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ENGAGEMENT PLAYBOOK

Surprise and delight passive members before they quietly leave

Six ingredients to creating an enjoyable member experience that proves membership value and elevates your association's brand.

1 Build a relevant onboarding journey

Always ask members *what* they want from membership, then use your onboarding comms to signpost the benefits that match.

2 Nail 'distribution' of information

Emails, webinars and downloadable guides are all ways to distribute the same content. People consume information differently — accessibility signals relevance.

Pre-requisites to create 'delight'

- ✓ Gather individual member expectations
- ✓ Connected CRM, comms and events tool
- ✓ Track what members do, not just say
- ✓ Use automations to remove friction

3 Use your CRM as a decision-making tool

A CRM is something you consult before acting, not after.

- Build event agendas from past attendee profiles
- Spot low-engagement members before renewals
- Find shared traits to build actionable segments

4 Create moments of 'joy'

Give members the VIP treatment. Acknowledge and reward loyal, active members on engagement history, repeat attendance or contributions to your resources.

>10%

of membership bodies use automations tied to engagement scores, content engagement or signs of disinterest.

5 Make impact visible before members ask

Remind members what to expect, demonstrate the impact of their membership and put success stories in front of them.

6 Facilitate 'open' networking channels

Build the structure and the community builds itself — even when it isn't trackable.

- A private portal with a member forum
- Informal virtual coffee or speed-networking
- Searchable directories and interest groups

"One of the biggest benefits of switching to ToucanTech is the consolidation of our data, communications and member management. With how versatile ToucanTech is, it seems like we're always finding new ways of engaging our members."

Mitch Netzer
Communications Manager, Washington State Association of Counties

Build a 'joyful' member experience.

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