

# Developing a Membership Strategy



# Introduction

## Why is a Membership Strategy Important?

**A strong membership strategy** is essential for any organisation that relies on members for its success. Understanding and engaging with members effectively ensures long-term growth, increased retention, and sustained value for all stakeholders.

Whether you are managing a professional association, a trade body, or a subscription-based organisation, a structured membership strategy enables you to:

- Define clear membership objectives
- Identify and engage key member segments
- Provide value-driven membership benefits
- Improve retention rates
- Monitor and adapt to changing member needs

An effective membership strategy aligns organisational goals with member expectations, fostering engagement and long-term commitment.

“*Efforts and courage are not enough without purpose and direction.*”  
John F Kennedy

## Key Components of a Membership Strategy



# 1 Vision & Objectives

## Reviewing your Membership Vision

Before developing your membership strategy, it is crucial to define and review your vision for membership. Consider the following questions:

- **What is the purpose of your membership offering?**
- **How does it align with your organisation's broader mission and objectives?**
- **What impact do you want membership to have on individuals and organisations?**
- **How will success be measured in the long term?**
- **What distinguishes your membership from competitors?**

By establishing a clear vision, you create a foundation that guides all strategic decisions related to membership growth, engagement, and value delivery.

## Importance of Objective Setting

Establishing clear membership objectives is critical for driving engagement, retention, and growth. Well-defined objectives provide direction, ensuring that all initiatives align with the organisation's mission and members' needs.

A strategic approach to objective setting helps measure progress, allocate resources effectively, and adjust tactics to improve outcomes. By implementing SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) goals, organisations can create a structured and results-driven membership strategy.

### Examples of SMART Membership Objectives

- Increase membership retention by 10% over the next 12 months.
- Grow total membership by 15% within two years through targeted recruitment campaigns.
- Improve member satisfaction scores from 75% to 85% within one year by enhancing engagement initiatives.
- Launch a new digital membership tier within six months, generating 200 sign-ups in the first quarter.
- Establish a mentorship programme with a minimum of 50 active mentor-mentee relationships within the next year.



# 2 Know Your Members

Understanding your members is fundamental to delivering value and ensuring long-term engagement. By identifying who your members are, their motivations, behaviours, and challenges, you can create personalised experiences that resonate with their needs.

This understanding allows for more effective communication, relevant service offerings, and a stronger sense of belonging. Without deep insight into your membership base, efforts to grow and retain members can be misaligned, leading to disengagement and higher churn rates.

Understanding your current and lapsed members is crucial for shaping an effective strategy. **To gain insights, consider the following approaches:**

## Analyse membership data

- Examine current membership trends, including growth and churn rates.
- Identify which segments are most engaged and which are at risk of lapsing.
- Assess engagement metrics, such as event attendance, resource downloads, and community participation.
- Analyse lapsed members to identify common reasons for disengagement.
- Investigate demographic and behavioural patterns to refine offerings.

## Understand member engagement

- Track member interactions to determine what they are attending and accessing.
- Identify frequently used benefits and resources.
- Monitor patterns in queries and requests to anticipate member needs.
- Review qualitative feedback from members through surveys, emails, and direct communications.

## Gather member insights

- Conduct membership surveys to collect feedback on experiences, expectations, and areas for improvement.
- Use consultation sessions to engage members in strategy development.
- Actively listen to conversations on social media and online communities to understand sentiment and emerging needs.
- Establish a member advisory panel to continuously gather insights and validate strategic decisions.



Don't just look at this data once, consider developing membership and insight dashboards, so that you can regularly review and learn from the data regularly.



# 3 Create Member Value

A strong membership value proposition does more than offer benefits—it drives engagement, retention, and advocacy. When members feel connected, they are more likely to participate and promote your organisation. Creating an interactive, rewarding experience strengthens loyalty, making members not just participants but long-term supporters.

## Member Benefits vs. Features

A strong membership value proposition ensures members receive benefits that align with their professional and personal needs. It is essential to differentiate between benefits—the value and impact a member gains—and features—the specific services that deliver those benefits. Effective membership offerings should focus on key benefits that drive engagement, retention, and advocacy.

**Below are examples of the core benefits members seek and some of the features and services that deliver them:**

### Benefit

#### Expert, timely knowledge

Members seek credible, up-to-date information that enhances their expertise and keeps them informed about industry trends.



### Feature

- Access to exclusive reports
- Expert-led webinars
- Industry white papers
- Research briefings
- Regulatory updates

#### Making connections

Networking and relationship-building are vital for professional growth and business opportunities.



- Virtual & F2F networking events
- Mentoring programmes,
- Online member directories
- Industry roundtables

#### Saving time

Busy professionals value access to streamlined, curated information and tools that enhance efficiency.



- Weekly summary newsletters
- Knowledge hubs
- AI-powered search tools
- On-demand webinars

#### Career advancement

Members want opportunities for learning, career progression, and leadership growth.



- Professional development courses
- Certification programmes
- Leadership coaching
- Career mentoring

#### Giving back

Some members seek ways to contribute to their industry or support emerging professionals.



- Volunteering opportunities
- Advisory panels
- Mentoring programmes
- Member advocacy



# Segment Your Offer

Tailoring membership services to different groups and segments is crucial for engagement and long-term retention. With members having varied interests, priorities, and levels of availability, a one-size-fits-all approach often leads to disengagement. Members are often short on time, and each segment has distinct expectations—from early-career professionals seeking mentorship to corporate members requiring industry influence.

By segmenting your membership base, you can deliver targeted services, ensuring members receive relevant benefits that align with their specific needs, ultimately fostering greater satisfaction and advocacy.

Segmenting membership tiers allows organisations to offer tailored benefits at different price points. **Consider the following approaches:**



### Individual vs corporate

Differentiating between personal memberships and organisational memberships.



### Career Stage

Categorising members as student, early-career, mid-career, senior professionals, or retirees.



### Geographic Location

Segmenting by domestic, international, or region-specific memberships.



### Membership Tenure

Differentiating new members, long-term members, and prospective members.



### Interest & Needs

Creating special groups based on professional goals, industry, or preferences.



Consider tracking and analysing your members' engagement and interactions with your organisation. Understanding their behaviours helps identify opportunities to develop tailored offers and services that better meet their needs, enhancing both satisfaction and retention.

## Membership Price Models

Choosing the right pricing model for your membership programme is key to accessibility and sustainability. Different members have varying needs and financial capacities, so offering multiple pricing structures ensures inclusivity while maximising value.

Membership pricing typically falls into three main categories:

- **Annual memberships:** A one-time yearly payment providing full access to benefits and services. This model works well for long-term commitment and simplifies renewals.
- **Subscription-based memberships:** Monthly or quarterly payments offering flexibility and affordability. This is ideal for members who prefer lower upfront costs.
- **On-demand pricing:** Pay-per-service or tiered access models allowing members to purchase specific benefits, such as event passes or premium content, as needed.

## Pricing Strategies

Offering flexible payment options and discounts is a powerful way to engage and retain members. Providing choices that align with different financial situations and commitment levels ensures greater accessibility and satisfaction. Whether through tiered pricing, subscription models, or targeted discounts, alternative payment strategies help organisations attract new members and retain existing ones.

- **Tiered membership levels:** Offering different levels of membership with increasing benefits ensures accessibility to a broader audience.
- **Flexible payment options:** Providing monthly, annual, or instalment-based pricing helps accommodate diverse financial commitments.
- **Discounted memberships:** Offering reduced pricing for students, retirees, or non-profits can encourage inclusivity and long-term loyalty.
- **Value-added services:** Premium add-ons such as coaching, mentorship, and leadership training enhance the perceived value of membership.



Is your membership price-sensitive? Consider who is paying the fees—individuals or employers. Be cautious of offering first-year discounts, as renewal rates often drop when prices return to normal. Instead, provide added value to new members, such as a free course or exclusive content, to engage them from the start and strengthen their long-term commitment.

# 4 Acquisition Strategy

A successful membership acquisition strategy is essential for attracting new members and ensuring steady growth. A well-planned approach should focus on raising awareness, demonstrating value, and making it easy for potential members to join. Consider the following key elements when designing your acquisition strategy:

## **Targeted marketing**

Leverage digital marketing, social media, and industry events to reach potential members where they are most active.

## **Referral programmes**

Encourage existing members to bring in new ones by offering incentives such as discounts or exclusive content.

## **Strategic partnerships**

Collaborate with aligned organisations, universities, and industry groups to expand reach and attract new audiences.

## **Trial memberships**

Offer limited-time access to premium features, allowing potential members to experience the value before committing.

## **Personalised outreach**

Use tailored messaging and segmented campaigns to engage different demographics effectively.

A well-executed acquisition strategy not only increases membership numbers but also fosters long-term engagement and retention by attracting the right audience.

## Onboarding New Members

Ensuring new members have a seamless onboarding experience is crucial element of any acquisition strategy. The first experience a member has with your organisation sets the tone for their entire membership journey. A well-thought-out welcome journey helps members immediately see the value of their membership and encourages active participation from the start.

- **Personalised welcome communications**
- **Orientation & resource access**
- **Early engagement touchpoints**
- **Ongoing support & check-ins**



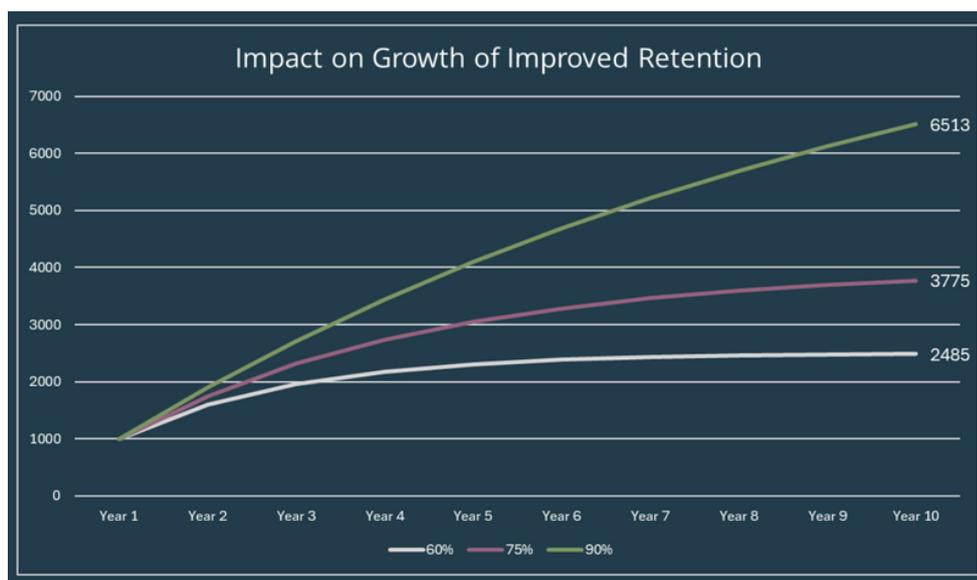
When you are designing your acquisition campaigns, build your new member onboarding or welcome journey at the same time!



# 5 Retention & Engagement

Membership growth is not just about attracting new members but also about retaining existing ones. A high retention rate ensures steady, long-term growth, reducing the "leaky bucket" effect where new members replace those who leave.

Investing in retention strategies leads to compounding growth, as engaged members stay longer, participate more, and bring in referrals. The accompanying graph illustrates how higher retention rates significantly impact membership expansion over time.



The graph, illustrates a new membership start-up. The example assumes a constant 1000 new members a year; but illustrates the impact on the total membership growth, of varying levels of retention.

## Importance of Engaged Members

Engaged members are the foundation of a thriving organisation. They contribute ideas, participate in events, advocate for your organisation, and help attract new members. An investment in engagement not only improves retention rates but also strengthens your organisation's reputation and influence. By making members feel valued, involved, and part of a community, you turn them into long-term supporters and ambassadors.



Membership organisations often face the highest attrition rates in the first 1-3 years. Members who stay for over three years tend to be more engaged, utilise more services, and see greater value in their membership.

## Map Member Journeys

Mapping out clear member journeys helps maintain engagement from the moment they join. Understanding different member touchpoints ensures a seamless experience that meets their needs at every stage. Consider offering structured engagement plans, such as:

- **New member engagement:** welcome emails, orientation sessions, and personalised introductions to benefits.
- **Mid-membership check-ins:** surveys, engagement tracking, and personalised recommendations for resources and events.
- **Renewal & loyalty incentives:** exclusive discounts, appreciation events, and upgraded benefits for long-term members.

## Prioritise Engagement

Encouraging members to interact with your organisation impacts and affects your membership retention. Measuring engagement is crucial to identifying members who may be at risk of lapsing—those not using services, engaging with communications, or contributing through volunteering or advocacy. While these members may seem easier and ‘cheap’ to manage, in reality, low engagement leads to low loyalty and an increased likelihood of lapsing.

Proactively addressing engagement gaps ensures a more involved membership base, improving retention and long-term commitment. Key strategies include:

### **Personalised content**

Delivering tailored articles, event invites, and learning resources based on interests.

### **Community building**

Facilitating discussions, networking opportunities, and interactive online forums.

### **Exclusive access**

Providing VIP content, behind-the-scenes insights, and leadership opportunities.

### **Gamification & Rewards**

Recognising engagement through points, badges, or exclusive incentives.



# 6 Measure Success

Tracking and analysing membership data is essential for continuous improvement, identifying trends, and pre-empting disengagement. Effective measurement ensures that membership strategies evolve based on real insights, allowing organisations to optimise engagement, retention, and overall value. Regularly reviewing data helps refine strategic plans, ensuring that member needs are met and potential challenges are addressed proactively.

## Access Member Data

Understanding where to source data is the first step in developing a robust measurement framework. Nearly all membership organisations will have access to data, but rarely combine it to create insight that can be used to drive growth. Key data sources include:

- **Membership CRM:** track renewals, new sign-ups, and cancellations.
- **Engagement metrics:** monitor event attendance, content interaction, and online activity.
- **Survey & feedback tools:** collect insights directly from members on their satisfaction and needs.
- **Email analytics:** assess response rates, email engagement, and communication effectiveness.

## Analyse Membership Data

Once data is collected, it's crucial to analyse it effectively to identify trends, challenges, and opportunities. Key approaches include:

- **Segmentation analysis:** Identify which member groups are most engaged and which are at risk.
- **Retention trends:** Monitor how long members stay and where drop-off points occur.
- **Engagement tracking:** Evaluate which activities or services drive the most interaction.
- **Predictive insights:** Use historical data to anticipate future membership patterns.



Consider looking at every potential data touchpoint, and creating an 'Insight Strategy' combining learning across all aspects of the organisation from reactive complaints to pro-active listening on social media!



## Key Membership Metrics

Measuring success requires tracking the right performance indicators. These metrics not only highlight areas of improvement but also identify at-risk members before they lapse. Key membership KPIs include:

Tracking the right metrics ensures organisations can measure success effectively. Essential membership KPIs include:

<b>Retention Rate</b>		$\frac{\text{No. of members who renew}}{\text{Total no. of members who are eligible}} \times 100$
<b>Attrition Rate</b> (Churn rate)		$\frac{\text{No. of members who do not renew}}{\text{Total no. of members who are eligible}} \times 100$
<b>Average Tenure</b> (Average lifetime)		$\frac{1}{\text{Attrition rate}}$
<b>Average Lifetime Value</b>		$\text{Average Tenure} \times \left\{ \begin{array}{l} \text{Annual} \\ \text{Membership} \\ \text{Fee} \end{array} + \text{Additional} \right. \left. \text{Income} \right\}$
<b>Average Servicing Cost</b>		$\frac{\text{Annual member expense budget}}{\text{Number of members}}$
<b>Maximum Acquisition Cost</b>		$\text{Average Lifetime Value} - \left\{ \begin{array}{l} \text{Average} \\ \text{Servicing} \\ \text{Cost} \end{array} + \text{Average} \right. \left. \text{Lifetime Period} \right\}$



High-level metrics like retention rates and revenue growth provide a snapshot of success, but deeper insights come from tracking the factors that drive these results. Develop a reporting framework that includes key indicators e.g. email open rates, engagement levels, and campaign performance. These insights help refine your strategy, ensuring continuous optimisation of your core membership metrics.

## Leverage AI & Technology for Deeper Insights & Engagement

Advancements in technology, including Artificial Intelligence (AI), are transforming how membership organisations operate. AI enables data-driven decision-making by identifying patterns, predicting trends, and fostering proactive engagement. Beyond analytics, AI-powered tools can create meaningful, two-way dialogue with members, enhancing personalisation and responsiveness.

Technology can help membership organisations:

- **Service members 24/7** answering simple enquiries, written in a style that engages and reflects your member voice.
- **Identify at-risk members:** predict disengagement based on interaction patterns and suggest targeted interventions.
- **Personalise communications:** deliver tailored messages, content recommendations, and event invitations based on behaviour.
- **Automate engagement strategies:** Use AI to prompt members with relevant resources, renewal reminders, and networking opportunities.
- **Enhance feedback analysis:** process large-scale survey and sentiment data to identify key trends and refine offerings.

“Some people call this artificial intelligence, but the reality is this technology will enhance us. So instead of artificial intelligence, I think we'll augment our intelligence”

Ginni Rometty, Former IBM CEO



# Developing your strategy

## A Step-by-Step Approach

Creating a membership strategy requires thorough research, thoughtful planning, and structured execution. A step-by-step approach ensures each phase builds on the previous one, leading to a comprehensive and sustainable strategy. Actively involving staff, colleagues, and members throughout the process is crucial for gathering valuable insights, fostering ownership, and ensuring alignment with actual needs.

By following this structured approach, you can develop a membership strategy that effectively serves your members while aligning with your organisation's objectives and available resources.

### 10-Point membership strategy development plan

- 1 Define your membership vision**  
Clearly articulate the purpose and long-term goals of your membership programme.
- 2 Understand your members**  
Conduct research to identify member needs, preferences, and challenges.
- 3 Develop Member Personas**  
Create detailed profiles representing different segments of your membership.
- 4 Define your value proposition**  
Identify the unique benefits and value your membership offers.
- 5 Set Measurable Objectives**  
Establish SMART goals for growth, retention, engagement, and satisfaction.
- 6 Align with organisational goals**  
Ensure your strategy supports the broader mission and priorities of your organisation.
- 7 Develop an acquisition and retention plan**  
Create strategies to attract new members and retain existing ones.
- 8 Build an engagement framework**  
Implement initiatives to encourage participation, communication, and involvement.
- 9 Measure and Optimise Performance**  
Track key metrics and adjust strategies based on insights and feedback.
- 10 Implement and Evolve**  
Execute your strategy and continuously refine it to meet changing member expectations.



# Partner with Agentic Consulting

At Agentic Consulting, we believe in empowering organisations to develop their own membership strategies through a coaching and mentoring approach. Rather than offering a one-size-fits-all solution, we work alongside your team to build internal skills, ensuring ownership and sustainability.

## Our approach focuses on

- Tailored strategy development – working with you to define and refine your membership vision and objectives.
- Internal capability building – providing your team with the skills, tools, and confidence to drive your strategy forward.
- Ongoing support and mentorship – helping you navigate challenges and optimise your approach over time.

## Why Work with Us?

- We bring years of experience in membership strategy and development.
- Our collaborative approach ensures long-term success and internal buy-in.
- We provide practical frameworks that align with your organisational goals.

## Take the Next Step

Are you ready to build a stronger, more sustainable membership strategy? Let's work together. Contact us today for a free consultation and discover how Agentic Consulting can support your organisation.

Visit [agentic-consulting.co.uk](https://agentic-consulting.co.uk) to book an introductory meeting or email us at [info@propellersolutions.co.uk](mailto:info@propellersolutions.co.uk)

**Together, we'll build a membership strategy that drives growth, engagement, and long-term success for your organisation.**



[www.agentic-consulting.co.uk](http://www.agentic-consulting.co.uk)

[info@agentic-consulting.co.uk](mailto:info@agentic-consulting.co.uk)