

Technology and Membership Management

The Top Ten Ways Technology Can Boost Membership

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INTRODUCTION

Technology has the potential to improve every aspect of your operations. But where do you start? What is most important? As a nonprofit professional, time is precious to you. How do you know where you should invest the majority of your resources — time and money alike? Where should you rely on technology the most?

Although your challenges may be numerous, there are a few key areas in which technology can really make a difference:

Strengthening relationships and providing good member service

Technology can help you increase your membership, communicate better with your supporters, and strengthen your relationships by ensuring that you are treating members the way they should be treated — which will, in turn, make them more likely to renew and upgrade.

Making better decisions

Planning will keep you far ahead of the competition. Technology supports planning by allowing you to maintain a single, up-to-date view of your members as well as strategically plan for your organization’s growth.

Managing your finances

Without technology, reducing the cost of mailings, tracking, and reporting on the “health” of your organization, as well as complying with nonprofit-specific accounting requirements, would be almost impossible. These days, members, donors, and the community are more demanding than ever when it comes to accountability.

Managing your operations

Increasing the efficiency of service delivery, optimizing your volunteers, memberships and sponsorships, and improving your internal processes are all areas in which technology can and will make a huge difference in the way your organization accomplishes its mission.

Seem Important? It is! But if your technology doesn’t allow you to grow and explore new methods of managing your membership program, it’s not worth the investment. At a minimum, your technology solution should help you in these ten areas:

1. **Single, holistic view of members**
2. **Relationship management**
3. **Analysis reporting**
4. **Accountability**
5. **Online member service**
6. **Marketing and communication**
7. **Renewal management**
8. **Advocacy**
9. **Empowering chapters**
10. **Event management**



Executive Summary

Many nonprofit organizations rely heavily on developing their membership bases so that they provide a solid foundation of support for general operating expenses and funds to help deliver on their missions. But developing and nurturing memberships can be a labor-intensive and time-consuming undertaking — from processing renewals and coordinating events to overseeing individual chapters and communicating with members — it all comes back to effective management. That’s where technology can help.



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A CLOSER LOOK: THE TOP TEN WAYS TECHNOLOGY CAN BOOST MEMBERSHIP

Let's take a more detailed look at the impact these areas can have on the health and future prosperity of your organization.

1. Single, holistic view of supporters

How many different ways can a person interact with your organization? Immediately, becoming a member comes to mind, but there are other ways people support our organizations. Within your database, you are likely to find board members, volunteers, employees, and if you do fundraising, donors. Then there are prospects, patrons, advocates, alumni, attendees, and vendors. It's pretty likely that many of your constituents fall into more than one category. The ability to see a holistic view of all the ways an individual interacts with your organization is vitally important. Data silos can damage relationships. Is each office within your organization using a different system for managing these categories? If your systems don't integrate, you could be treating the same person as if they were two separate people. The proper technology will allow you to carefully manage all the day-to-day details and interactions with your members and help you build and maintain institutional knowledge within your organization — something that's pretty important in an industry known for high turnover.

2. Relationship management

Successful membership management is centered on the ability to cultivate and manage relationships with your members. Good communication is important both when you are initiating contact and when you are building the case for long-term involvement. Technology can help you with everything from tracking valuable biographical information to ensuring each touch you have with your members is helping build stronger relationships by monitoring staff and member interaction. You should also be able to easily manage membership benefits and the details surrounding all types of members — both organizational and individual.

Each person from your organization who comes in contact with the outside world — members, staff, employees, volunteers, etc. — is working to brand your organization. Sharing professional best practices among the group, such as successful email or letter templates, will help ensure they are working together. More importantly, you'll know that your members are being treated in a way that reflects positively on your organization.

3. Analysis reporting

What makes your organization successful? Which areas can be improved? Capturing and accessing the information you need to demonstrate the effectiveness of your organization is critical. You will enter a lot of important information into your database, and getting it back out should be a breeze. Once you have the information, you want to be able to share it with board members, staff, and the community at large. The right reports can help you take a flood of data and turn it into insight and action.

Technology will help you gain a better understanding of your organization through trend and financial analysis as well as give you a holistic view of chapter help. It will also help you make better strategic decisions regarding the acquisition and upgrade of members and the administration of membership programs.



About the Author

April Parker, product marketing manager for Blackbaud's fundraising solutions, has a special focus on faith-based organizations and has invested more than ten years in the fields of advertising and marketing. April received a Bachelor of Arts from the University of Memphis with an emphasis in film and video production and began her career in marketing as a copywriter. April is a frequently published contributor to industry publications such as *Fundraising Well*, *Fundraising Success*, and *the Major Gifts Report*.

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4. **Accountability**

There's no hotter topic in the nonprofit world than accountability. As nonprofits are increasingly scrutinized and regulated, your ability to ensure that dues and funds are managed correctly is critically important. Being able to easily share information between your financial and membership systems and then present it to key stakeholders will help you demonstrate the revenue you receive. Your technology solution should allow you to share timely, accurate information, ensure that funds are accounted for, verify monies were used for their intended purposes, and satisfy both internal and external reporting requirements.

5. **Online member service**

Your website is often the first impression your organization will make. It's a great tool for catching the attention of new potential members and providing them the opportunity to interact online. Is your site compelling and up-to-date? Can you personalize your messaging and coordinate your online and offline marketing? Can you recognize and treat visitors as individuals? Actively using your site as a tool to learn about your members will result in an expanded loyal network of supporters with a lifelong connectivity with your organization. Your technology should support all of these, as well as efforts such as integrated advocacy

Once prospects become members, the job of your website doesn't stop. Can your members renew and upgrade their memberships online, as well as update their contact information? Can they register for classes and conferences? Can they download documents, meeting minutes, and directories, and get up-to-the-minute updates? Can they communicate with each other? If not, your website isn't working as well as it should for your organization.

6. **Marketing and communication**

A marketer's number one job is to brand their organizations and build awareness for their mission. Easy enough, right? Not so! Differentiating your organization can be a huge challenge — especially with the ever-increasing amount of competing organizations out there.

Do you have all the information you need to develop a winning marketing strategy? Technology can help by providing you with a complete online/offline marketing solution that will help support your strategy and help you define your brand, build awareness, and increase members' engagement with your organization.

For many organizations, direct mail and email communications not only makes up a large portion of the communication they have with their members, but it also takes up a large portion of their time and resources. The good news is that managing communications doesn't have to be as challenging, costly, and time-consuming if your technology solution allows you to automate the process — making reminders, renewals, acknowledgements, receipts, newsletters, and personalized emails a breeze.

7. **Renewal management**

As a membership-based organization, the majority of your income probably comes from dues and other types of member fees. But keeping track of who's paid, who hasn't, who's promised to pay, etc. can be a big challenge. A good technology solution can help you successfully see who's missed a payment, set up payment schedules, and keep track of when payments come in. Technology can also help develop and administer a moves management program that will enable you to successfully move your members through an upgrade path.

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Through your website, you should not only be able to easily educate the community on the issues, but also inspire them by presenting that information in a personalized way.

8. Advocacy

If your organization does advocacy, you understand the importance of rallying support by allowing your members to contact elected officials and the media on issues that impact your community. How can technology help? Through your website, you should not only be able to easily educate the community on the issues, but also inspire them by presenting that information in a personalized way. Once inspired, your supporters need the tools to initiate action.

But it doesn't end there. It is vital to the health of your relationships with those supporters that you be able to see what interests and inspires them. Only by storing that information in your centralized database will you be able to take your grassroots advocacy campaigns to the next level while maintaining great relationships with your supporters.

9. Empowering chapters

The more complex the structure of your organization, the more time and resources go into managing it. Giving chapters the ability to manage themselves allows organizational oversight to save time and de-centralize their work load while, at the same time, empowering chapters to be autonomous and make decisions on their own.

Technology is pivotal in this endeavor. It will allow organizational oversight to structure policies and procedures as well as roll up reporting, and it will give individual chapters the tools to better manage themselves by creating their own direct mail, dues reminders, emails, chapter-specific websites, and more.

10. Event management

A great venue does not ensure a great event! As your members become more savvy, their expectations of your events will grow. Therefore, your events must be tailored to engage the newest generation of members while also appealing to your older, loyal member base.

Technology can help you plan, organize, and implement all aspects of your events, expos, and conferences, making it easier and more cost-effective than ever for you to manage first-class events. All the information you need — from participants to fees, expense lists, and revenue analysis, should be right at your fingertips in one, centralized location

CONCLUSION

The previous sections of this paper describe ways that technology can help your organization boost your membership program. But none of them really makes a difference if it takes an eternity to make them happen. Technology should improve your daily processes and drive efficiency within your organization. Everyone at your organization must be committed to working in the most effective manner possible. The efficient use of time, money, and staff allows you to better deliver on your mission. Take a look at the technology solution you are using. Can you automate repetitive tasks? Can you access frequent operations from one place? Are you able to integrate with other frequently used applications, such as word processing, spreadsheets, email, and calendars? And finally, do you have fast access to the reports and information you need on a daily basis to make strategic decisions?

Technology is an investment that can help ensure your nonprofit is operating efficiently. Clearly, success requires more than technology, but if your technology doesn't allow for process automation and easy management of data, you can expect more work in the long run. In the end, the most important thing technology can do for you is to help your staff, processes, and the people you serve all work together seamlessly, providing the best experience for everyone involved.



About Blackbaud

Blackbaud is the leading global provider of software and services designed specifically for nonprofit organizations, enabling them to improve operational efficiency, build strong relationships, and raise more money to support their missions. Approximately 22,000 organizations — including University of Arizona Foundation, American Red Cross, Cancer Research UK, The Taft School, Lincoln Center, In Touch Ministries, Tulsa Community Foundation, Ursinus College, Earthjustice, International Fund for Animal Welfare, and the WGBH Educational Foundation — use one or more Blackbaud products and services for fundraising, constituent relationship management, financial management, website management, direct marketing, education administration, ticketing, business intelligence, prospect research, consulting, and analytics. Since 1981, Blackbaud's sole focus and expertise has been partnering with nonprofits and providing them the solutions they need to make a difference in their local communities and worldwide. Headquartered in the United States, Blackbaud also has operations in Australia, Canada, the Netherlands, and the United Kingdom. For more information, visit www.blackbaud.com.

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