

Planning Helps Association Chapters Avoid Bottlenecks and Confusion



In previous posts we've discussed ways to avoid a single point of failure in your association chapter, like the effects of your VP of membership stepping down without notice, and realizing you have no idea where they've documented their processes or their passwords. But what about ways to avoid failures in your chapter technology or processes that, if they happen, could keep you from meeting your mission and providing benefits to your members?



What's are your plans for when your:

- Member management system is no longer being supported
- Association website provider disappears
- The technology and the manual processes you run your association chapter with can't keep up with the increased demands being placed on them

Have you explored alternatives and developed strategies to avoid the potentially devastating outcomes of these situations?

Start by creating a list of all the systems you use to run your association chapter, free and paid, as well as the different platforms your members and guests interact with; include your website and social media and the spreadsheets and programs you use for fundraising, communications, marketing,

ecommerce, etc. Once you have a sense of all you're using, it will be easier to plan the changes you need to make in these five areas, to take your chapter smoothly, and smartly, through the next three to five years.

A single management system. If your current chapter management systems and processes don't interact easily with each other, it's time to move to a single platform. This shift will allow you to use your data more effectively and develop targeted, stronger programs that better meet the needs of your board and your committees as well as your members, prospects and even sponsors. By using a single association management software program to gather, store, and retrieve information, you'll decrease the time it takes to complete projects, require less time from fewer volunteers, and get things right the first time. Your board will have a clearer picture of your chapter and easy access to specifics like revenue from members versus non-members, sponsorship activity, chapter member retention and growth, all of which can help you better target your offerings.

Email. How do you currently get information to members, guests, sponsors, etc.? Are all of your emails going to your entire database when some only need to reach certain groups? Email segmentation increases engagement and decreases email fatigue for everyone on your email list. With strategic email tools, you can welcome new members and new sponsors, and send things like newsletters, invitations, surveys, follow up to board meetings, event registration confirmations and dues reminders to just who needs them.

Website. Your website is the front door to your chapter; all your audiences should be able to easily find what's important to them there; building and managing your website appropriately is essential to your chapter's long-term success. It's time for a strong, engaging design and navigation that allows your different audiences to find what's relevant to them, with timely content that meets their needs. Choose a system that also improves how you handle everything behind-the-scenes, like managing events, accepting event registrations and payments, sending communications and centralizing data.

Growth. Just as important as being able to easily collect, store and access information about potential members is looking for new members in new places, like your local colleges and retirement organizations, and providing those individuals with the information they need to drive them to join your chapter. Make it easy for prospects to access information, through your website, social media, member stories and even through your current members. Existing members can be one of your best sources of new members, so help them share all the best parts of your chapter. Consider member



contests and other membership incentive ideas to make them feel they are a strategic part of your membership campaign.

Retention. To keep your members engaged for the long-term, you need to understand their needs and meet them, knowing those needs may be different from what they needed a few years ago. Include periodic surveys in your chapter member retention plan, to listen, recognize priorities and understand how the generation they're in plays a role in what they want out of your chapter. Develop a multi-faceted campaign to engage members throughout their careers, from new career professionals through retirement. To keep your board and committee members from feeling overwhelmed, provide the tools they need to perform their duties and clarify their role in the overall success of the chapter.

Having documented plans and directions will make it much easier to provide the right future for your chapter and members, whether you need to make a sudden change or if the shift is part of your normal growth. Just be sure to keep those plans flexible, to continue to meet your chapter and member needs well into the future.

