



Embracing Digital:
**Membership
Organisations**

Introduction

The digital landscape has shifted massively over the last few years, and technical capabilities and members' expectations have changed just as rapidly. For membership organisations, meeting these expectations means investing in new technologies to service members better.

As many membership organisations look for ways to cut costs, generate new members and find efficiencies within their businesses, many are now turning to digital as a tool to achieve these new goals.

We've worked with numerous membership organisations of all shapes and sizes over the last 15 years, helping them to achieve their digital ambitions. From The Pony Club to Ramblers and Healthcare Infection Society (HIS), getting digital 'right' has resulted in these organisations achieving a more efficient service, a boost in revenue and an increase in engagements and members. But it all starts with having the right digital strategy.

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Marty Bibby - The Pony Club

The opportunities that exist once a membership organisation has defined a digital strategy can be huge. In this paper, we present to you some key pointers for those thinking of using digital to combat current challenges.

SIX

key digital strategy questions to ask your Board

01

What will it take to meet our members' expectations in a digital world?

02

Do our business plans reflect the full potential of technology to improve our performance?

03

Is our portfolio of technology investments aligned with opportunities and threats?

04

Do we have the capabilities required to deliver value from the technologies?

05

Who is accountable for digital and how do we hold them to account?

06

Are we comfortable with our level of digital risk?

What are the major goals and challenges for membership organisations?

In a sector where communication is key, membership organisations are under increased pressure to service their members better and improve digital efficiencies. The need to 'go digital' has never been more apparent. According to Memberwise in their most recent research summary report, the prominence of digital challenges

suggests a high degree of pressure on organisations to define and deliver effective digital strategies that will enable them to reach their key goals. Complexity of systems, channels and features, along with an increasingly demanding digitally savvy member population makes this a tricky area to get right.

To understand how to move forward, it's important to recognise what the key goals and challenges are:

Goals

Membership engagement

How can we keep members engaged and promote what we offer?

Acquisition and retention of members

How do we continually acquire new customers and retain existing members?

Member benefits and expectations

How can we demonstrate our value to members and communicate our offering?

Membership satisfaction

Are our members getting the most out of their membership and what can we do to ensure they are happy?

Challenges

Digital commitment

How do we embrace the power of digital?

Reputation

Can we clearly demonstrate our value to all members?

Inadequate integration

Is the technology we have suitable for what we need to achieve and are our membership management systems and website integrated?

CRM

Is our database integrated and up to date?

The digital shift is not only about building a new website but improving internal operations; creating more effective communication channels with members and driving efficiency through closer operational relationships. This all starts with using the right digital tools.



How is technology transforming the way membership organisations operate?



Website Analytics

Using website analytics will help you to translate your data into meaningful, actionable insights and identify areas of opportunity. Generating reports at regular intervals means that strategic and day-to-day decisions can be data-driven.



Personalised Content

At a time when customers have increasing demands and are no longer satisfied with traditional means of mass communication, content marketing is of great value to marketers. Members don't just want to be informed, they want to be engaged, and they want it to be personal. Response rates to personalised content is high and when the value of each member is high taking the step to personalise is the way forward.



AMS/CRM (Association Management System/ Customer Relationship Management System)

A CRM system can benefit your business by helping you centralise, optimise and streamline your communication with members. By using a CRM, you can achieve better segmentation, member retention and speedier communications enabling you to create effective marketing campaigns personalised to your members.

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Social Media

The use of social media within the membership and association sector has increased year on year. Many organisations are now embracing social media as a digital solution to increase awareness, attract new members, promote their organisation and, most importantly, engage with and build relationships with their members.



Reduced Manual Processes

Businesses are replacing traditional methods of member recruitment, such as member applications and surveys, with digital forms and portals so that it's easier and faster to update members' data. Not only does this create a speedier process and reduces costs but it also helps to create a better experience for your members.

Did you know...

53%

do not personalise
website content

4 in 10

don't have a Member Value
Proposition

61%

use targeted content based
on special interests in their
email marketing

78%

of organisations highlighted
they experienced challenges
in measuring member
engagement

6%

of organisations quantify a
Return on Investment (ROI)
from their social media
activity

28%

of organisations reported they now
employ a dedicated person to look
after their social media channels

65%

don't have a person
responsible for managing
their social media channels



Case Study: Healthcare Infection Society

The Healthcare Infection Society (HIS) is a charity and a membership organisation whose objectives are to advance knowledge, foster scientific interest and disseminate information about the prevention and control of healthcare-associated infections (HCAIs).

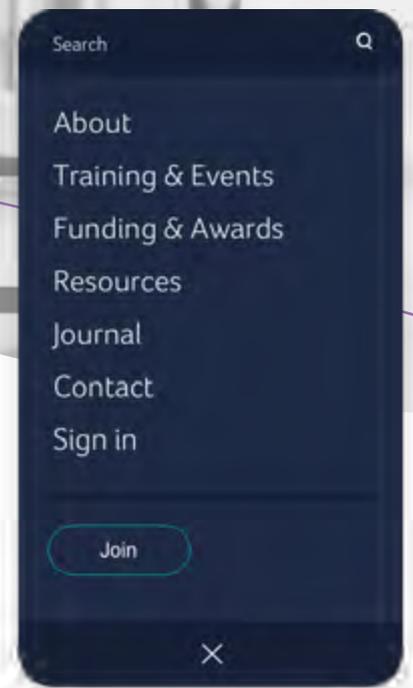
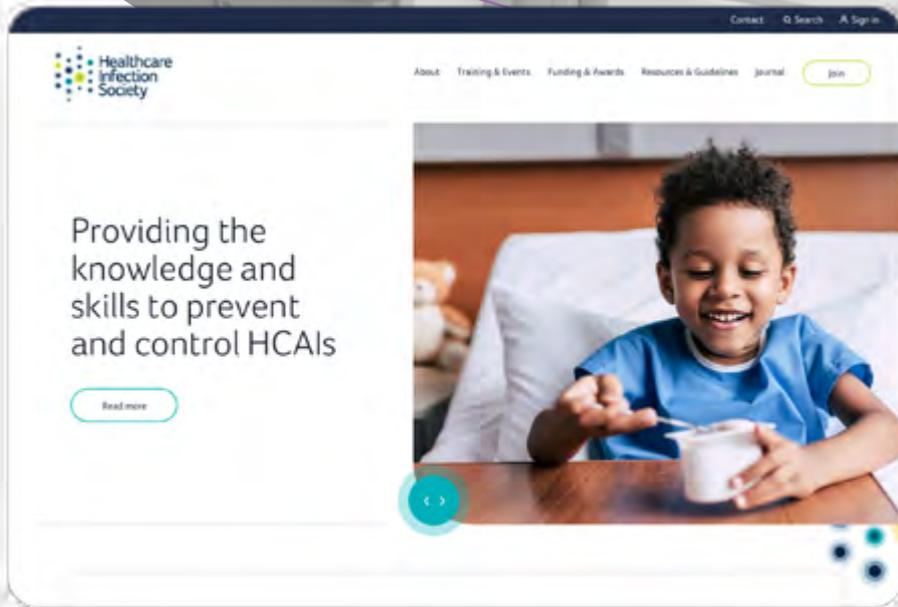
Digital Objectives

- Mobile optimised
- Personalised members' area
- Media integration options
- Act as a centralised management system
- Analytics and reporting functionalities

The Brief

The new Healthcare Infection Society website was conceived as a pivotal part of driving the ambitious new membership, communications, events and education strategies of the organisation. The main aim of the project was to create a site which provides centralised management of a number of aspects, such as events, email marketing, grants and memberships, from a single, seamlessly integrated CMS platform.

As part of the project, HIS had a number of requirements for the new CMS, including a premium design service, the inclusion of a personalised members' area and a range of media integration options. What's more, the new website needed to be mobile optimised and allow the HIS team to easily manage all content. The brief also included a requirement for analytics and reporting functionalities to measure important visitor statistics. The key business objectives of the new website fell into the following four categories:



Membership

HIS needed a membership functionality which allowed new members to join online by filling out an application form featuring an easy to search drop down list of countries. According to the membership subscription option and the country the user selects, the relevant fees will be automatically generated.

The new membership system would also be able to track duplicate members, send out automatic member renewal emails and allow existing members to review all information relevant to their membership as well as easily renew online. An email marketing functionality would help HIS engage with their members throughout their journey – from automated welcome emails to renewal reminders and more. Automated e-marketing sends out tailored communications and updates preferences in real time, so you never miss an unsubscribe.

Grant Management

In the grant management section of the new site all users (both members and non-members) need to be

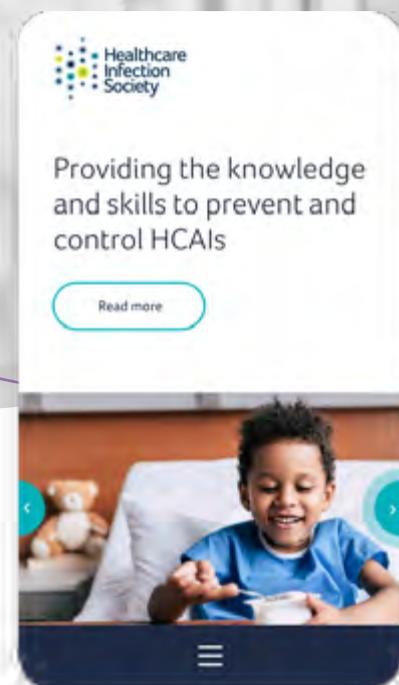
able to apply for a variety of grants using an online application form. The system would then be able to store all their grant application data, including PDF and Word documents. An automated workflow would streamline the grant submission, review and approval process with the help of Sage Live.

Events

The new website needed to feature an Events section where both members and non-members could register for events online. The website would then automatically generate their rates according to their membership status. HIS required an event registration system which pushed the appropriate fees to delegates and auto-populated the registration form with the details of logged in members. Following the event, the new system would also automatically send out feedback surveys tailored to the individual occasion.

Reporting

The CMS behind the new Healthcare Infection Society website also needed to support a series of



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Thanks for all your help so far – it’s been a really great experience working with you all at Spindogs. The website looks fabulous!

Helen Davies – Membership, Education and Events Manager at Healthcare Infection Society

reporting functions such as sorting membership data by all the available CRM fields, allowing users to create customisable reports (including financial reports) and extract them in a variety of formats. The new site would also give the HIS team access to live reports, which could be pre-defined and automated, and mobile optimised dashboards displaying real-time data.

The Solution

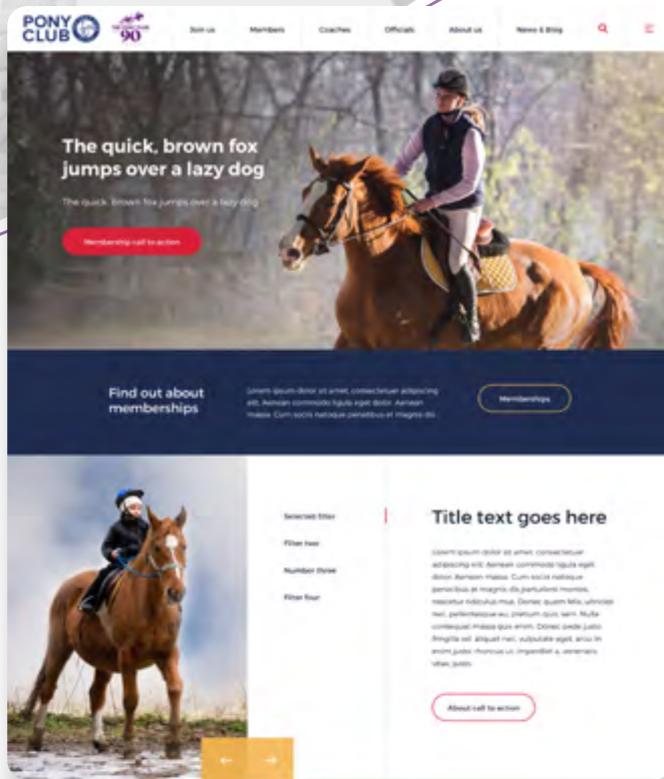
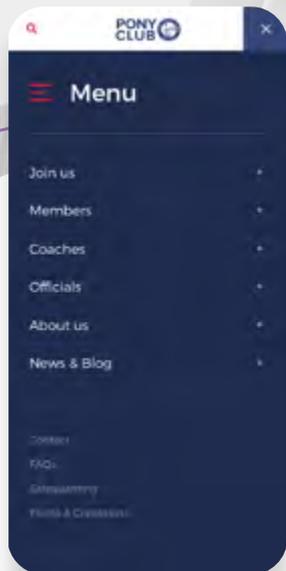
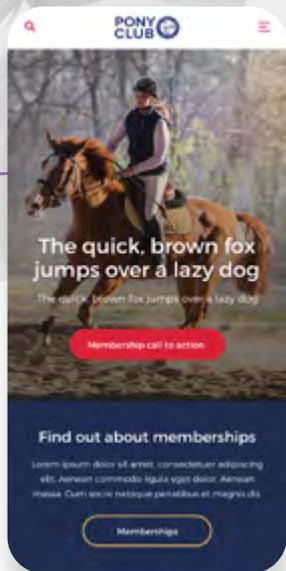
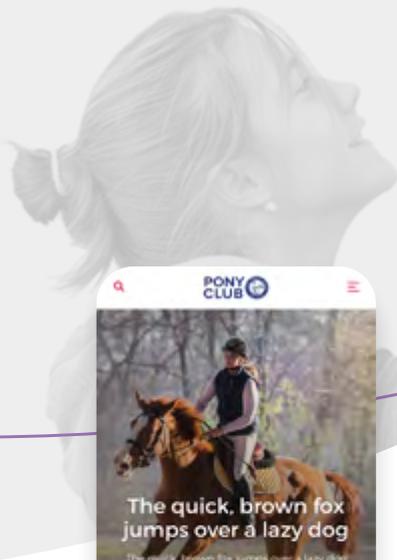
Collaborating with CRM provider Oomi, we held a series of Discovery workshops with the HIS team to gather information about the ways internal and external stakeholders interact with the current site. Informed by the outcomes of these workshops, we then went through a seven-week design phase during which we perfected the home page and the sub-pages.

Once the designs were complete, we kicked off a twelve-week development stage which culminated in running Umbraco training sessions with the HIS team, during which they learned how to use the

new site. Once the Healthcare Infection Society had uploaded all their content to the website and completed user acceptance testing (UAT) on both Oomi and our deliverables, the website went live in October 2018.

We held weekly phone calls with the HIS team over the course of the entire project and well after launch to ensure that all the final touches were completed.

Case Study: The Pony Club



The Pony Club is an international voluntary youth organisation for young people interested in ponies and riding. Tracing its history back to the 1920s, the club has been a stepping stone for a large number of equestrians and medal winners. Now with 345 branches and 480 centres in the UK alone, The Pony Club has over 110,000 members worldwide, making it the largest young riders association in the world.

Digital objectives:

- New navigation and burger menu
- New website
- Improved UX
- Dropdown form for members
- Mobile responsive
- 'Find a Pony Club' page

The Brief

The Pony Club first came to us when they realised that their website was dated and was no longer fit for purpose. With three chaotic navigation bars and many conflicting calls to action on each page, the site offered a rather confusing user journey. This made it difficult for visitors to find the content they were searching for, which in turn meant The Pony Club were losing potential new member sign-ups. They needed us to review the user journey and use our findings to build an engaging, accessible website that offered an improved user experience for all of the different Pony Club member groups. Following the creation of a clear user journey, The Pony Club also required a new content structure which could be easily navigated by users.

The Solution

Before we design any website, we conduct a series of discovery workshops that help us to understand how users interact with the website and what their frustrations are. The Pony Club discovery phase confirmed that the website wasn't user-friendly for

new visitors. The chaotic navigation made it difficult for potential new members to sign-up and contact their local branch or centre, which resulted in a large volume of enquiries sent to The Pony Club HQ and a whole load of extra work for their staff there.

We also found the catalogue of content was buried in the depths of the website with poor navigation which made it difficult for visitors to find the content they wanted to access.

Following the workshops, we delivered a discovery blueprint which set out our recommendations for the new website. We worked with The Pony Club to confirm what functionality they wanted for their website from the get-go, as well as a wish list of features for later down the line. Based on their goals, we decided that Umbraco would be the best CMS for The Pony Club as it would allow them to create microsites for individual branches and centres, should they wish to expand their website in the future.

When we were designing the new website for The Pony Club, we did so with a clear user journey and content structure in mind. Our aim was to create a site that would guide potential new members to the content they needed and encourage them to sign up as a member. We started by consolidating the three navigation bars into one clear bar at the top of the page. We then created an additional burger menu, which could house any content that did not fit the categories in the main navigation. With the help of the new CMS, The Pony Club could map content appropriately, doing away with duplicate content from their old site, which in turn helped to create an easy-to-follow structure. Faced with the challenge of enabling members to easily find membership details on the website, our designers and frontend team worked together to create a 'decision tree' on the membership types page. The drop-down form with three simple questions was designed to determine the user's membership type. Once they have answered the questions, the system highlights the most suitable membership option on the right-hand side of the page.

We also created a call to action for the page, designed to drive potential members to sign up for the correct membership. The call to action encourages the users to enter their postcode or a specific centre/branch, and then points them to

their nearest 'Pony Club'. As well as ensuring users could easily get to the relevant contact information, we also simplified the site search by adding filters to take members to their desired destination in fewer steps.

Lastly, to tackle the issue of users contacting HQ instead of their local branch, we created a dedicated 'Find a Pony Club' page. The simple layout, combined with Umbraco's sophisticated tagging functionality, enabled users to easily find the contact information for their local Pony Club without going through HQ. We used the same tagging functionality for the 'Latest News' page, so that visitors can sort news articles by sport type. In the future, we anticipate this functionality will also allow The Pony Club to tag their news content by specific centre and branch as well.

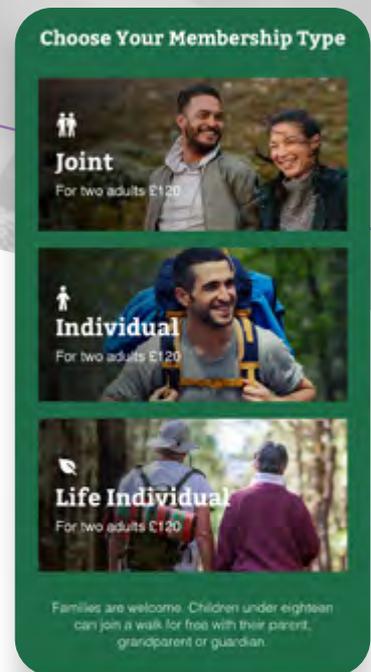
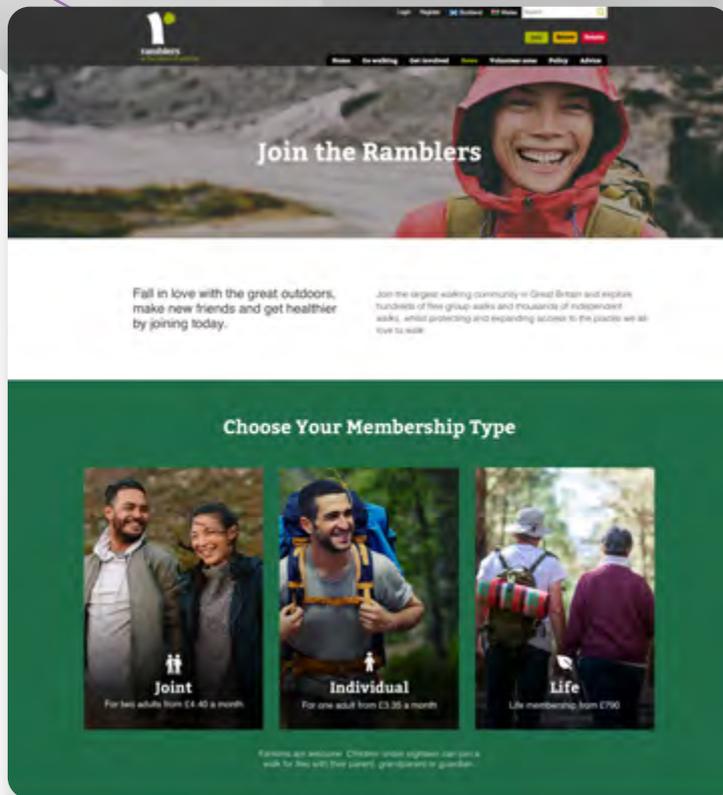
The end results? A mobile-friendly website with an improved content structure and seamless user experience, which enables The Pony Club members to find their membership details and local branch information with ease.

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Marty Bibby - The Pony Club

Case Study: Ramblers



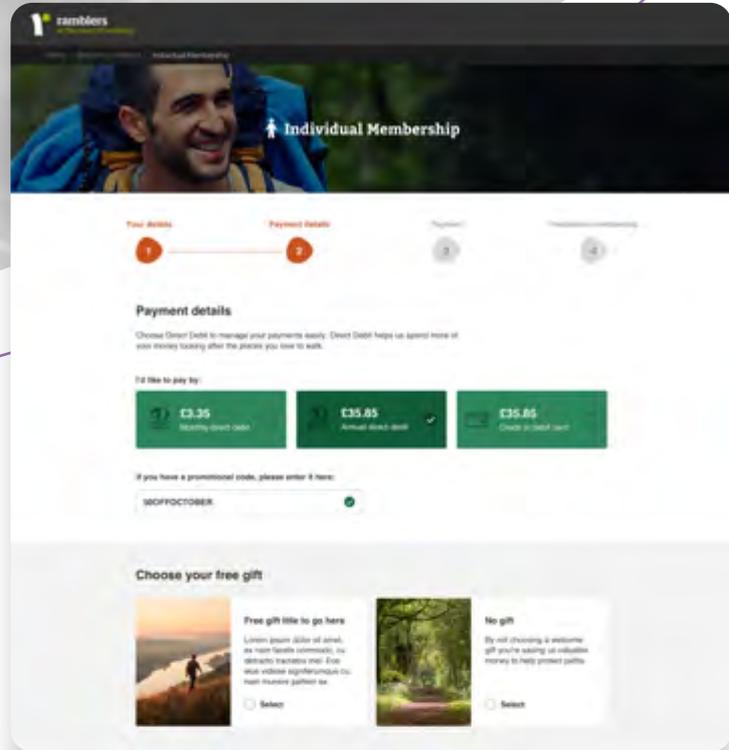
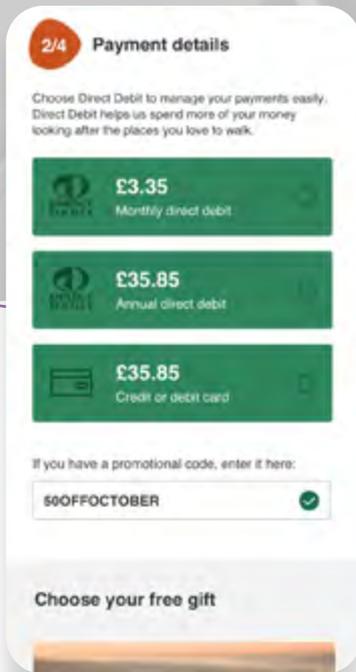
The Ramblers is a charity whose goal is to protect the ability for people to enjoy the sense of freedom and benefits that come from being outdoors on foot. They're an association of people and groups who come together to both enjoy walking and other outdoor pursuits, and to ensure that we protect and expand the infrastructure and places people go walking in the UK.

Digital objectives:

- Clear navigation
- Interactive content
- Support for electronic campaigning including polls, petitions, electronic appeals
- Website advertising / income generation
- Improved member servicing and processing via CRM integration
- 'Ramblers Routes' interactive mapping

The Brief

When The Ramblers decided to embark on a new digital project, they were looking for an agency to fulfil an extensive and thorough brief that would accelerate The Ramblers digital activity and ensure they were servicing members and users more efficiently. Firstly The Ramblers required a brand new website. The key deliverable was an attractive and useful new website with a user-friendly design, content and 'ease of use' mix that would have a very wide appeal and reflect accurately the Ramblers' status as Britain's walking charity. The new website, which aims to be 'best in class' in the walking sector,



needed to provide benefits to Ramblers' members and walkers in general, and improve the Ramblers' ability to take forward its charitable aims, generate income and recruit and retain members along with a fresh design and consistent messaging and branding. A prime goal was a clear navigation and a more dynamic feel to provide a more efficient and seamless service to members.

The Solution

We understood that The Ramblers had a number of objectives and required a full project from the development of personas, site mapping and wireframing into design, development, launch and support. First, we integrated Sitecore with The Ramblers membership system, Integra, and developed new user journeys for joining. Sitecore is a reliable, scalable and user-friendly Content Management System (CMS) which enabled The Ramblers to effectively and quickly add, edit and remove content and manage all aspects of their website. This also provided creativity and

design flexibility for web editors while maintaining consistency in formatting, style and quality.

The project needed to deliver more streamlined and effective membership processes through the integration with the CRM. The new system would allow members to update personal details, communication channels and mailing preferences. It would also trigger an automated electronic welcome pack for joining members, an automated electronic 'thank you' letter, renewal notifications and reminder email for existing members and synchronise and reconcile all online transactions and updates to personal information.. Electronic membership cards and end-to-end processing of new member applications and renewals were also an integral part of the project. Continuing the digital transformation, we brought the Walk Magazine onto the website and developed 'Ramblers Routes' developing the 'Routes Builder' system - an online tool for route volunteers (www.ramblersroutes.org). It enables Ramblers volunteers to develop and check high quality walking routes.

About Spindogs

We are a full-service digital agency helping organisations with marketing both online and offline. We love delivering great website design & development, marketing and brand solutions for our clients, so whether you're looking to drive more value from your digital marketing budget or bring your

business to life with a visually stunning website, we have the full package to take your online presence to the next level. That's how we've built successful, results-driven relationships with clients for over 15 years.

Websites

- > Web Design & Development
- > eCommerce
- > Multiple CMS platforms including WordPress, Umbraco and Kentico
- > Intranets & Extranets

Marketing

- > Outsourced Digital Marketing
- > SEO
- > PPC
- > Social Media Advertising
- > Analytics
- > Conversion Rate Optimisation
- > Email Marketing
- > Training & Workshops
- > Content Creation

Creative

- > Brand Consultancy
- > Logo Design
- > Graphic Design
- > UX
- > Website Design
- > Print
- > Branding



Get in touch

To learn more about partnering with Spindogs for your next project, get in touch with our Business Development team:

E: info@spindogs.com | T: 02920 480 720

The image features a light purple background with a large, thin purple circle. In the bottom-left corner, there is a solid purple shape containing the text 'spindoogs' in white. The text is in a lowercase, sans-serif font with a slightly rounded appearance. The overall design is minimalist and modern.

spindoogs