1:1 Association Marketing

Let's Get Personal

A STEP-BY-STEP GUIDE TO LEVERAGE PERSONAS AND DRIVE MEMBER ENGAGEMENT

REAL MAGNET

Attract. Engage. Deliver.

1:1 Association Marketing: *Lets's Get Personal*

Nowadays it is rare to read a marketing newsletter or blog and not find some mention of personas - with good reason. Association members' inboxes are overflowing with messages competing for their time, attention and wallet. Last year, in fact, the average business user received 123 emails per day, more than 15 per hour in a typical work day.

Unless those emails deliver targeted information that is relevant and interesting to the recipient, there's a good chance they will die a swift death in the trash folder. Industry studies show that nearly two-thirds of association emails on average go unopened. Applying personas to your email campaigns is one key step to ensuring your emails stand out from the rest.

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What is all this talk about personas?

The term "persona" may sound like highfalutin jargon, but really it is just the latest term for what always has been Marketing 101: Know your audience, and deliver what is interesting and relevant to it. While the concept of personalization is old-school marketing, the techniques available through today's marketing automation technology make personalization easy for even a one-person association marketing department. Personas provide structure to your personalization strategy by painting a composite of the various segments of your membership. By understanding their roles and responsibilities, motivations and drivers, you can create meaningful dialogue with them.

Bringing personas into your marketing strategy doesn't have to be hard. Here is a four-step guide to creating and leveraging personas.

Step One.
Define your membership.

There are many ways to slice and dice your membership data, but you must start with who you are as an association. If yours is a trade association, membership is held in the name of the organization which pays the dues. Within your trade association membership, demographic groupings can be built based on such things as the member organization's revenue, number of employees or geographic business scope (local, regional, international, for example). Professional associations or societies, on the other hand, comprise individual members. If that is your niche, you can begin to segment those members by such demographics as where they are in their career (student, early career, emeritus, and so on) and by their specialization within the industry.

Member scoring is another valuable tool for segmenting your members. Highly engaged members, as reflected by higher member scores, likely are further down the sales funnel as potential buyers of value-added member benefits. How you communicate with them will be quite different than communications to an inactive member or to one who is new to your association.

But just defining your membership demographics does not complete your personas. Demographics answer the "who" or "what" of your membership but not the "why" and "how" that you will need to form your composite personas. The whys and hows are the behavioral characteristics that members share.

There is no right or wrong answer for the number of personas to develop, but two important tests are:

❶ *Is it meaningful?*

If I create a persona for this type of member, will it make sense to others (and to me) in a year from now? Will this be recognizable?

❷ *Is it manageable?*

If only a handful of members are in a persona, it's too specific. A good rule of thumb is to start out small, with no more than three to five personas, and expand over time as you get more comfortable with the process.

Step Two. Uncover the data.

Of course, this all sounds great – but where do you find the information you need to build out your personas? Actually, your association is a treasure trove of data if you know where to look. You may be surprised at what you can uncover with minimal sleuthing. Here are some good sources to get you started:

Membership applications are a great place to start gathering the "who" and "what" answers. The key is to be sure your application is asking the right questions.

Your AMS or CRM systems are good sources to spot potential persona groups. Some to consider are committee members and volunteers; members who actively advocate or speak on your behalf; members of special interest groups or communities; you get the idea.

the best insights come from your members themselves

Rely on subject matter experts. Ask your colleagues for input from their respective areas – what commonalities do they see in the members with whom they interact?

Go to the source. To understand the "why" and "how" themes within your membership, the best insights come from your members themselves. If you conduct an annual member satisfaction survey, scour it for nuggets. Meet one on one with members or host focus groups using a persona checklist or worksheet to ensure you gather useful information. (An example persona worksheet is included in the Appendix.)

Step Three. Document your personas.

Once you have uncovered data about your personas, you need to document them in a way you and your team can easily reference. Your personas can be a simple Word document, or an infographic that paints a picture of the types of members comprising that persona. These serve as a guide when framing messaging, developing calls to action, even writing subject lines.

Like the number of personas themselves, your persona documents should pass two primary tests: Is this format understandable to others, and is this a format that I can manage over time? We've provided two example formats in the Appendix.
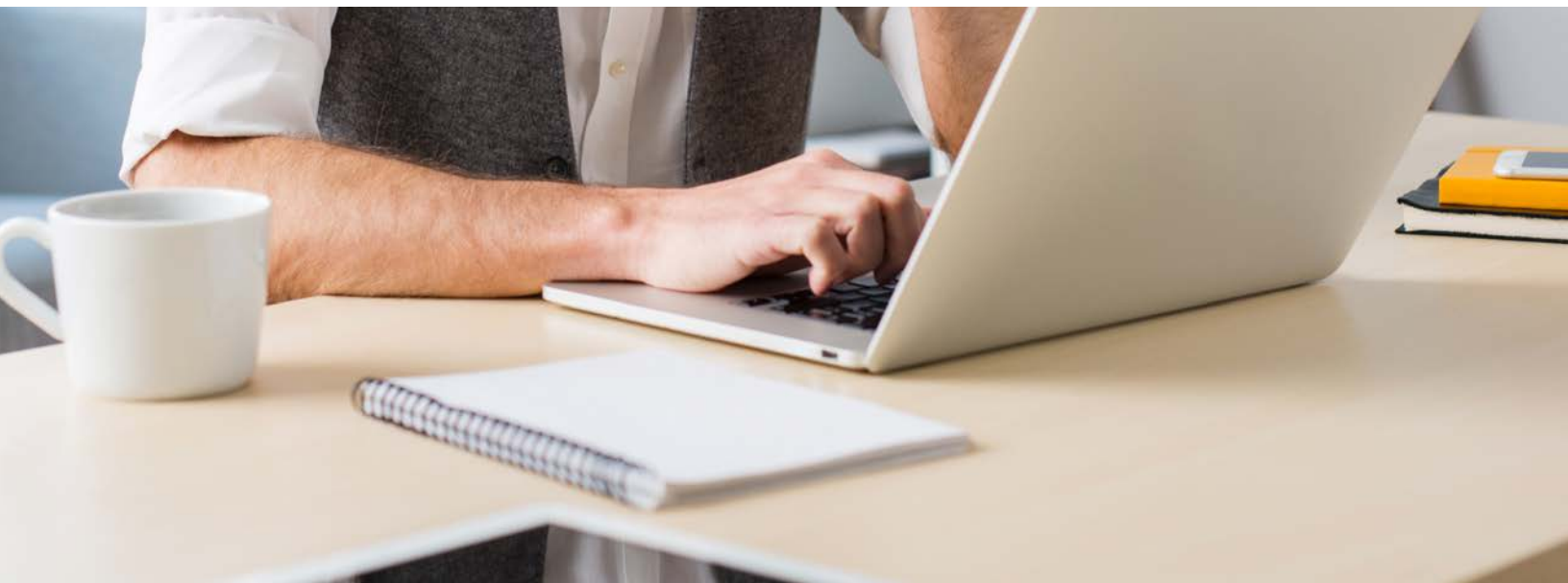
Step Four. Put your personas to work.

Your personas form your basic understanding of who your members are, what motivates them, what will resonate with them. Now that they are developed, you can deliver more useful, relevant content to them. How?

Marketing automation enables you to take what you know about various personas, and customize your messages – from simple drip campaigns to more sophisticated dynamically rendered content. Marketing automation puts structure around your marketing and enables you to do multiple things with less effort. Two advantages to using marketing automation are the ease it provides for:

Dynamic content. This sophisticated tool enables you to create one campaign, but with sections of dynamically rendered content that target specific personas. The dynamic content might be a paragraph in the email body, or it could be a call to action, sidebar, special offer, or even a graphic. Instead of creating multiple individual emails, with dynamic content, you can do the heavy lifting of writing the bulk of the campaign once, identify where you want dynamic content and to which audiences, develop these variations, and launch the campaign.

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When the Entomological Society of America started incorporating dynamic content into its email communications, it started with a single email – the thank-you notes sent to reviewers of journal articles. Using dynamic content, the team could create the core content for one email and then swap out content customized to specific journals, enabling them to thank all reviewers at once. Over time, the ESA incorporated dynamic content into event marketing, by sending variations on one webinar invitation to both members and non-members.

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Segmentation. Even if you don't incorporate dynamic content, marketing automation makes the job of segmenting your campaigns easier. Just as you do when developing your conference education tracks, look at your audiences and customize your offers and segment to your various personas.

Combining both approaches, however, is where marketers really begin to see payoff. For example, when the ESA combined personalized data and dynamic content in its membership renewal campaign, it saw a 3% uptick in renewals immediately. Using the combined approach for its member e-newsletter, open rates climbed to nearly 37%, a 13% jump over the same newsletter sent through their prior tool.

In the same way, ESA's annual conference email campaigns have generated twice the number of paper/poster submissions as its previous emails, and helped ESA achieve the highest conference attendance in its history.

Bottom line.

Don't be intimidated by personas. Start small. Keep your personas simple and manageable. Refine and expand over time as it makes sense. Leverage marketing automation to help you work smarter, not harder. Even if you don't use marketing automation, you still can benefit from the personalization insights that personas will uncover. Regardless of your approach, personas are a proven tool to help your association remain relevant to members and keep them engaged.

Appendix 1

Persona Development Worksheet:

Here are some examples of items you may want to include when developing your personas. Depending on the nature of your association and membership, you may want to add or modify items.

- Education level

- Years in industry (or career stage category – early, seasoned, etc.)

- Job title or role

- Career specialization (for professional societies)

- Your organization's size (number of employees, offices, etc. – for trade associations)

- What are your biggest frustrations and challenges – pain points?

- What work-related issues keep you up at night?

- Industry news preferences

- Social media channels you use

- Preferred communication methods

- What are your most urgent needs (problems to solve right away)?

- What are your goals and objectives (what do you want to move towards)?

- How did you hear about our association?

- What inspired you to join?

- What association activities, products, services are most enticing to you, of most value?

- Buying concerns? What do you base purchasing decisions on?

Appendix 2

Persona Template Example:

Here is the first of two example persona templates to illustrate how you might document and use personas. This is for a persona we're calling "Mary Academic", who is a member of a professional society for female chemists.

Simple document outline: Persona – Mary Academic

- Education level: PhD

- Career Stage: Tenure Track or Tenured

- Job title or role: Assistant/Associate Professor, Professor

- Career specialization (for professional societies): All specialties

- Employer: College or University

- What are your biggest frustrations and challenges – pain points?

  - Keeping up with the need to publish

  - Finding graduate students to advise / mentor and managing their work

  - Preparing engaging lectures for undergraduates

- What work-related issues keep you up at night?

  - Concern about being scooped by another researcher in my field

  - Achieving tenure (for those who do not yet have tenure)

  - Receiving poor teaching reviews

- Industry news preferences: Trade Journals

- Preferred social media channels: Facebook, LinkedIn

- Preferred communication methods: Email

- What are your goals and objectives (what do you want to move towards)?

  - Tenure (for those who don't yet have it)

  - Full professorship

  - Ensuring that high percentage of graduate student advisees receive their doctorates

  - Professional recognition for research

- What association activities, products, services are most enticing to you, of most value?

  - Networking events / conferences

  - Job listings

  - Speaking opportunities

Appendix 3

Persona Template Example:

Here is the second of two example persona templates to illustrate how you might document and use personas. Again, this is for the persona we're calling "Mary Academic", who is a member of a professional society for female chemists.

Infographic format: Persona – Mary Academic

MARY ACADEMIC

Education level:

PhD

Career Stage:

Tenure Track or Tenured

Job Title or Role:

Assistant/Associate Professor, Professor

Employer:

College or University

Preferred social media channels:

Facebook, LinkedIn

Preferred communication methods:

Email

Key information:

Mary Academic needs to regularly publish original research to maintain her position. In addition, she needs to attract and mentor graduate students who will perform much of the research. She is also required to teach undergraduate classes. Her employer will measure her performance on whether her graduate students receive their PhDs and on undergraduate reviews of her teaching. She enjoys networking with her colleagues and speaking at professional conferences.

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