

'Planning For Growth' By Sue Froggatt

Essential research for developing your member recruitment strategy

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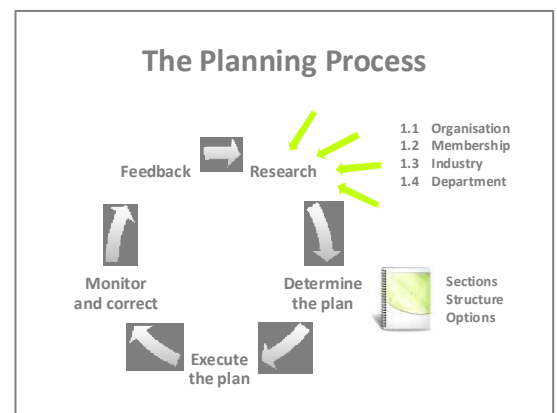
One-Day Seminars For Membership Professionals

** Member Recruitment * Member Retention * Member Research * Delivering Member Service Excellence*

** 100 Great Recruitment & Retention Ideas * Sponsorship Fundamentals*

Agenda

1. Essential recruitment research
2. What to include in your recruitment plan - Structure and sections
3. My all time favourite recruitment campaign
4. Maverick & challenging approaches to use when planning & researching



1. Essential Recruitment Research

- What information do you need before you can write your recruitment plan?
- What do you know? What could you know? What should you know? What are you missing?

1.1 Organisational Review - Sets The Scene

- What are you trying to achieve and why? Your mission, vision & direction. Your organisational strategic goals & objectives. Aspirations of leaders – elected and salaried
- What have been your key achievements? Where are the powerful stories?
- What are your key resources and assets?
- What benefits are being introduced and withdrawn?
- Why? Your plan needs to be in total alignment with this

1.2 Membership Review

1.2.1 What's been happening over the past few years?

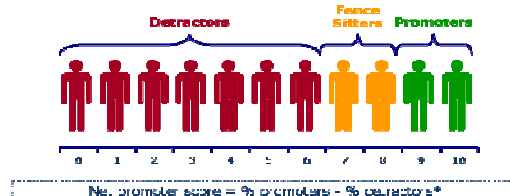
- What is your current retention rate?
- What recruitment tactics did you use last year? What worked well and why? What failed and why? What surprised you?
- Financials: Guidelines for recruitment budget? Past years? What is the lifetime value of a member?
- Past ROI?
- Review your 'member turnover'. What's the story? Why are members leaving?
- Member Turnover Analysis

1.2.2 What is the size of the opportunity?

- What is the overall size of the sector eligible for membership? Is it static, growing or declining?
- What is your penetration of the overall sector?
- What are the different segments/groups? (What are your segmentation options?) What is your penetration of each segment? What is causing the change and who is affected? Which segments are emerging, growing and declining? Which benefits will attract the growth sectors? Or, will new benefits be needed? Are any groups underrepresented and essential to achieving your mission?
- Segmentation Options: Geographic & Demographic (Easy, popular but can mislead); User behaviour – past or future intentions – life-cycle or situations; Member segments is not equal to member categories

1.2.3 Where is your current appeal?

- Who has been joining and what is their profile?
- For each distinct group/segment: Ask new members why did they join? What are the main catalysts and triggers? Who influences them at each stage of the joining process? Who pays? What can they do now, as members, that they could not do before? What are their communication preferences?
- What's the joining process? Map it out & confirm with new members. What does it look like from their perspective? What do they see? How long does it take? Any key dates or periods? Are there any barriers?
- New Member Review
- Put Yourself In Their Shoes
- Who failed to join? What happened? 'Fail-To-Join' Research Make sure your efforts are going to be productive! Wrong target? Wrong message? Poor impression? Weak benefit package? Not convinced of value for money?
- Ask existing members: What makes membership a "must have"? What makes membership indispensable? Caution: The reasons for joining and staying are likely to be different. (Ref 'Decision To Join' research)
- Would you recommend membership? Possible Ambassadors or referrers? Use the Net Promoter Score - How likely are you to recommend membership to a colleague or friend?



1.2.4 What are the real benefits of joining?

- Have a really clear understanding
- Consider not just the rational benefits but the underlying emotions
- Don't sell me..., sell me...

1.2.5 How do people see you?

- What is the level of awareness of your organisation?
- What impression do people have of you? What is your reputation? What does your brand say about you?
- What first impressions are you giving? Web site; Elected members; Branch volunteers
- Conduct a 'mystery shop'

1.3 Industry Review - Environmental Scan

1.3.1 What is about to happen in the sector?

- What do the thought leaders, futurologists and experts predict will be the new trends and 'pain and worry points' for members? e.g. changes to legislation, technology, etc.
- How will this affect the demand for membership?
- Who will be most affected? Can we help?
- Where are the PR opportunities to raise our profile?

1.3.2 What is happening in the membership sector?

- In the association sector – especially recruitment campaigns?
- What are similar associations doing in other countries?
- Review of successful recruitment campaigns. What made them work so well?

1.3.3 Who are your competitors?

- How do they compare and contrast?
- What is the 'perception' of how you are different? Positioning research
- What new things have they been doing?

- What do they charge?

1.3.4 Who could be your recruitment partners?

- Who do prospective members turn to for advice?
- Who influences them?

1.4 Departmental Review

- Audit your recruitment systems & processes: Any re-keying of information? Any leads in other departments e.g. events, publications? Review your lead management, especially lead qualification and lead nurturing
- Review your core competences, knowledge & skills. Any critical gaps?
- Review of supporting collateral, including images
- Review of communication channels
- Results of tests done on new promotional tactics. The best plans are based on evidence!

Other Thoughts

- How Does The Planning Process Need The Research Data? Raw; Interpreted; With Recommendations
- Now You Have The Research You Need To Start The Formal Planning Session

2. What To Include In Your Recruitment Plan - Structure & Sections

- Beforehand find out: What is the purpose of the plan? Who is going to read and refer to it besides the recruitment team? Senior staff, Elected leaders, Branch volunteers, etc. What will they need to know?

2.1 One Page Summary

- Overview: Who you will target and how you will reach them; What the plan requires to be successful; Overall spend and return on investment
- Summary of strategic recruitment goals & objectives: SMART; Quantify - why achievable?; Timeline - key milestone dates; Responsibility for

2.2 For Each Recruitment Goal

- Series of tactical steps to achieve each
- For each: Activity; Input; Processes; Output/results; Timeline; Responsibility & who else is involved; Costs; Resource implications

2.3 Managing The Execution & Delivery Of The Plan

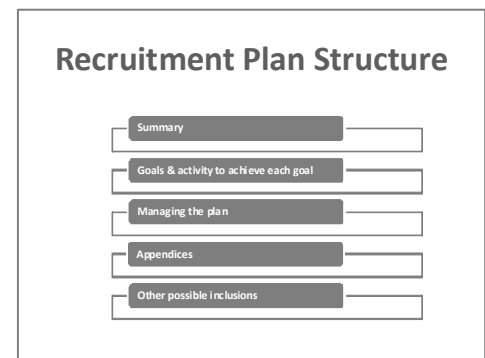
- KPI's – to keep things on track!; Personalise; Dashboards & alerts
- Critical points
- Review stages
- Promoting the plan – internally and volunteers: One page diagrammatical summary; Business card sized summary?

2.4 Appendices

- Background to the plan
- Figures: Projected new members by month; Estimated costs and revenues
- Critical/key assumptions
- Critical/key resources – back-up plan
- Key risks
- Constraints
- Obligations

2.5 Other Possible Inclusions

- What this means for others - help others quickly digest how it affects them



- CEO, elected leaders, receptionist, third party suppliers, partners
- Departments – PR, conference and events, training, publications & branch support
- Processes, systems & operations - membership/CRM system, web/IT development, etc
- The planning process – what we did to arrive at the plan
- What we have learned: Last year, Previous year, Anticipate new this year
- Background research
- References & further reading

3. My All Time Favourite Recruitment Campaign - Why?

1. Used word-of-mouth via a trusted friend – always number 1!
2. Incorporated an everyday trigger to help their members start a very natural and authentic conversation. Set the members up for a successful conversation about membership
3. On joining the new member personalised their membership (instant engagement!). They talk excitedly about 'their' membership - warm and enthusiastic. Membership made them feel good and proud - emotional appeal
3. Carried their membership with them all the time. Easy to show others

Guide Dogs for the Blind (NSW/ACT) 2 year membership - 'Pups with Promise' Register via Web then get updates via mobile phone

4.1 Maverick Approaches

4.1.1 Appoint A Devil's Advocate

- We are sometimes blind to what is happening – ref Willful Blindness by Margaret Heffernan
- How do we 'see better'? (Chapter 12)
- Appoint a critical thinker and has the courage, to speak up and challenge, be a dissenting voice, ask hard questions, unveil awkward truths, holes, gaps and concerns – to take this role - Also called a 'Professional Third Party' or 'Court Jester' Who uses this approach? British Airways, Vatican

4.4.2 Use Hats

- Ref Edward de Bono's 'Six Thinking Hats'
- Help people abandon their silos & adopt different perspectives
- Recently used to help staff develop empathy with members & with generational work

4.2 Challenging Research Techniques

- Familiarity and comfort mean we keep relying on ineffective research tools!
- Deep Dive Techniques
 - Use Metaphors "If the association was an animal, what would it be?" "What makes you say that?"
 - Use Lateral Thinking
- New Research Tools
 - Monitor Social Media e.g. LinkedIn, Facebook, Twitter...
 - Analyze Clickstreams - Find out what people look for and are thinking about. Look at search strings & search patterns. Timing – When do people look?

Sue's One-Day Seminars for Membership Professionals

- * *Member Recruitment Strategies & Tactics*
- * *Member Retention Strategies & Tactics*
- * *Member Research Fundamentals*
- * *Delivering Member Service Excellence*
- * *100 Great Recruitment & Retention Ideas*
- * *Sponsorship Fundamentals*

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