All Hands on Deck: Getting and Keeping Your Members

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Today’s Plan

• Membership lifecycle
• Creating a Membership Campaign
• Overview of Member Recruitment
• Group activity
• Overview of Member Engagement
• Group activity
• Group share

We have to move fast to get through the content. You will walk away with ideas for recruiting and engaging members…and detailed plans will follow.
Membership Lifecycle

Recruit → Engage → Renew
Campaign Lifecycle

- **Audience**: Who you want to target
- **Goal**: What you want to achieve
- **Plan**: How you’re going to reach the goal
- **LAUNCH**
- **Lessons Learned**
Regardless of where you are in the Membership Lifecycle (recruit/engage/retain), start the campaign process - 
**determine your audience**.
Determine your audience

1. Brainstorm potential audiences
2. Select audience
3. Establish characteristics of selected audience
Audience: Brainstorm options

1. Millennials
2. New to perioperative field
3. Seasoned
4. Close to/Retired
5. Staff nurse
6. Educator
7. Leader
8. Lapsed
Audience: Select audience

1. Millennials
2. New to perioperative field
3. Seasoned
4. Close to/Retired
5. Staff nurse
6. Educator
7. Leader
8. Lapsed
Audience: Establish Characteristics

1. Brainstorm characteristics (strengths and challenges)

The goal is to understand who you’re targeting with the campaign.
The Worksheet

<table>
<thead>
<tr>
<th>AUDIENCE</th>
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</thead>
<tbody>
<tr>
<td>Who is your membership target?</td>
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</table>

**Audience characteristics:**

1. 
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14. 

One writer and one facilitator per group
1. Review the brainstormed list of characteristics (strengths and challenges)
2. Add/Revise list

The goal is to understand who you’re targeting with the campaign.
Membership Campaign

Part 1: Recruit
Part 2: Engage
The Worksheet

Now, let’s talk about what “recruitment” means.

GOAL

☐ Recruit
☐ Engage
Membership lifecycle

Recruit → Engage → Renew
What is recruitment?

Recruit: to furnish or replenish with a fresh supply

http://dictionary.reference.com/browse/recruit
Why recruit?

New Members + Retained Members = Member Count
Recruitment 101

1. Why should I join?
2. What will I get?
3. How long until I see return?
4. What’s it like to be a member?

It’s not about you/your organization. It’s about the audience, the person you are trying to recruit.
Recruitment 101 – Why should I join?

According to *The End of Membership As We Know It* (p. 39),

the NUMBER ONE reason members join an association is because...

they believe the association will help them solve a problem.

**Why should I join? = What problem will they help me solve?**
Recruitment 101 – Why should I join?

- **Information seekers** – join to access information, opinions or research
- **Lifelong learners** – strong desire to pursue knowledge even though it isn’t required to maintain a license, practice or position
- **Continuing Education Requirement Members**
- **Thought leaders (current and aspiring)** – individual recognized as an authority in selected areas of specialization
- **Rising Stars and Networkers** – individuals who turn to association to expand their network
- **Mission members** – believe very strongly in the purpose of the organization (not WIIFM)
- **Prestige members** – view membership in association as a way to add credibility and prestige to their profile
- **Uninvolved members** – do not volunteer or attend in-person events or conferences
- **Transactional members** – join association to save money; membership makes financial sense

*The Art of Membership – Sheri Jacobs, CAE*
Recruitment 101 – Why should I join?

What do I need?

- find a job
- find a better job
- get (more) involved at a local level
- get (more) involved at a national level
- build up my resume
- help resolving a problem at work
- how to enter the field
- learn about specific issues
- get published
- get CHs
Increasing the menu of programs and services was an attempt to increase the value of belonging. The thinking was that the more an association offers with membership, the more value membership has. Wrong. **Unused services have no value.**  

*Race for Relevance*, p. 11
If you were to brainstorm the “benefits” of membership, you’d probably come up with a list of “features.”

A “feature” is not a “benefit.” You have to translate a tangible offering into how it will benefit the member.
### Recruitment 101 – What will I get?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Benefit</th>
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<tbody>
<tr>
<td>As a member, you receive 12 monthly issues of our <em>Alert</em> newsletter.</td>
<td>Our <em>Alert</em> newsletter gives you instant access to job critical reports.</td>
</tr>
<tr>
<td>Receive the flagship magazine of the ABC association.</td>
<td>ABC’s magazine tells you the real story you won’t find anywhere else.</td>
</tr>
</tbody>
</table>

*Membership Essentials, p. 176*
Recruitment 101 – How long to see a return?

I have a problem.

This group says they can help solve my problem.

How long will it take?

Are there other – faster, cheaper, better – options out there?
Are there other costs besides the initial investment?
Recruitment 101 – What’s it like to be a member?

Do I know any members?
Are the members like me?
Are the members like who I want to be in 5, 10 years?
Can I see myself in this group?

Do I fit in?
The Worksheet

1. Why should I join?
2. What will I get?
3. How long until I see return?
4. What’s it like to be a member?

What is the specific problem(s) you are going to help the audience solve?
Membership Campaign

- Audience
- Goal
- Plan
- LAUNCH
- Lessons Learned
The Worksheet

AUDIENCE

Who is your membership target?

Audience characteristics:
1. 
2. 
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GOAL

☐ Recruit
☐ Engage

What is the specific problem(s) you are going to help the audience solve?
**Activity**

1. Brainstorm campaign ideas that will:
   - resonate with the audience.
   - address their problem.
2. Select one idea.

**CAMPAIGN PLAN**

Brainstorm campaign ideas:

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Campaign selected: ________________________________
The Worksheet

Identify success metrics:

1. 

2. 

Activity
1. Identify your success metrics.
   • What are you hoping to get out of the campaign?
   • How will you know if the campaign was effective?
Activity
1. Develop top level messaging ideas for the campaign.
   • Tone: What works best for your audience? Fun? Professional?
   • Content: How will you describe/pitch your campaign to your specific audience?

<table>
<thead>
<tr>
<th>Tone</th>
<th>Content</th>
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### The Worksheet

**Activity**

1. How will you communicate to the audience? (phone, email, personal ask, etc)

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The Worksheet

1. Campaign launch date: When will the campaign start?
2. Campaign timeline: Based on start date, what is your timeline for planning the campaign?
3. External resources: What additional support do you need?
4. Internal resources: What internal resources do you need?
5. Campaign cost: Projected expenses
6. Projected revenue: (if applicable)

Campaign launch date: ________________________________
Campaign timeline: ________________________________
External resources (facility, AORN, etc.): ________________________________
Internal resources: ________________________________
Campaign lead: ________________________________

<table>
<thead>
<tr>
<th>Campaign cost</th>
<th>Pre-campaign</th>
<th>During campaign</th>
<th>Post-campaign</th>
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Projected revenue: ________________________________
We can’t do this today, but...

### LESSONS LEARNED

<table>
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<tr>
<th>Identify accomplishments (what went well)</th>
<th>What should be improved</th>
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**Activity**
1. Conduct a campaign debrief.
2. Review outcomes against original goals.
3. Identify strengths and opportunities.
Membership Lifecycle

Recruit → Engage → Renew
Ready, Set, Engage!

You got them in the door...

...Now keep them coming back!
Show ‘em Why It’s Worth It

‘Emotional involvement or commitment; to get and keep someone’s attention, interest, etc.’

- Engagement is different things to different people
  - Purchases, transactions, volunteer, donate, events

- Engagement should be an ongoing interaction that builds a relationship over time
  - Engagement is not one and done

Remember: Active members ≠ Engaged members
What’s the Big Deal?

- **An effective engagement strategy:**
  - **Builds** relationships
  - **Reinforces** value
  - **Fosters** advocates
  - **Advances** mission
  - **Drives** volunteerism
  - **Offers** a collective voice
  - **Produces** longer tenure
  - **Raises** awareness
  - **Encourages** involvement
Creating an Effective Engagement Strategy
Who Goes There?

- Identify audience based on select attributes
  - New to AORN
  - Seasoned vs. new to OR field
  - Job position (staff nurse, educator)
  - Practice area/Specialty
  - Proximity/location

We have already defined the “Who” for you – Millennials, New to Field, Seasoned, Retirement, Educator, Staff Nurse, Leader, Lapsed.
It’s How You Say It

- Create tailored message by audience
- Focus on needs/interests of each audience
  - Find out what’s important to the audience
  - Demonstrate how you solve their challenges

<table>
<thead>
<tr>
<th></th>
<th>Volunteering</th>
<th>Leadership</th>
<th>Education</th>
<th>Clinical Practice</th>
<th>Career Center</th>
<th>Advocacy</th>
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</thead>
<tbody>
<tr>
<td>Leaders</td>
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<td>x</td>
<td>x</td>
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<tr>
<td>Millennials</td>
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<td>x</td>
<td>x</td>
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Remember: Build Value by reinforcing membership benefits and reminding them why they became members.
Here, There, and *Maybe* Everywhere

- Decide how to communicate to your audience
- Members have different ways of interacting with you – go **to** them, be accessible
  - Face-to-face meetings
  - Newsletter/Bulletin
  - Facility
  - Online (ORNL, email)
  - Direct mail
  - Word of mouth/personal relationships
  - Social, i.e. FB page
Are They Engaged Yet?

- Remember, engagement is an ongoing interaction that builds a relationship over time
- Connect with members **throughout** the year
  - Keeps *members* involved, up-to-date
    - Welcome new members
    - New member on-board plan (ie: first 90 days)
    - Exploratory period – let them acclimate
    - Current events/happenings
    - Volunteer opportunities
    - Time to renew
  - Keeps *you* relevant, top-of-mind
Your Strategy May Need a Tune-Up

- Look at what works, what doesn’t work
- Fine tune and refresh message/delivery
- Ask members:
  - How they want to be reached
  - Have their interests changed
- Incorporate member feedback
Let’s Get to Work

AUDIENCE

Who is your membership target? ____________________________________________

Audience characteristics:
1. ____________________________________________
2. ____________________________________________
3. ____________________________________________
4. ____________________________________________
5. ____________________________________________
6. ____________________________________________
7. ____________________________________________
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13. ____________________________________________
14. ____________________________________________

GOAL

☐ Recruit
☐ Engage

What is the specific problem(s) you are going to help the audience solve?

□ Audience:
  - Who is your target audience?
  - What are audience characteristics

□ Goal:
  - Engage
  - Problem?
Let’s Get to Work

- Campaign Plan:
  - Brainstorm campaign ideas
  - Select campaign
  - Identify success metrics
  - Identify campaign messaging for audience (i.e., what’s relevant)
  - How will message be delivered to audience?
  - Campaign Timeline
  - Campaign launch date
  - AORN resources? Other resources?
  - Who will lead campaign?
  - Campaign costs

- Lessons Learned
  - Accomplishments
  - Needed improvements
Pick a speaker for your table (one speaker per audience).

In 2-3 minutes:
• State your audience.
• Describe your audience.
• Describe ONE of your campaigns.
Thank you!

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