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HOW TO MAKE YOUR ASSOCIATION A DIGITAL LEADER

INCLUDING 34 ACTIONABLE
IDEAS YOU CAN START
IMPLEMENTING TODAY

AN
ENGINESS
BUSINESS GUIDE

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Introduction

When it comes to technology, it can feel like you're just trying to keep up with the Joneses: always chasing the next big thing, but never quite becoming the digital leader you want to be.

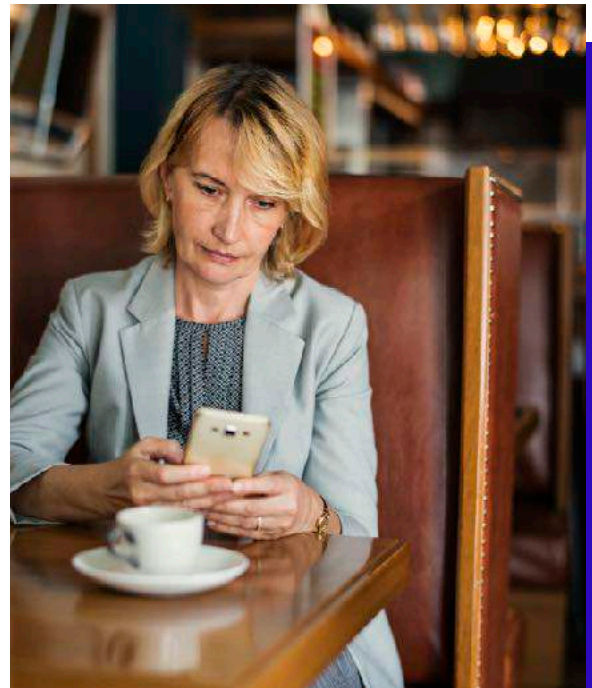
Combined with the staggering number of digital solutions out there, it's easy to feel like your digital transformation has a lot of movement, but not a lot of progress.

Associations are under increasing pressure to provide better products and services than ever before, delivered in new and innovative ways that suit their audience. Maintaining the status quo or doing things 'like we've always done' isn't an option anymore.

If associations want to be digital leaders, they need to take decisive action and leverage the tools available to them to deliver change.

And we're here to help. We've worked with countless associations to help them find their way through the digital landscape, identifying pitfalls, problems, opportunities, and continuously honing our methods to deliver meaningful change for members.

In this ebook, we've collected what we've learned through our extensive work digitizing associations and keeping them competitive in the digital landscape so that others can move towards becoming digital leaders.



In this ebook, you'll learn how to:

1. Define and execute an executive vision informed by data
2. Improve the member experience
3. Review your products and services to ensure new investments continue to deliver value
4. Transform, manage, and create content in a new digital media landscape
5. Bolster your conferences and events with digital engagement
6. Leverage continuing education as the silver bullet for building member value, driving revenue, and improving association ROI.

Plus, this ebook is packed with digital tips and tricks, including 34 actionable ideas you can get started with right now.

We're beyond proud of what our team has done for our clients, and we're incredibly excited to bring you this guide to becoming a digital leader in your space.

We hope you enjoy.

About Us

Enginess is a Toronto-based digital consultancy. We empower associations to get the most out of technology.

We shape strategies for business processes and deliver solutions that enhance customers' experience, improve efficiencies, generate new market opportunities, and redefine value creation for many different kinds of organizations.

We offer services that include:

- Strategic Planning
- Website and Custom Software Development
- Database Integration and
- Revenue Growth Strategies.

Over the past 18 years, we've built a solid reputation based on our ability to consistently deliver high-quality customer service and handle complex digital strategy and development assignments.



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Chapter 1: Executive Vision & Strategy

Change doesn't have to start at the top, but digital transformation usually does.

85% of enterprise decision-makers believe they have two years to launch digital initiatives before they are outpaced by their competitors.

Businesses are now thinking digital-first more than ever, and ideas that were once buzzwords are increasingly pillars of business strategy.

But what about associations?

Associations have traditionally struggled to develop and execute long-term strategies.

The challenge we often see is association leadership being busy trying to do more with fewer resources that they don't have the time to put a robust strategy and vision in place.

And with digital technology, this challenge is only exacerbated, in spite of the fact technology often makes an executive strategy easier to develop and execute, and gives leaders the breathing room they need to ask: "What's next?"

Ultimately, an executive vision is about identifying what members want and what the association should be, and the executive strategy is about clearly and deliberately working to meet those needs and helping the association excel in its defined role.

In this chapter, we look at how digital solutions give executives the information they need to form a data-driven vision and the tools they need to build a functional and realistic strategy to keep associations valuable to the members they serve.

The challenge with strategy

Before we get into the digital solutions to the strategy problem, let's take a minute to better understand the strategy problem: why do associations often struggle to develop and execute robust strategic plans?

In our experience, there are three main culprits.

1. Strategy is driven by the board of directors. And the board of directors doesn't have the expertise, the incentive, or the time/resources to dedicate to developing a strategic direction. "Firefighting" activities remain the norm.

2. Strategy (because of the director problem) is moved down the chain. Strategy ends up living at a divisional level executed by division leaders/VPs, who are focused on their domain rather than a thinking holistically about what's best for members overall. Experiential inconsistencies become the norm.

3. Strategic thinking isn't done at all. In some cases, we see a complete lack of unified strategy, and the association focuses on what it knows and does well now, rather than looking forward to the future.

These three points summarize the problem – but what's to be done about it?

Here's how digital solutions can help.



Digital solutions to the strategy problem

1. Centralize your data

The best thing you can do for your digital strategy is centralize (or at least link) the data your association is generating.

Learn and disseminate data points like:

- How many new members you're signing up annually
- How many members are leaving annually
- How long members stay with your association on average
- How long it takes for members to cross key milestones, e.g. reach a specific accreditation, produce a specific product/service, hit a goal, etc.

Once this data is collected the holes are usually fairly obvious, and having a frank discussion between stakeholders about vision, value, and strategic direction becomes much easier.

2. Engage your council, board, or executive

Forming a cohesive vision and strategic direction is all about consensus and buy-in. It's not enough for you to think something is a great idea – you have to bring your executive, council, or board with you (which can be easier said than done).

Using tools that build transparency and basing your strategy on data makes this far easier to accomplish.

3. Build a clear picture of where you are now... and where you want to be

You can't improve if you don't know where you are. Use the data you've gathered, plus surveys, questionnaires, KPIs, and metrics to evaluate where you are.

If you can, try and place yourself in the context of other relevant associations. Then start to define where you want to be.

What's going to make a big impact on how valuable you are to members? How are you going to measure it, and how much will it cost?

4. Integrate, integrate, integrate

Finally, integrate everything. A vision is much easier to track, and it's much easier to link performance back to strategy, when data is readily shared between different departments.

Essentially, by integrating your systems so you have a more unified view, you can start to compare apples to apples.



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ACTIONABLE IDEAS TO DEPLOY RIGHT NOW

1. Map your data repositories

Unless your association is natively digital, you probably have data in various different programs and tools. You don't have to centralize it, but you do have to know where to find it if you need it.

2. Move to a cloud-based shared document system

Stop storing things locally. Strategic vision is all about collaboration, so your assets should be moved to a shared platform, such as a Digital Asset Management (DAM) system like Bynder or a Document Management system.

If procuring this technology is a long-term objective, a short-term solution is using a business-class shared drive like Box or Google Drive.

Once you've selected your platform, switch to storing all assets and documents there so all strategic stakeholders can see and take part in the process.

3. Identify where you have "data gaps"

Gain an understanding of what data you need but don't have access to and how can you plug those gaps. In most cases, there are digital tools that can help you once you start looking.

4. Move your processes out of Excel to a more collaborative tool

It's not uncommon for much of an association's member management processes and reporting to be built around Excel spreadsheets. Some may even use an Excel file to keep track of renewals and finances.

Excel will always have a place, but you should move your processes to a tool that allows access to your member data and financials in an easy and transparent way for those who need it. Depending on your size and needs, this could take the form of membership management software, a CRM with customizations, or – if budget is restrictive – you can leverage a combination of open internet platforms that communicate with each other via Zapier.

A more collaborative approach to member management and financial planning will take a lot of the politicking out of the association's budget, especially when combined with a clear direction and clear KPIs.

5. Establish measurable goals – and then measure them

Strategic vision doesn't necessarily have to be a nebulous concept. Your vision can be something simple, like "increase membership engagement by 10% this year." You just have to define at the start how you're going to measure that.

Getting the correct metrics tools in place, e.g. Google Analytics (web and content metrics), Salesforce or CRM Dynamics (onboarding/retention metrics) can make this process much easier.

6. Create a base system for a central source of truth

No matter how good your software integration is, it's all too common to find you have multiple values for the same thing. For each key metric you want to measure, identify not only what you're measuring, but where you're taking the reading from.

And if you can get these metrics centralized in a few platforms, that's even better.

Chapter 2: Member Experience

In the last chapter, we looked at how building a digital presence dovetails with both defining and executing on a strategic direction and, increasingly, is an integral part of how professional associations conceptualize their executive strategy.

In this chapter, we turn our attention to the members themselves. We cover:

- How organizations can define the member experience
- How to track the member experience
- 6 digital actions to take that will improve your member experience.

Defining the member experience

Defining member experience is a little like defining user experience – it's easy to look at what it's made up of, but it's hard to put your finger on what it is.

We think a positive member experience is made up of 3 primary components.

1. Member engagement

We look in more detail at member engagement in Chapter 3, but for now let's say it's how much members enjoy using your product/service, how easy it is to use/access, and how much unique value you offer your members.



2. A positive membership lifecycle

The lifecycle of becoming a member, being a member, and renewing or exiting the organization are key parts of member experience. This is where you can address questions like:

- How easy is it for members to sign up?
- How easy, how much, and how often do members engage and use your products/services?
- How easy is it to renew, and what happens when a member decides to leave the association?

3. Communication

How an association communicates with its members will be a critical part of your member's experience.

Depending on the model of your association, communication can mean many different things. It may be built around public protection or keeping your members licensed and in good standing, or you may focus instead on providing member services and education, or others yet may be focused entirely on B2B.

Regardless of the type of communication, what matters is that it delivers value. All of your communications should be focused on facilitating and creating opportunities for your members.

If your communications detract from that mission, you should evaluate what their purpose is and reconsider your approach.



Tracking the member experience

Now that we understand the core tenets of member experience, how can organizations track how they're doing? Here are the four ways we use for our clients.

1. **Retention rate.** Of the members who sign up, what percentage renew their membership? This is the easiest way to measure member experience. A high retention rate is a strong indicator of a positive member experience.
2. **Lifetime value.** Eventually, members will leave. That's why it's important to track lifetime value, or LTV, in addition to retention. How many years do members stay before they depart? Like retention, the higher the lifetime value, the better you're doing.
3. **Online engagement/content metrics.** Do people engage with you online? Do they visit your site? If so, for how long, how often do they log in, how much content do they read/consume before leaving, and how frequently do they come back? Metrics like this – which are all freely available through Google Analytics – can help you tell if you have engaged members or ghosts.



4. **Offline engagement.** If offline events, conferences, meetups, classes, or other 'real life' engagement are a core part of your association's activities, tracking registration, attendance, and follow up actions are a good way to get an indication of your overall experience.

Additionally, these kinds of events are a great opportunity to capture actual feedback via surveys and questionnaires.

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ACTIONABLE IDEAS TO DEPLOY RIGHT NOW

1. Digitize your onboarding experience

The single best thing you can do for your member experience is lower the barriers to entry and get new members through the door.

Fortunately, this doesn't have to be difficult. The goal should be to make the new member registration process completely self-driven. To do this, there are a few tools you need.

- **An onboarding user flow.** Users need to know where to go on your site and on your app to sign up.
- **Ecommerce functionality.** If you're accepting payments from new users, you need to do this online. Fortunately, there are many tools for this, from Stripe to PayPal to Shopify. All are viable and can be quickly installed on most websites.
- **Data collection tools.** You'll probably be collecting information about your members when they sign up.

This information might be extensive, but using something like Google Forms, Typeform, or even a marketing automation tool like Pardot means you can capture all the data you need in a user-friendly way.

Linking these tools with something like Zapier means you can send the captured information to any number of other systems where you need it.

- **Post-signup welcome package.** The user flow doesn't stop when you collect payments. Make sure new users know where to go, what they're looking at, and where they can get more information and help, as well as what upcoming events are available that they might be interested in participating in.

2. Leverage digital tools to register offline events

Offline events, including networking events, workshops, classes, lectures, and more are a big incentive for most members to join an association. However, what usually happens is members sign up to the association but rarely take advantage of the events being held, reducing the value they receive and eventually leading to member churn.

But it doesn't have to be this way. Digital tools can help promote, register, remind, and follow up with members, letting them (and you) get more out of events.

- **Promote.** Automated email campaigns can be set up once and deployed over time, reducing the amount of work associations have to do to tell their base about what's coming up. Templated email solutions reduce the work even further and can be extensively personalized based on a member's profile or preferences.
- **Register & Remind.** Event software, like Eventbrite or EventMobi, makes it simple for members to register for events. Most services allow people to save their details on their devices, so once they're entered the next event is literally a one-click registration. The event platforms can then automatically send reminder emails, push notifications, and more to increase attendance without you having to lift a finger.
- **Follow up.** Following up with both those who attend and those who didn't is essential for member experience. Those who attended usually want some collateral or value-add piece that will help them remember and leverage their experience. And those who didn't attend should know it was a good event they missed out on, encouraging their attendance next time.



Digitizing and automating this process with event software like Eventbrite and CVENT, templated content creation, and automatic email deployment solutions like HubSpot, Pardot or Mailchimp, increases the value of events for little additional cost/effort for the association.

3. Create value-add content for your site

You can create interactive quizzes, e-learning tools, competitions, polls, user-generated content, dynamic content, and more with many online tools.

Move content beyond static PDFs and blog posts for a more engaging and ultimately better member experience. (We cover this topic more extensively in Chapter 4.)

4. Use software to better track membership renewal dates

Keeping track of the member lifecycle manually can be a time-consuming process. That's where association management software like Protech, iMIS, Microsoft CRM Dynamics and Wild Apricot, just to name a few, come in.

These tools are designed to help you define and track members as they move from consideration to purchase and then through the member lifecycle. It means you can know two months before renewal that it's time to re-engage with disengaged members.

It can also identify at-risk members based on data, accelerate new member acquisition rates, and build a better, more streamlined way to service the members you have.

5. Engage your audience to see what they need

The best way to know what your members need during onboarding, mid-membership, and membership end-of-life is to just... ask them. Regular surveys, data collection projects, and gamified data collection initiatives can give you strong insight into what works and what doesn't.



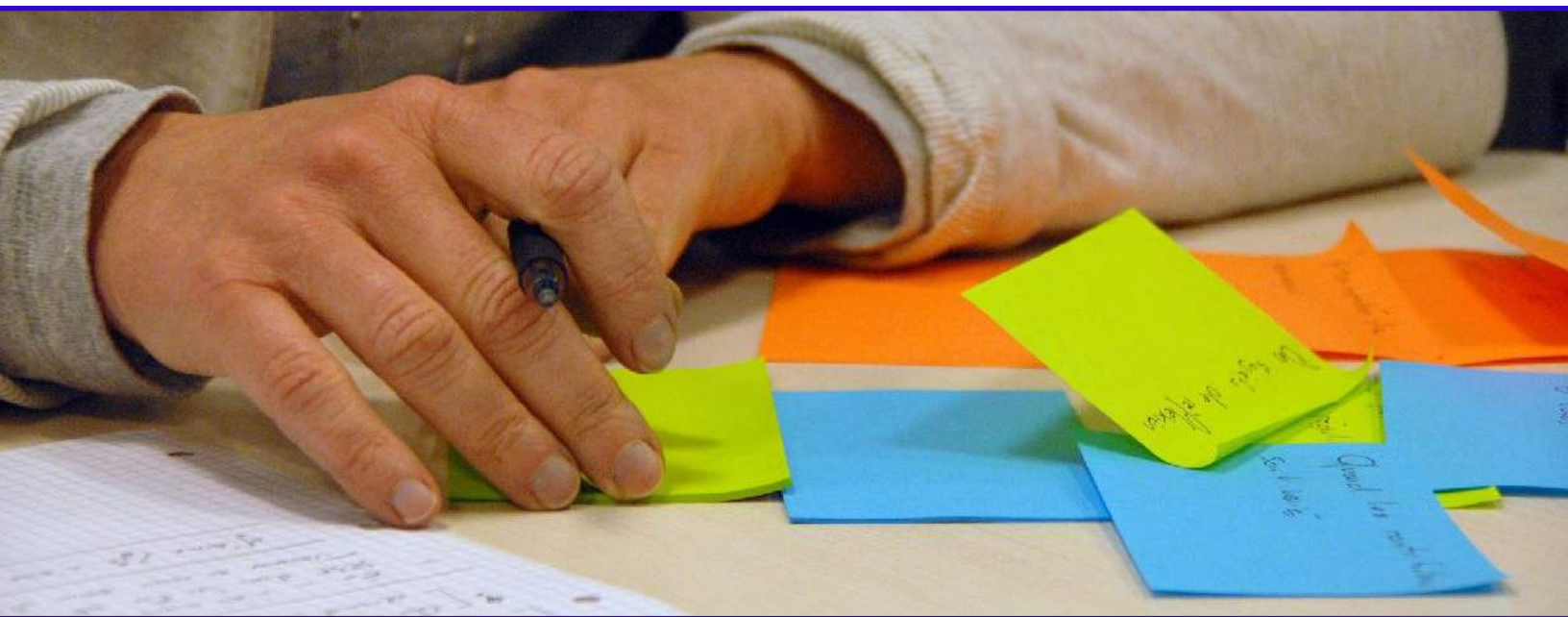
6. Leverage data to identify content weaknesses

Turn the insights you gather from surveys into useful content for your members.

Use Google Analytics to track when members stop engaging online and combine them with surveys/questionnaire data to understand where you need more content on your site or more services at an association product level.

This data can also be used to inform higher-value activities like live events, new speakers, additional products or even new services that your association can offer. You have a better chance of producing work that enhances rather than detracts from the member experience when you base your decisions on data.

Plus, as you continue to track your data, you'll be able to see if your changes make a difference and create a positive feedback loop for you and your members.



Chapter 3: Products & Services

So far in our journey down the professional association structure, we've covered executive strategy and vision and member experiences.

Basically, we've outlined how digital tools can help build strategy and improve how people engage with that strategy.

Now we get to the meat: products and services. These are the actual "thing" that associations sell and are directly linked to revenue.

We're going to cover:

- The challenge with analog products and services
- What potential solutions might look like
- Next steps: 6 actionable ideas to deploy right now



The challenge with analog products and service

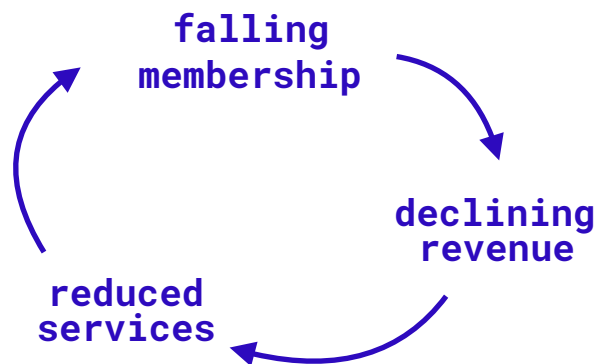
The core challenge for any association is how to serve members with valuable products and services while also driving revenue.

This problem usually manifests itself in two ways.

1. The cycle of decline

First, an organization has spiralling operating costs. Membership fees go up or the quality of products and services decreases.

In turn, this causes members to leave, reducing the pie and exacerbating the original problem.



Fortunately, many associations are linked to either regulatory requirements, essential industry products (e.g. insurance) and are less prone to these analog services. But for those who are not, employees are being asked to do more with less.

2. Products and services don't match the audience

The second major challenge is that products and services are no longer relevant to the audience they're supposed to serve. For instance, an association that offers professional certification services might only offer a booklet to help prepare for an upcoming exam.

However, people are more likely to engage in an e-learning course, online video tutorials, quizzes, or an app.

It's not that the underlying product or service is bad – it's just outdated.

Both of these challenges can be summed up under a single concept: membership engagement.

What is membership engagement?

Membership engagement is a term that's frustratingly difficult to define.

Maddie Grant of [WorkXO](#) neatly explains why:

“ Many organizations jump straight to trying to score engagement, through mostly transactional touchpoints like attending meetings, buying products, and volunteering on committees. But they often find this to be either complex and difficult, or ultimately meaningless, because that first step of defining engagement for them has not been done. The process of defining tells the association what truly matters. ”

Taking that idea, we boil member engagement down to this:

How much do members enjoy using an association's products and services, and in terms of measurement, where does it rank? Is it the easiest part of their day or their hardest?

With that in mind, here are the top three challenges we see associations face with their analog products and services.

1. Shallow digital engagement

Most organizations now have a web and mobile presence of some description.

But many organizations only have a “digital skin.” Once they dive deeper into engagement with the association, members find themselves reading scanned PDFs and printing forms.

What deeper engagement looks like

Digital-first product and service offerings. Rather than re-skinning old processes and systems, associations need to rethink the best way to offer their products and services at a strategic level and then deploy the appropriate technical solution to create an end-to-end experience for members.

2. Inaccessible data & misaligned expectations

Associations have reams of content and data that are useful for their members. But oftentimes, it’s difficult or impossible to access, with digital access only achieved through clunky and unintuitive portals when users are expecting a search experience like Google.

What accessible data and aligned expectations look like

Associations need to do two things to bring these in-line with expectations.

First, they need to make all their content searchable like content on Google. Document indexing, keyword search, Boolean logic, and filterable content hubs should all be deployed.

Second, associations need to carefully listen to their members to get a better sense of how they’re engaging with their products and services. New products and services need to be backed by solid data from existing members, rather than expansions of “what’s always been done.”

3. Fundamentally changing demands on services

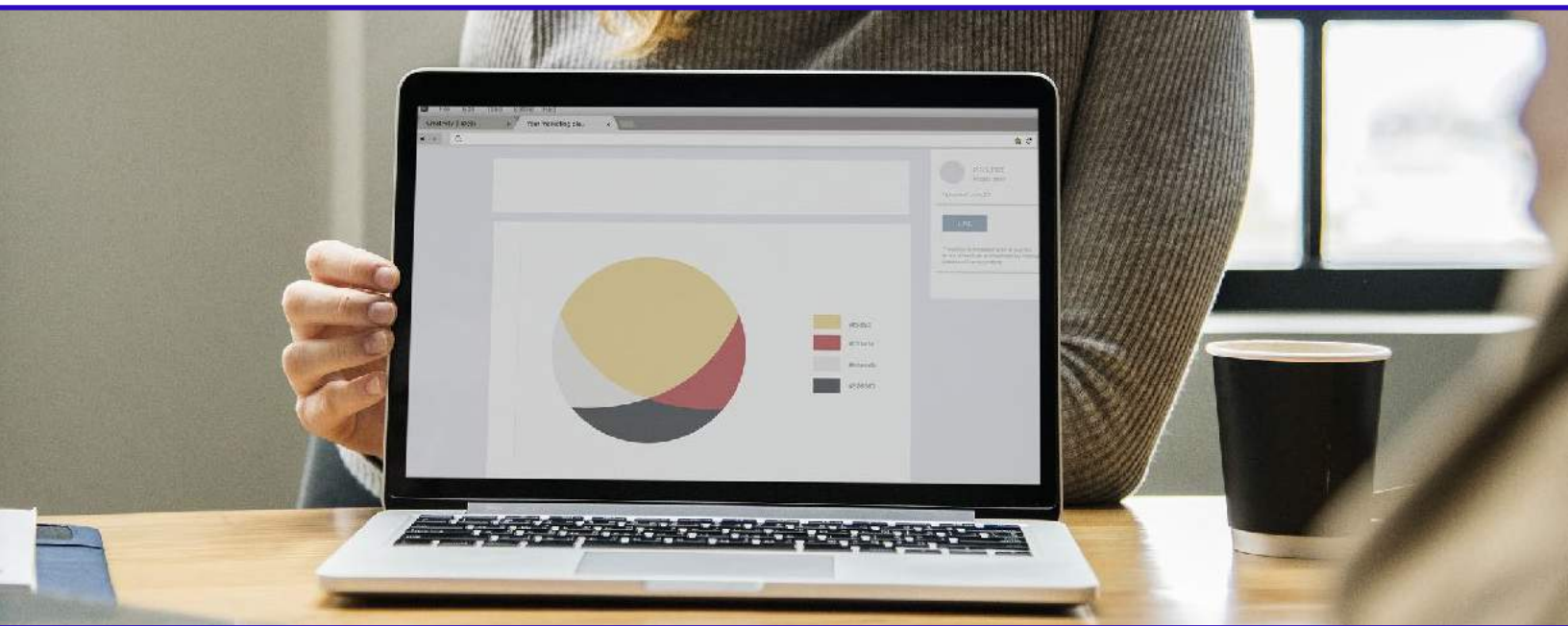
Traditionally, associations have been content and information hubs. But that's changing.

With the internet, data is now democratized and accessible on a global scale, and associations have shifted their focus to social and relational services. However, while the strategic approach and demand for these new services have moved, the ability to practically deliver them often lags behind.

How to meet changing demands

There is no simple solution here. The best thing associations can do is to truly understand their members, their pains, and transparently develop robust solutions.

Beyond that, associations need to look at another essential but often-overlooked group: people who are eligible but are not members yet. What products and services can associations offer to bring them into the fold?



6

ACTIONABLE IDEAS TO DEPLOY RIGHT NOW

1. Conduct membership user testing

The best thing an association can do is find out what their members think of their existing products, services, and experiences. User testing can be an in-person test, where a usability expert sits down with a user and gets them to complete specific tasks, an online experiment where users evaluate your digital product or even a survey with key questions.

By understanding your users better, associations can better prioritize digital efforts, product and service improvements that will have a meaningful impact, and new products and services to explore.

2. Make all your content searchable online

There are countless content management systems to choose from these days. From open-source platforms like WordPress to proprietary systems like Advantage CSP, there are many viable options to make digital content easy to find and access.

If your digital properties make it difficult for users to find what they're looking for, adopting a CMS is a quick and easy fix.

3. Build robust user flows – and then fix them

Look at your entire member's engagement with your product or service. Try and understand it as a journey of connected touchpoints. These become your user flows. Once you have a clear idea of how your users engage with your product and services, you can start to optimize them over time.

4. Convert content into digital-first content

Converting content to digital isn't just scanning a report or uploading a PDF. Identify your most important content for your members and turn that into digital-first assets. Infographics, interactive web pages, engaging reports, blog series, and short 1-2 minute videos are all good avenues to pursue.

5. Conduct membership surveys

Not all research has to be difficult. Use Google Forms to create a survey that can be emailed to your members. Find out specifically what they like or don't like about your products and use that data to inform decisions for improvement.

6. Build a culture of transparency

One of the most frustrating things for members is either not knowing where their financial commitment is going or not knowing why.

Furthermore, it's in the best interests of your association to develop lines of communication with the public, ensuring openness and accessibility, and offering education where needed.

So build a culture of transparency, both for your members and the public, and ensure all association staff is aligned with it.

Ensure you're set up with communication channels that your members want and like. These might include live chat or chatbots, FAQs, email, apps, a ticketing system, or a knowledge base.

And if communicating with the public is a priority for your association, ensure you are making engaging and educational information publicly available on your website and social channels.



Chapter 4: Content & Communication

An association's content is, in many ways, the core of what an association does. It's also usually the first thing to be digitized and launched on a website or digital tool (app, microsite, etc.)

But here's what we see again and again – an association converts static, analog processes to digital formats, but doesn't change the content or the communication accordingly.

And while this kind of transformation is a great start, it's just a start.

In this chapter, we cover how you can take your content and communication to the next level. So far, we've talked a lot about strategy but in this chapter, we're going to get into the nitty-gritty details of how to make your association better.

We're going to cover:

- Why crafting digital content is important
- How organizations can use digital tools to unify their communications under one voice
- How to develop a content strategy that delivers meaningful experiences and results.



Why digital-first content is important

First, what is digital content? Essentially, digital content is anything that lives or is accessed online – which most associations have a firm handle on.

However, where digital transformation efforts and digital tools can help is with digital-*first* content.

Digital-first content is content created or curated specifically for use on digital mediums.

For instance, say you're an association that's involved with registering members for workshops. Digital content might be a fillable PDF that gets completed and sent back via email to confirm registration.

Digital-first content would be something like an online form that users complete and the data is automatically pulled into the registration system.

There are two reasons why digital-first content is important:

1. **It's better designed for the medium it's in.** A fillable PDF is essentially taking a paper-format and putting it on a computer. There are going to be some sacrifices to quality and experience as you transition mediums.
2. **Content is about creating a specific experience.** Associations are engaging with their members online but using content that was designed for offline – and the member experience suffers.

By developing digital-first content, associations can create a better member experience and ultimately serve their members better.

One voice: digital content & communication

Communication channels have proliferated as product/service delivery methods have shifted online. Associations have a new problem: there are more ways to reach their audience than ever before. So many, in fact, that maintaining a single voice is an ever-growing challenge.

And even when getting the right messaging happens, knowing how to deploy it across all channels is a challenge in its own right. For instance, the requirements for how to engage on Twitter might be very different from how to produce a blog post on your website.

When you're considering how to communicate across your digital content, you need to consider two key points: who you're talking to and what your relationship is with them; and what channel you're communicating in.



Who are you talking to and what are the relationship dynamics

For associations, this usually boils down to members, prospective members, and non-members. Each of these groups will have their own specific wants and needs – wants and needs that associations should be working to understand.

Additionally, each of these groups will see the association slightly differently. Do they see you as an authority figure or a friend? Are you an enforcer (e.g. regulatory body) or more of an optional motivator and support network?

The dynamics of your relationships should inform the voice you communicate with.

The parameters of the channel

Most associations nail the first point. They know their audiences. The challenge comes when you get to the parameters of new channels that associations know their audience is on.

And every channel is a little different. Some differences are obvious – Instagram is all about images, Twitter is more about text. But others are more nuanced. For instance, how you give instructions on your site might not be the same as how you give instructions in an email.

Remember: content isn't just articles or social media posts. It's anything you put out in the world, including forms, documents, emails, event pages, e-learning courses – everything comes back to content.

So, how do you match your relationship dynamics, brand voice, and channel parameters? Here are 3 tips to get started:

1. **Template wherever possible.** Problems happen during content generation. So eliminate content generation. Templating content (e.g. emails) can help you get something right once, and reuse it again and again.
2. **Create common threads.** A similar look, repeated image templates, logo placement, call to actions – having one (or all) of these elements the same across your content will ensure people know who it's coming from.
3. **Leverage dashboards.** A single view of your content will help you spot trends and see what's not on-brand quickly and easily.

Content strategy today

At this point, we've talked about audience, brand, voice, and channels. Next, you want to bundle this all together into a content strategy that is both executable and effective.

First, you need to understand where you are with a content gap analysis. This is a step that's used to determine what content you have, what audience it speaks to, and what it does so that you can uncover holes where you need to focus your creation efforts. This step is much easier if you have a content repository, like a content management system (CMS) or a digital asset management system (DAM).

Next, you need to work out how to plug the content gaps you have. Is it a problem with your e-learning or are you struggling to get new members through the door? Are your email blasts not working, or are your social media channels a ghost town?

Now, you have a good idea of what your content is good at, bad at, and how to fix it. Next, it's a matter of turning those ideas into a content calendar.

In general, a content calendar should reflect:

- What you're going to produce in a given month (e.g. 4 blog posts, 1 white paper, 4 email blasts)
- Roughly what audience you're targeting

You don't need to know exactly the topic, audience, and the subject line for an email slotted for December way back in June. All you need is the general idea, like "an email will be sent about this topic to these people". The rest you can work out as you go.

This format gives you enough flexibility to work effectively, while still giving you the structure you need to generate your content in a timely fashion.

5 ACTIONABLE IDEAS TO DEPLOY RIGHT NOW

1. Document a content strategy

A lot of these ideas live in the institutional memory of associations. So get these thoughts down. Digital planning tools like Trello, Asana, and Co.Schedule are all great at this, but a simple shared Google Sheets document will work just as well.

2. Document a broad communication guide that gives flexible parameters

A brand guideline document can be a great addition to a marketing team... or it can completely hamstring creative content production.

For instance, if the guidelines say “we never make any joke about our association” then you’re not going to have great luck reaching new audiences on Twitter.

The guidelines should give content creators everything they need to understand a brand and the technical details of using their assets, and nothing they don’t. The worst thing a brand can do is micromanage its users through a stringent brand guidelines document.

3. Centralize and automate communication

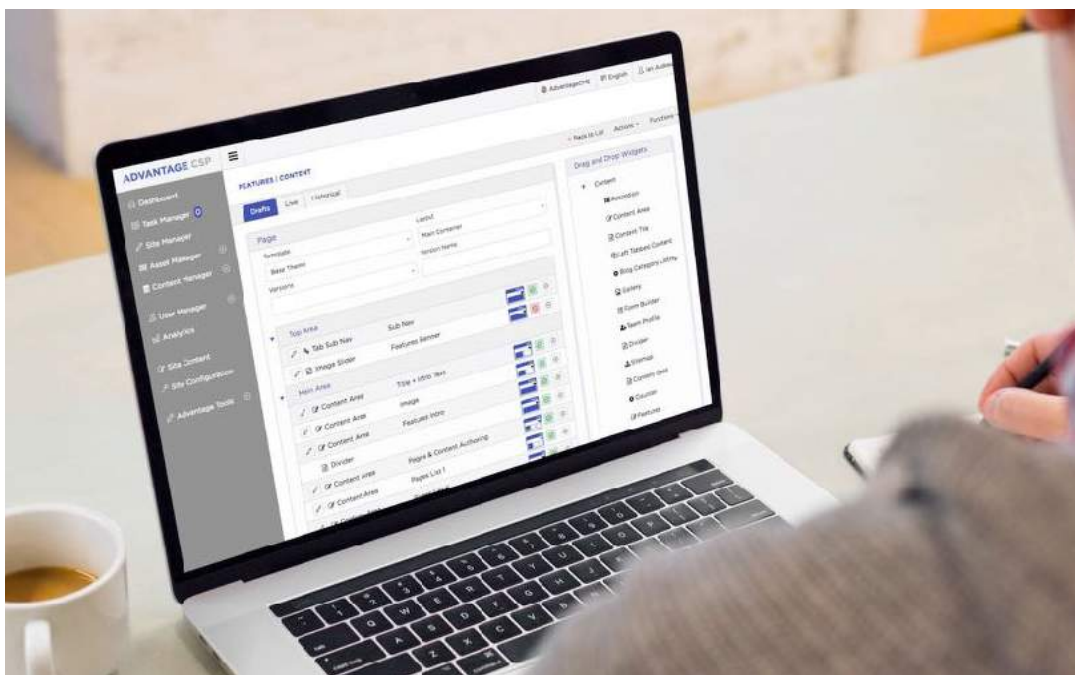
We’ve mentioned templating already, but centralization and automation speak to the same objective. Centralized content is easier to manage over time, and makes it easier to transform static into dynamic content, reducing maintenance even further.

Automation keeps an experience consistent, allowing teams to focus on getting one experience just right, rather than creating and executing dozens of experiences every day.

4. Streamline content creation with a content management system

Creation is always going to be expensive. Whether it's internal or external, it's difficult, time-consuming, and in high demand. So make sure you get the most out of yours.

A content management system makes content creation far easier and ensures it's created in an accessible and secure environment.



5. Shift your focus to see content as a primary service offering

Associations are in the service business. But in a world where self-service is increasingly popular, they need to realize: content that moves users through their association relationship autonomously is the key to meeting users needs.

Associations are in the publishing business now – and the sooner that becomes a core service, the better off the association and its members will be.

Chapter 5: Managing the RFP Process & Evaluating Vendors

In the previous chapter, we covered the methodology of creating content for audiences using digital tools, and a few tools that can help that content creation.

But there's a subset of content and engagement that deserves special attention: real-world and digital conferences and events.

In this chapter, we look at:

- How digital tools can help you drive engagement during events
- How digital events like webinars, online seminars/workshops, and lunch-and-learns can drive ROI for associations.

Digital tools for live events

Back in the day, just hosting a conference was enough for an association. It might be the one big marketing activity for the year.

But now, just hosting an event isn't enough. Associations need to add value at the conference/event and create persisting, lasting value that members can take away with them. Fortunately, there are a host of digital tools that can do that.

Badge scanners

Badge scanners for conferences are tools or apps that do two things:

1. They take the place of business cards – attendees can just scan each other's badges to capture contacts' information.

2. Badge scanners help vendors create a list of people to follow up with (if your conference has vendors). For the vendor, this saves them from doing gimmicky stuff to capture leads like a fishbowl full of business cards. And for the attendees, it means their info isn't shared with everyone – only vendors who they're actually interested in hearing from.



Mobile apps

If you're either running one big event or events are a big part of your monthly/quarterly marketing mix, a dedicated event app might be worthwhile. Why? Because it vastly improves the user experience for your members.

First, for the 'lots of small events' strategy, it makes it easier for members to find out what's available. It makes it easier to register and gives associations the opportunity to use push notifications and reminders to get people to actually go.

Second, an app makes one-click registration possible. Download the app once, login, and register forever without re-entering your details.

Third, mobile apps make it far easier to deliver engaging experiences. With a mobile app, users can quickly share their experiences on social media, associations can push polls, surveys, Q&As, and more directly to users' phones, and collect feedback to refine event content/strategy over time.

Near field communication (NFC) technology

NFC technology like geo-fencing is when users are triggered with a digital message (e.g. a text or push notification via an app) when they enter a specific physical area. For instance, a store might have geo-fencing in place outside their door and when people who have downloaded the app walk past, they get a push notification with a promotion.

The benefit of NFC is you can send timely, targeted, extremely relevant communications because you know exactly (within a 10m radius) where the user is, which means you have a good idea of what's going to resonate.

For associations, NFC can:

- Enable you to reach conference-goers and drive digital engagement by prompting them to participate in online discussions (e.g. geo-fenced to a specific session)
- Share their experiences on social media (e.g. turned on when a session/workshop ends)
- Connect with other similar members around them (e.g. professional networking based on physical proximity).



All these digital tools make events better, but the events themselves remain offline experiences.

What about digital events?

Digital events

Digital events like webinars and lunch-and-learns remain an effective tool for businesses and associations alike.

For instance, according to the [DemandGen Report – 2017 Content Preferences Survey](#), 79% of buyers would give up their info for a webinar, higher than any other kind of asset that was polled, including ebooks, white papers, case studies, infographics, videos, or third-party reports.

What associations can extrapolate from this is that webinars remain a form of content with a high perceived value that are effective at engaging audiences.

The challenge, as with all content, is producing enough webinars and getting people to attend. According to BigMarker, only about a third of registrants will actually attend a webinar, so you need to have a long, robust lead cycle to capture enough registrants to make the actual webinar worthwhile.

And that's where digital tools can help.

Drive registrations with event software

Anything from a WordPress plugin to Eventbrite to webinar-specific technology can help make signing up for your webinar or digital event easier. Most of this software will allow you to create forms, track leads, and send automated emails about the event.

An alternative approach is to use your existing email/lead capture tool, like a CRM or marketing automation tool (if you have one). This has the advantage of keeping all your data in one place, but may cost you in some event-specific statistics.



Make your webinar interactive

The value of a real-life experience isn't the content delivery. It's that you can respond in real time with questions and comments and get feedback from the presenter as a conversation develops organically.

Basically, the audience has the opportunity to shape the discussion. Live webinars and other digital events can do the same thing with in-event questionnaires, polls, Q&A sections, chat functions, and more.

The webinar doesn't end when it ends

The great thing about digital content is that it can be recorded, uploaded, and turned into all kinds of other, evergreen content that continue to deliver value. Webinars can be downloaded and watched later, turned into blog posts and articles, and transcripts can boost SEO value with little to no extra work. Make sure you have a post-event plan to get the most from your content creation.



Last note: it doesn't have to be webinars

There are many digital events that bridge the gap between event and content. Live streaming talks, workshops, lectures, digital courses, Ask Me Anythings (AMAs), and more can all help improve member engagement and deliver high-value content in a new and interesting way.

5 ACTIONABLE IDEAS TO DEPLOY RIGHT NOW

1. Get a webinar tool that has digital engagement functionality

There are many webinar tools available, but Join.me, GoToWebinar, and AdobeConnect are some of the largest. All have polling, Q&A, chat functions, and more to help make the digital event experience more engaging between audiences and presenters.

2. Build a promotion campaign around your digital event

Only one in three registrants will attend your digital event, so you need to drive 3x your attendee target to hit it. And that means advertising. When you're conceiving your webinar, build in a long (6-8 week) promotional campaign involving paid and organic media to deliver results.

3. Think outside the webinar box

A webinar is the go-to digital event, but there are other options too. Smaller, more intimate group chats recreate the feel of a workshop, AMAs deliver high engagement at low cost, and live streaming gives a sense of "FOMO" (Fear Of Missing Out) and urgency to your audience.

Once you have your execution strategy down, start to think about what else you can do.

4. Price out an event app

If events are a key part of your marketing mix, price out an event app. Find out how much it will cost and see if you can fit it into your budget, especially if you're hosting many smaller events, like workshops or meetups.

5. See if NFC/geo-fencing technology is available for your association

Find out if NFC or geo-fencing technology will work for your association, especially if you have a high profile conference you're hoping to get a lot out of.

Chapter 6: Continuing Education/Training

In the previous chapter, we covered communication and content. In this final chapter, we look specifically at one kind of content – continuing education (CE).

Most associations are responsible for some level of continuing education. What's more, many professions, like architects, nurses, psychologists, and doctors, require continuing education as part of their licensing process. Associations can offer value to their members by providing the education directly, rather than their members seeking out third-party, expensive CE solutions themselves.

But frequently, the education offered by associations is a conference or workshop – at most, an online portal that is out of date and difficult to use.

Digital technology has opened many doors for interactive education options.

In this chapter, we cover how associations can:

- Engage with their users with digital tools
- Create crediting systems that track credit accumulation over time, weighted by activity
- Leverage e-learning programs that will turn static content into dynamic experiences
- Gamify continuing education.

Engaging users with digital tools

Digital tools can and should be a big part of your association's continuing education. Practically, it means it's easy for you to track who's done what, and it's easy for association members to register their continuing education progress and achievements (if required for their profession).

It also makes continuing education more engaging, providing more value to members and driving up membership and renewal rates.

In addition to these core benefits, digital tools offer a few other tangential ones:

- **Tracking.** You can see who's engaging and who isn't, giving you a target audience for marketing and re-engagement campaigns.
- **Content feedback.** What are people reading and engaging with and what are they not? Get real-time feedback on what your members care about.
- **Learn anywhere.** Members no longer have to go to a meetup or a seminar to secure the credits they need. Digital tools allow you to learn anywhere you have an internet connection.



Continuing education credits

Most associations have some sort of CE credit system in place, but it's often disjointed and disconnected:

- **There's no centralized location for storing collected credits.** That is, credit record isn't stored for users in one place.
- **Online and offline credit collection and recording offer very different experiences.** For instance, an offline class might have you fill out a form stating you attended and coordinate the credit allocation later, while an online quiz might log your participation automatically.

For digital tools to be effective, there must be a single record of credits recognized by the members, your association, and regulatory bodies. Furthermore, the process of linking credits to activities to people must be as automatic as possible.

When these three things are in place – internal faith, external credibility, and automated upload processes – then associations can take full advantage of digital tools.



e-learning programs

So how do the credits, digital tool creation, and gamification (more on that in a minute) actually come to fruition?

The answer is an e-learning tool, usually called an LMS (Learning Management System). Adobe Captivate Prime is one of the best-known examples, but there are plenty to choose from.

An LMS tool helps in many ways, but it primarily streamlines and simplifies the e-learning process for the association and for its members.

Benefits for an association

There are two big perks for associations that use an LMS.

First, the association gains the ability to centralize its continuing education. It's a single resource that can hold various kinds of structured courses and the associated content, as well as the corresponding reward (e.g. credits) for completion.

Most LMSs can also be designed to include offline activities, giving associations valuable data all in one place.

Second, an LMS significantly expands the functionality available to associations in terms of how they can structure their courses and how they can conduct evaluations. Now, it's easy to create interactive content that members want.

Benefits for members

Just like an LMS centralizes the work of building and maintaining continuing education, it also centralizes the workaround participating in continuing education.

First, credits are tracked and stored in one place, meaning you can do online activity as well as offline as it suits you.

Second, it means e-learning courses are better constructed and include much more interactive content, making them more engaging and higher value.

And finally, LMS give association members the ability to engage wherever they find themselves, whether it's on the subway or at home on their laptop.

That flexibility, plus the confidence that progress and performance will be tracked automatically, improves the value members receive out of their association membership.

Gamification

According to prolific gamification expert [Yu-kai Chou](#), gamification is:

“ A design process that optimizes for human motivation in a system, as opposed to pure efficiency. ”

The core principle of gamification is this: if you can “gamify” a boring, repetitive task, you can get people to complete it at a higher rate. It doesn’t matter if it’s collecting gold coins in Mario or learning a new regulatory framework – you can incentivize the behaviour you want by borrowing from video games and apps.



There are plenty of gamification frameworks out there, but broadly speaking, to gamify something, you need to:

- Create quests
- Track progress over time
- Award points, badges, or other progress markers. If this is public, it’s even better (it creates social proof and builds social pressure).

For associations, gamification of CE should be a top priority. By creating rewards and quests, you can encourage better member engagement.

And by building in a social proof function via badges or points, you can bring some friendly competition and create a community into an otherwise dry aspect of association services.

6

ACTIONABLE IDEAS TO DEPLOY RIGHT NOW

1. Install an e-learning management system

LMSs go as complete or bare bones as you want. Find one that suits your needs and price point and convert static content into dynamic experiences in weeks. Leveraging your CMS if you have one is a great way to fast-track this work.

2. Reward those who complete courses with badges

TripAdvisor uses these effectively to solicit free reviews with their TripCollective Badges program. People like others to see how knowledgeable they are and compare themselves to those around them. Badges let them do that.

3. Offer a reward

It's amazing how easy it is to drive behaviour with a small, guaranteed reward. Make a Starbucks Gift Card or some other less-than-\$10 reward a part of hitting major milestones in your e-learning course.

4. Link online and offline activities

Users want one CE portal. Make sure they have it and make sure it unites digital education while hooking in things like seminars and workshops. With unique accounts, this is a relatively easy task.

5. Build a mobile app

Building a simple app isn't as daunting as you might think. And if your users want to learn on the go, find out what they need to know and see if you can create a mobile experience. You might find an app you can essentially white label, or even have a simple one developed for relatively low-cost.

6. Integrate sales and marketing with CE

Find out where existing clients are getting value based on CE content engagement and feed that data into your sales and marketing funnel.

Final Thoughts

The prospect of being a leader in the digital space might seem like an impossible task. But we hope, by now, you see it's not.

Driving digital transformation in an association isn't an easy job. We know that because we've done it.

But what we hoped to do is convey that, while it's not easy, *it is possible for any association to do*. All too often we hear "we don't have the money for new digital technology" or "that's not how we've done things."

But great digital experiences don't have to come at extraordinary costs. Granted, something like NFC is not cheap, but providing something like an online webinar signup is effectively free.

Digital leaders aren't leaders because they have the most money or the best graphic designers – they're leaders because they **fundamentally understand their audience's needs, wants, and desires**. They know what makes their members tick, and they do their very best to serve their members in a way that works for them.

And anyone can do that.

But it's easier when you have the right tools.

Whether you're doubling down on content, expanding your executive vision with a digital focus, or you're revamping your CE program, digital tools can help you deliver a better solution faster and with less work than ever before.

As technology continues to improve, we're exposed to new opportunities and it's easy to become paralyzed by indecision. Or, worse, to try and move in every direction at once and end up going nowhere.

Transforming your association into a digital leader is something anyone can do. And hopefully, now you know the tools you need to get started.



Thank you for the opportunity to share this book with you. We hope you have found it helpful on your path to make your association a digital leader.

If you have any questions about your association's digital strategy, get in touch with us using the contact information below.

We'd love to hear from you.

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