



WHITE PAPER:

USING MEMBER SURVEYS FOR RETENTION

BY LARRY J. SEIBERT, PH.D.

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Use one set of survey questions to identify vulnerable members and another set of questions to determine their characteristics.
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Members are the life blood of any association, not only for the revenue members provide through their annual dues, but also with their time and talents as volunteers. Associations can only remain viable and carry out their missions as long as they can attract new members and retain existing members. The function of attracting and retaining members is such an important part of any association that it generally requires the full time attention of at least one staff member, if not a team.

Most associations conduct surveys on a regular basis to monitor the relationships that they have with their members and to allow members the opportunity to “be heard”. Though frequently overlooked, one of the best uses for a member survey is to identify those members who are likely to drop their membership, and to use this information to develop intervention and prevention strategies to retain more members.

Identify Vulnerable Members From Survey Results

To accomplish these objectives, there are two types of questions that must be included in the

survey. The first is a small set of questions designed to identify those individuals who are at risk of allowing their membership to lapse. While some organizations like to use an overall satisfaction question, we have found that this question is a weak predictor of who is likely to renew their membership and who is not.

In our research, we have found that using three questions to build a loyalty index does a much better job of predicting membership renewal. By asking members to rate the value they get from their membership, the likelihood of renewing their membership, and the likelihood of recommending the association, we can use these combined results to zero in on those most likely to renew and those least likely to renew.

By itself, the “value” question gives an indication of whether or not members feel they are getting value in their membership based on the money and time they are asked to contribute. The “likelihood to renew” question directly asks members to declare whether they plan to renew their membership or not. The “likelihood to recommend” question measures which

members are strongly committed to the organization and willing to put their personal reputation on the line. When combined, these three questions create an excellent index for identifying those members who are truly loyal, and those who are not committed to staying with the association.

While the survey does an excellent job of pinpointing the respondents who are at risk for leaving, the real power of the survey is the ability to apply the survey results to the entire membership base. The second set of questions is used to accomplish this task.

The purpose of the second group of questions is to identify the individual respondent characteristics that differentiate the loyal members from the vulnerable members. These characteristics, or descriptors, are common among loyal members but different from vulnerable members. Armed with this information, an association can examine its membership base, identify specifically those individuals who are vulnerable, and efficiently target them with intervention and prevention strategies.



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Examples of descriptor questions might be:

- When did you last attend the association's annual convention?
- Did you vote in the latest association election?
- How often do you attend local chapter meetings?
- What were the main reasons you joined the association?
- Who/what influenced you to join the association?
- Were you a student member (or associate member) before you became a professional member?
- How often have you contacted member services in the past six months?

Additional descriptors could be age, education, and gender, but our experience is that these questions are generally too broad and rarely differentiate between loyal and vulnerable members. The more descriptor questions you include in the member survey, the more likely you will be able to develop a precise profile of your vulnerable members.

Determine Percentage of Vulnerable Members Among Respondents

Once you have the survey results, you will be able to use the responses from the first group of questions to assign respondents into the loyal and vulnerable segments. Very quickly, you can calculate the percentage of respondents who are loyal and the percentage who are vulnerable. Depending on how strong an association's relationship is with its members, the percentage of vulnerable respondents can range from below 10% to over 30%. The higher the percentage of vulnerable members, the more important intervention tactics become.

Examine the Descriptors of the Vulnerable Members

Analyze the responses of the second group of questions and look for those that are descriptors of loyal members and those that are descriptors of vulnerable members. Look for any general theme that might be an indication of other descriptors not measured, such as apathy toward the association's activities.

Each descriptor that is significantly different between loyal members and vulnerable members produces a segment of at-risk members. For discussion purposes, let's say that 80% of respondents are loyal and 20% are vulnerable and that we are going to examine the responses to the question about whether or not respondents attend local chapter meetings. When we split respondents into those who attend chapter meetings and those who don't, we might find that those who attend chapter meetings are 90% loyal (10% vulnerable) and those who do not attend chapter meetings are 60% loyal (40% vulnerable). We have not only discovered a key descriptor that differentiates loyal members from vulnerable members, but we also know the probability of someone being vulnerable if they do not attend chapter meetings. If intervention strategies are used on those who do not attend chapter meetings, then we have a 40% probability that anyone randomly selected from this group will be vulnerable.

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Descriptors are used to apply survey results to the entire membership base.
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Determine Size and Vulnerability Probability of Each Descriptor

This process is repeated for each descriptor, and the probability of an individual being vulnerable can be calculated for each descriptor.

To take this process to the next level, descriptors can be combined to generate even higher probabilities of vulnerability. For example, in addition to finding that individuals who do not attend chapter meetings have a higher probability of being vulnerable, you might also find that individuals who do not vote in association elections are more likely to be vulnerable. You can then calculate the vulnerability probability for those who do not attend chapter meetings AND have not voted in association elections.

In addition to calculating the vulnerability probability, you can also calculate the size of the segment. What percentage of respondents do not attend local chapter meetings and what percentage of respondents did not vote in the latest election? As you combine descriptors (e.g. does not attend chapter meetings AND did not vote in election),

the size of these segments will decrease even if the vulnerability probability increases.

The purpose of identifying respondents is to make the intervention and prevention strategies more efficient. You could simply use intervention on all members, but if you only have a vulnerable membership population of 20%, then you are wasting your efforts on the 80% of your members who are loyal. The key to efficient intervention efforts is to develop a strategy that gives the highest return on investment.

When ranking or prioritizing segments for intervention, there are several other factors to consider in addition to the segment's probability of vulnerability and its size:

- What will it take to migrate these members to the loyal segment?
- Will changes result in a long term or a short term shift in loyalty?
- How much will it cost?
- Will the changes needed to migrate vulnerable members be consistent with the mission and the business model of the association?

What it Takes to Migrate Vulnerable Members

Now that you have the results of the member survey, you can contact some of the vulnerable respondents (assuming you asked for contact information in the survey) and conduct a follow-up interview, either a one-on-one in-depth interview or as part of a focus group. During this follow-up study, you can uncover the reasons why they are not planning to renew their membership, and what changes would have to occur for them to change their minds.

Not only is it important to know what it will take to get them to stay, but it is vital to determine if they would actually renew their membership if you made the changes for which they are asking. "What would it take to get you to renew your membership," and "If we made this change would you renew your membership," are two totally different questions and will produce two different responses. The former is asking for an opinion; the latter is asking for a commitment.

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Each descriptor identifies a different segment of vulnerable members, and each segment has its own unique vulnerability probability.
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Long-term vs. Short-term Shift in Loyalty

Whether a change will have a long-lasting or short-lived impact on loyalty depends on what is being changed. Long-term remedies usually involve some type of permanent change in the way the association conducts business. For example, revamping the association's publications to make them more valuable to members, or improving member services so members can speak directly to a person who can handle their issues in one call are examples of process changes that are likely to have long lasting effects. Dropping the price of membership dues is a quick fix whose impact on loyalty is likely to dissipate just as quickly.

Cost to Migrate Members

The association management can conduct a cost/benefit analysis to determine whether or not to make the changes necessary to migrate vulnerable members to the loyal segment. In addition to the actual monetary expense, management must also consider the number of members that this change is likely to retain, the lifetime

value of retaining these members, and the opportunity costs of time spent on retention efforts that could be spent on other tasks.

Changes That Are Consistent With the Association's Mission and Business Model

We have found in our research that there are two broad reasons why members are vulnerable – sometimes it is because the association does a poor job in providing benefits to its members, and other times it is because members are looking for a mix of benefits that the association is not designed to offer because of its business model. If the changes needed to migrate members are to improve existing processes and the delivery of benefits, then simply making improvements will not require changes to the business model.

When processes are improved, it is important to communicate those changes to all members through the normal communication channel, such as newsletters or email. Without communication, members are left to wonder if the increase in the level of service they experience is a result of a permanent process improvement, or if the higher

service quality is simply a temporary spike in "business as usual".

Often members will join an organization for one particular benefit, like group insurance, but have no interest in the wide array of other member benefits. Because they do not find value in the benefits they do not use, they believe they are "overpaying" for the one(s) that they do use. Unless an association can get these members involved in the additional benefits the organization has to offer, it will have to resign itself to the fact that these members will leave when they can find a lower price elsewhere for the benefits they want.

Develop Intervention Strategies for Existing Members and Prevention Strategies For Incoming Members

When an organization has decided which intervention strategies to use to retain existing members and which segments to target, the next step is to use the descriptors to find those vulnerable members among the total membership base. Some of these descriptors may already be available to the organization, such as

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Some members are vulnerable because the association does a poor job of delivering value; others are vulnerable because they are looking for something the association is not designed to deliver.
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attendance at local chapter meetings. Where descriptors are not readily available, a short survey requesting information to “update membership records” can be sent to the membership base to capture this information.

Some descriptors might be relevant for incoming members (e.g. who/what influenced you to join, why did you decide on our association, in which state do you reside) and can be captured from the membership application. Based on their responses to the incoming descriptor questions, new members can be flagged for prevention tactics.

Validate With Former Member Surveys

One of the best ways to determine if your descriptors are accurate and your retention strategies are as good as they can be, is to conduct a survey of your former members. If your association is like most, you will

find that your former members will fall into three groups: (1) individuals who have left the profession or left the country and no longer need the benefits from association membership (no need), (2) individuals who joined a rival association or get their benefits elsewhere (defectors), and (3) individuals who are still in the profession but have chosen to not renew their membership (lapsed).

Lapsed members are generally the most likely of the three groups to rejoin. We have found in our research that these former members give higher performance ratings for the work the association does than do defectors. Since lapsed members do not currently have a membership with any association, they are more likely to rejoin if they can be given a compelling reason to rejoin. Defectors may rejoin at some point in the future, but at the present time, their needs are being met elsewhere.

Conduct Follow-up Member Surveys

Follow-up member surveys do a good job of tracking progress to see if the percentage of loyal members is growing and if members appreciate the association’s process improvements. One of the best ways to tell if intervention and prevention strategies are paying off is if the retention rate goes up and the additional revenue generated from these migrated members more than offsets the cost of retention efforts. That is the bottom line.

About the Author

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Use former member surveys for validation.
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