Introduction

Your association's approach to marketing makes all the difference when it comes to recruiting and retaining members. In short, it’s vital to the ongoing success of your association.

Before jumping into marketing activities, it’s important to have a plan. A strong marketing plan helps you choose your marketing efforts based on what you want to achieve (your goals and objectives) and how you want to achieve them (your strategy). It also helps you think through the right communications channels and frequency for each objective.

Start with the basics
Marketing plans can get complex. But, with a small staff, you don’t have time for that. The key to success is to focus your efforts on the basics so you can optimize your time and still reach your goals.

This toolkit covers the building blocks of a good membership marketing plan. It also includes resources, tips, and tools to help you pull together the right membership marketing plan for your association.

Let’s get started.
Goals and objectives

Start by defining your goals and objectives. These will help guide your marketing strategy and tactics by giving you a clear purpose for your marketing activities. They also will give you a benchmark to determine the success of your marketing activities.

Here are fill-in-the-blank templates and examples to help you begin outlining your goals and objectives:

**GOAL**
Broad definition of what you want to achieve

- **Template:** To [what you want to do] by [how you want to do it].

- **Example:** To increase overall membership by attracting new members.

**OBJECTIVE**
Specific, measurable step toward the goal

- **Template:** To [what you want to do] [what you want to impact] by [how much you want to impact] among [member segment] by [date].

- **Example:** To increase new members by 15 percent among students and new graduates by December 31, 2021.
Strategy

Next, think strategically about the membership programs and offerings you will use to achieve your membership marketing goals. Here are three key programs that many associations find invaluable for attracting and retaining members:

**Events (virtual, in-person, and hybrid)**
For years, in-person conferences and events have been powerful tools for associations. They’ve traditionally been one of the largest sources of non-dues revenue. They also provide learning and networking opportunities – which are among the benefits members value most.

Today, virtual and hybrid events have emerged as another critically important tool for associations. Even for associations with small staffs, these types of events can help reach people when in-person events aren’t feasible. They offer a convenient and cost-effective option to attendees, sponsors, and the association.

**RESOURCE:** Discover tips and techniques for virtual events: Download the guide, The Small Association’s Guide to Planning and Delivering Virtual Events

**Online continuing education/learning programs**
According to Community Brands research, 85 percent of members want their professional associations to provide continuing education opportunities. The report also indicates that while annual conferences top the list of ways members have been involved with their organization, members don’t look to a one-time-per-year event as the only source of training and continuing education.

These findings suggest the need to address your members’ preferences for learning in a variety of ways. For example, webinars and webcasts are great ways to provide more continuing education opportunities in an online learning environment. You can set one up with minimal equipment: a device with a webcam and microphone, an internet connection, and a learning management system (LMS).

**TIP**
Using YourMembership Learning™ LMS, you can easily deliver content and empower your members’ career growth through live and on-demand content.

**Online job board/career center**
Career advancement is a top reason members join professional organizations. By offering an online job board/career center you can attract new members, help them find their next great job opportunity, and provide the career resources they need to land the job. You can also deepen your relationship with members by helping them to grow their careers and achieve their goals by becoming their trusted resource for professional development.

**YM Careers™** is job board software built for associations. It can help you drive member engagement and increase non-dues revenue without additional staff time or resources.
Channels

Once you have a strategy in place, it’s time to define the specific channels you’ll use to promote your organization’s programs. Here are four key online channels that help attract more members and keep them around long term:

Website
Your website is one of the first things a potential member sees in relation to your association. It often makes the first impression. It’s also a go-to site for your current members.

A well-executed site with modern, user-friendly design goes a long way toward attracting and engaging members while building your brand. Make sure your website:

- Is mobile-friendly
  Make it easy for members and prospects to view and interact with your website on mobile devices.

- Is optimized for search engines
  Incorporate best practices, such as using keywords in your web pages, so prospective members can easily find your site.

- Includes a membership application
  If you haven’t already done so, move your paper-based membership application online to make it easy for members to join.

Social media
Ad hoc posts to your primary social media accounts have their place. But using social networking to its fullest requires a plan. Your social media strategy should align with the needs and interests of your prospects. Some helpful ideas:

- **Know your prospects’ and members’ habits.** Send your members a survey asking them what platforms they use and how they use them.

- **Demonstrate your value.** Use the information you learn about social media channels to demonstrate your value as an information curator: In addition to sharing your own content, share interesting and informative content from other sources in your industry.

- **Promote your programs.** Social media is a great way to recruit attendees for your events and other programs, as well as to build anticipation for them.

YourMembership® association management software (AMS) includes a content management system with mobile-responsive layouts and an easy-to-use editor tool so you can quickly build emails, forms, and web pages that will work and look great on mobile devices.
Online community
Beyond typical social media channels, offering an online member community is a great way to elevate social networking among your association’s members and prospective members. At the same time, it can make your association a part of your members’ social networking habits.

There are many ways to encourage member involvement on an online community. For example:
- **Create discussion groups based on key challenges in your industry.** This allows members to problem-solve with each other, which encourages them to participate more.
- **Post the latest reports on best practices for your industry.** Giving your members this type of access to valuable content makes your online community the go-to place for them to stay plugged in to their industry.
- **Use your online community’s quick announcement area to draw attention to important information, such as breaking news and new educational opportunities.** This is an effective way to keep members coming back for the latest on what information and help are available to them.

RESOURCE: Launching an online community when you have a small staff may seem like a big task, but it doesn’t have to be. Read The Small Association’s Guide to Getting Started with an Online Community.

Email
Email is still a great way to connect with prospective members and keep current members engaged. But it must be used strategically to be effective. Here are some key approaches:
- **Think mobile.** As with your website, people expect to easily view your emails on their mobile devices.
- **Segment your list.** Dividing your members and prospects into smaller groups based on their behavior, engagement, demographics, etc., means you’re sending information to the most relevant audience – making it more likely they’ll open your email and take action.
- **Automate.** With a small staff, you don’t have extra time to spend on sending emails. Automating process-related emails will free your staff’s time to work on more strategic email marketing campaigns.

Email campaign management functionality in YourMembership AMS allows you to quickly and easily create email lists and target email content based on a variety of member properties.
Content calendar

Now it’s time to start putting detailed communications plans down on paper. It’s important to build communications that deliver the most effective content with the most effective timing to attract new members and provide value to current members.

**Purpose and Frequency**

For each of your marketing objectives, create a plan for content with varying purposes – such as providing industry information, starting a conversation, or entertaining – and determine the frequency for sharing each associated content type. Use your marketing channels (website, email, social media, online community, and other channels) to share content regularly.

Here is an example of a plan for content purpose and frequency that’s focused on driving member engagement.

![Content purpose and frequency diagram]

The image isn’t meant to be a precise formula. It’s more of a directional roadmap – an example.

Each association’s content map will look different, depending on industry, staff, budget, member preferences, and other factors. The key is to make sure you are defining what your specific content is doing and how frequently you’re sharing it with prospective and current members.
Content calendar

Once you have your content frequency plan in place, start to put your content on a communications calendar. Key elements to include are:

- **Your strategic programs**: What you’re promoting, such as events, learning programs, or your job board.
- **Your audience**: Who you’re communicating with. Be sure to revisit your objectives to make sure you’re targeting the right member segments to reach your goals.
- **Your marketing channels**: How you’re communicating, such as website, social media, online community, and email.
- **Content purpose and frequency**: What is the intention of each communication and how often that type of communication will be shared.

Putting together a communications calendar doesn't have to be fancy. A simple Word document or Excel spreadsheet can do the trick.

It also can be organized in different ways, depending on your goals and objectives. You can even create a separate calendar for each objective and then combine the calendars for a birds’ eye view of your communications calendar.
Take the next step

Having a great plan in place is fundamental to a strong membership marketing program. The building blocks, resources, and tips in this toolkit will help get you there.

But there’s something else you’ll need: the right association management software to support your marketing efforts.

YourMembership AMS is it. It offers affordable, easy-to-use, all-in-one membership software for small to mid-sized organizations. It includes membership management functionality combined with event management features and an online community platform to help you manage member activities while providing members with an easy, everyday way to connect, share, and learn.

Learn more about why YourMembership AMS is the ideal solution for small and growing associations.

Explore YourMembership AMS