



# The ultimate guide to managing your members

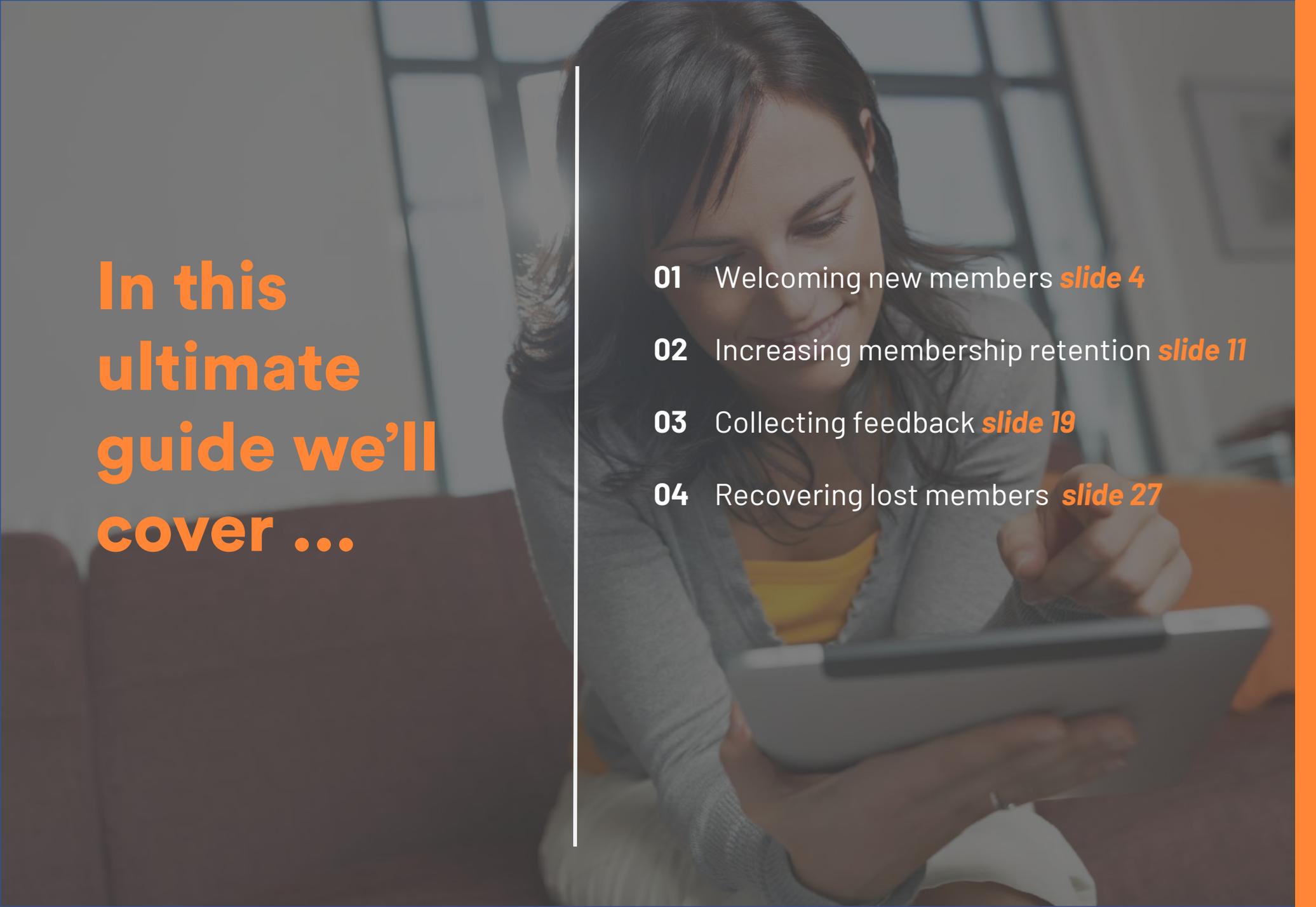
**loveadmin**  
moving your organisation forward

# Introduction

Onboarding, managing retention rates, engaging with members, collecting feedback...

Membership management involves a large number of tasks that can be hard to stay on top of – especially if you're trying to grow your business at the same time.

To help you manage your members, we've compiled this ultimate guide to help you every step of the way when running a successful organisation.

A woman with long dark hair is sitting on a brown couch, smiling and looking down at a tablet computer she is holding. She is wearing a grey cardigan over a yellow top. The background is a blurred indoor setting with a window. The text is overlaid on the left side of the image.

**In this  
ultimate  
guide we'll  
cover ...**

- 01** Welcoming new members *slide 4*
- 02** Increasing membership retention *slide 11*
- 03** Collecting feedback *slide 19*
- 04** Recovering lost members *slide 27*

A woman in a white blazer is smiling and clapping, surrounded by other people in a meeting room. The background is a blurred office setting with bookshelves and other people. The image has an orange tint.

# 01

## **How to welcome new members**

Good membership management begins from the second they join.



## **With so much energy and resources poured into recruiting new members, doesn't it make sense to ensure that once they've joined, you make sure they are happy and engaged with your organisation?**

Welcoming your newest members might seem obvious yet it is something many organisations overlook. Having a welcome process in place shows you care about your new members beyond simply receiving their membership fees.



## Why you should make a fuss of new members

When new members arrive it is tempting to assume they'll immediately immerse themselves in your organisation. After all, that's why they joined, right? While you might be right to think this, it doesn't hurt to go the extra mile to welcome new members and help them understand more about your organisation and their membership.

Think of it as guiding your newest members as you aim to build a lasting relationship. By going that extra mile to make them feel a part of what you do from the beginning, they're likely to form good first impressions and feel more empowered to engage with organisation activities.

Essentially, by welcoming your new members, you are introducing them to a new membership community and reaffirming their decision to join.

## Here are three simple ideas to help you provide a warm welcome to new members...

### 1) Members-only website

Providing members-only areas on your website is a good way to not only encourage people to join but to also engage them once they do. These areas need to have value however.

Engage members with interesting content, members-only offers and other benefits that are only accessible after they have joined. A members-only forum will enable newbies to begin connecting with other members and learning more about your organisation.



## 2) Follow up the welcome email with a phone call

A welcome email is the simplest form of greeting you can set up and most online membership software packages (like LoveAdmin) will automate this for you. However, you shouldn't stop there. Most of us are aware that emails are automated these days and there is a strong likelihood your newest member may simply delete it before reading. Using engaging subject lines to entice recipients to open and discover more, rather than the standard 'Welcome to.....' can help.

Follow up this email with a phone call. Not straight away - give it at least 24 hours. Use the call to not only welcome them, but to ask if they have any questions, were they happy with the registration process, is there anything else you can help them with etc. Run through any important information they need to know, let them know of any upcoming organisation events, and finally outline when they can expect to receive any benefits connected to their membership.

You might consider phone calls to new members a drain on your resources, but in terms of immediately engaging with them, calls are invaluable. People appreciate businesses and service providers who go the extra mile to get to know them and provide an element of personal service.

You don't need to assign people to personally greet new members over the phone but it might be an idea to create some form of community support system or mentorship programme so that longstanding members can reach out and connect with new members. They will be well placed to answer their questions, tell them more about your organisation and provide personal insight into how they benefit from being a member – essentially letting them know what's in it for them.

### 3) Welcome pack in the post

This can work as a standalone welcome tactic or in conjunction with those mentioned previously. A welcome pack is a great way to introduce new members to your organisation, to tell them about member-only benefits and provide them with anything else applicable to their membership.

If printed welcome packs are not affordable for your organisation, then you can attach it to your welcome email after they sign up. LoveAdmin offers this feature and gives the option of sending different welcome emails and packs to each of your membership categories.



# 02

## **Increasing member retention**

Keep your membership base stable with these tips.



## **Retention is almost always more cost-effective and requires less effort than acquisition.**

It's also key to the consistency and stability of your membership management. Let's look at 10 things you can do to keep your retention rate high...

## **1) Meet or exceed expectations**

The number one factor in whether a member will renew their membership is whether they feel you've met their expectations. Have you provided them with the service they were expecting? Sometimes you may even exceed their expectations and often the ensuing delight leads not only to retaining that member but to new members coming from enthusiastic referrals.

## **2) Be honest in your marketing**

This again speaks to meeting your members' expectations. There is very little in life that's more disappointing than feeling you've been duped or misled. And a disappointed member will not stay a member for long. When you share your marketing messages, it's normal to present yourself in the best light possible but make sure you deliver on what you promise and aren't just misleading people.

### **3) Ongoing communication throughout the year**

Repeated, regular communication is absolutely essential. Your members will need ongoing support and advice of various kinds. Email is a great format to do this. It can be automated and scheduled, sent to many people, and tracked. But, most importantly, email is a direct line of communication between you and your members.

### **4) Communicate through preferred channels**

Sometimes communication through other channels will be necessary. Which ones depend on your membership demographic but social media has obviously become a major player. Assess your membership base and decide which platforms are the most relevant to your members.

## **5) Add value through additional services and events**

Adding value is a great way to exceed the expectations of your members. For instance, you might create regular competitions, events or celebrations that add to the community feel. Throughout the year, listen to feedback and see if there is a consensus on what your members would really like.

## **6) Build a community**

Get your members talking to one another and helping each other. This might be via your own forum on your website or via something like a private Facebook group. Very few members will be inclined to leave a community that they feel a valuable part of and that is genuinely supporting them.

## **7) Send multiple reminders in the lead up to renewal**

When it comes to the practicality of renewal time, make sure you have a renewal cycle that begins well in advance. Typically, this cycle should be triggered by a date and take members through a journey of reminding them what benefits they get from being a member and what they can look forward to if they continue. LoveAdmin's membership management software makes renewal cycles easy and all communications can be automated to go out on set dates.

## **8) Make renewal automatic**

One certain way to help boost retention rates is to make renewals automatic, requiring a positive 'opt-out' from members if they want to finish their membership. LoveAdmin helps facilitate this by giving your organisation the ability to require members to pre-authorise future payments so each time payment is due, the system will collect it automatically. If you choose this approach, make sure you're clear this is how your membership is set up. You'll also need to put members in a renewal cycle so they're aware of what's happening.

## 9) Additional offers

You may be able to offer additional services to encourage members to continue. Often this is a better approach than offering a discount to members who are 'sitting on the fence'. Wherever possible, see if you can add value to your service rather than discounting the cost but do bear in mind that at times, a discount may be just what's needed.

## 10) Personalise

Talk to your members as individuals. Even with mass mailing via email you can still be sure their name is used automatically. If you're using membership software to manage and collect relevant information on your members, you'll be able to segment them into smaller, more specialised categories and talk with more relevance to them.

Ultimately, meeting or exceeding the expectations of your members will be the most effective way you have of retaining your members. Be sure you know what they are expecting by asking questions throughout the year and make sure you provide what you say you'll provide.

And for those members who decide to leave, continue to communicate with them as often, ongoing communications about your organisation are still of relevance and interest. You may be able to find out their reasons for leaving and woo them back.



A woman with long, dark, curly hair is smiling warmly at a meeting table. She is wearing a blue button-down shirt. Her hands are clasped on the table in front of her. The background is a blurred office setting with bookshelves. The entire image has a warm, orange-toned overlay.

# 03

## **How to collect member feedback**

Take the guesswork out of  
what's going well and what isn't.



## **How do you know if your members are happy with your services? Are they getting true value from your content? What benefits do they find most useful?**

There's no way to know the answers to these questions unless you ask your members. Feedback is the best way to find out what your members like, don't like, and what they want more of.

Member comments, views, and opinions are like gems to your organisation. Use this feedback to eliminate problems and focus on what your members actually want.



Listening to feedback increases loyalty and satisfaction as members feel as though their voices are being heard, valued, and taken on board. However, it's not always easy to get feedback because it requires time and effort on the members' part.

Unless they have a serious concern or there's something in it for them, the chances of members giving feedback are quite low. That's why it's logical to mix it up and have several different ways of collecting feedback.

Of course, not everything will work for your organisation and you need to maintain a balance so that you're not bombarding members either. It's down to you to experiment and use the right methods. To help you, here's a list of nine different methods to collect member feedback...



## 1) Email surveys

These are the obvious first choice. They're straightforward to send out, and it's simple to analyse the results. The most popular online feedback tools used for email surveys are SurveyMonkey, Google Forms, and Typeform. Depending on your objectives, you can ask open-ended questions, closed-ended questions or both. But bear in the mind, the shorter your surveys are, the more responses you'll get. Let members know how many minutes a survey will take and offer incentives such as entry into a prize draw, a gift card or exclusive access to a gated ebook.

## 2) Email newsletters

Surveys don't have to be the only way you collect feedback via email. When sending out your newsletters, have a "Survey of the month" or "Question of the week" section that links to a feedback tool. Ask questions related to the content mentioned in the newsletter to make it relevant. This drip-feed method breaks up the collection of your feedback, making members more likely and willing to respond as it takes less time.

### **3) Social media polls**

If your organisation is active on social media, it's an effective means to get quick, casual feedback. Facebook, Twitter, and Instagram (via Stories) all have easy-to-use poll features that are open to everyone. These might be useful if you're looking for feedback from prospective members as well as current ones. Thanks to the nature of social media, you can get creative and have fun but still collect useful information.

### **4) Social media mentions**

Don't forget to monitor mentions, comments, and reviews of your organisation on these platforms too – you don't want to leave anything unnoticed in the public eye, especially if someone isn't happy. You can reply to members, take note of their feedback and then either address this instantly or propose changes to your internal roadmap.

## **5) Website/app forum**

Not only are forums great for members to interact with each other and build a community, but also for you to engage with them and get a conversation going. Chances are if members are active on a forum, they have some spare time to answer questions and provide the feedback you're looking for.

## **6) Website/app feedback form**

Use feedback form widgets that are triggered when members land on certain pages on your website/app. You want to limit how many questions you ask here and keep them short. Focus these questions on the website/app experience or the content that they're viewing.

## 7) Event surveys

Whether it's at your monthly luncheons, your regional meetings or your annual conference, make the most of talking with your members. With most communication done online, having face-to-face interaction is a treat you don't want to miss out on. When members are networking, eating or waiting for a presentation to start, hand out tablets with online surveys or you can stick to traditional pen and paper questions.

## 8) Event interviews

What's even better at events (if time allows) is to schedule one-to-one interviews with members. Doing so will also help you build deeper, more meaningful connections that aren't always possible over the internet or phone. Again, offer incentives and follow up with a personalised thank you.

## 9) LoveAdmin forms

It's possible to collect feedback via [LoveAdmin](#) too. There are two ways to do this – you can either create a group with a customised form or create an optional extra with a customised form. As there is the option to select a free-type field or multiple choice field you can ask both open-ended and close-ended questions. Members can access and complete the form via their online account and you can analyse the results by exporting them.

Remember, feedback is not a one-off thing. Always stay curious, keep your communication channels open, and regularly touch base with your members. Although no one particularly likes negative feedback, it's important to use this to make positive changes that will lead to better member experiences. Happier members equal higher renewal rates and more people spreading the good word about your organisation.

# 04

## How to recover past members

Members who haven't renewed are still important to your organisation.



## Every organisation has people who come and go.

Their reasons for leaving you though can be wide ranging, just as their reasons for joining probably were. However, while it's natural to focus your attention on attracting new members, there is an important argument for attempting to recover those who have come and gone.

A vital part of knowing how to manage your membership is knowing what motivates people. So let's look at why you should try and recover long-lost members, the reasons why they left, and how to entice them back.

## Maintain communication

Imagine you have a ready pool of potential members. Better still, a pool of people you know are interested in what you have to offer. This is what your lost members represent. Whether they were long-term, or whether they only joined for a few months, tempting people back can be far easier than you think – it doesn't have to require resource-heavy recruitment or special events.

In reality, people may have left due to something that could easily be rectified. For many of us, it is far easier to simply cancel our membership than convey any concerns or difficulties that are impacting our enjoyment of the organisation. A simple email from you addressing the reason for leaving can be all it takes to entice them back.

Part of managing your members' information should involve asking why they are leaving. Ensure you set up your membership management software to ask why they are cancelling.

## Reasons for leaving

Before you can attempt to recover a lost member, you first need to know what made them leave. Traditionally, this information could have been hard to collect, but with the help of a membership management software like LoveAdmin, it is quite easy to discreetly ask.

Here are some of the most common reasons a member may leave your organisation:

**Cost** – fees can easily account for a large portion of disposable income, so if circumstances change, they are often the first to be cut

**Perceived Value** – a person may leave because they do not feel they are getting value for their membership fees. If this is the case, you need to explore this further

**Inactivity** – if someone isn't actively engaged in the organisation there is little point in paying for it

**Unsuitable** – your organisation may have addressed a particular need when they joined. Over time, this need may have lessened, making their membership redundant

**Competition** – sometimes another organisation is more attractive. If this is the case, then you need to find out what makes your competition a better prospect

**Dissatisfaction** – there can be many reasons why someone is dissatisfied with your organisation, so it is important to follow this up

## Recovery tactics

Bringing past members back to your organisation can be as simple as sending an email, perhaps with a special offer, or making a phone call.

The initial task, however, is to sort past members according to their reason(s) for leaving. This is important because enticing them back cannot be done with a 'one-size-fits-all' approach.

Your next contact with them needs to be targeted, specifically address their reason(s) for leaving and offer some kind of solution – for example, a reduction in membership fees if cost was their biggest pain point.

After you've planned how you'll contact them, you need to decide when.

Again, sort each person according to their reason for leaving. For those who left due to a lack of value, inactivity, unsuitability or to join a competitor, you should act as soon as possible. There is still a strong chance of reversing their decision to leave, so long as you can show you understand their reason(s). This demonstrates brilliant customer service on your part, showing that you care about your members and that you take their satisfaction seriously.

It is also a good idea to set-up an automatic email (something that can be done within the LoveAdmin platform) to be sent as soon as someone cancels their membership. In this email, express your sadness at their decision to leave and ask if there is anything you could do to help them reconsider.

Just because a member leaves does not mean they cannot be encouraged to come back. By demonstrating an understanding of their reasons for leaving and offering solutions where possible you can help increase, and maintain your membership pool.



**Thanks for  
reading!**

**Ready to move your  
organisation forward?**

**Get a FREE demo**

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