



3 Keys to Success for Modern Associations:

Relationship-Building Secrets
that Drive Acquisition, Engagement,
and Retention





What we'll cover

It's no secret that the world has changed a lot lately, but successfully adapting your operations, attitudes, and strategies to thrive in the modern world isn't quite as obvious.

How can associations navigate today's challenges while building thriving member communities and making a positive impact? In this eBook, you'll learn simple, yet powerful ways to turn obstacles into opportunities in order to enhance your mission and membership across the live and virtual landscape.

In the end, you'll walk away with a three-step guide to success as a modern association – a foolproof plan no matter what the world has in store for us next.



Associations in a challenging time

The digital wave made its way to the association landscape long ago, spurring advances in the way our organizations leverage technology for communications, member management, and events. Then in 2020, the challenges of digital transformation were compounded by global events that prevented us from providing the services and experiences that inspire our communities, advance our missions, and provide the revenue needed to grow. According to the [Association of Fundraising Professionals research](#), as many as 70% of charities projected a pronounced drop in revenue in 2020 and beyond. A report by the Institute of Association Leadership, [Events, Associations, Covid and Crises](#), found that 46% of association executives canceled their organization's largest event in 2020, while another 46% held the event online.

What can associations do to keep pace with rapid change, digital demands, and an unpredictable economy?

Let's start by defining the goals modern organizations should target and how they can measure success.

What are modern association goals?

Some might call this a trick question. Although the world has changed, association goals are still the same:



Recruitment



Engagement



Retention



Revenue

Whew! Now that we know our fundamental objectives haven't changed, let's dive into three key ways you can accomplish – and even exceed – your goals, now and in the future. »

Secret to success #1

Focus on the why, adapt the how.

No matter the circumstance, humans have a strong desire to connect. Throughout history, the ways we engage with one another have changed, but the fundamental need for connection always remains.

The same principle applies to modern associations. Organizations that have focused on their 'why' (doubling down on their core mission) while adapting their 'how' (delivering on the mission in flexible ways) have actually enhanced relationships with and across their communities in the last year. For example, professional associations that amped up their job board, networking, and career development offerings with convenient cloud-based tools became indispensable resources for their members.

On the other hand, organizations that struggled to translate their why into how have suffered. Associations must become skilled at applying the right engagement context to deliver on their missions and member expectations.

Check out [this blog post](#) on finding your why.

“Covid made us more adaptable and resilient but it hasn’t changed the mission for most organizations. In fact, when capitalized on appropriately, the pandemic enhanced association membership. It became an accelerant for moving forward and leveraging the digital space more strategically.”



Mark Sedgley
**CHIEF REVENUE
OFFICER AT PERSONIFY**

Making new challenges work for your mission

The Academy of Communication in Healthcare (ACH) strives to increase accessibility, equality, and diversity within their membership. In the forced pivot to virtual in 2020, this organization achieved their highest number of international members in attendance. Well done!

To build on this win, ACH staff have explored more ways to deliver events and services virtually when it strategically serves the mission.

Interestingly, some organization members still expressed eagerness to “getting back to normal,” failing to recognize how the new delivery strategy furthered the mission.

The Institute of Association Leadership describes this phenomenon (and how to shift to a future-focused mindset) in their December 2020 report:

“[Associations] that have focused on delivering high-quality content rather than focusing on delivery models have seized the opportunity to continue adding value to their member’s experience and have enjoyed lower levels of financial disruption. Indeed, some have benefited from enhanced income and impact.”



Secret to success #2

Look for opportunities

As you've just learned, sometimes challenging circumstances can unlock innovative ways to better serve your member community. Here are a few tips for turning these happy accidents into a strategic practice in your association.

THINK OF DIGITAL SPACE AS AN OPPORTUNITY, NOT AN IMPEDIMENT.

Having to rethink your "how" can create opportunities to expand engagement and revenue. It may be impossible to replicate an in-person event in the digital space, but consider which aspects of a live event and member goals fit well into the virtual environment. For example, completion and delivery of continuing education credits translates online seamlessly and offers members increased convenience and variety.



“Successful organizations will have a highly refined focus for their experiences – whether online, in person, or in a hybrid format – and will deliver them exceptionally well.”

Rich Vallaster

**DIRECTOR OF MARKETING,
EVENTS MANAGEMENT SOLUTIONS**

**DON'T TRY TO DO EVERYTHING
IN ONE EVENT.**

Modern associations must optimize the experiences they offer by assessing what can feasibly be accomplished online versus in person. You should be sure about the purpose of your event and include only what contributes to it as this will save you time and money and bring more impact to members.

**OPPORTUNITIES DON'T MEAN
MORE WORK – JUST DIFFERENT WORK.**

For many organizations, the shift to the virtual environment has created fears and challenges around revenue. However, associations must understand that this is a monetization challenge, not an opportunity challenge. Through this lens, it's easier to discuss smart ways to overcome seemingly insurmountable problems. In other words, work to understand the true root of each challenge you face and then innovate rather than battling to return to the status quo.

“It comes down to using technology to do the heavy lifting, then pointing limited resources in the right directions.”

Phil Dolan

CHIEF MARKETING OFFICER AT PERSONIFY

Secret to success #3

Listen to your members to understand their evolving needs

It's hard to make the most of emerging opportunities if you don't know where to look for them. More than ever, associations must tap into their communities to align their offerings with what members want and need.

In connecting with this well of insights, you'll likely learn that consumer expectations have significantly changed. Association members now expect some services, experiences, and content to be delivered online so they can connect with you and their peers anytime, anywhere. You're also sure to learn about the challenges your members face, giving you a prime opportunity to add value to your membership (and profits) by developing solutions your community will love.



The 3-step guide to modern association success



Step 1

Focus on the **why**,
adapt the **how**.

Step 2

Look for
opportunities.

Step 3

Listen to your
members.

Leaving a legacy that makes you proud

Ultimately, your guide to success as a modern association comes down to one thing: meaningful relationships. Each secret to success is driven by empathy and a desire to create connections with and between your members.

Leading with relationships doesn't just feel good – it makes good sense (and dollars). Investing in relationships in all of your activities drives member loyalty; that translates to more renewals, repeat event attendance, and greater lifetime member value for your association.

It's not a badge or the swag or certificates hanging on the wall that build thriving association communities. It's you. Just follow our three relationship-focused secrets of success and you'll not only grow your membership and your revenue, but you'll also leave a powerful legacy behind you.



“Contracts are only as good as the people who sign them.”

Forbes

WHY RELATIONSHIPS MATTER MORE THAN SALES

Grow a stronger community. Leave a lasting legacy.

Personify helps you manage and grow your community with integrated software solutions that strengthen the connection between your organization, your members, and your mission.

CONNECT WITH SOMETHING GREATER.

We promise to become your true partner – dedicated to facilitating the growth of your organization, your community, and your ability to drive your mission forward.

WE'RE IN THE RELATIONSHIP-BUILDING BUSINESS.

Looking for a committed, understanding partner to help you grow? Let us mix, match, and mold our Community Experience solutions to meet your emerging needs and help you create better relationships with your community. We love to listen, and there's nothing we find more gratifying than deepening the connections that drive your success.

[LET'S TALK](#)



We build strong connections with our customers so they can build strong connections with their communities.

70K+ organization staff use Personify solutions every day.

25% of the U.S. population interacts with Personify through associations, events, and nonprofits.

20 years of industry leadership make Personify the trusted choice for a technology partner.

