

White Paper

# Membership Organisations: Achieving Your 2020 Vision

## Providing you with:

- ✓ Practical tips to make your vision a reality
- ✓ Insight into common challenges and pitfalls
- ✓ Ways to measure the impact of your initiatives



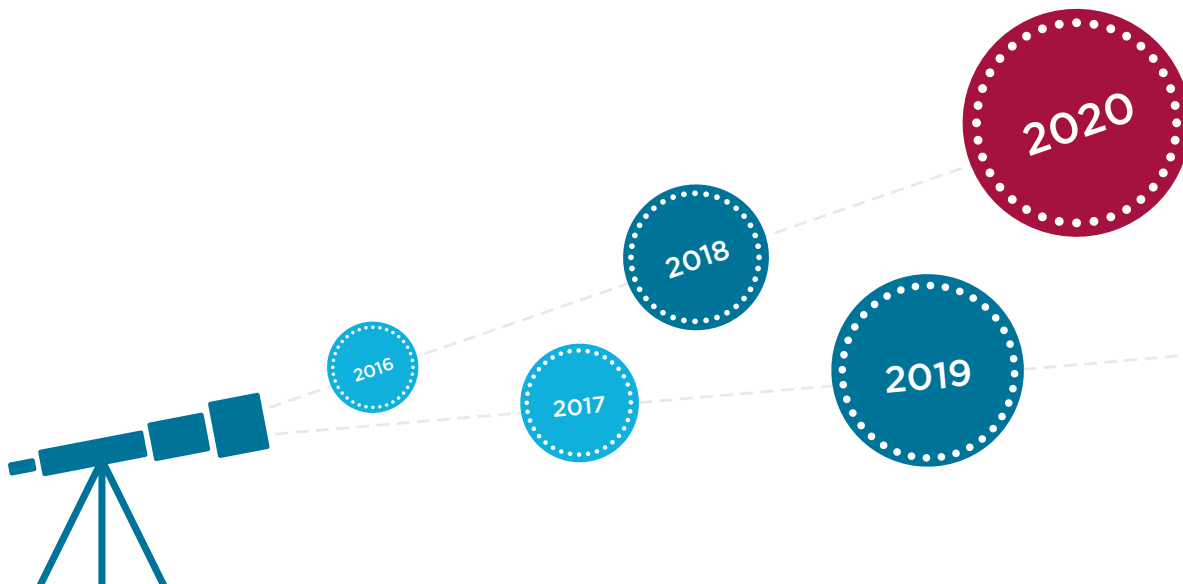
# Introduction

## From vision to reality

As a modern membership organisation, it's likely that you have a long-term vision for the future. Whether it takes you through to 2020, 2025 or is more loosely defined, it's around this vision that you'll craft all aspects of your strategy - enabling you to grow revenue, expand your reach, and better serve your members.

Having worked closely with a wide variety of membership organisations over a number of years, we understand the central role these vision statements play in the decision-making process, and the effort that goes into their creation. A well-crafted vision statement will have been built to address the underlying wishes and desires of members, staff, public audiences and other key stakeholders, and rigorously validated through a period of testing and refinement.

It will also typically be grouped around key themes that link back to your overarching goals. For example, in our experience educating members and building a strong community are central pillars of many membership organisations' visions, as are contributing to and influencing the wider society, economy and political system.



However, even with the most robust of visions in place, the journey towards achieving this will likely be complex, not to mention constantly in flux. Consequently, your organisation needs to be empowered to create a plan for managing and mitigating this complexity, and make decisions that align with current needs and priorities - which requires that you're able to continually measure and evaluate your progress.

This white paper explores how these capabilities can be integrated into every level of your organisation through effective internal processes and team hierarchies, an on-going focus on members, and continual review and validation activities - allowing your strategy to respond to internal and external shifts, without losing sight of the aims and objectives set out in your vision.



# The challenges facing member organisations

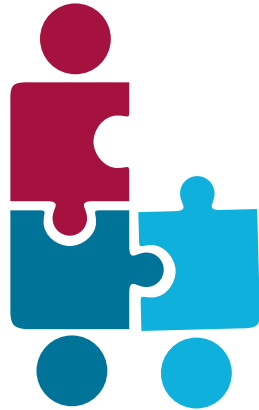
Membership organisations today are subject to numerous and disparate demands. With digital advances introducing greater competition from alternative communities such as social networks, for example, there is increasing pressure to prioritise growing membership bases and opening new revenue streams over individual member needs. At the same time, though, audience demands and expectations continue to rise as they're exposed to high-quality customer experiences elsewhere - forcing member organisations to go above and beyond business as usual in order to remain relevant, valuable and useful.

These issues are often compounded by the traditional business structures to which these organisations typically adhere, which reinforce departmental and channel-based silos. A fear of change and the unknown can make breaking down these silos a challenge, hindering the drive for a unified approach to activity - one that touches on operations, IT, finance, data, and even the internal culture of an organisation - that is needed to keep the organisation focused on delivering value in the face of different (and often competing) demands.

Increasingly, too, membership organisations are subject to forces outside of organisational control. This is a subject that's particularly pertinent to British (and European) organisations in the wake of the EU referendum, and the subsequent discussions around how and when the country will leave the European Union. Whatever the outcome, there will no doubt be a significant impact on the role membership organisations play in shaping and influencing policies in the sectors they support, as well as new questions around funding and employment. This further highlights the need to remain

adaptable enough to respond to future shifts and changes rapidly, and with effective co-ordination.

If these challenges are all-too familiar to you, then, you might be forgiven for asking how can you hope to achieve your vision. The answer lies in transforming your membership organisation to bring it firmly into the 21st century - and the journey to get there is something we'll cover in subsequent sections...

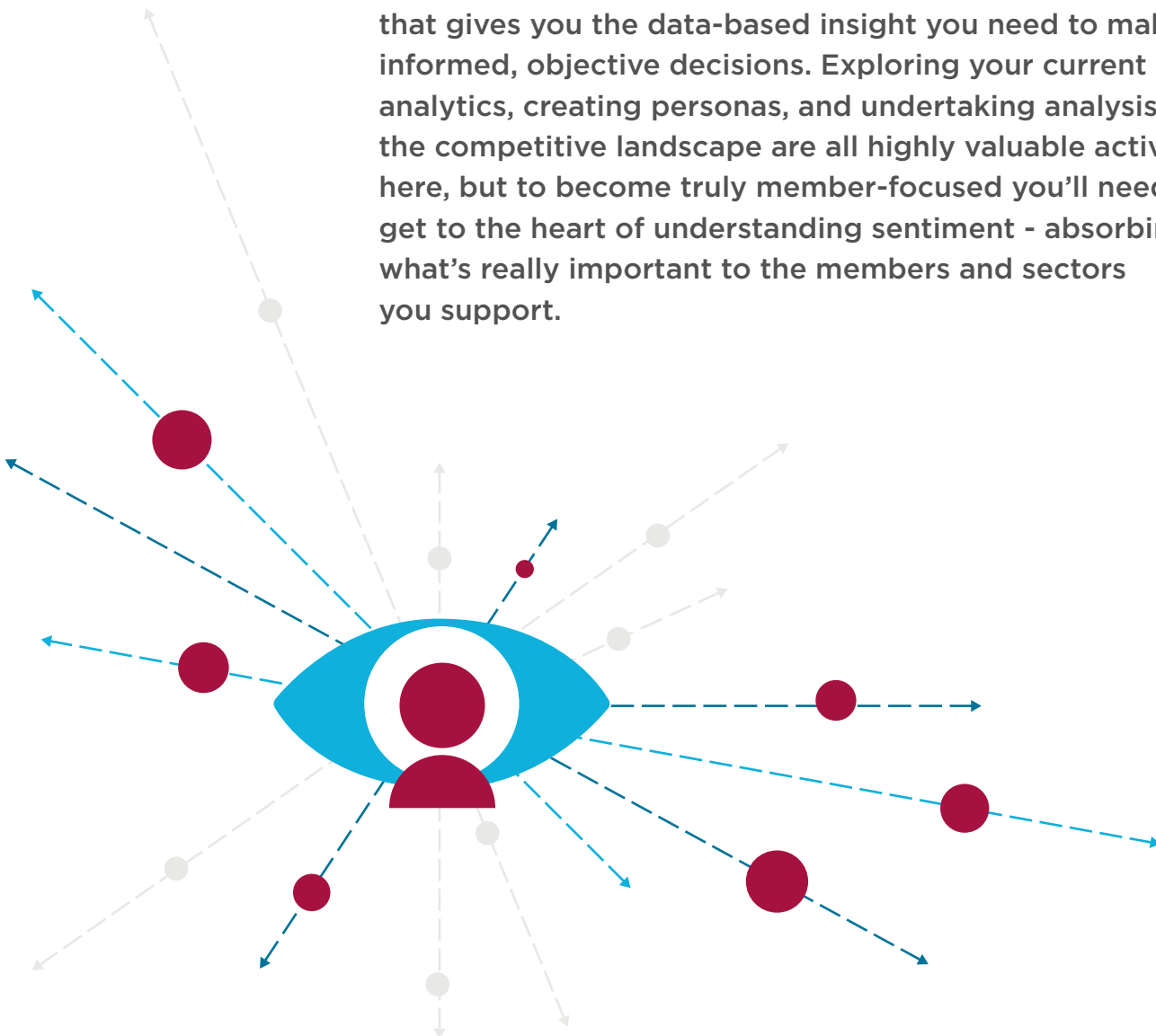


# 1

## Maximise member insight

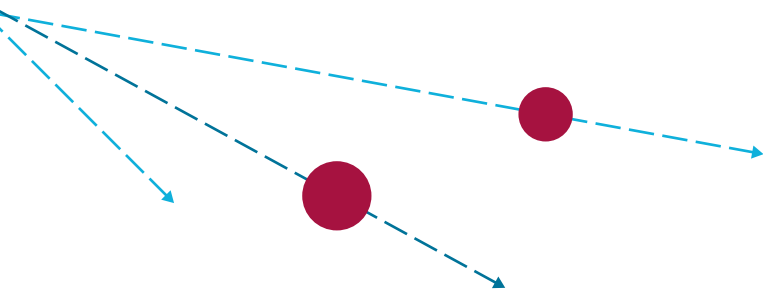
There is a temptation to deprioritise serving individual member needs in favour of pursuing more immediately revenue-generating activities. However, with digital technologies giving consumers ever more power and choice it's only by putting your members at the heart of your vision - and all activity needed to deliver it - that you'll be able to drive your own organisational ambitions in the long-term.

While you'll of course have spoken to members during the development of your vision, in order to effect this shift from an enterprise-led to member-centric approach you'll have to go deeper, conducting empirical research that gives you the data-based insight you need to make informed, objective decisions. Exploring your current analytics, creating personas, and undertaking analysis of the competitive landscape are all highly valuable activities here, but to become truly member-focused you'll need to get to the heart of understanding sentiment - absorbing what's really important to the members and sectors you support.



It's likely that you already possess a great deal of information around this, but often it is captured, stored and applied in various different places, preventing its true value from being fully realised. By giving each business operation and staff member the tools to capture and share sentiment, though, you'll build a valuable picture of member needs, enabling you to identify what's working well within your current member offering as well as any areas that may need more investment than others in order for your vision to be fulfilled. Additionally, with a clear understanding of the 'as-is' situation you'll gain a powerful barometer that can be referred to throughout the journey, helping you more effectively assess the impact of any future initiatives.

First, though, you need to be able to make sense of the raw data, by extracting relevant insight and translating it into a format that can be communicated and understood right across the organisation. This may, for example, involve the construction of executive dashboards that provide a high-level overview of the most important trends, patterns and results, so that requirements and priorities can be adjusted to maximise value for your members, and return on investment for your organisation. Another approach, meanwhile, is to employ user-centred design activities such as [customer experience mapping](#) to identify any areas of disconnect, inconsistency and fragmentation - or services that may be underdeveloped or underperforming - and take steps to address these issues.



# 2

## Support flexibility

The member insight you capture will prove invaluable in helping align activity across your organisation to support the effective delivery of your vision, from optimising your structure, processes and culture through to shifting the ways in which you think about the different products and services you offer, and even shaking up your existing team and department hierarchies.

For example, information on member behaviour, preferences and sentiment can be used to create distinct 'value streams'. Whereas your traditional operational structures will likely be drawn up along clear channel or revenue lines (for example publishing, online services, or new member acquisition), these value streams instead reflect how your members view your organisation and the benefits they receive from membership - no matter when, where or how they are delivered. As such, you may find that changes will be required to transition to this new way of thinking about the member experience.

Once your streams are in place, therefore, you'll need to review and update your budgets, team setup, strategic initiatives and key performance indicators to bring them into alignment. Integrating all these elements across your organisation is also of crucial importance, to avoid conflicts arising or the duplication of effort.





For example, if individual departments aren't made aware of what is happening in other areas in the business they may purchase technology solutions (such as content management systems) that are already in place elsewhere; while a lack of a shared content hub and publication workflows can lead to inconsistency in the ways that topics are referred to.

(Similar issues can also arise as a result of the fragmented data management processes mentioned previously, as without a single customer view it's impossible to deliver a personal, joined-up experience that encompasses a variety of different channels, communication methods and membership stages.)

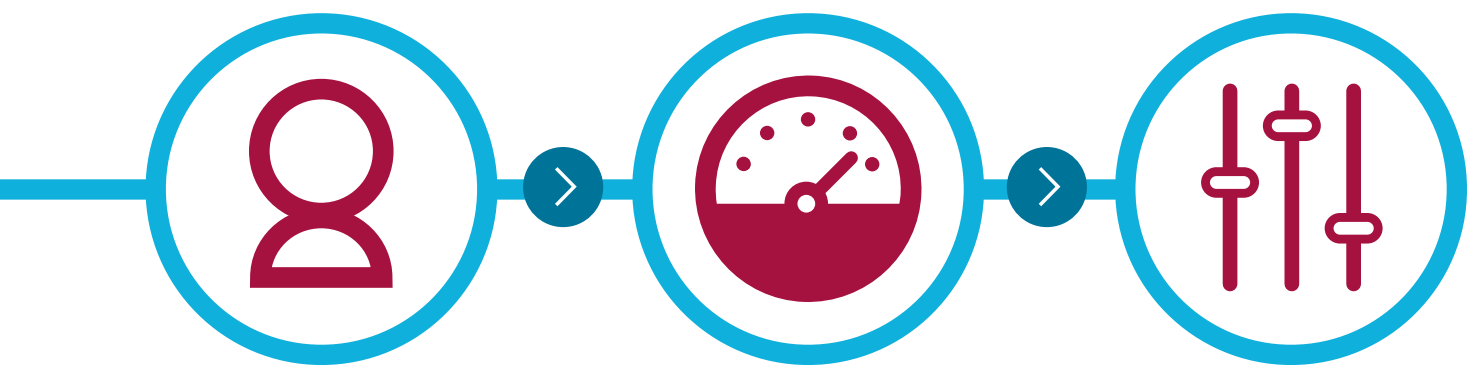
To further strengthen the drive to achieve a single, unified vision, it can also be useful to set up an executive board. Responsible for coordinating all activity throughout the organisation, this board acts as a unifying link between departments; encouraging collaboration and fostering awareness of overarching requirements, priorities and goals at all levels.

# 3

## Measure and optimise

With a shared understanding both of the value you'll need to deliver to members so that you can fulfil the statements set out in your vision, and of the work required to facilitate this, you'll be ideally placed to validate your strategy for the future, along with any associated tactical activity. As with the previous stages in your journey, this process should be undertaken collaboratively so that all work remains focused on the member - with content supporting services, digital supporting physical, national supporting local, and vice versa.

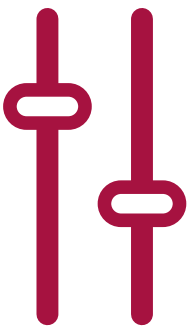
Each element of your strategy should also have clearly-defined success criteria, to enable you to clearly and accurately measure the performance of your initiatives. Crucially, too, these should in all cases be tied back to your vision, to maximise the returns being delivered to the organisation as a whole. It can be easy to fall into the trap of highlighting 'vanity metrics' that may superficially look good, but if they don't serve your stated goals and intentions they may not offer any truly valuable insight.



For example, while an increase in website traffic is generally accepted as a positive trend, if your goal is to increase engagement then you should also be looking at metrics such as bounce rate, time on site, pages viewed, and content shared, as the high traffic levels may be masking poor performance in these areas. If, on the other hand, your goal is to maximise revenue from advertising or similar, website traffic can be an effective indicator of success.

Alternatively, it may be the case that you offer a trial membership to incentivise sign-ups. In this case you'll need to look beyond the number of trials taken up and assess how many of these are converting into full membership, as well as activity levels during the trial period. If these figures are low it may indicate a problem with your on-boarding process, or a lack of visibility with regards membership benefits. Gaining access to premium content, for example, is often a key motivation for members to sign up - although it can also of course be a means of generating direct revenue through sales to non-members. Be sure then to look at both of these influences when assessing the return on investment of your content.

Your strategic plan should also include key milestones - such as the launch of a digital platform, the rollout of a new service, or updates to membership bandings - to enable you to assess progress towards your goals and ensure your vision remains validated. It's important that these milestones stay flexible though, to manage the continual evolution and potential for disruption that is inevitable in today's digital landscape. Using the same set of tools throughout the process will also help ensure consistency, making it easier to spot specific patterns and changes to outcomes at an early stage, and make any refinements that may be needed to facilitate the on-going and iterative improvement of your plans.



# Conclusion



A vision statement can be a powerful tool for membership organisations looking to drive change both in the way they support and serve their audiences, and in their wider structure and operational running - but only if it is acted upon.

As the steps required to do this will naturally have a significant, far-reaching impact on your business, and will need to cover both current and new members (retention and acquisition) in order to be successful, overcoming any fear of the unknown is therefore a crucial first step on the journey towards achieving your vision. Beyond this, your journey will also need to be supported by the structures, capabilities and culture covered in this white paper - requiring that you:

- Understand what matters most to your members and other key stakeholders
- Share and collaborate across the member enterprise to unlock the true potential of your data
- Review and reshape operational structures to enable you to effectively assess the value of your initiatives
- Ensure your team has the flexibility to adapt to opportunities, both known and unknown
- Continually measure and iterate to drive optimisation and improvement

At Box UK we've worked closely with numerous organisations from across the membership sector - including BCS, The Chartered Institute for IT, UNISON, the National Childbirth Trust, the Royal Photographic Society and the Royal College of Nursing - to help ensure they remain relevant, valuable and successful in the fast-changing digital landscape. To find out more about our expertise and experience visit the dedicated [membership resources](#) section of our site, or [get in touch](#) to discuss how we may be able to specifically help you.

# Further Reading

[Designing for Desire](#)

[Five Ways to Improve Web Forms in the Membership Sector](#)

[Eight Pitfalls to Avoid When Budgeting for Digital Transformation](#)

[Mapping the Customer Experience](#)

[Seven Elements of Agile You Can Take Outside Software Development](#)

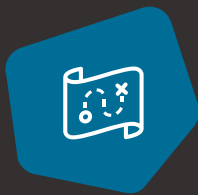
[The Death of Mass Marketing](#)

[The Digital Transformation of Membership Organisations](#)

[Two Months Post-Brexit: Why We Need Agile Now More Than Ever](#)



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**membership@boxuk.com • +44 (0)20 7439 1900**