tick these boxes

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## Clear priority

Does it link directly to a members concern (growth, risk, talent, transformation, reputation)?

## Peer relevance

Does it show what other members are doing or the value of peer-to-peer input?

## Outcome focused

Have you framed it in terms of results or impact, not just activity?

## Urgency

Is there a “why now” (regulation coming, opportunity window, competitor moves)?

## Concise ask

Is it under 2 minutes, with no jargon or filler?

## Value exchange

Does it answer “What’s in it for me and my organization?”

# Recap

- ✓ Speak the language of strategy, impact and growth
- ✓ Anchor value in priorities – revenue, risk, reputations
- ✓ Translate features into strategic outcomes
- ✓ Be the bridge between solutions and goals
- ✓ Frame your message as a business enabler, not just a service
- ✓ Refine your elevator pitch using the correct vocabulary
- ✓ Practice articulating the value in metrics that matter to the member
- ✓ Challenge yourself – would this message resonate?



# Membership experience

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# The engine of engagement and retention

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Membership today is an emotional decision, not just a transactional one.

Members stay when they feel seen, supported, and understood.

Experience drives value, value drives belonging, belonging drives retention.

Every interaction sends a message: "This is for you" or "This isn't."



# Relevance creates belonging

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Members decide instantly whether something feels relevant. Imagery, tone, stories, and examples should reflect your audience.

When members see themselves, they feel they belong. When they don't, they disengage way before they unsubscribe.



# From passive to proactive: tools to deepen engagement

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Technique	What it means	Quick win example
Personalisation	Tailoring by role, region, or interest	Use segmentation tags in emails or outreach scripts
Frequency/ consistency	Steady rhythm of contact (not just event-driven)	Create a quarterly check-in template per priority contact
Using data smartly	Track who's engaging, where, and how often	Use CRM reports to flag drop-offs or warm leads
Proactive outreach	Don't wait to initiate valuable interactions	Member to member intros, tailored invite to next coalition call

# Build segmented value propositions

## SME retailers

Pain points:

- Compliance
- Competition
- Consumer trust

**Stand out as a trusted provider and access expert support to run your business safely and profitably.**



## Manufacturers/suppliers

Pain points:

- Regulation
- Market access
- Credibility

**Shape standards, influence policy, and strengthen your credibility with customers and regulators.**

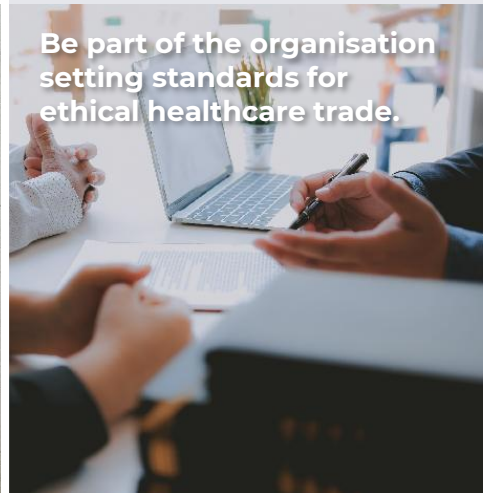


## Policy focused organisations

Pain points:

- Influence
- Sector visibility

**Be part of the organisation setting standards for ethical healthcare trade.**



## Mobility retail

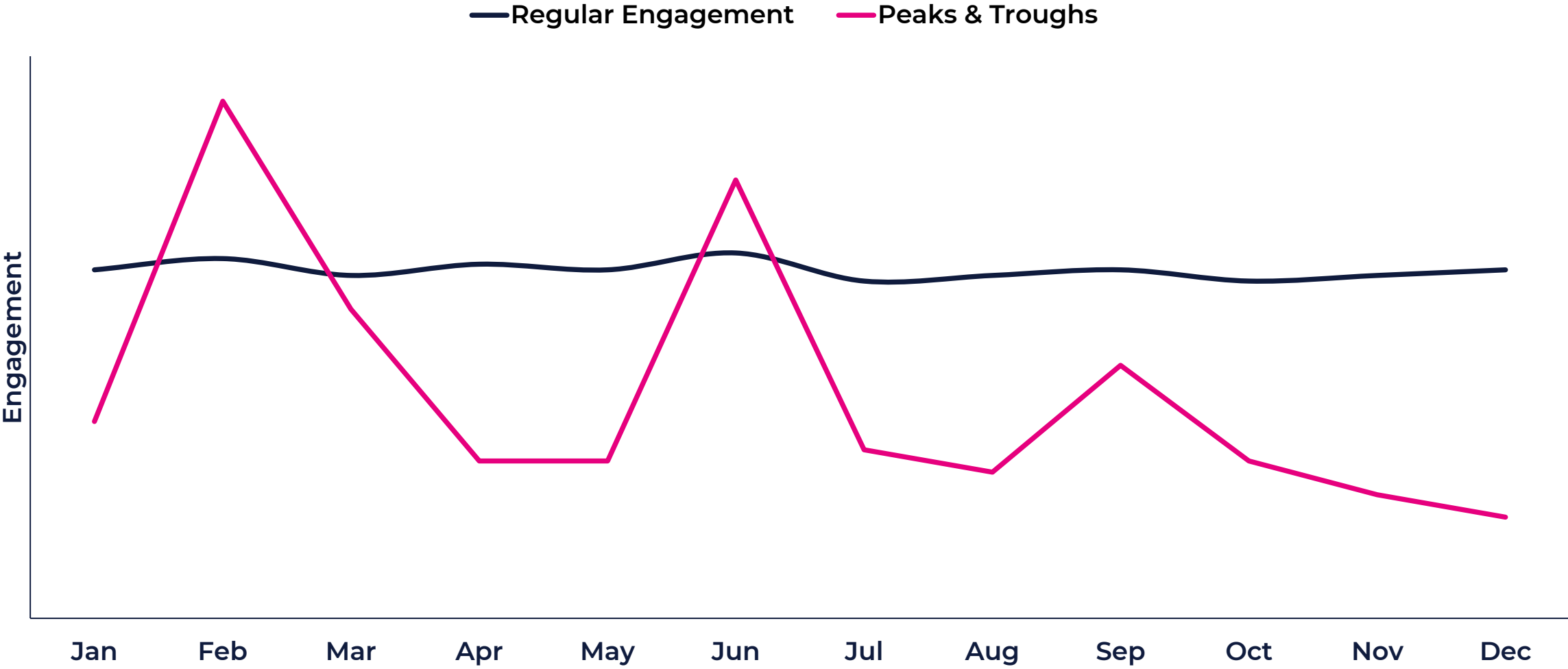
Pain points:

- Consumer trust
- Regulation
- Competition

**Show customers you meet the highest standards in mobility retail.**



# Can you make engagement regular throughout the year?



# Regular check-ins

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Be our guest...

We have missed you...

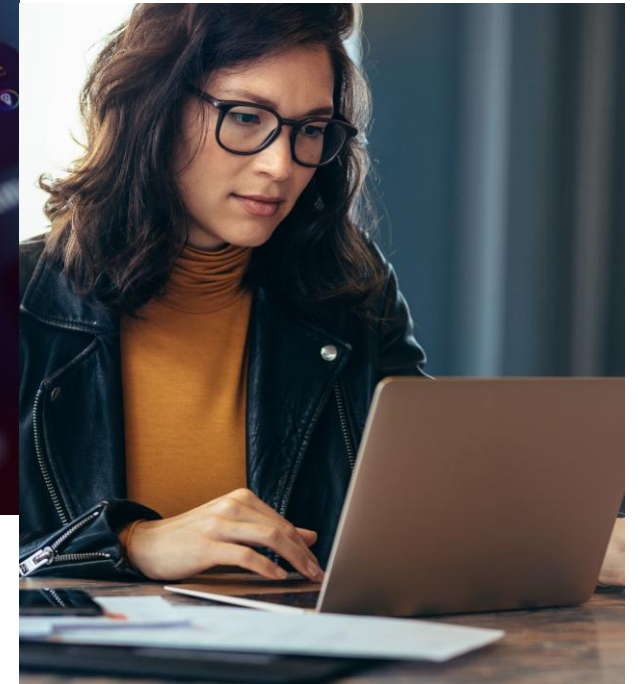
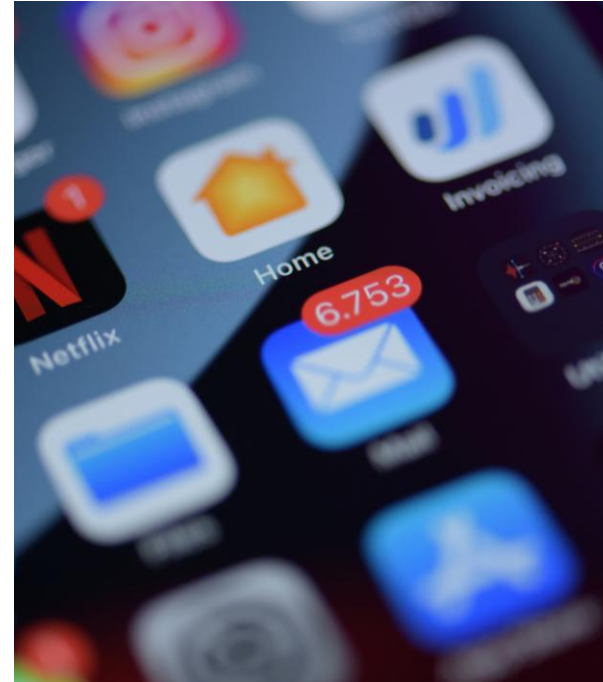
## Pulse surveys

Short, 1-2 question check-ins

Quarterly sentiment + NPS

Trigger-based: post-event, post-renewal

Close the loop, share what you heard



# Membership journey

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## Common blind spots:

Prospects, Onboarding experience, member sentiment, learning outcomes, mentoring impact.

## Why gaps exist:

Siloed data, tech limitations, no feedback loops.

## Practical tip:

Map the full membership journey and overlay what data you do (and don't) collect.

**Awareness**

**Consideration**

**Join**

**Engagement**

**Value realised**

**Renewal**

**Advocacy**

# Designing the membership journey around human moments

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**New member welcome**

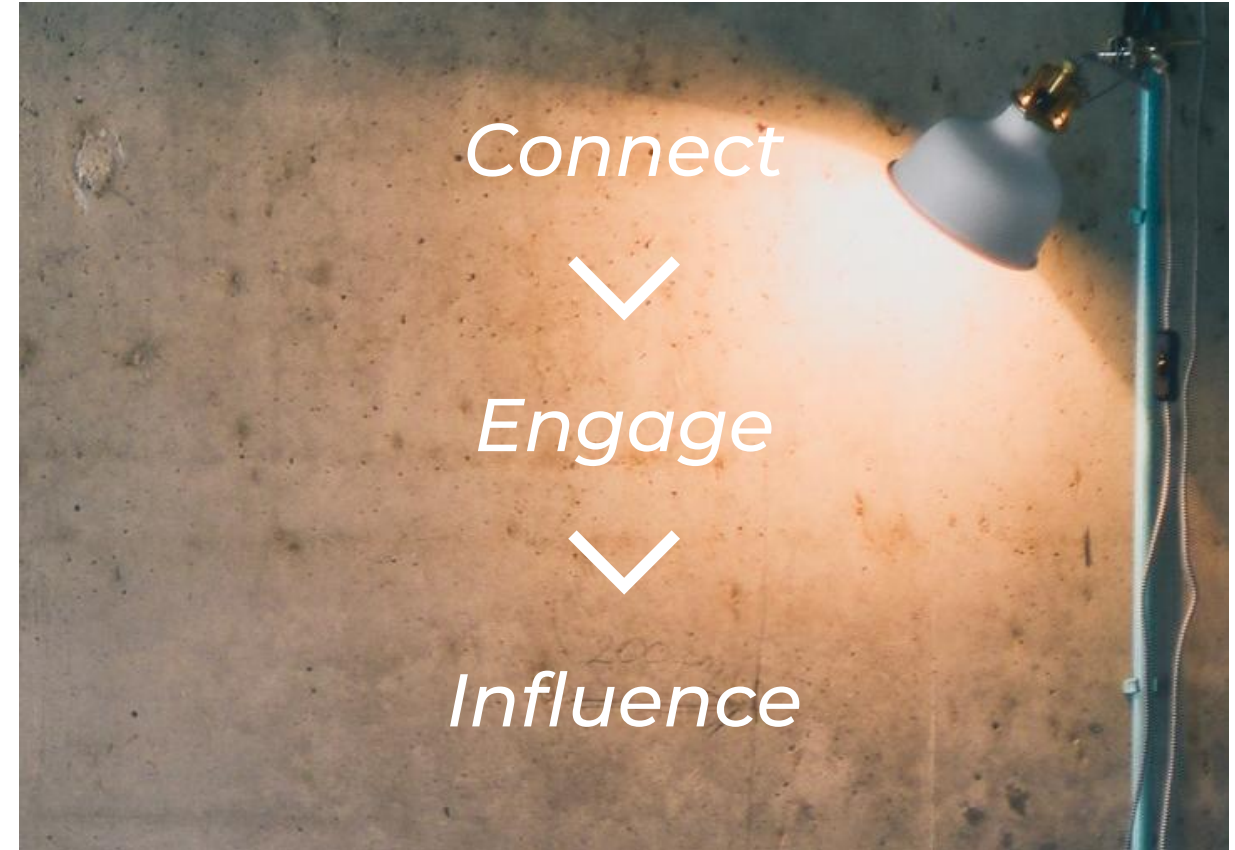
the biggest “make or break” moment

**First ask, first event, first win**

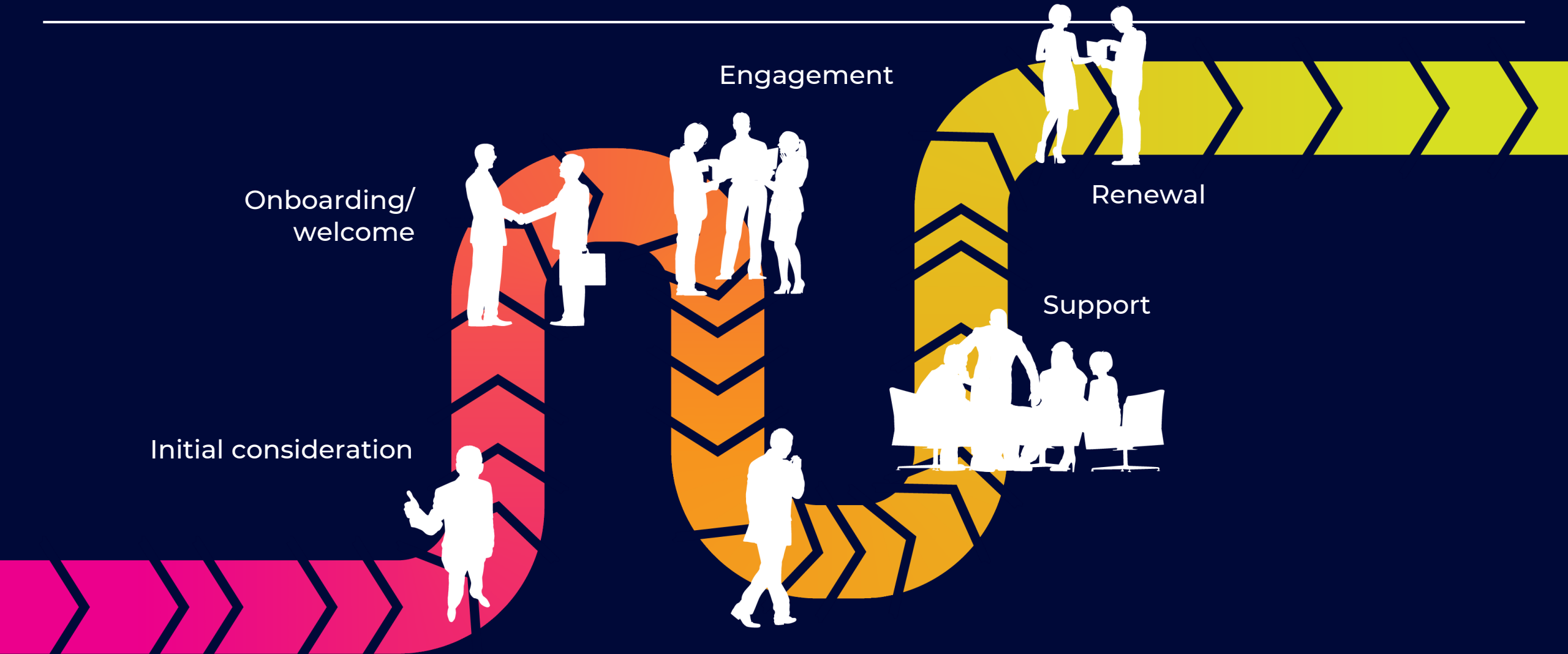
shapes emotional loyalty

**Every touchpoint**

should reinforce “you belong here”



# Journey of discovery



# Prospect journey planner

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Collect qualitative  
and quantitative data  
on your audience



Use the data to build  
your member  
persona



Identify all your  
touchpoints



Identify the different  
stages of the member  
journey



Test, validate  
and repeat



# Prospect journey planner

JOURNEY LENS	SEE	THINK	DO		CARE			
PROSPECT JOURNEY	1. Awareness	2. Consideration	3. Qualification	4. Application	5. Onboarding	6. First 90 days	7. Renewal	8. Advocacy
<b>PROSPECT/MEMBER ACTIONS</b>	Become aware through campaign, sector activity, recommendation, events or policy visibility.	Review relevance: asks "Is this for a business like mine?" and compares with doing nothing or joining another body.	Makes contact, downloads information, requests a conversation, or attends an intro webinar / event.	Chooses membership route, reviews banding/pricing, secures internal sign-off, completes form and code commitments.	Receives welcome, meets key contacts, activates login, chooses interests/sections and plans first steps.	Uses benefits, joins communities, attends events, engages with policy/guidance, and starts to see value.	Reviews ROI, budget and relevance, confirms renewal, updates profile and explores broader participation.	Recommends, provides testimonials/ case studies, speaks at events, refers peers and becomes visible in the community.
<b>TOUCH POINTS</b>	Website, LinkedIn, sector press, events, partner referrals, search, thought leadership, campaigns by audience type.	Segmented email nurture, sector landing pages, membership guide, case studies, FAQs, prospect calls, discovery survey.	Business development call, membership team follow-up, event invite, peer introduction, tailored benefit conversation.	Application pack, pricing/ banding explanation, code of practice information, light-touch support to complete joining steps.	Welcome email series, onboarding call, member directory profile setup, calendar of events, section introductions.	Check-in emails, account management, member-only content, webinars, committees/ sections, networking and insight surveys.	Renewal comms, usage summary, impact highlights, invoice process, renewal call for at-risk members.	Speaker/contributor outreach, referral asks, awards/recognition, leadership opportunities, ambassador programme.
<b>DATA TO CAPTURE IN CRM</b>	Source, sector, company size, geography, role, product/service area, procurement relevance, key interest theme.	Audience type (SME, corporate, policy-focused, code-led), priority challenges, content consumed, event attendance, lead score.	Need/intent, buying timeline, objections, stakeholders, section fit, follow-up actions, next meeting date.	Band selected, fee sensitivity, approval stage, application status, code acceptance, invoicing details, lost/won reason.	Member owner, onboarding status, interests, section choices, communication preferences, portal activation, first goals.	Engagement score, event attended, content usage, committee involvement, support requests, satisfaction signals, upsell/cross-sell potential.	Renewal probability, member value perception, budget risks, issues raised, decision-maker details, retention action plan.	Referral source, advocacy interest, speaking topics, case study approval, testimonials, strategic influence/leadership interest.
<b>CONTENT/SERVICE NEEDED</b>	Clear proposition by audience, sector proof points, concise "why join" messaging, code of practice visibility.	Segment-specific benefits pages, SME/corporate/ policy/code-led use cases, pricing explainer, member stories.	Qualification checklist, tailored decks, short intro webinar, objection handling, procurement-targeted messaging where relevant.	Simple application journey, transparent pricing table, joining checklist, FAQ, human support, sign-off toolkit for internal approvers.	Structured onboarding plan, quick-start guide, section map, key contacts, personalised welcome and early-win recommendations.	90-day engagement campaign, curated introductions, event recommendations, policy updates, practical resources and feedback loop.	Renewal value summary, usage/impact snapshot, refreshed benefits by segment, retention call plan, easy renewal process.	Recognition opportunities, ambassador toolkit, referral incentive/ask, opportunities to shape policy, speak, mentor and lead.
<b>LIKELY PAIN POINTS</b>	Low awareness, unclear relevance, assumptions, weak understanding of outcomes.	Benefits feel generic, pricing/banding unclear, hard to see difference for SMEs vs larger firms, policy value not tangible.	Slow follow-up, unclear next step, not enough tailoring, internal stakeholders not aligned, prospect not yet ready.	Application feels admin-heavy, fees questioned, approval delayed, code expectations not fully understood.	Welcome is too passive, benefits overwhelm, member unsure where to start, no clear owner internally.	Engagement drops after joining, too many options, value not surfaced fast enough, low community connection.	Renewal seen as a cost not investment, activity not visible to decision-makers, unresolved issues undermine retention.	Happy members are never asked to advocate, no easy route to contribute, advocacy opportunities feel ad hoc.
<b>DESIRED STATE</b>	Target sectors know who you are, what you stand for and why membership matters to their commercial, policy and credibility goals.	Every prospect quickly sees a tailored reason to join, with the right message, proof and entry route for their profile.	Qualified prospects move into a clear managed pipeline with agreed next steps and strong CRM visibility.	Joining is simple, transparent and well-supported, with minimal friction and clear confidence in value for money.	Each new member has an owner, a plan and a defined early-win path linked to their goals and sections of interest.	Members build habit and connection within 90 days, with measurable engagement and visible benefit usage.	Renewals are proactive, evidence-based and segmented, with risk flagged early and retention actions triggered in time.	Advocacy is systematic: satisfied members become visible champions, referrers, contributors and long-term community leaders.

# Modern members want personalisation and connection

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## A two-way relationship

Not a broadcast

## Clear communications

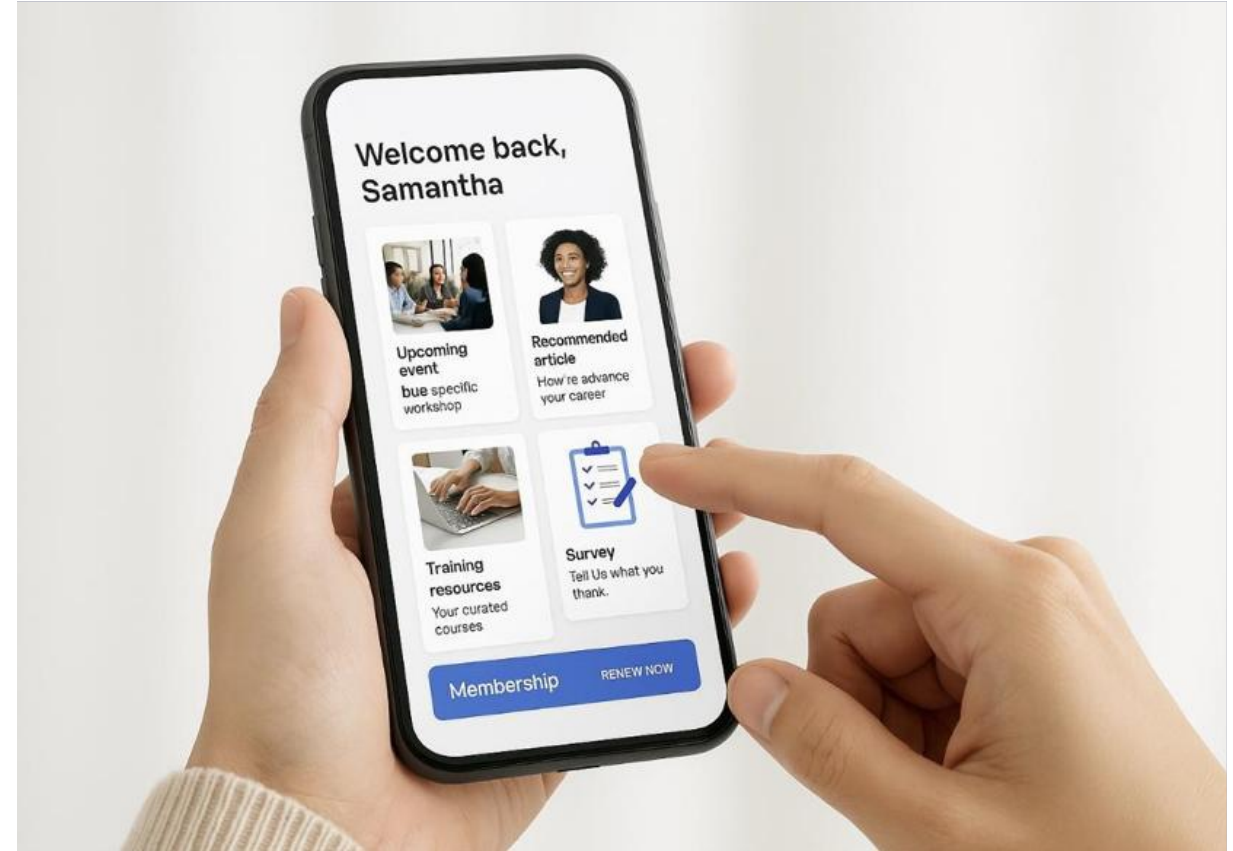
Tailored to their role, needs and stage

## Seamless experience

That is joined up across all departments

## A community

That feels open, safe and relevant



# Belonging drives growth, advocacy and renewal

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## Belonging increases retention

More than any single benefit

## Members who feel connected

Are more likely to participate

## Feeling part of something bigger

Unlocks advocacy and word-of-mouth

## Belonging is no longer a bonus

It's a strategic requirement



# In their own words

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## What members tell us

*"I joined for the network and the recognition. I stay because they understand what I'm working on."*

— Senior member, 8 years

*"The renewal email arrived with no context. It felt like an invoice, not a relationship."*

— Lapsed member, 3 years

## What they're asking for

- Relevance — content and connections matched to their stage of career
- Recognition — being seen as more than a renewal number
- Reciprocity — clear ways to contribute, not just consume
- Responsiveness — feedback acted on, not just collected
- Real human contact — at least one personal touchpoint a year

# “Be Our Guest” campaign

## Campaign purpose

To allow members or non-members to experience the value first-hand by attending selected events, roundtables, or briefings.

This helps:

- Build relationships with prospects
- Demonstrate value before asking for membership
- Increase membership conversion rates

## How the campaign works

Inviting carefully selected members or non-member companies to attend a specific event.

Examples:

- Policy briefings
- Industry roundtables
- Networking receptions
- Sector insight webinars
- Panel discussions

Guests receive:

- 1 complimentary invitation
- Access to networking
- Introduction to leadership



# “Be Our Guest” experience journey

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## 1. Invitation

Prospect receives invitation. Message example:

*“We would be delighted to invite you to join us as our guest at an upcoming event.”*

This provides an opportunity to connect with industry leaders and learn more about the work being done.

## 2. Event experience

Guests experience:

- Sector insights
- Policy discussions
- Networking with members
- Introduction to leadership

## 3. Follow-up

After the event:

- Thank you message
- Membership information
- Invitation to discuss membership

## 4. Conversion

Offer a fast-track membership conversation.



# “Be Our Guest” opportunities

## Industry roundtables

Small discussions on key issues:

- Procurement challenges
- Regulation
- Technology innovation
- Sector trends

These are high conversion opportunities.

## Policy briefings

Invite prospects to briefings:

- Regulatory developments
- Government engagement
- Policy updates

This demonstrates the value of industry representation.

## Webinars

Low barrier entry point. Examples:

- Technology trends
- Regulatory updates
- Procurement insights

## Networking receptions

More informal events where prospects can meet members.

### Important rules for the campaign

To protect membership value:

- Guests should attend only once or twice
- Guests should be qualified prospects
- Events should include clear membership messaging

### Why this works

Associations that run this model typically see much higher conversion rates because prospects:

- Meet members
- See the value first-hand
- Feel part of the community before joining



# Design experiences that say “this is for me”

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Show members they belong through visuals, language and tone

Build journeys around human moments

Create consistency across teams and channels

Make members feel seen – and they will stay



# Break

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# Proposition

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# Getting the member offer right

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## Why your package of benefits matter

A compelling benefits offer is one of the biggest drivers of joining and renewing. **But benefits only work when members clearly understand their value.**

Your offer should evolve as members needs, pressure and expectations change. **The benefits you promote must match the problems your members face.**

## Benefits aren't static. Review, refresh, retire

Members expectations shift every 12-18 months, review regularly for:

- Relevance
- Usage
- Satisfaction
- Cost vs impact

Remove or rework benefits that members no longer value. **Add new benefits that reflect emerging needs, trends and behaviours.**

## Q4 What triggered the decision to retire a member benefit?

*(Responses from those who had retired a benefit)*

### Internal cost vs usage

*"Internal cost compared to usage"*

### Members didn't use it

*"Members did not use the benefit"*

### Low take-up / subscription

*"Low subscription"*

### Survey showed low value

*"Survey and it came out as very low value"*

### Loss of relevance

*"Loss of relevance for the companies"*

### Membership structure change

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### External decision (e.g. journal went digital)

*"RAMP stopped its printed version of the journal"*

### Funding removed

*"We no longer have funding for it"*

# Ensure your benefits are clear and concise

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## The word cloud of shame

These are the words that appear most frequently on weak membership benefit pages

Networking · **Events** · Newsletter · **Updates** · Guidance · **Information** · Resources · **Support** · Discounts · **Access** · Community · **Webinars** · Representation · **Opportunities** · Exclusive · Content · **Training** · Advice · **Much more**

Every one of these is a *container* word. None of them answers the question:

**"What will change for me if I join?"**

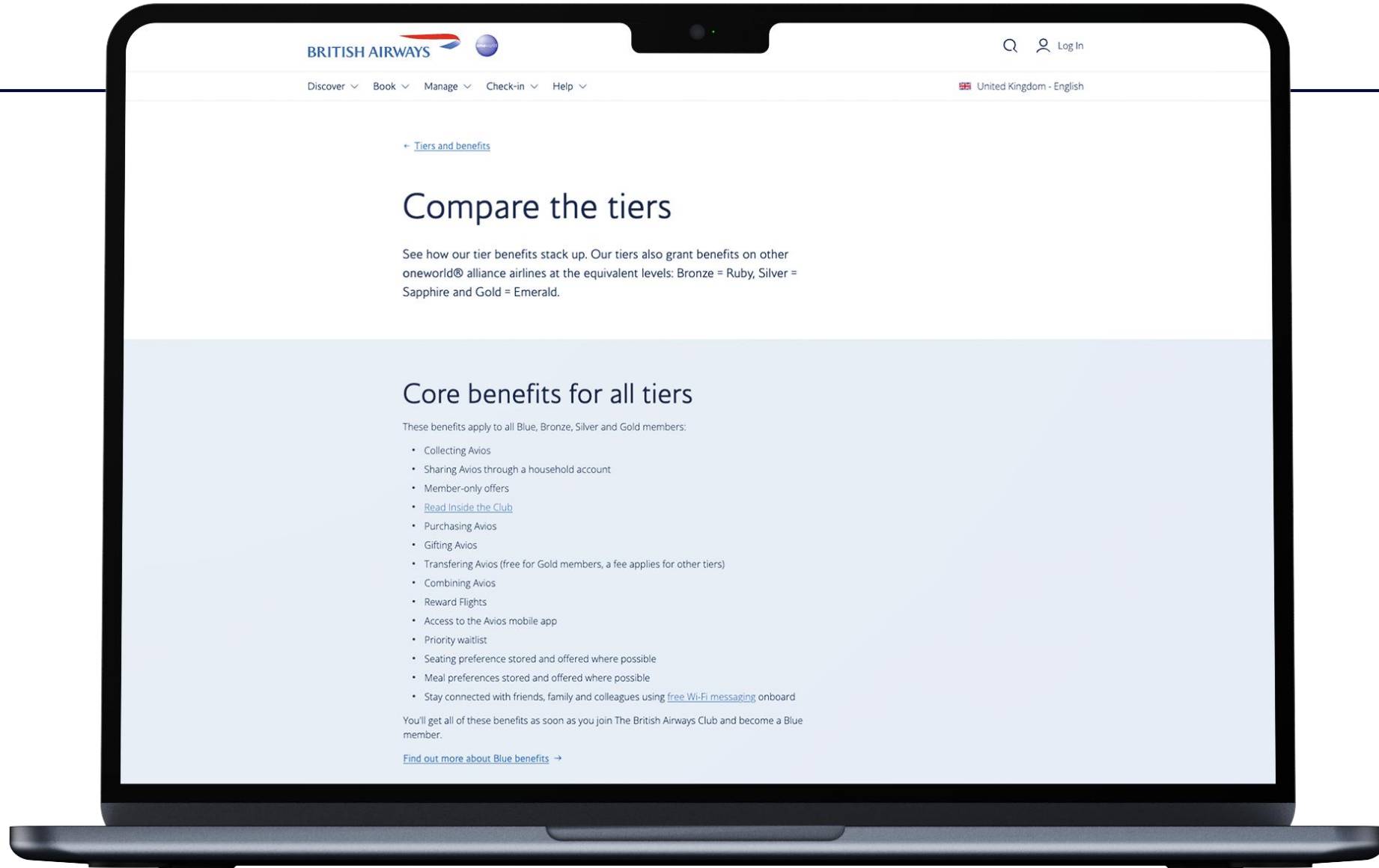
# From container words to outcome language

The same benefit written two ways. One describes the activity. One describes the impact.

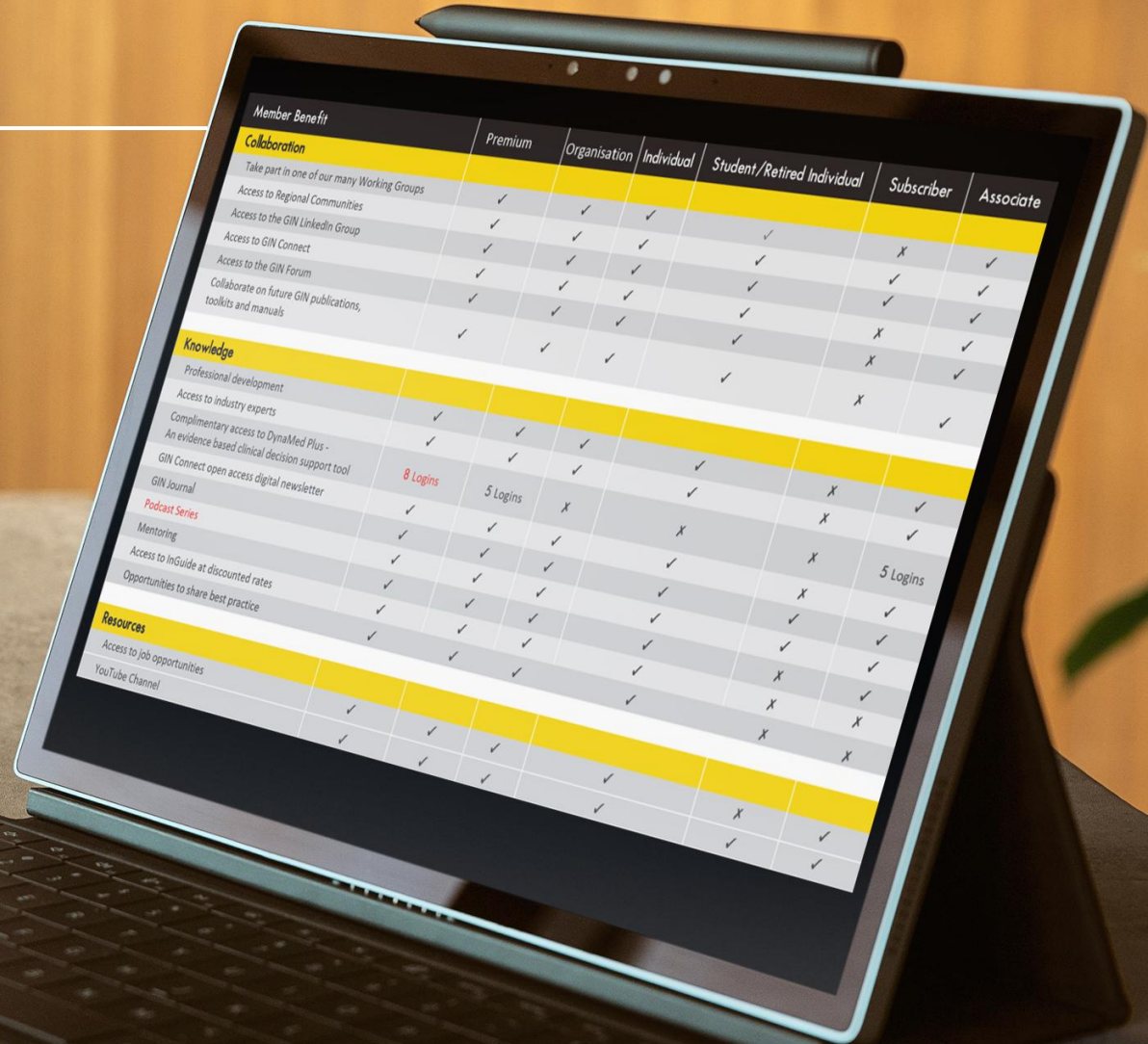
Benefit	❌ Container word (what it is)	✅ Outcome language (what it does)
<b>Networking</b>	<i>Networking opportunities with like-minded professionals</i>	Connect with the procurement directors who decide which suppliers get shortlisted at your next renewal
<b>Newsletter</b>	<i>Regular updates and exclusive newsletter</i>	Weekly intelligence briefing so you know about regulatory changes before your competitors do
<b>Events</b>	<i>Access to industry events and webinars</i>	Roundtables where your CEO shapes the industry's response to government, not just hears about it afterwards
<b>Support</b>	<i>Guidance and support on a range of issues</i>	Legal helpline that saved members an average of £4,200 in employment disputes last year

**The rule: if you could swap your benefit list into any other association's website and it would still make sense it needs rewriting.**

# Clear benefit tiers



# Breaking down benefits



Member Benefit	Premium	Organisation	Individual	Student/Retired Individual	Subscriber	Associate
<b>Collaboration</b>						
Take part in one of our many Working Groups						
Access to Regional Communities	✓	✓	✓			
Access to the GIN LinkedIn Group	✓	✓	✓			
Access to GIN Connect	✓	✓	✓	✓	X	✓
Access to the GIN Forum	✓	✓	✓	✓	✓	✓
Collaborate on future GIN publications, toolkits and manuals	✓	✓	✓	✓	✓	✓
<b>Knowledge</b>						
Professional development				✓	X	✓
Access to industry experts	✓				X	✓
Complimentary access to DynaMed Plus - An evidence based clinical decision support tool	✓	✓	✓			
GIN Connect open access digital newsletter	8 Logins	5 Logins	X	✓	X	✓
GIN Journal	✓	✓	✓	✓	X	✓
Podcast Series	✓	✓	✓	X	X	✓
Mentoring	✓	✓	✓	✓	X	5 Logins
Access to InGuide at discounted rates	✓	✓	✓	✓	X	✓
Opportunities to share best practice	✓	✓	✓	✓	✓	✓
<b>Resources</b>						
Access to job opportunities	✓	✓	✓	✓	X	✓
YouTube Channel	✓	✓	✓	✓	X	✓

# Examples

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- <https://theiamt.org/benefits-comparison-grid/?v=7885444af42e>
- [https://www.cipr.co.uk/CIPR/Membership/Compare\\_benefits.aspx](https://www.cipr.co.uk/CIPR/Membership/Compare_benefits.aspx)

# Design benefits that say “help me succeed”

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Align benefits to real member needs and challenges

Make them simple, visible and easy to use

Communicate value in clear member friendly language

Review regularly to keep your offer fresh and relevant



# AI, Automation & Analytics

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# AI in action: from data to decisions

*Your data is only valuable when it triggers the right action. Here is what AI and automation make possible.*



## Predict who is about to leave

Spot disengagement signals falling logins, missed renewals, no content clicks weeks before a member lapses. You intervene while there is still time.



## Trigger the right action automatically

When a member misses two events in a row, automation sends a personalised check-in not a generic newsletter. The right message, at the right moment, without manual effort.



## Segment beyond job title

Group members by actual behaviour content consumers, event attenders, community contributors so you communicate to who they are, not what they put on a form.



## Personalise the member journey

Based on what a member reads, attends and downloads, recommend the next event, resource or connection most likely to be relevant before they ask.



## Automate the admin, not the relationship

Renewal reminders, onboarding sequences and benefit prompts run automatically freeing your team to have the high-value conversations that no algorithm can replace.



## Read the mood, not just the score

Analyse open-text survey responses to surface what members actually feel identifying frustration or enthusiasm that a star rating alone would never reveal.

**The goal is not to replace human judgement, it is to make sure your team acts on the right intelligence, at the right time, for the right member.**



Behavioural insight:  
track what people do,  
not what they say

# What 'value' means to different groups

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Example	Survey answer	Actual behaviour
Events	I attend events to learn from industry experts	Registers but leaves after 10 mins or watches no replays
Content engagement	I read your research reports regularly	No downloads, zero time spent on insight pages
Community	I love the sense of community	Not part of any member group or online discussions
Benefits	The member discounts are really valuable	Has never redeemed a single member benefit in 12 months
Communications	I stay up to date through the newsletter	Open rate <10%, never clicks

# What **good** looks like: post behavioural insights

## Event participant

- Attends 3+ events every year
- Joins breakout sessions
- Completes surveys

## Content consumer

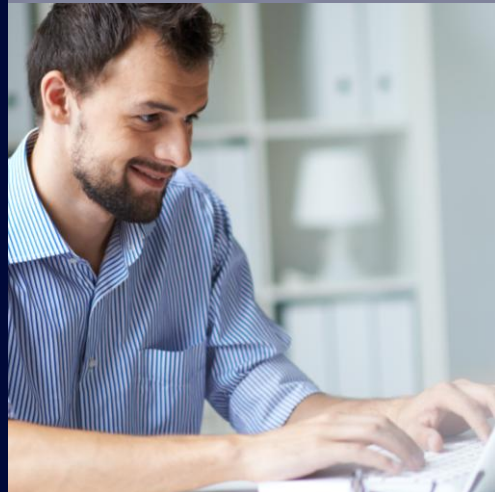
- Downloads reports regularly
- Watches full webinars
- Shares content

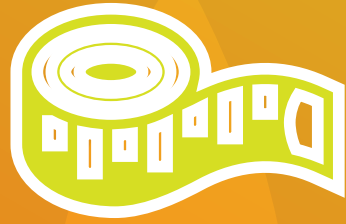
## Community contributor

- Posts in discussion forums
- Responds to other members
- Joins peer groups

## Engaged member

- Uses perks and discounts
- Frequently logs into portal
- Responds to polls





# Measuring engagement

# Measure what is valuable and easy to measure

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## Implement and consistently monitor

Align your KPIs with your strategic goals

Use reliable tools, such as CRM systems or data analytics platforms, can be used to gather and analyse the data.

Do routine check-ins should be regularly scheduled to assess progress, and adjustments should be made where necessary.

Implement and regularly track your KPIs, allowing your association to stay on course to achieve sustained growth and success.

## Review and adaptation

Metrics should be regularly reviewed and adapted to ensure continuous improvement and growth.

## Focus on the specifics

The most effective metrics are those that are tailored to the specific goals and objectives of the organization.

## Common pitfalls

Data overload, lack of strategy, disconnected systems, and low data literacy across teams.

# Transactional vs emotional data

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**Transactional data:**  
what people do - measurable actions and behaviours.

**Join/renewal data:**

Date joined, renewal history

**Event attendance:**

Webinars, conferences, networking

**Website behaviour:**

Page views, downloads, click paths

**Content engagement:**

Email opens, resource downloads

**Purchase history:**

Product purchases, add-ons, upgrades

**CRM interactions:**

Contact forms, service usage

**Emotional data:** why people do it - attitudes, motivations, perceptions, and sentiments.

**Satisfaction scores:**

Event feedback, NPS

**Sentiment analysis:**

Comments, open-text surveys

**Member aspirations:**

Career growth priorities

**Belonging and value:**

Feeling of community, benefits

**Loyalty indicators:**

Advocacy, referrals

**Brand affinity:**

Emotional language about your brand

Combining both data types gives a 360° view of your audience – what they do and why they do it.

# Emotional Connections

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Advocacy

Ambassador Network

Working Group/Board

Community

Make them feel like they belong

Introductions

Be the Cheerleader

Recognition

Create the FOMO!!

THANKS



# Metrics that identify early signs of disengagement

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Drop in logins or platform activity

Skipped or delayed membership renewals

Unresponsive to emails, calls, or event invites

Low engagement with content (e.g. downloads, clicks, video views)

Unregistered for key events or webinars

No downloads of member-exclusive resources

No contribution to discussions, forums, or surveys

Lack of participation in special interest groups or committees

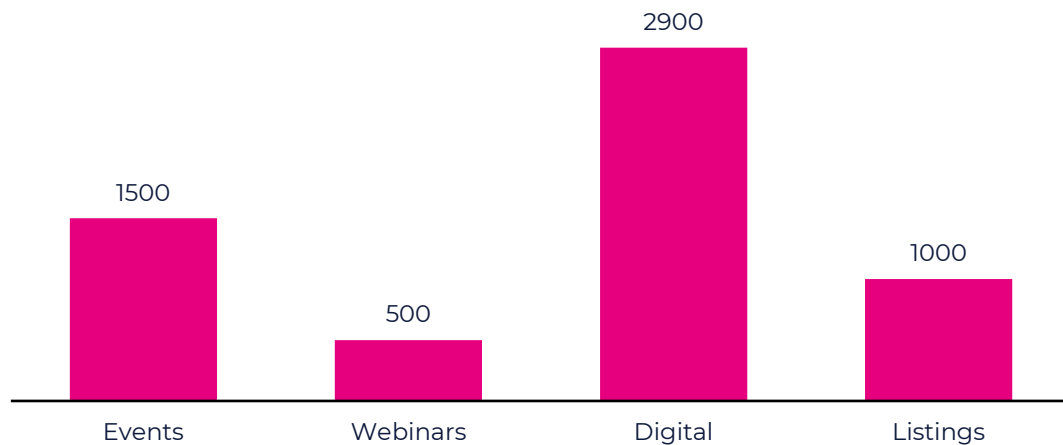
Failure to update profile or preferences (shows detachment)

No interaction with CRM-generated touchpoints or personalised recommendations

# Member benefits statement

Company Name	ZYX Digital Limited	Date Joined	01-01-2025
Membership Type	Gold Member	Renewal Date	31-12-2025
Most Recent Activity	Page Views	Leads Generated	35
Price of Membership	£4,500	Value of Benefits Used	<b>£5,900</b>

## Benefits Summary



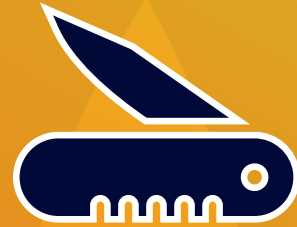
## Benefit Statement Details

### Delegate at an Event

Date	Event	Delegate	Value
21-06-2025	Event 1	Ben Dales	£100.00
05-04-2025	Event 2	James Long	£50.00
23-03-2025	Event 3	Ben Dales	£100.00
<b>Total Value</b>			<b>£250.00</b>

## Digital Engagement

Date	Item	Value
21-06-2025	Digital: BAM Live Gold Partner Listing	£1,000.00
29-04-2025	Digital: FOMO Friday Email Feature	£150.00
05-03-2025	Digital: Posting on Job Shop	£100.00
15-01-2025	Digital: Tracks on Shop Window	£250.00
<b>Total Value</b>		<b>£1,500.00</b>



# Tools and templates to track engagement across functions

# Tools you can use

## Spreadsheet Trackers (for smaller teams)

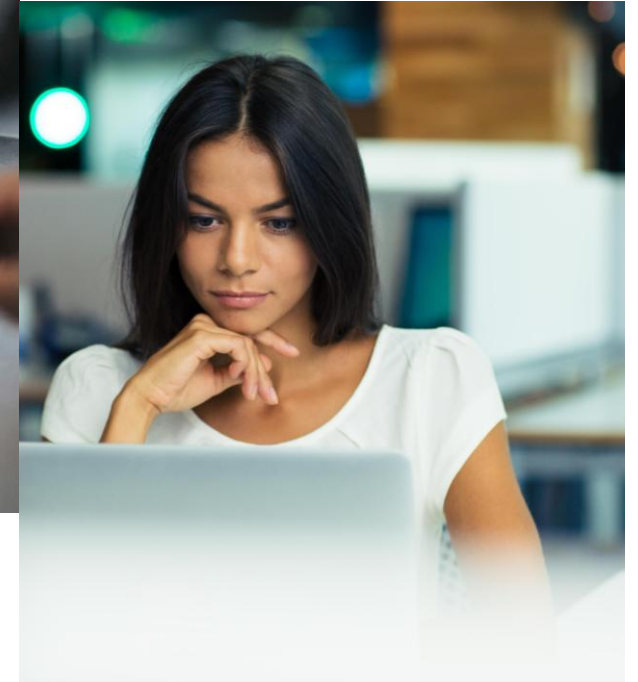
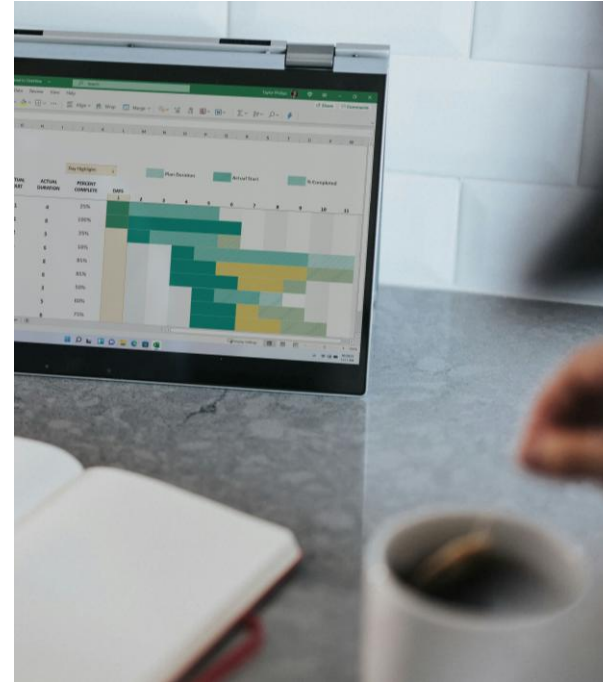
Excel, Google Sheets, Airtable

- Manually log contacts, engagement type and dates; colour-code engagement levels; pivot by department or function.

## CRM Systems (for scale and integration)

Salesforce, HubSpot, Microsoft Dynamics, iMIS

- Single source of truth for member data; automated engagement scoring; segmentation, journeys and renewal triggers.



# Experiment with Emerging Technologies

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- AI
- Chatbots
- Gamification
- Personalisation engines
- Audio AI Messages from your CEO
- Embrace new social platforms
- Digital Membership Cards
- Predictive churn modelling
- Community platforms (WhatsApp, Slack, Discord, Circle)
- AR / VR experiences
- Voice assistants (Alexa, Google)
- Smart event tech (RFID badges, beacons)
- Generative video (personalised summaries / renewals)

# Bringing it all together

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Map contacts.

Track engagement.

Use insights to demonstrate value.

Tools to track engagement.



Coming up next...

AI Readiness:  
from awareness to action  
for membership organisations

Join me later for the deep dive

# Collaboration

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# Cross-team plays that work

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## Break down the silos

- One shared member view across membership, marketing, events and finance
- Joint KPIs — renewal isn't just a membership team metric
- Weekly cross-functional stand-ups on at-risk members
- Embed a marketer or data analyst in the membership team
- Single source of truth: agreed CRM as the system of record

## Coordinate on the moments that matter

- Onboarding: marketing + membership + content align on the first 90 days
- Renewals: finance + membership share early-warning signals
- Events: post-event handover from events to membership within 7 days
- Lapsed members: a clear cross-team win-back playbook, not ad-hoc emails
- Leadership: one quarterly member health review with every department head present

# The culture and shift of internal thinking

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## Start with leadership

- Model data-first behaviours in leadership decisions
- Use dashboards in meetings to reinforce importance
- Ask data-informed questions regularly
- Agree on what “data-first” looks like in your context:
- KPIs used in daily decisions
- Regular review of insights before action
- Everyone has access to relevant data
- Embed data into tools people already use (CRM, email, PM software)

- Deliver bite-sized, role-specific training (e.g., “How to use dashboards,” “How to spot trends,” “Telling stories with data”)
- Require data review before sign-off or major decisions
- Create safe spaces for challenging status quo with data
- Spotlight teams or individuals using data creatively
- Tie data engagement to performance reviews or OKRs

## Measure adoption

- % of staff accessing reports or dashboards
- Track improvements in data-driven decisions
- Nominate data champions per team /department

# What good looks like the numbers

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## Acquisition

- 90-day onboarding completion rate  $\geq 70\%$
- Time to first 'aha' moment  $< 14$  days
- Conversion from prospect to member  $\geq 25\%$

## Retention

- Year-1 renewal rate  $\geq 85\%$
- Overall renewal rate  $\geq 90\%$
- Lapsed-member reactivation  $\geq 15\%$

## Belonging

- NPS  $\geq +40$
- Community participation rate  $\geq 30\%$
- Member-generated content per quarter  $\uparrow$

## Collaboration

- Cross-team initiatives shipped per quarter
- Member touchpoints coordinated across teams  $\geq 80\%$
- Internal NPS on cross-functional working

# Take Action

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# Your action plan

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One thing I will start.

One thing I will stop.

One conversation I will have.



# I.M.P.A.C.T.

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## Insight

Language that resonates understanding what members really need

## Membership Experience

Mapping the moments that foster belonging

## Proposition

Aligning value with members' evolving needs

## AI, Automation & Analytics

Smarter, faster decisions built on data you trust

## Collaboration

Internal teamwork as the engine of external success

## Take Action

From insight to action – your plan to create impact

Creating, empowering,  
and scaling powerful  
networks of likeminded  
professionals.

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