

DAVE HERSH & BEN MARTIN

The Enlightened Member Journey:

HOW TO 10X



PROFESSIONAL NETWORK

ENGAGEMENT

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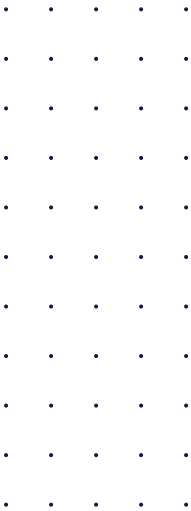
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FOREWORD

Professional networks are **at a crossroads**. Will they respond to society's changing expectations? Or will they remain stuck in the past and struggle to hold onto a dwindling member base? It's time to **rethink** the entire member journey.

Imagine that you have just arrived at a big party full of strangers. Would you rather start your experience with a sign telling you where to find food and drinks? Or would you prefer to be greeted by a welcoming friend who shows you around?

The answer seems obvious, but most membership organizations are still acting like brochures and megaphones—



pushing information out to a passive audience and expecting **them** to respond. That worked 15 years ago because there were no other options and little competition for attention. Content used to be king, but now the onslaught of information is overwhelming.

Human connection has the power to reshape the organizations of the future. The most successful organizations will not be defined by how much data they collect or how many newsletters they send out, but by how they touch the hearts and minds of those they serve—that is how they will earn their engagement. In a previous ebook on [*The 2020 Rules of Millennial Engagement*](#), we showed how millennials are shaping the member

journey for a new era: one that is built around **mobile, shared experience, authentic connection** and **purpose**.

Industries are **already being transformed**—from toys (Lego) to hospitality (Airbnb Experiences) to fitness (Soul Cycle, Cross-fit)—moving away from their old focus on products and benefits to experiences that bring people together. Membership organizations will have to adapt quickly to this new model... **or risk irrel-**



evance. It is time to reimagine your organization as a thriving, engaged, human-first professional network, where member's goals align closely with your own. **It is time to embrace a new enlightened member journey.** We'll show you how.

CHAPTER 01

INTRODUCTION

Enlightenment is a journey.

[NEXT CHAPTER](#)

ENLIGHTENMENT IS A JOURNEY.

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Just as a prospect’s path to membership is a journey, so too is the process for organizations—as they move away from tactics that worked in the pre-digital era to a new, complex web of enlightened and informed engagement strategies.





MEMBERSHIP IS ABOUT BELONGING.

It may sound obvious. But building a sense of belonging in the digital age is about so much more than just launching a website or blog. That's because paradoxically, as digital tools become more and more advanced, consumers demand a digital experience that feels **more and more organic**. The race for new members and sources of revenue now requires organizations to look within, to **reconnect** to the very human needs the organization was designed to meet in the first place.

Membership engagement is more than just a metric. It is the lifeblood of any organization planning to exist into the next decade. Behavioral economics tells us that some things are more important to potential members than money. Engagement is one of those things. **Humans crave personal connection**; it is so important that it is listed right after safety on Maslow's Hierarchy of Needs. Considering that humans now spend nearly a third of our lives online, why would we demand anything less of our online experiences?

Back in 2015, a Walker study predicted that by 2020, experience would overtake price and product as a key brand differentiator, and the data is lining up to [confirm it](#). A more recent study by Qualtrics XM Institute™ has found that organizations that invest in customer experience can expect as much as **33% revenue growth** in just three years.

But as the consumer and digital landscape continues to shift beneath our feet, what was once thought of as a series of predictable customer service touch points has become a winding membership journey that is as varied as each [individual human experience](#). The key is to keep members and potential members engaged every step along the way. How? By inspiring them to be active in the process instead of passive. By focusing on belonging instead of transactional communication.

The upside of proper online engagement is huge. Gallup has found that engaged customers are indisputably more loyal and profitable, with a fully engaged customer spending as much as [23% more than the average customer](#). Online engagement



often translates to offline engagement. **Super Members** (those who engage heavily with an organization online) are more than twice as likely to donate to their organization, **2.5 times more likely** to volunteer at that organization's event and six times **more likely to speak at that organization's event.**

Despite its importance, many organizations still struggle with engagement. In one survey, **43% of members** said their organizations seem out of touch, and **close to one-third** said that they didn't understand the benefits of the organization to which they already belonged.

The fact is, many organizations are still operating based on the marketing funnels of yesteryear. But generationally and psycho-

graphically, their members have changed. What once worked to secure revenue—old tactics like direct mail, email and paid content—are ignored at best, and at worst, **they can actually do more harm than good.**

Members and potential members are on a journey of their own. And if organizations want to be a part of it, they're going to have to learn **how to engage members** in an enlightened way that is less about the result, and more about the process. In other words, focus on the journey. The destination (and revenue) will follow.

"We now live in 'the Experience Economy' where people value experience more than the actual product."

— Marketing Technology Insights



CHAPTER 02

WHY ENGAGEMENT HAS PLUMMETED

Hindsight isn't 20/20.

[PREVIOUS CHAPTER](#) / [NEXT CHAPTER](#)



HINDSIGHT ISN'T 20/20.

***Every journey starts with
a problem, or at least a desire
for improvement.***

*This is as true for organizations as it is
for their members and potential members.
And although we may gain some insight from
looking back into the past, the real solutions are
only to be found when we look ahead. The fact
is, members and their needs have changed. They
want to engage in more organic, human ways, and
associations will need to get on the new membership
engagement path if they hope to stay relevant.*

A TALE OF TWO ENGAGEMENTS

THE OLD PATH

96% Revenue from Dues

4% Revenue from other sources

Members average job tenure **8 years**

Members devote **~4 hours** per month

90/10 Member engagement rule

Low churn rates

THE NEW PATH

38% Revenue from dues

62% Revenue from other sources

Members average job tenure **1 year**

Members devote **~2 hours** per month

50/50 Member engagement rule

High churn due to lack of engagement ~58%



ORGANIZATIONS ARE FACING IRRELEVANCE

In the past, organizations could count on earning almost all of their revenue from membership dues. Jobs were stable and long-term, memberships stayed active longer, and people devoted almost twice as much time to participating in their organizations.

Fast forward to now. **Engagement is on the decline**, and that's hurting organizations. One study of 218 organizations found that a lack of engagement is the most commonly cited reason for non-renewal. In fact,

membership churn due to lack of engagement can be as high as 58%.

THE ONLY WAY OUT IS FORWARD

Gone are the days when a professional could expect to stay with the same company for life. That's a real obstacle for associations, where 21% of the members who cancel report that it is due to a job change. But it's also a huge opportunity. According to one survey, new members are joining associations in hopes of gaining access to jobs and networking, but associations are

not prioritizing those engagements as highly.

In an era where prospective paying members are being asked to shift their attention to a new topic every 8 seconds, listening to what they really want and addressing the missed engagement opportunities is the only way to win their attention and give this story a happy ending.

INNOVATION IS SURVIVAL

We are at a tipping point. In the year 2020, **Millennials will comprise more than 50% of the**

workforce. And they have a totally different set of expectations for how, where and when they want to engage with associations. The competition is fierce—Millennials can self-organize in seconds, using any social media outlet and other digital tools. However, if you can win their approval and participation, they can be fiercely loyal and help drive your organization's impact.

The new dynamics of membership and participation demand that associations become more innovative in their approaches to everything, from finance to outreach and engagement.



CHAPTER 03

THE NEW MEMBER JOURNEY

Building an ecosystem.

[PREVIOUS CHAPTER](#) / [NEXT CHAPTER](#)



BUILDING AN ECOSYSTEM.

As we move from the Industrial Age to the Information Age, members no longer fall into neatly organized lines of description, ready to be moved by a conveyor belt to the next stage. Instead, they behave more like cells that interact as part of a complex network or larger web of organisms.

And that translates into an entirely new marketing model for professional networks.

The old marketing funnel—where prospective members are guided along a curated pathway, from discovery to membership—simply doesn't work anymore. Your new prospective members **don't trust ads**, they **require social proof**, engage **less offline**, and demand a **clearer value proposition** in order to be swayed.

The new member journey is based on **what makes us human**. It gives prospective members a feeling of belonging, a clear purpose, and a palpable sense of community. It is decidedly non-linear. Welcome to the membership ecosystem, the next generation of engagement.

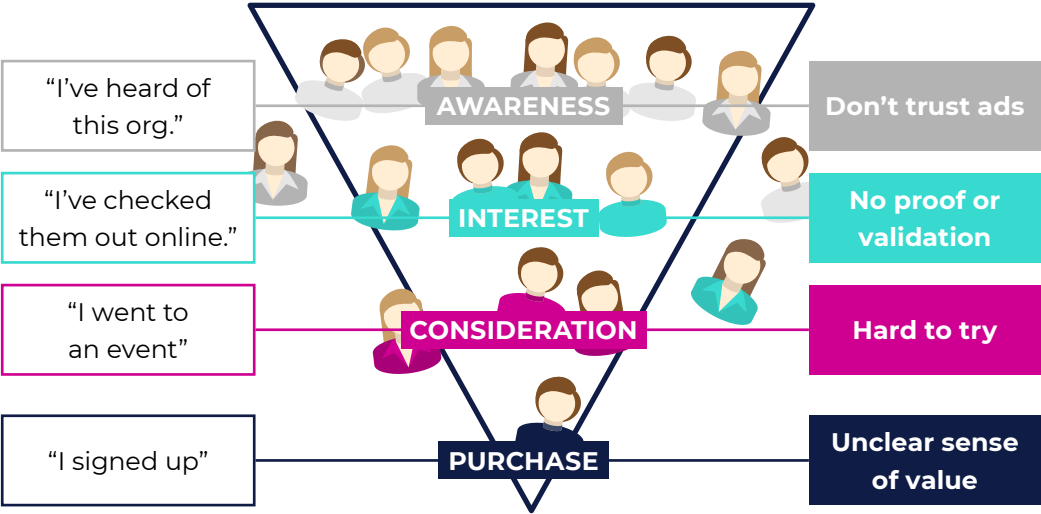


THE EVOLUTION OF A FUNNEL



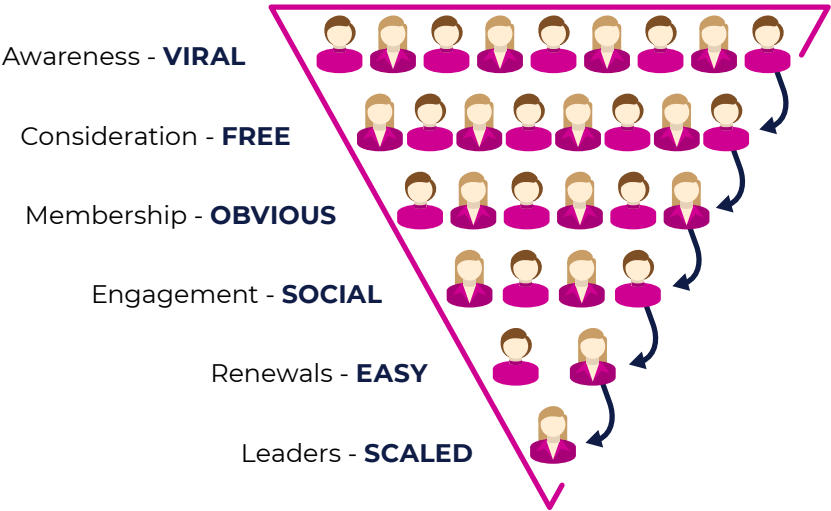
OLD FUNNEL

• LEAKY • INEFFECTIVE • EXPENSIVE

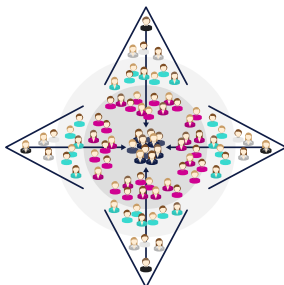
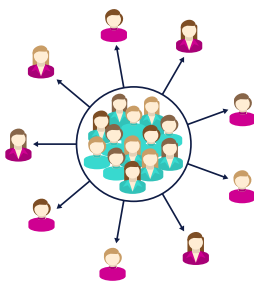


THE NEW HUMAN FUNNEL

- **SCALABLE • INVERTIBLE • PURPOSE-DRIVEN**
- **BUILDING BLOCK TO CREATING A LARGER COMMUNITY**



HOW THE NEW FUNNEL AFFECTS COMMUNICATION



OLD FUNNEL
=
*Hub & Spoke
communication*

Scalability **limited**
by budget

Amplifies **disconnect** between
organizational message and
members' actual experience

No leadership pipeline

Large group **weakens**
sense of **belonging**

Competes with other availa-
ble modes of self-organization

Measured by **membership**

NEW FUNNEL
=
*Ecosystem
of connection*

Infinitely scalable

Amplifies
shared purpose

Built-in leadership pipeline

Small group **strengthens**
sense of **belonging**

Structured with
options to self-organize

Measured by **engagement**

THE NEW MEMBER JOURNEY

We live in a **multi-touchpoint, multi-dimensional, attention-deprived era**. Organizations are no longer held accountable in a vacuum based solely on their merits. Now, every organization is judged by the last great experience that each of its members had, not just with other professional networks, but also with companies like Netflix, Amazon, and every other online service or community. It's the "**Amazonification of expectations.**"

Trying to keep up with the Joneses, or in this case the Amazons, requires a constant attention to detail and continued innovation to ensure that members are provided with the right kinds of frictionless experiences, personalized interactions and ease of use. So...**how can associations possibly keep up?**

IT BEGINS WITH LISTENING.

Surveys and focus groups are great, but online communities allow organizations to "listen" to

their members in real time. The information gleaned can be invaluable. Getting a more accurate picture of what members and prospective members want can help organizations craft strategies to address community needs and provide **new services** that may not have previously been on the radar.



IT IS PERSONAL.

Every connection a member or prospective member makes is **personal**. There is an emotional reason behind every rational decision, and organizations can build **greater engagement** and loyalty from ensuring that members feel personally seen, heard and valued.

IT IS ORGANIC.

Enlightened communities are designed around the needs of the members, not dictated by

the organization. Think of an organization like a college campus. Top-down thinking would dictate where sidewalks would be laid, then students would be expected to stay on those sidewalks, even if it was a less convenient route to class. A more responsive and inclusive approach would be to see where students carve paths through the quad, and then lay sidewalks where it is most likely to enhance their experience. In other words, let members choose their own paths to engagement, and then build structures to help facilitate it.



3 PILLARS OF ENLIGHTENED ENGAGEMENT



PURPOSE There is a strong “**why**” behind every action and interaction, for the organization itself, and for its members. Outcomes are important—meeting members’ goals becomes the sole focus. That is how hearts, minds and memberships are won.

BELONGING In an **enlightened** organization, members feel seen, heard & valued. They’re able to immediately connect to groups. Intimacy is scalable.

ORGANIZATION The best, most scalable communities are the ones that “get out of the way” and **let members drive**. Top-down communications simply can’t keep up with the pace of

connection members crave, and can prevent the real, human connections that solidify loyalty.

In this new journey, members actually **become leaders** and evangelists who can help scale organizations bigger and faster a traditional leadership structure ever could. They are the ones who will bring in new members and drive revenue growth in the future. Enlightened engagement should feel more like a movement than a paid membership.

“People do not buy goods and services. They buy relations, stories and magic.”

— SETH GODIN

CHAPTER 04

HOW IT DRIVES RESULTS

From ROI to RO-WHY.

[PREVIOUS CHAPTER](#) / [NEXT CHAPTER](#)

FROM ROI TO RO-WHY.

ROI is important, and enlightened online communities generate significant revenue. In a recent survey, 80% of startup leaders (the bellwether for business trends) said community was their key “moat” or differentiator.

Community has become the key way to drive revenue, whether it's dues, sponsorships, product sales or otherwise. Having a social filter and evergreen engagement is **the new marketing funnel**. Some of the results are immediate, and others like retention, evangelism, and community leadership can take longer to see.

But there is another very important aspect of building a highly-engaged community: **the community itself becomes a part of the product offering**. In every analysis, organizations need to remember their original purpose for building engagement and understand that at times, engagement is its own reward.

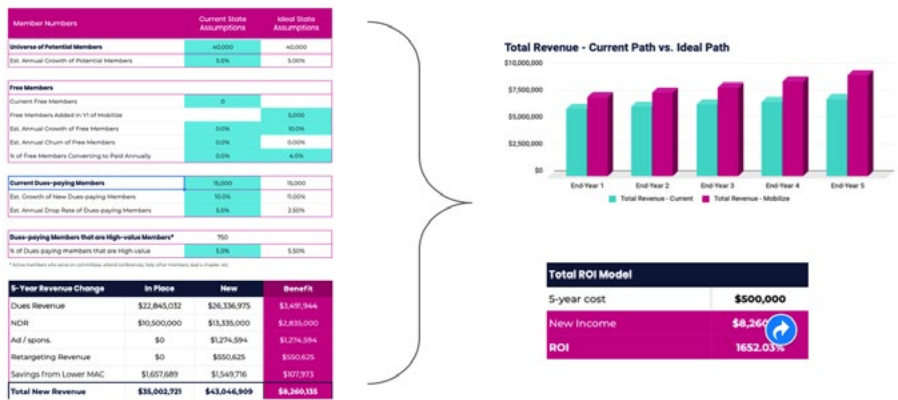
In other words, focus on the RO-WHY and ROI will follow. Stay true to the purpose-driven organizational mission, and the sense of camaraderie that members have for each other. When that is harnessed, the community will move from a phase of infancy, **to a phase of maturity**. And that's where the really big impacts and revenue gains are made.

RO-WHY QUESTIONS

- What is the **purpose** of the community?
- Why do people **join in** the first place?
- Why do they **keep** coming back?
- Why do they **stop** coming back?
- What **goals** do they have when they engage with the community?

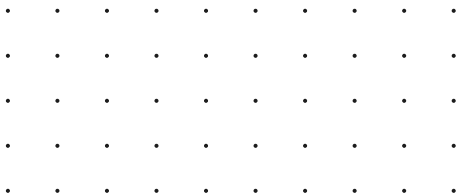


CALCULATING THE ROI OF ENGAGEMENT



Highly engaged communities can generate more loyalty, provide a source of free testimonials and target outreach, solve customer service issues, contribute to higher non-dues revenue, and so much more.

Want a free ROI calculator? Just ask!



TRACKING RO-WHY

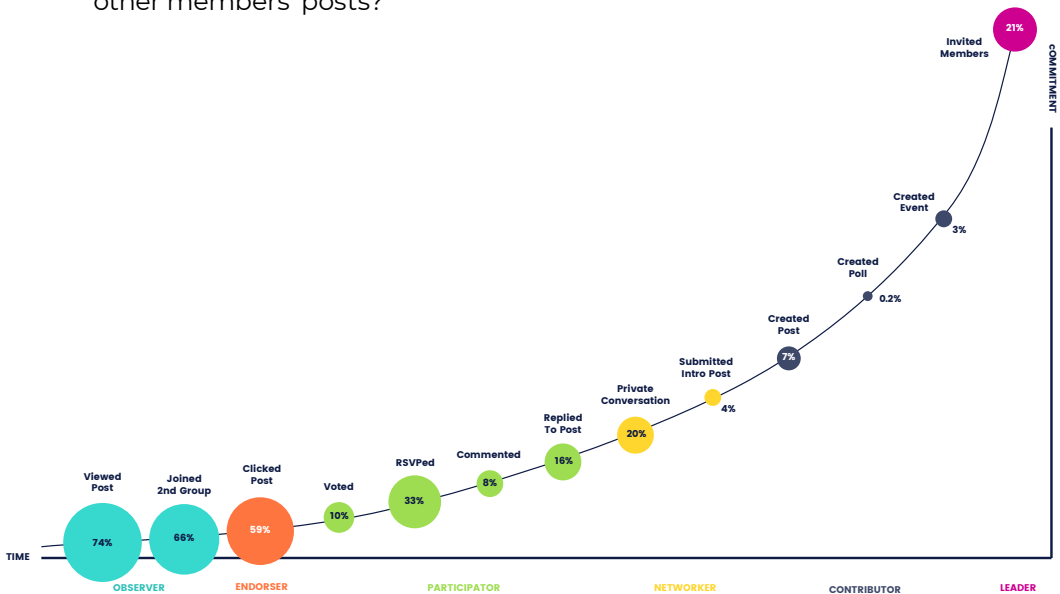
MEASURING COMMITMENT

This is about more than dollars and cents. A snapshot of membership engagement can show **where** communities are thriving...and where they need more attention.

Thinking about moving members along the commitment curve can reveal opportunities on how to get tactical. How many conversations are members having? How many connections are they making? Are they creating their own posts? Are they responding to other members' posts?

Ideally your member journey should be aligned with your **commitment curve**. This provides a way to track your progress towards your desired outcomes and course correct as needed.

Tracking RO-WHY is about developing a plan for pushing members up the commitment curve, ultimately **transforming them into leaders** who can engage and connect with those who aren't as committed...yet.



CHAPTER 05

HOW YOU CAN DO IT

Every journey begins with a single step.

[PREVIOUS CHAPTER](#) / [NEXT CHAPTER](#)

EVERY

JOURNEY

BEGINS WITH

A SINGLE STEP.

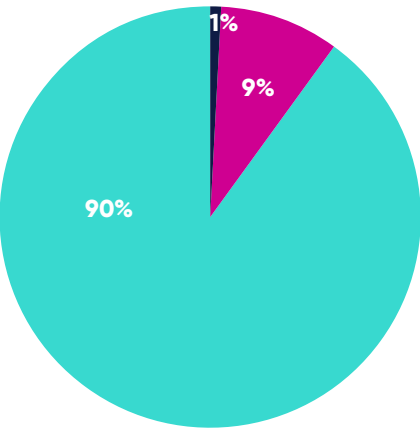


Building an enlightened member engagement model starts with a shift in perspective.

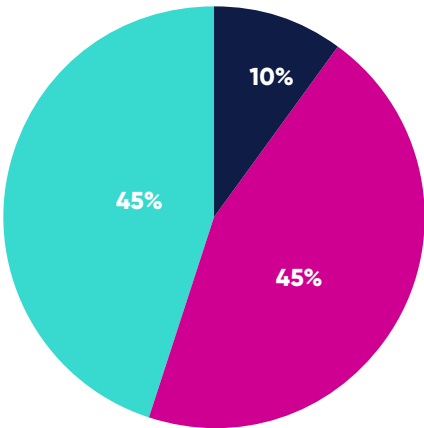
Remember the 90-9-1 rule of engagement? It used to be common practice to assume that a community or network would have 90% of its members lurking/reading, 9% contributing and 1% creating. But for organizations to generate sustainable revenue and growth, they should strive for a community **that is much more driven by contributors and content creators.**

SET NEW BENCHMARKS FOR ENGAGEMENT

Common knowledge of “Healthy” Communities: **10% engaged**



The New Community: **40 - 55% engaged**



● Heavy Contributors ● Intermittent ● Lurkers

THE NEW PLAYBOOK

- Check-ins
- Targeted outreach
- Frequent, valuable content
- Online events
- Drip campaigns
- Matchmaking offers
- No-login participation
- Welcome journey
- Response times

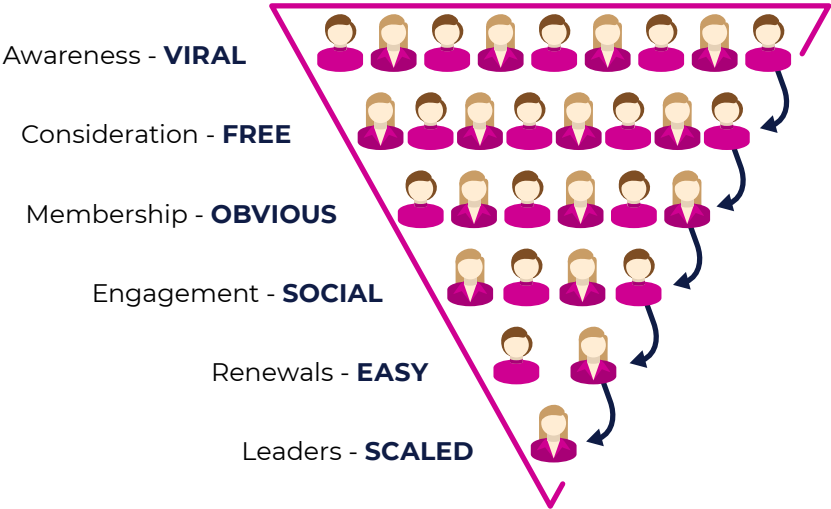
DRIVE RESULTS WITH SMART GOALS

To generate more engagement, set SMART (Specific, Measurable, Attainable, Realistic, Timely) goals that combine the new, human-centered funnel with movement-based thinking.



SAMPLE ENGAGEMENT GOALS

- Certification
- Events
- Training
- Products
- Contributions
- Evangelism



MAP OUT THE JOURNEY

It's easier to get to a destination with a map. Creating member journey maps for each member persona helps organizations find more opportunities to engage and nurture along the different touch points of their journey.

Member journey mapping requires defining the outcomes that members are seeking, not the organization's preferred outcome. **Empathy is key.** Ask: What are their pain points? What is the journey that gets them to the solution that alleviates that pain?

It involves thinking about the funnel in a different way. Although

most associations see membership dues as the goal at the end of the journey, there are **multiple** legitimate goals that members themselves could have.

For example, Member A might feel lonely and crave a tight-knit community, while Member B might be a young professional who is looking for career advice. Paid membership might be the end of the funnel for Member A, while Member B's funnel might end with a free tier of community access...for now. Connecting those two member types will strengthen Member A's sense of community and nurture their



ability to become an evangelist for the association. And it will help Member B achieve their desired goal. And while paid membership might not be the end goal for Member B at this time, meeting them where they are in their journey helps to prime the relationship for when they do have the financial means to join.

Likewise, referrals, event attend-

ance, product purchases, volunteering and foundation contributions are all **mutually beneficial** ends of a member’s journey that should be considered. Developing journey maps for each of these outcomes allows organizations to create a series of community experiences and other touch points that advance members up the commitment curve from one level of engagement to another.



CREATING A JOURNEY MAP

Understanding that there are **multiple beneficial ends** to a members' journeys, as well as **multiple member personas** or profiles to consider, mapping out a journey for each permutation can be a daunting task. It might be helpful to identify all the combinations of ends and personas, then work your way down from most important to least.

A journey map considers each step along the way of the journey, from beginning to end. The actions that the user must take at this step of the journey are documented. Every step is also assigned **an emotion or feeling on a scale of 1-5**.

*For example, when a user searches the internet for an answer, **clicks through**, and discovers your community has a solution, he is **excited**. This could be considered a **5** on the emotional scale.*

***Registering** an account might be considered a **mildly annoying** step. The user must provide contact details and confirm their account. This is friction in the process, and might be considered a **3** on the emotional scale.*

*When a user **asks a question** in your community and their post sits **unanswered**, the user may feel that their time and energy have been **wasted**, so this could be considered a **1** on the emotional scale.*

Some of this will be guess-work at first, but you can objectively inform evaluation of a user's emotions through usability testing, and by looking at the rate members leave steps along the journey in your web analytics.



Steps can then be grouped into stages. For example, a stage called **On-boarding** might contain five steps:

1. *Confirm community membership account (emotion = 3)*
2. *Receive automated on-boarding message (emotion = 4)*
3. *Complete community profile (emotion = 3)*
4. *Contribute to an “Introduce Yourself” thread (emotion = 4)*
5. *Receive personal replies from other community members (emotion = 5)*

Keeping in mind that journeys are different for various personas, emotions, stages and steps can vary. For example, if instead of an internet search leading a user to your community, the user learns of it from a colleague, the stages, steps and emotions could be different.

Once your journey maps are complete, identify the **emotional low-points** along the journey and experiment with tactics to alleviate the friction or pain members feel, causing them to exit the journey.

USE THE FORCE

Human connection is more powerful than any paid marketing effort or crafted message. Using a new human-centered funnel, organizations can support members in creating their own highly engaged communities that take off with all the passion and purpose of a movement.

As members get more and more connected to the larger organization over time, their collective ideas will drive new thinking about

what the organization can become, and membership **grows exponentially** as the community organically scales.

That is the path to an enlightened member journey. And it is how organizations can grow membership, boost retention and engagement, grow Millennial audiences, drive NDR and generally succeed happily ever after...or at least for the foreseeable future.



CHAPTER 06

**NOBODY HAS ALL THE ANSWERS
(BUT HERE ARE SOME GOOD ONES)**

Questions

[PREVIOUS CHAPTER](#) / [NEXT CHAPTER](#)

A black and white photograph of a young woman with long, dark, curly hair, smiling and looking towards the camera. She is sitting on a wooden floor with her legs crossed, wearing a striped t-shirt, jeans, and white sneakers. A laptop is open in front of her. The background is plain white.

NOBODY HAS ALL THE ANSWERS

(BUT HERE ARE SOME GOOD ONES)

WHERE CAN I FIND JOURNEY MAP EXAMPLES AND/OR AN ROI CALCULATOR?

We've got you covered. Email sales@mobilize.io for tools you can use.

HOW CAN ORGANIZATIONS EFFECTIVELY LEVERAGE THE TOOLS BEST FORMATTED FOR MILLENNIALS WHEN THE MAJORITY OF THEIR MEMBERS ARE BABY BOOMERS AND GEN X?

Enlightened engagement **isn't just for Millennials**. Although Millennials are driving many of the community trends that organizations need to address to boost engagement, the expectations of Millennials have bled through to all generations. Now, **members of all ages** expect a seamless, user-friendly, mobile-friendly experience.

And although there are variations in the ways that different age groups use technology, the principles of engagement are still the same. For example, Mobilize has a “**member-first**” mobile experience, designed by the same firm that designed Uber and Slack. So it's modern and easy to use, a Millennial-must. But Gen X and Baby Boomers use the platform just as much; they might use it differently (e.g. use the email integration more than mobile), but the experience is the same regardless.

These types of unique characteristics will surface through the journey maps. Understanding the different personas and where they fall generationally, can inform organizations as they design the best experience that fits their specific members.

In order to reach generations on either end of the spectrum, **simplicity is key**. The easier a platform is to use, the less friction there will be when a new member from any generation decides to engage. That said, Millennials and Gen Z are the membership base of the future, so keeping an eye on their preferences can help future-proof your efforts.



WHAT'S THE BEST WAY TO CREATE A FREEMIUM MODEL?

Creating a free membership tier has many advantages and is an excellent tool for organizations to **open the top of their funnel really wide**, capturing a large number of membership prospects.

There are two main freemium models: **time-based** and **space-based**. The time-based model gives new members a chance to be part of a community for free, experiencing the full benefits of membership for a certain period of time. The space-based model gives free members access to a more limited set of benefits forever.

While space-based freemium models may contribute to creating a larger community, time-based freemium models have the advantage of giving prospective paying members a taste of all of the benefits.

After deciding on the type of freemium model to offer, an organization's CRM (or related backoffice system for managing members), can be used to automate members' access to resources, limited by either time or space.

HOW DOES JOURNEY MAPPING WORK FOR EDUCATION, OR ORGANIZATIONS THAT ARE SUPPORTING THE PURPOSE OF EDUCATION?

When designing any member journey, it can help to **start at the bottom** of the funnel and work backwards. For education, the end goal could be as simple as attending a webinar, education session, certification, or accreditation. Or it could be something that's more elaborate, like a series of educational events, or a multi-day conference.

After thinking about the end goal for each member persona, it is easier to examine the **top of their funnels**. How does each person get introduced to the journey in the first place? Are they referred by another member or an internet search?

Fill in the points of the journey **along the way**. How does each persona get from the top of the funnel to the bottom? Examples of steps in the journey are: registering for an account, clicking on a link to request more information, and filling out a lead form. Knowing those different touch points, educational organizations can then address where and how to engage with members over time.

Smaply is an excellent journey mapping tool that can help to identify points of friction along that journey, sparking ideas on how to minimize them.



CHAPTER 07

CONCLUSION

The end is just the beginning.

[PREVIOUS CHAPTER](#)

THE END IS JUST THE BEGINNING.

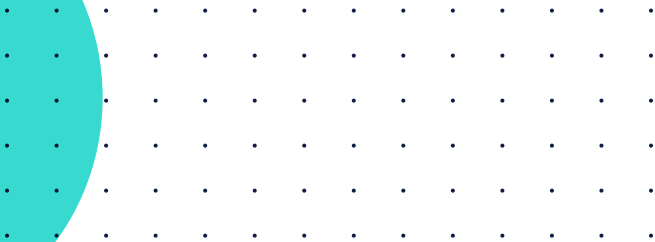
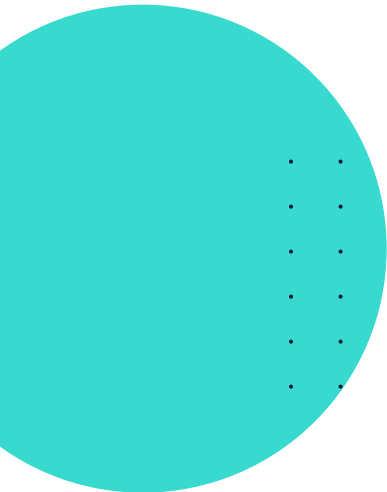


When it comes to enlightened member engagement, letting go of old outreach and top-down communication models is just the first step. Only then will listening, identifying and responding to the emotional and practical needs of members form a new foundation for a human-centric community model.

There is something poetic about this process. In designing an empathy-based customer journey and allowing communities to organically scale, organizations themselves are transformed in the process.

This is a journey we're all on together. Let's make it an enlightened and prosperous one for all.

For a follow-up strategy session or access to the journey mapping or ROI tools, **reach out and connect.**





www.mobilize.io