Personify

New Decade:
New Experiences,
New Challenges

Introduction

As the saying goes, the more things change they more they stay the same.

Depending on your perspective, it represents either a good thing or a disappointment. But when it comes to associations and nonprofits, who would typically be expected to thrive in a healthy economy, the lack of strong gains has served as a bit of a surprise.

Marketing General Incorporated's *2019 Membership Marketing Benchmarking Report*[1] saw 45% of associations surveyed say their membership increased, down three percentage points from last year's report and in contrast to what had been a decade-long trend. Retention certainly looks strong, with McKinley Advisors' annual *Economic Impact on Associations Study*[2] reporting membership retention is at an all-time high with nearly half of association executives surveyed (47 percent) reporting a retention rate greater than 90 percent. Yet as strong as that number is, it remains largely unchanged from years past.

These concerns aren't breaking news, but how organizations are effectively positioning themselves for long term success is coming into focus.

Per Marketing General, the same report shares that 81% of associations saw membership increases in the past year. Eighty-two percent of these organizations reporting an increase in overall new members are significantly more likely to indicate that their organization has a culture that supports innovation. Those reporting declines in membership are significantly more likely to believe their association culture does not support innovation.

45%
of associations saw their membership increase

47%
reported a retention rate greater than 90%

82%
reported an increase in overall new members

Powerful shifts in key demographics, the emerging importance of global markets, the transformation of traditional tactics and the relentless march of technology have thrust membership organizations into uncharted waters, challenging associations and nonprofits to navigate a perfect storm of unprecedented conditions.

Beyond shifts in demographics and globalization, 2020 has also seen the rise of COVID-19, a virus labeled as a global Pandemic by the World Health Organization in March 2020. The rapidly spreading Coronavirus (COVID-19) has significantly affected individuals, businesses and communities. To prevent the disease from spreading further, governments and local authorities have asked or mandated that people limit travel, work remotely and keep a distance of at least three feet from other people.

Associations and member-based organizations are grappling with how to manage a convergence of challenges stemming from the pandemic. Among them include a remote workforce and cancelling their in-person events, while simultaneously creating virtual and digital opportunities to continue engage constituents during this unprecedented time.

It's as Greek shipping magnate Aristotle Onassis once observed, "We must free ourselves of the hope that the sea will ever rest. We must learn to sail in high winds."

Organizations who fail to adapt to change face the prospect of a slow decline, replaced by more innovative, resilient competitors. Those willing to embrace the tempest of change may find themselves broadening their horizons, with renewed purpose, greater value and additional relevance.

The beginning of a new decade brings with it a time of reflection and focus. There is renewed opportunity for innovation, with the years ahead poised to build on those we're leaving behind, as we take key learnings and apply them to the new world in which associations increasingly find themselves. Membership is anything but dead - it continues to evolve. The relationship between organizations and constituent, and all the interactions encompassed within, has transcended membership and emerged as an experience.

To paraphrase a definition of experience published in the Harvard Business Review[3] the experience, "needs to be seen as all these things, and more. It is the sum-totality of how customers engage with your company and brand, not just in a snapshot in time, but throughout the entire arc of being a customer." Instead of focusing on an individual transaction, program or interaction, the delivery of an experience requires organizations to recognize that the whole is indeed greater than the sum of its parts.

The long-term relationships organizations build with their membership, or that trade shows establish with attendees and exhibitors require equal attention to the performance of individual programs and tactics. They also require continuous learning to understand what audiences think about your organization and to find new ways to improve the shared relationships. While marketing-led branding takes an authoritative stance, experience (by contrast) lends itself to collaboration. Everything an organization does plays a role in shaping the customer's experience.

Many organizations believe they already deliver experiences, yet the collaborative spirit that serves as the backbone of the experience falls short. There remains a tremendous opportunity to disrupt, reinvent and to grow through:

COMMUNICATION	When it comes to experience, your team should be communicating well with each other as well as with your constituents.
PERSONALIZATION	Today's constituent lives in a hyperconnected world thanks to technology captured by internet-connected devices and telematics connected to a cloud. Smartphones, watches and other internet-of-things (IoT) devices send our data which can then be sorted, processed and analyzed to form insights about their preferences and then develop smart responses. The end result? More profitable and personal interactions which serve as the cornerstone of the enduring connection organizations seek to create.
ALIGNMENT	Gathering information on constituents is one thing but using the data to ensure you're aligned on the value you deliver may be something else entirely. According to Marketing Week[4], conversations that focus on transparency, collaboration and honesty are the most successful in helping brands realign with customer expectations.

This study seeks to chart the path ahead, expanding our understanding of the role that demographics, engagement and technology are poised to play as we enter the 2020s and a new era of experience. We will look both to the past and also the future to develop a clearer picture of:

- The critical role of a compelling, and relevant, experience in acquiring new constituents
- How experience continues to drive evolution of trusted engagement methods and propel new ones forward
- Experience ecosystems and how an organization's technologies must provide value independently but also together

While each organization's membership is unique, Personify believes our findings can inform membership organizations as they look to create strategies designed to support the long-term growth and success of their organization. Organizations should take the opportunity to survey their own members and evaluate their responses against the trends noted in this study.

Survey questions were explored with more than 1,000 members in the United States. The online surveys were fielded throughout 2019.

Experience as a growth engine

Customer-centricity has become the defining feature of top consumer businesses. However, a fully realized constituent experience has also become an increasingly influential driver of topline and bottom-line growth. This means that organizations are not only tasked with exceeding the expectations of the overall market, but also to delivering the highly targeted personalized, relevant experiences necessary to stand apart from the crowd.

In an age of communication overload, building and delivering on the right customer experience strategy is the difference between surviving—or thriving—in the decade ahead. Two areas where this alignment is most critical are for organizations looking to a compelling experience to attract and build relationships with younger members and for others looking to grow their presence through global expansion.

EXPERIENCE AND YOUNGER GENERATIONS

Boomers pay to join associations. Young professionals participate in a group of their peers.

Although stark in its language, this assertion strikes at the heart of the generational divide facing many organizations looking to deliver a meaningful experience to the entirety of its constituency. Many organizations have prioritized diversifying their membership and growing the percentage of young members in particular and with good reason. According to AARP[5], 10,000 Baby Boomers – long the cornerstone of many member-based organizations – are reaching retirement age daily.

Meanwhile, Millennials will make up half of the global workforce in 2020[6] and brought to their early days of membership, shifting ideas around work and engagement. This is happening alongside a seismic adjustment in communication preferences, prioritizing work aligned with their personal values over loyalty to an employer[7] and seeking out flexible, collaborative work environments[8]. Generation Z has begun their ascent into the workforce with a notably different perspective, with recent data suggesting 70% prioritize stability and security in a job over passion and flexibility[9]. Similarly, they are more likely to indicate a preference for a traditional brick-and-mortar workplace as opposed to working remotely[10].

While both generations have enjoyed unparalleled access to on-demand career resources and networking opportunities via tools like TED talks and LinkedIn, young members remain steadfast in their commitment to membership. Eighty-seven percent of those responding to our survey reported that it is important to be part of an association and more than half (51%) reported that being part of an association is becoming more important than it used to be.

Within Personify's survey data, several segments showed unique behaviors worth noting. Millennial members were 16 percentage points more likely to say being part of an association is growing in importance and African-American members surveyed were significantly higher than average (+18 percentage points) to agree that being part of an association is more important than it used to be, at 66 percent.

Bringing experiences that are inclusive of young members can be a relatively straightforward exercise thanks to extensive research available on the needs and preferences of Millennial and Gen Z constituents. The numbers alone suggest that for organizations looking to drive sustained, long-term growth in the decade ahead, delivering an experience to young members is critical to success.

EXPERIENCE BEYOND BORDERS

Another growth strategy gaining momentum is expansion to new markets. According to the United Nations[11], in the year 2100 the world's population will be 11.2 billion people.

It is nearly impossible to identify an organization that is not affected, in some significant way, by globalization. As new markets emerge, businesses and a growing population of local professionals will increasingly need the services that associations provide. Opportunities like professional development, knowledge transfer, networking, education and professional certifications will continue to provide value to constituents. Research firm Globalstrat also reports organizations that have a solid international strategy experience faster growth.

Yet driving growth through the delivery of a global experience requires discipline, patience, and a willingness to look at facts rather than rely on assumptions. The diversity of associations, and the uniqueness of the conditions and environments within which they operate,

mean there's no 'one-size-fits-all' template for success. And then there are the constituents and the countries they call home. International constituents may carry distinct expectations around experience while unique market attributes, needs, preferences and regulations introduce additional complexities. Associations Now suggests that smart growth is fueled by a comprehensive understanding of the "dynamics and characteristics of their markets, particularly as new sources of competition threaten traditional avenues of engagement."

Additionally, as individuals, cities and nations look for risk mitigation strategies that can prevent the spread of Coronavirus, they are looking to other countries and governments for guidance and support. Similarly, member-based organizations and event professionals can benefit from connecting with their peers across the globe to understand digital engagement tactics that help them connect with constituents in a world where face-to-face contact is not feasible. An international and collaborative strategy has both short-term and long-term benefits.
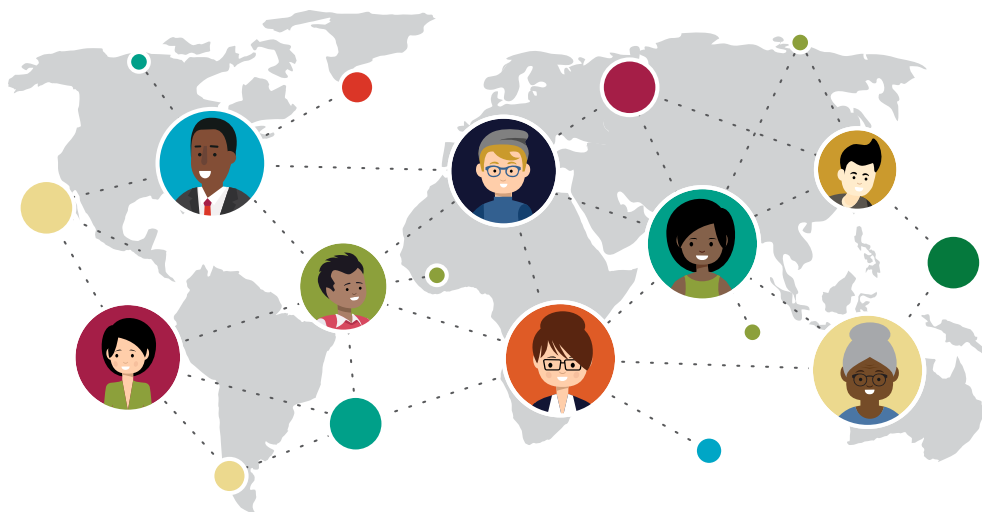
Driving Engagement via Experience

Whether your constituents live in another part of the world or are just embarking on their career, all audiences now enjoy an unprecedented number of ways to engage with your organization.

Here's an example. A prospective member comes to your website. After taking some time to learn about your organization and programs, they navigate to a page where they choose a membership from several options, submit their payment information and click "Join."

Within minutes they receive a welcome email, thanking them for becoming part of your association and highlighting key pieces of information to make getting involved easy from day one including local chapters, online resources where they can start participating immediately and an upcoming annual conference with workshops specific to the areas of interest they've shared.

A comprehensive experience must allow for deft navigation between traditional channels and an ever-growing array of digital options. Organizations can't view touchpoints in isolation, but as part of a seamless constituent journey. Many organizations try to create this via a multi-channel approach where they maintain a website, blog, Facebook, and Twitter. Each is used to engage and connect with constituents however, in most cases, the experience falls short due to a lack of consistent messaging.

An omnichannel approach is all about creating a simple, seamless experience for constituents, wherever they are—allowing them to pause an activity and resume it later from any channel without disrupting workflows. It accounts for each platform and device used to interact with an organization and aligns messaging, goals, objectives, and design across the various combinations and scenarios.

An omnichannel approach allows an organization to dial up a particular tactic, like digital engagement through an online community, when traditional tactics such as your annual tradeshow are not feasible. When done right, the experience benefits from increased engagement and productivity by delivering the right information, to the right person, at the right time. Digital and physical channels converge as differences between two distinctive channels become avoidable and disappear. For retailers, the industry for whom omnichannel trends have been most widely researched, the benefits of this integrated approach have proven substantial. Customers who engage with omnichannel marketing, according to the Harvard Business Review[14], spend an average of ten percent more than those who do not. Omnichannel engagement has long-term value too, with omnichannel strategies driving a 30% higher lifetime customer value per research from Google[15].
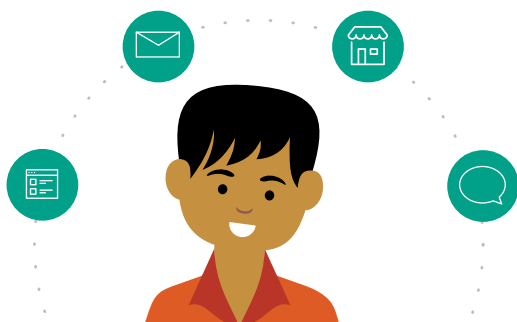
In addition to the tangible benefits of bottom line results, an omnichannel strategy supports engagement and delivery of a superior experience by:

- **Providing an inclusive solution for audience diversification.** When implementing multiple channels at once, you reach out to members who only interact on certain channels and then can combine each audience by facilitating smoother transitions/integrations between talk, text, chat and email channels. For example, younger members may engage regarding a breaking news story via social media while global members, whose access to news outlets may be different, could choose to reach out via email or at an in-person affinity group during the annual conference. Organizations can meet the needs of each group but then also share a consistent response and/or information across *all* channels to create a more cohesive experience for *all* members.

- **Empowering constituents to personalize their own experience by providing access to information, programs, services, and support options on demand.** For example, a member has questions about an upcoming event and is looking at an organization's website while they are on the phone with an organization's conference team allowing for a more personalized, and satisfying, support experience.

DIGITAL ENGAGEMENT CONTINUES TO PLAY A GROWING ROLE IN EXPERIENCE

Whether digital engagement opportunities are used as a complement to an organization's in-person interactions and non-dues revenue, or as a first touch tactic, they are playing an increasingly visible role within a constituent's overall experience. Additionally, digital engagement enables organizations to demonstrate their value when in-person interactions are not possible—whether its due to a global pandemic, geographical borders or other reasons.

According to Pew Research, only 14 percent of U.S. adults had access to the internet in 1995[18], but by 2014 that number had risen to 87 percent. Millennials were pioneers in the digital age, witnessing the introduction and rise of multiple social media platforms, smartphones, rich media and more. Born beginning in 1997, Generation Z was born into a world where these innovations were commonplace. Ubiquitous connectivity, highly curated information, on-demand video and 24/7 news cycles are native to Generation Z.

But it's not just young members. According to Google[19], 98 percent of Americans switch devices over the course of that day. IT research firm Aberdeen Group reports[20] more than half of all companies are trying to reach us through no fewer than eight channels. Known for their digital savvy, it may not have come as a surprise that these trends are even more exaggerated among Gen Z, who spends an average of six to ten hours a day[21] across five different screens[22]. Millennials also frequently switch between devices, with a study from Adobe[23] showing that almost a quarter of them will switch devices while reading and a third while watching video content. The result of all this information? A shrinking attention span, dropping to as little as eight seconds[24].

But despite all the screens and all the content, according to consulting firm McKinsey[25], 45% of consumers report companies aren't delivering the right digital experiences fast enough.

HOW CAN ORGANIZATIONS LEVERAGE DIGITAL ENGAGEMENT TO STRENGTHEN THE CONSTITUENT'S EXPERIENCE?

The first step is to develop a clear understanding of channel preferences. This is true for both those currently used in outreach efforts and for those not yet part of your engagement efforts. Understanding how specific groups of members are interacting (or not) across these different channels can yield multiple benefits.
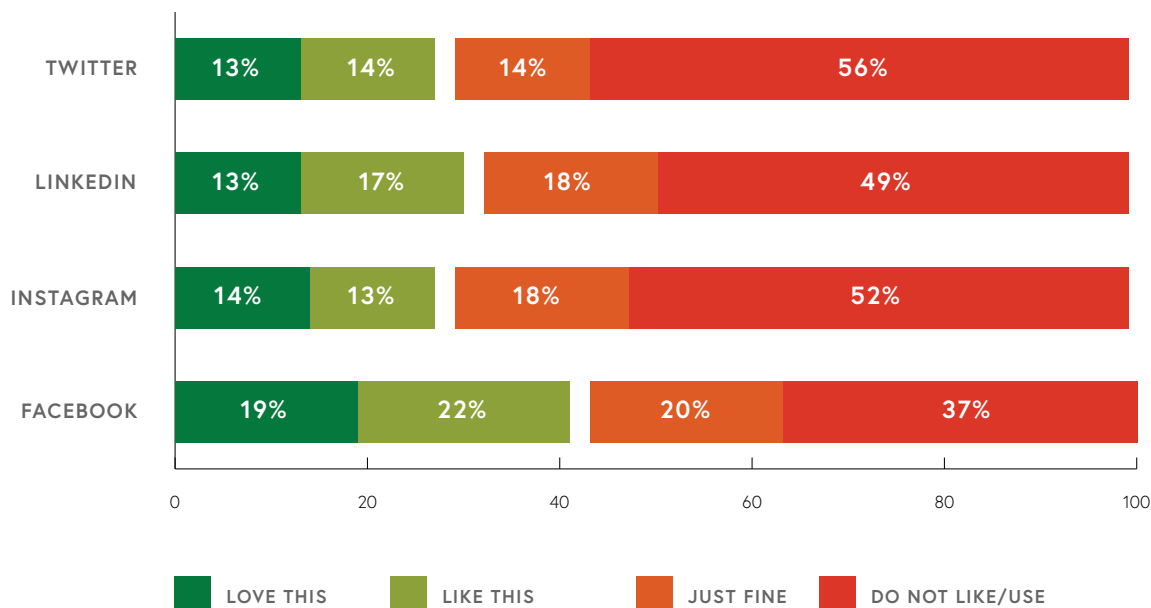
Across all groups, given the choice of four channels, a plurality of constituents told Personify that email is the best way to reach them with a large majority (82%) of those surveyed ranking email first or second. Personalized email performed especially well. According to marketing firm Omnisend[26], targeted campaigns with personalized messages generally attain an open rate of 28.05%. This is 34.7% higher than non-segmented campaigns, who had an 18.3% open rate.
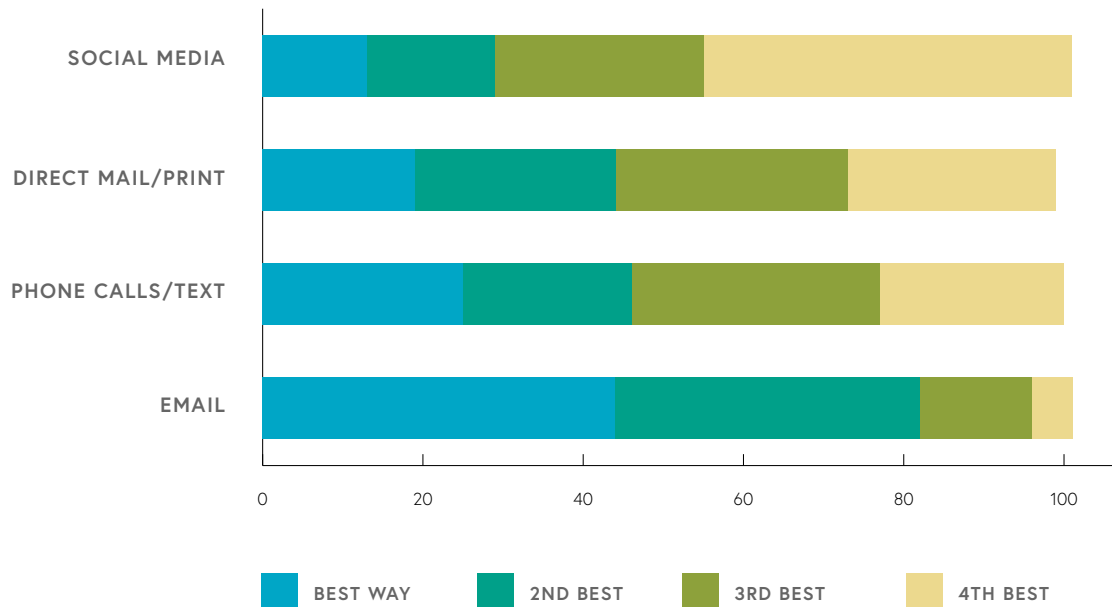
While 8 in 10 constituents told Personify that they like or love personal emails from their association and three-quarters have a favorable opinion of e-newsletters, the same cannot be said for social media. Fewer than half of constituents – sometimes far fewer – express a desire to engage via these channels.

Yet social media usage continues to grow. When Pew Research Center[27] began tracking social media adoption in 2005, just 5% of American adults had used at least one of these platforms. By 2011, that share had risen to half of all Americans, and today 72% of the public uses some type of social media.

When asked, "And when thinking about where you might get information from an association from, how do you feel about each of the following (social media channels)?"

	LOVE THIS	LIKE THIS	JUST FINE	DO NOT LIKE/USE
TWITTER	13%	14%	14%	56%
LINKEDIN	13%	17%	18%	49%
INSTAGRAM	14%	13%	18%	52%
FACEBOOK	19%	22%	20%	37%

African American respondents to our survey were slightly more likely than average to love Instagram (+17 percentage points) while those in the Northeastern United States showed a slightly greater affinity for LinkedIn with 20% reporting they "loved" LinkedIn, +7 percentage points versus the average.

Across almost each of the audiences surveyed, members told Personify the social media channel most frequently used by associations is Facebook. Yet, for two of the segments surveyed (Gen Z and Facebook), Facebook was also ranked as the least effective. Conversely, Twitter and Instagram – noted among the social media channels least used, are also identified by three of the four segments as the most effective.

When asked to indicate whether their social media usage had grown in the last two years, Facebook (40%), Twitter (39%) and Instagram (44%) all saw adoption grow. For all segments except Gen Z, Facebook is the preferred social media channel. While three-quarters of Millennials and Gen X follow their association(s) on Facebook, there is a dramatic drop-off on both sides of the age spectrum.

The Role of Experience in the Age of Coronavirus

We know that digital experiences play an important role in a constituent's journey with an organization, but what about when constituents can't attend an organization's annual conference, network in person with their industry peers and attend programs and activities that grow their expertise and skillsets?

While the full impact of the Coronavirus on associations and organizations is still relatively unknown, we have already seen a significant number of association event cancellations that include annual conferences, meetings, networking events and more. According to a survey conducted by Pew Research from March 10-16, 2020 , 86 percent of Americans report that the Coronavirus outbreak is a threat to day-to-day life in their community.

As members and constituents transition to remote working options, there's an opportunity for member-based organizations to provide digital connections and touchpoints to supplement the lack of interaction that would typically take place at work. Personify's research on young members that was fielded in 2018 found that phone calls are an effective, but underused, tactic to connect with people.

The phone was cited as the best or second-best channel by 46% of those surveyed, almost twice as many as who expressed a preference to engage via social media. Overall, 45% of members told us they liked or loved receiving a phone call from their association, with 51% showing the same level of appreciation for text messages. Consider having leaders within your organization reach out to members by phone to check in with them, drive awareness for digital programs and reaffirm the value that the organization provides to those members.

And make sure that your systems are structured to help you acquire, engage and retain constituents across all of your channels. Beyond the concerns about public health and risks of contracting the virus, health officials are concerned about the ramifications of the "social recession" that will occur as a result of social distancing. A report, which measures routing social contact conducted by the National Academies of Sciences before the coronavirus outbreak began, found that about a quarter of adults fit the definition of socially isolated, and 43 percent said they felt lonely. The report found that both social isolation and loneliness can inflict harm upon one's physical and mental health with positive associations for increased risk of dementia, heart disease, cancer mortality and stroke.

This is particularly concerning for organizations with a significant number of older constituents, who are more likely to be socially isolated. Consider hosting virtual meetups and coffee breaks with members and constituents to allow for people to see one another on-screen. This will not only reduce the feeling of social isolation and loneliness but will remind constituents of the value and experience provided by the organization.

Experience-Driven Technology

Engagement has historically been viewed through a one-on-one lens: one constituent getting value from an interaction through one channel or program. However, as illustrated above, the modern customer experience is based on a one-to-many dynamic. That is, one constituent engaging simultaneously via many different ways at various points of their journey.

Balancing the need to exceed these increasingly complex, extreme expectations across multiple audiences while delivering consistent, cohesive messaging across an ever-evolving number of engagement channels can feel like a lot. Even if an organization recognizes the value of creating an experience, understanding how to apply what has traditionally been a commercial sector strategy in a nonprofit setting can prove daunting. Absent the budget, staff and technology enjoyed by sophisticated retailers, how can associations realize similar gains?

Delivery of an experience requires rethinking business processes as well as technology infrastructure. Many times, an organization's goals and objectives are established by department rather than shared across functional lines. Individual groups may be too focused on the very specific ideal path that they have crafted for an audience or unaware of the greater experience that path impacts. This fragmentation often manifests in an organization's technology stack, which has developed organically over time. IT organizations and other leaders within an organization are expanding their technology stack with new tools and point solutions over time as needs and preferences changed.

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Experience driven organizations must break down internal barriers to develop an ecosystem designed to eliminate operational silos and propagate the idea of the constituent relationship as a singular entity that everyone impacts.

What is an ecosystem? Used in a business context, the term ecosystem first appeared in the Harvard Business Review[28], used to describe an increasingly interconnected world where different businesses, "co-evolved cooperatively instead of inside a vacuum, attracting similar, yet different resources to satisfy customers." Accenture[29] reports that 81% of business and technology executives believe boundaries will blur between industries as technology empowers teams to work together within interconnected business ecosystems.

Forrester[30] further clarifies an *experience* ecosystem as, "the web of relations among all aspects of a company - including its customers, employees, partners and operating environment - that determine the quality of the customer experience." The ecosystem works together to achieve success, with each group no longer operating in a silo, but simply adding their unique contribution to the constituents' overall journey. Experience ecosystems facilitate and capture the dynamic interactions between people, software, data, systems and services. What makes them unique in the world of technology is the way in which technologies exist, both independently but also together.

As such, to support continued growth and engagement, experience ecosystems require their foundational technology to be open, dynamic and integrated. This introduces new challenges for CIOs and IT organizations. IDC[31] predicted that by 2018, more than 50 percent of large enterprises—and more than 80 percent of enterprises with advanced digital-transformation strategies—will create or partner with industry platforms. At the same time, there will be more than 50 billion connected devices expected by 2020, according to Cisco.

These numbers point toward a radical reframing of the role technology plays in an organization. To transform complex legacy architecture into experience ecosystems, technology leaders must draw external technologies closer while managing security issues and proactively supporting the ever-accelerating stream of technological innovations. It's no longer about buying software packages and building bespoke solutions on-premise or working with a few systems integrators to deliver a business solution. It's about understanding the end-to-end constituent experience, how technologies can work together to support unique audience needs and facilitating engagement to deliver a complete and personalized offering.

Social Media

Customers

Systems

Devices

EXPERIENCE ECOSYSTEM

Operating Environment

Data

Employees

Partners

Bringing Your Experience to Life

UNDERSTAND THAT YOUR COMPETITION IS YOUR CONSTITUENT'S LAST BEST EXPERIENCE

Successful experience ecosystems require a level of consideration and reflection. Constituents bring expectations informed by other interactions with sophisticated retailers and commercial businesses. Consider what pillars form the foundation of that experience and use them as the benchmark against which you evaluate thoughtful, smart and natural extensions with the same consideration and care. Identifying an experience ecosystem opportunity has to make business sense and be customer centric at the same time.

EMPHASIZE CONSISTENCY

Understand your membership as a whole, the unique segments within your constituency, where they are, and then be consistent across all those channels for a cohesive experience. Instead of viewing the landscape as your website, your annual conference and Facebook page—think of them as parts of the same story. The goal should be to bring as much of your brand experience as possible to each, reinforcing the value that your organization delivers, but not necessarily to drive traffic from one channel to another.

GET REAL WORLD FEEDBACK

You can't fully understand the constituent's experience, or identify the gaps within it, if you're not talking to them. Focus groups, in-person visits, reading feedback, even simply calling them and asking for their perspective serves as an essential step in informing your understanding of their journey, across all the channels they may interact with.

ALIGN THE SOLUTION TO THE STRATEGY

The introduction of a supporting ecosystem can transform not only the constituent's experience, but the role of technology within an organization. Prioritize the narrative and interconnectedness of all tools for maximum impact. While building out this experience ecosystem can be complex and based on many interdependencies, technology leaders can optimize their efforts by:

Aligning the solution to the strategy.

Leaders can then identify gaps and future sources of value while developing the necessary strategic actions to address it within the ecosystem. This dialogue is a two-way and constant exploration, in which technology and an organization's strategy are inextricably linked.

Establishing a flexible supporting architecture.

Experience ecosystems are dynamic in nature, requiring a next-generation infrastructure built for scalability and integration optimization. Advances in cloud computing and infrastructure as programmable software, infrastructure resources (e.g., networks, servers, storage, applications and services) allow an infrastructure to be rapidly provisioned, managed and operated with minimal effort. iPaaS creates a hub to streamline the introduction and management of new tools.

Investing in new capabilities.

In creating a compelling experience ecosystem, organizations should look to partners with fluency in multiple best-of-breed technologies and the experience integrating these capabilities in meaningful ways. Expert guidance can bridge gaps between an organization's goals and the technology required to extend value and improve the constituent's experience.

Wrapping Up

Technology plays an important role in the successful transformation of an organization, focused on a series of transactions into an organization bound to a deeper, richer experience and a more valuable long-term relationship. A strong association management solution, suite of engagement tools and a platform that makes streamlines integrations will ensure you're able to seamlessly embrace new trends, make shifts in your engagement strategy when global forces mandate it, incorporate the latest technologies and provide a strong foundation that will be constantly improved by the application of new insights.

About Personify

Personify is the market-leading Constituent Management and Engagement (CME) platform that empowers organizations to better engage their constituents, maximize revenue and optimize operations. For over 20 years, Personify has served as the technology foundation for organizations of all sizes from the largest associations, charities, event professionals, YMCAs and JCCs to emerging nonprofits. Nearly 25 percent of the U.S. population interacts with Personify through their involvement in organizations. For additional information, visit www.personifycorp.com.

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