7 Your guide to Essential

Member Surveys

Bramm Research Inc.
Better Information. Better Solutions.

1ST Edition

Your Guide to 7 Essential Member Surveys

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Better Information. Better Solutions
www.brammresearch.com

This paper has been written as an introduction to seven types of member research that will improve you ability to know, listen, communicate and create value for your members.

Please distribute, copy or reprint this material for your colleagues and clients. My one request is that the document remain in one piece with all contact information in place.

You will find my bio and complete contact information in the appendix. Please contact me if you wish to discuss member surveys in greater detail.

I am available to conduct workshops related to the topics presented here. Also, please download my companion papers, **7 Tips for Creating Successful Online Surveys** and **The Essential Pre-Launch Online Survey Checklist**.

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Your Guide to 7 Essential Member Surveys

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1. Developing a Member Profile

Typically the members of your association cover a broad demographic spectrum from younger members just starting out in their career to older members who are nearing retirement. But not only that, they have different values, interests and attitudes.

Knowing your members from both a demographic and psychographic perspective can be invaluable. This information will help you target your members more precisely with products and services as well as communicate more effectively. While this knowledge might be more valuable if your members are individuals, for example, you're an association consisting of professionals, it is still worthwhile for these trade/industry associations whose members tend to be organizations.

Let's start with personal and professional demographics. Survey questions in this area will include age, gender, geography, number of years on the job, work setting and specialty area. Surveys often stop at these questions. I suggest that you also consider the following types of questions. What stage are they in their careers for example, are they new to the profession, mid-career, late career, nearing retirement or semi-retired? How do your members categorize themselves in terms of adopting new technology? Are they innovators, early adopters, early majority, late majority or laggards?

Next consider adding questions that relate to values, opinions, attitudes, interests and lifestyles. Collectively we refer to these at psychographics.

1. Developing a Member Profile (Cont'd)

These can be developed as a series of statements that your survey participants respond to using an agree/disagree scale. These statements may relate to attitudes towards new ideas, innovation, relationships with colleagues, collaboration, professional development and learning preferences.

Analyzing the results and combining it with demographic information can help you see the clusters or segments within your total membership. This allows you to focus your attention on the needs of specific segments.

Some associations take this a step further and develop member personas. These are typically fully rendered characters that embody specific characteristics of your member sub-groups. For example, one can imagine having a profile of Nancy Networker or Victor Volunteer.

The goal is to create a standard way of categorizing and thinking about the key traits of members so that their needs, motivations and preferences can be addressed.

2. Needs Assessment – Your Members' Needs and Wants

As an association you want to anticipate the needs of your members and provide them with valuable products and services in a timely fashion. To achieve this goal you decide to conduct needs assessment research.

This is an essential tool but it is the most difficult one to get right. Why? Because people are ill equipped to tell you what they might need or want in the future. Henry Ford said, "If I'd asked customers what they wanted, they would have said a faster horse."

Not only is it difficult for most of us to apply our imagination in a survey setting to our future needs, our thoughts about the future are unreliable.

Generally we're accurate when it comes to our actions today. I know that I had cereal for breakfast this morning. But what I might want for breakfast a month from now is a bit harder to predict. Compound this with the fact that I want to appear to be making better choices than what I might actually be making. I will be more inclined to say that I'm going to have granola for breakfast rather than the truthful answer…Captain Crunch. The anthropologist Margaret Mead said, "what people say, what people do and what people say they do are entirely different things."

So with all of these challenges in mind, how do we proceed? Here are three suggestions.

1. Rather than ask about future needs ask your members about their current challenges and headaches. Once you have a laundry list of challenges you can group them together into a handful of categories.

2. Needs Assessment (Cont'd)

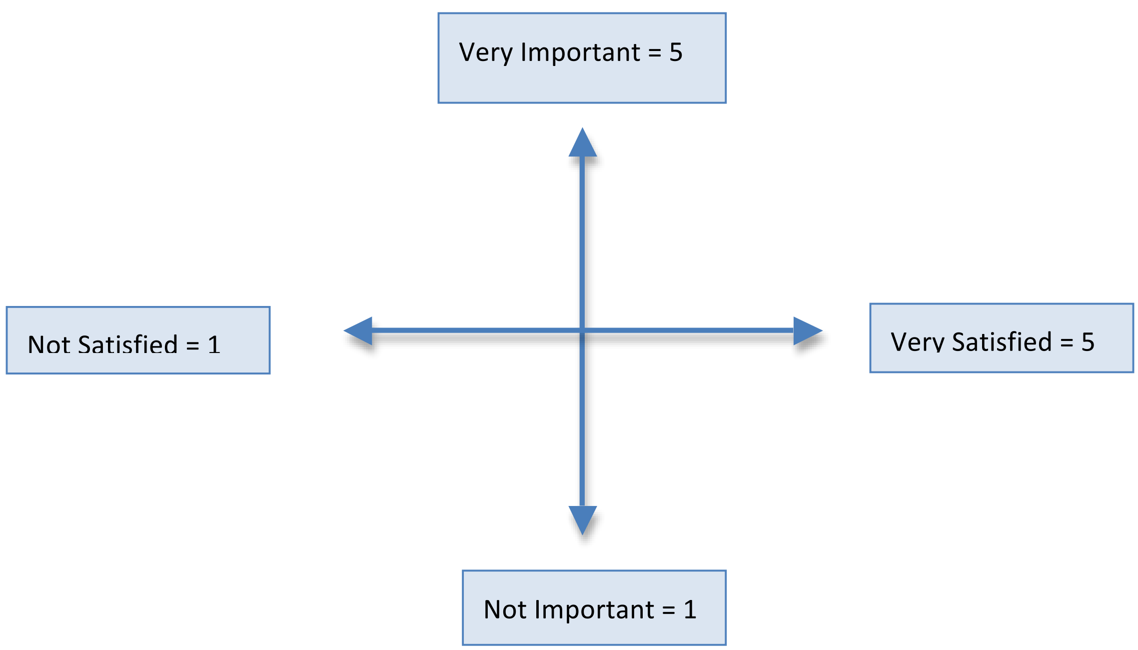
2. Look at the groupings and think of ways to creatively address these needs. Become a problem solver. Ask yourself, what can the association do for members that they can't do individually on their own? Or, how do we help our members save money or be more productive?

3. Once you've developed a list of possible products or services, you may want to consider, where else might these products/services be available? What are peer organizations offering? What can we do that's different?

3. Evaluating Importance and Satisfaction

A standard aspect of many member surveys is to ask respondents to rate the importance of various benefits and then to indicate their satisfaction with these benefits. Typically a 5-point scale is used for both elements.

From there it is possible to rank order important benefits and satisfaction with those benefits. It's also desirable to create a quadrant like the one pictured below. As you can see, importance and satisfaction can be plotted on the quadrant.



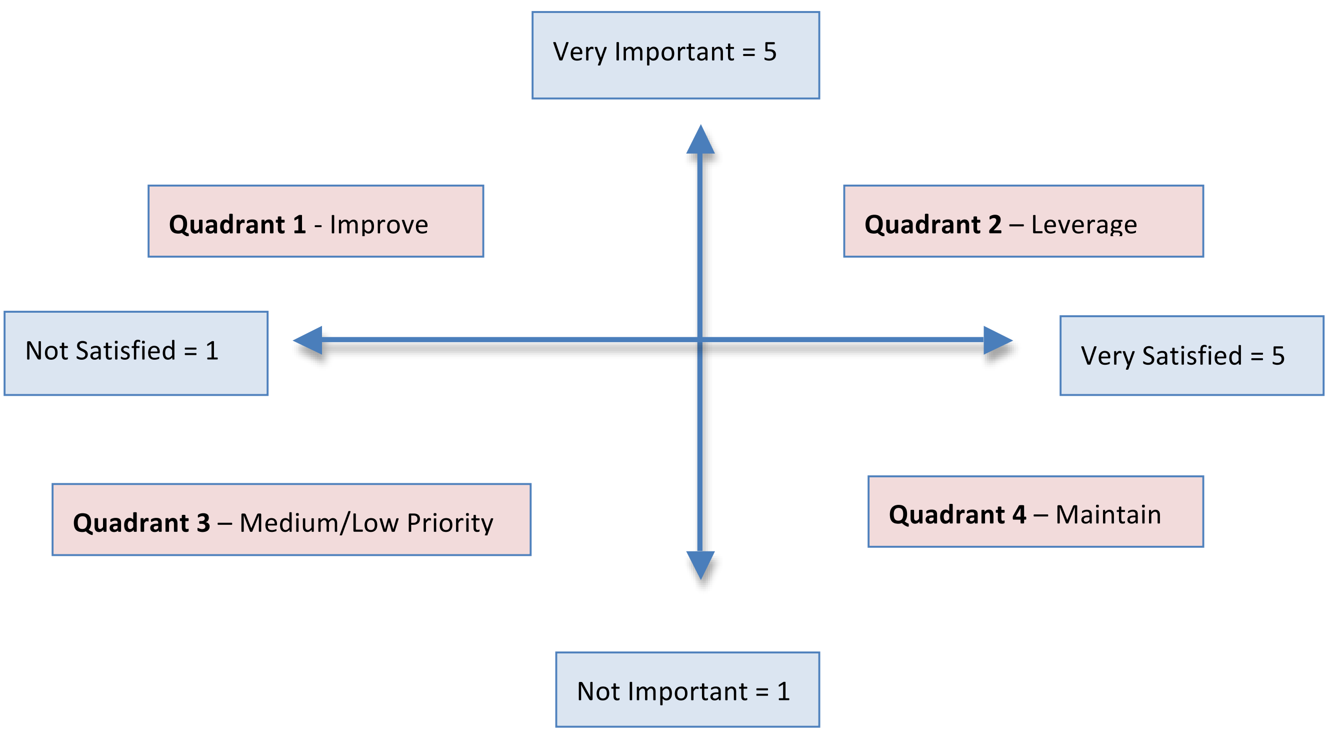
3. Evaluating Importance and Satisfaction (Cont'd)

We can further our analyses by labeling the quadrants. Items in **Quadrant 1** are important to members but their satisfaction is low. Clearly this represents an opportunity for improvement.

Quadrant 2 represents those benefits that are both important and generate a high level of satisfaction. These are benefits that can be further leveraged.

We label **Quadrant 3** as medium to low priority. These are benefits that, although they under-deliver in terms of satisfaction, they are also relatively unimportant to members.

Quadrant 4 represents benefits that should be maintained at current levels. There is a relatively high level of satisfaction yet they are deemed to be somewhat unimportant.



3. Evaluating Importance and Satisfaction (Cont'd)

Points to Consider

When you ask about the importance of various offerings it is advantageous to put this into context, for example, important reasons for joining the association in the first place. This will give you a clearer idea of what's truly important to members.

But keep in mind that the benefits you are looking for when you first joined an association may change over time. For example, networking with your peers may be an important reason for joining initially but overtime your reasons for renewing may evolve into less tangible benefits such as advocacy.

Therefore, it's important to ask about the primary reason for joining and primary reason for renewing.

4. Member Engagement

Member engagement and its measurement continues to be a dominant theme in the association world. There are many definitions of the term but generally quantifying engagement includes an assessment of members in terms of their attending, purchasing, participating and volunteering. Often values are attached to each type of interaction and members can be tracked using an association management system. Such a tracking mechanism can create an “early warning system” alerting you to reach out to members who are disengaged and who are unlikely not renew their membership.

While this approach has merit it overlooks the important fact that your members define engagement and not you. Deciding that certain activities represent a specific engagement value may not accurately depict how your members see their relationship with the association.

What has to be incorporated in this model is information that captures a members beliefs and attitudes about your association and its role in their lives.

Therefore, your engagement survey will have a behavioral component as well as questions devoted to member attitudes.

On the behavioral front you will ask members to indicate their participation/involvement in offerings such as meetings, conferences, committees, educational opportunities and material, your website and social media.

From an attitudinal perspective respondents will be asked to indicate their level of agreement with a number of statements pertaining to their membership in the organization.

Member Engagement (Cont'd)

Such statements may include:

"I belong to my association primarily for the networking opportunities it provides."

"I belong to my association primarily for professional development."

"I'm not sure why I continue to belong to association."

By combining our behavioral and attitudinal components together we can arrive at an idea of where our members exist along an engagement continuum. From there we can make decisions regarding how best to move members along the continuum.

Below is an engagement model developed by Anna Caraveli in her recently published book, The Demand Perspective. It's a useful way of thinking about the engagement continuum.

Caraveli Model

Value and Engagement Continuum

Nominal member – "I just pay dues."

Interested member - "I occasionally attend."

Active member - "I learn and use what I learn to improve."

Solutions seeker - "This organization contributes to achieving my goals in real and measureable ways."

Strategic solutions seeker - "I cannot succeed without this organization."

Member partner - "My success is the organization's success (and vice versa), and I want to contribute actively to that.

Anna Caraveli, *The Demand Perspective,* p. 130

5. Communications Audit

Associations spend considerable resources on communicating with their stakeholders. And yet, it's often not clear whether these efforts are effective. Undertaking a communication audit is one way to guide your efforts.

The first step is to determine the objectives of your audit. Your objectives may include the following:

- Are your key audiences receiving/reading your communications?
- How useful are your communication topics?
- What are the preferred communication vehicles and frequency of communication?

Having established the key objectives it is now time to develop the questionnaire. Typically you will be listing all the ways in which members and non-members can receive information from your organization. This will include print, for example, your magazine, your online newsletters and email as well as social media and your website.

Respondents may be asked to indicate their awareness and frequency of reading material from these sources. At this point you may also ask their preferred method of receiving information.

I recommend you zero in on specific topics of interest. If, for example, you're looking at content in your magazine and newsletter, I would list the titles of articles from your most recent edition. Ask respondents if they read the article. If yes, get them to rate the information on a usefulness scale.

Information from your communication audit can be tied into your member profile information. For example, in all likelihood, members who are at different stages in their career will have their own content, vehicle and frequency preferences. To the extent that it is possible, you will want to meet the needs of these various groups.

6. The Creation of Knowledge Products

Associations can offer value to their members by providing them with information that will help them make better decisions, save time or money. These “knowledge products” may include industry sales and volume statistics, industry forecasts/ outlook surveys, and benchmarking and best practices information.

Knowledge products position an association as a “knowledge broker,” provides member value and potentially generate non-dues revenue via sponsorship opportunities and/or report sales.

The Process

The development of a knowledge product typically follows these steps:

1. Knowledge Product Audit

- Review of current knowledge products.
- Review of the make-up of membership including a review of allied business members and identification of possible sponsorship opportunities.
- Review of recent member research with the intent of discovering unmet needs. If required, additional research will be conducted.
- Review of offerings from peer associations and other sources.

2. Concept Development

- Based on the audit phase, several knowledge product concepts are developed in consultation with the association.

6. The Creation of Knowledge Products (Cont'd)

The Process (Cont'd)

3. Concept Evaluation

- Validation of knowledge product concepts through an association executive review and member survey.

An Example of a Knowledge Product Provided by the Supply Chain Management Association (SCMA)

Shown below is material that SCMA uses to promote their annual survey. We have been involved in managing and analyzing the results over the past few years.

Annual Survey of the Canadian Supply Chain Professional

SCMA Supply Chain Management Association · Purchasing B2B · MM&D · Canadian Shipper

Sponsored by: BDO

Did you know that the average supply chain salary in Canada last year was $86,987? Do you want to find out what the magic number will be for 2015?

Each year, SCMA conducts an Annual Survey of the Canadian Supply Chain Professional, in partnership with PurchasingB2B, MM&D and Canadian Shipper. This popular comprehensive survey polls SCMA members and magazine readers to examine factors – beyond salary – that are important to supply chain practitioners. It also looks at current benefits, job satisfaction, training for supply chain management professionals and more.

7. Benchmarking and Best Practices

Benchmarking information is a type of knowledge product that can be an extremely valuable asset to association members. It provides a way for an organization to compare their procedures and results with other organizations.

Sometimes an organization will want to look at a specific function, for example, order fulfillment and compare their practices with a wide range of organizations that may not necessarily be within their industry.

Typically they're interested in comparing themselves to organizations that are recognized as being leaders in that particular area.

In another type of benchmarking, organizations wish to compare themselves just with organizations in their industry. In this case, they are looking across their range of activities. Usually we identify top performers based on profitability or some other agreed upon definition.

The results of this "best-in-class" group are shown separately. The value for an individual member will be in comparing their results with this group and to identify ways where they can improve.

As well the results are usually shown in a variety of ways so that an individual firm or practice can compare their own results and procedures to similar operations. For example, results may be grouped by billings or by region.

7. Benchmarking and Best Practices (Cont'd)

Interior Design Benchmarking and Best Practices Study

This benchmarking project was conducted on behalf of the association Interior Designers of Canada and the publication Canadian Interiors. It was conducted amongst interior design firms across Canada and covered a wide range of topics.

An overview of these topics is shown below.

Topics of Inquiry

1. Firm and staff demographics
2. Number of type of projects completed in the past year
3. Detailed staffing information
4. Gross Billings and Average Profit/Loss
5. Billing rates for specific positions
6. Benefits and Compensation
7. Marketing efforts
8. RFP's – Average cost to develop, percent resulting in business.

Final Thoughts

The member surveys discussed here have been presented as discrete units. The reality is that often we will combine different elements within a single survey.

However, my advice is to keep the survey as focused as possible. The most important step in any survey is to clearly define your objectives.

As you think about your member survey, continue to ask yourself…

Why are we conducting this survey?

What are my key information needs?

How will I use this information or what actions will I take based on the information that I gather?

About the Author

Bramm Research Inc.
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Gerald Bramm has operated Bramm Research http://www.brammresearch.com for more than 20 years. The firm works primarily with associations, business publications and B2B companies. He has worked on hundreds of projects both in Canada and the U.S. and has experience in all types of survey research, from large-scale online surveys to focus groups and individual interviews.

Gerald is a member of the Canadian Society of Association Executives (CSAE) and is the research partner of the Trillium Chapter (Ontario) of the CSAE. He is also a member of the American Society of Association Executives (ASAE).

Gerald has been a member of the MRIA (Marketing Research and Intelligence Association) for 26 years. He holds the CMRP designation (Certified Marketing Research Professional).

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