

# 10 REASONS WHY MEMBERSHIP ASSOCIATIONS NEED A CRM



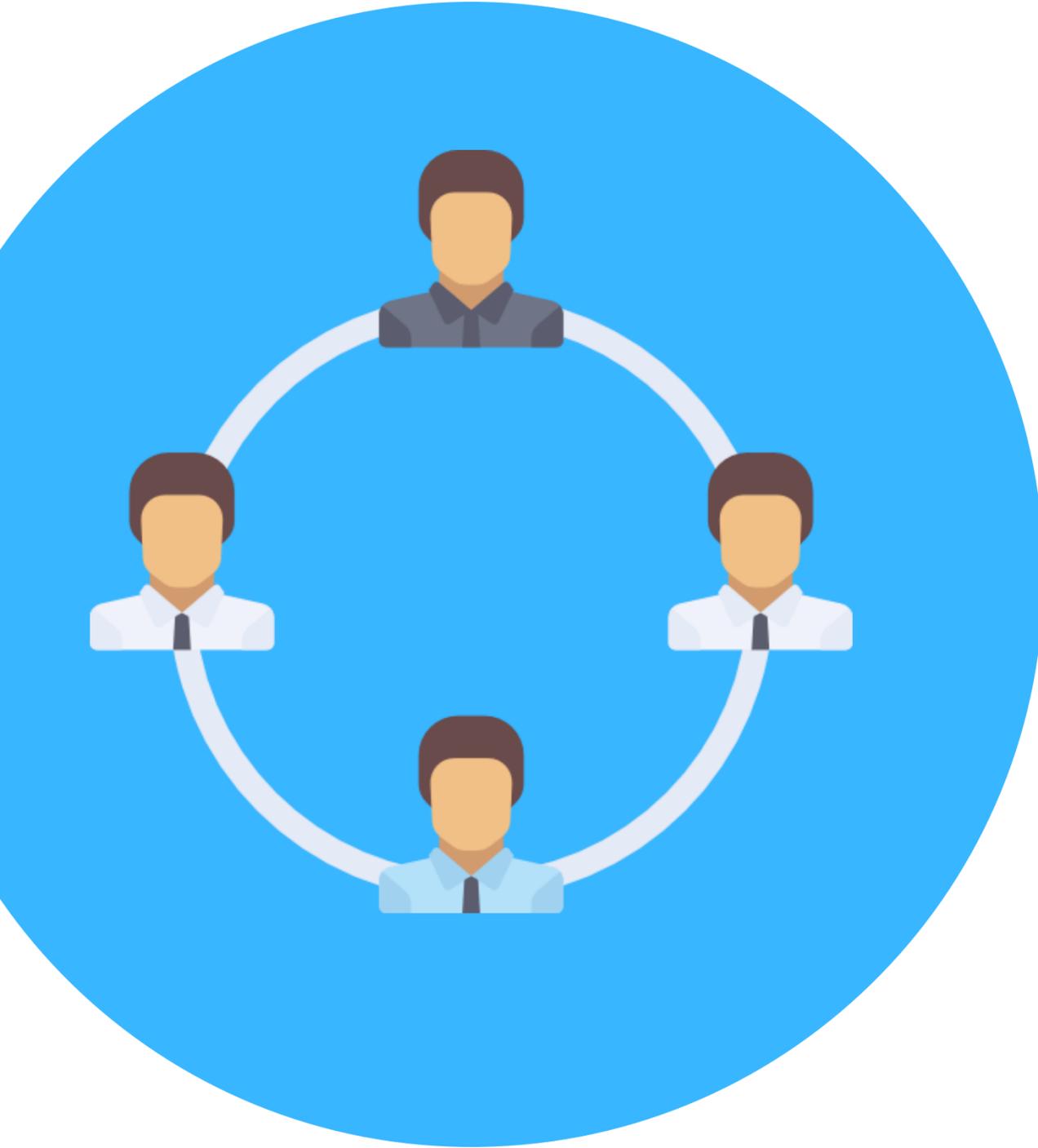
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# TABLE OF CONTENTS

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## 10 REASONS WHY MEMBERSHIP ASSOCIATIONS NEED A CRM

- #1 - One End-to-End Solution
- #2 - Better Manage Your Member Lists
- #3 - A 360 Degree View of Members
- #4 - A Customer Portal
- #5 - Targeted Marketing Messages
- #6 - Managing Education Requirements
- #7 - Event Management
- #8 - Automatic Membership Renewals
- #9 - Social Media Tracking
- #10 - Increased Revenue with a Storefront



# IS IT TIME TO MOVE TO A CRM?

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ASSOCIATIONS ARE OFTEN EXPECTED TO  
DO MORE WITH LESS RESOURCES.

With greater demands for transparency and efficiency than any other time, it is imperative that Associations fully utilize all the resources at their disposal to get the job done.

It was with those challenges in mind that CRM Dynamics spoke to leading members of the Association field to learn more about what was needed from a CRM system. What we found was that many leaders in the field were choosing to avoid large, all-in-one CRM solutions, opting instead to piece together several different smaller systems to accomplish many of the things they needed.

Although there was a variety of reasons expressed, two key themes did emerge.

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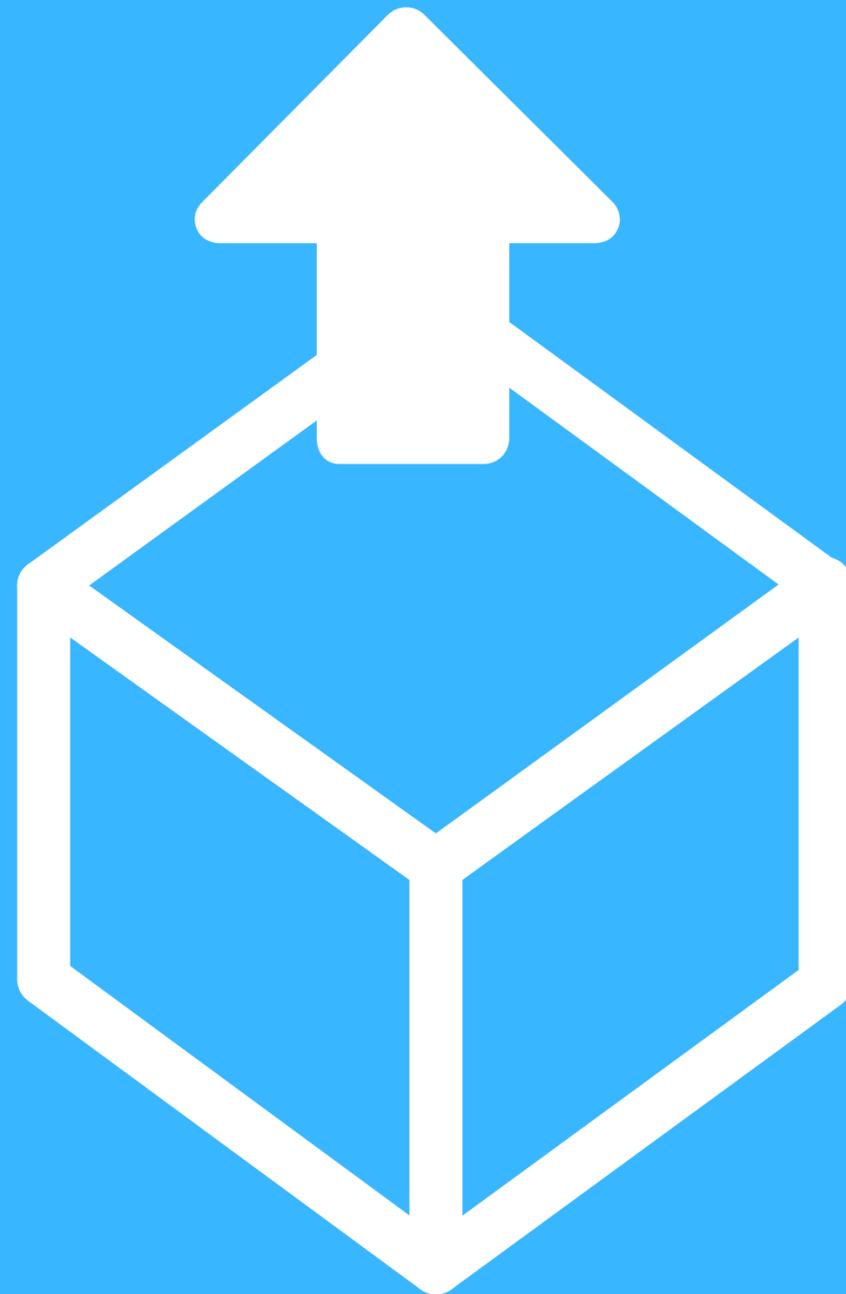
Many felt that they didn't have the resources required to properly train their staff to use the CRM solution properly. Without that ability, it was felt they weren't getting enough value for the investment.

The second issue was cost. A fully customized CRM project was way outside the budget for many Associations. Ultimately, they were willing to sacrifice quality in their systems in exchange for a lower price.

However, it was agreed that a CRM solution offered the best capabilities and if it was affordable they would be open to purchasing it.

# WHAT IF THERE WAS AN OUT-OF-THE-BOX SOLUTION?

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That's why CRM Dynamics has developed the Dynamics Associations Blueprint (DAB), an out-of-the-box, Microsoft Dynamics CRM solution that can help your associations reach the next level. The CRM solution addresses the two main concerns expressed to CRMD in the focus group plus other challenges. It is designed as a straightforward CRM that can be implemented at a much lower price point than the leading software on the market.

Again, it was agreed by those in the field that there simply is no better way to run an Association than with a CRM. The cost might be higher, but the efficiency it provides allows Associations to grow and thrive in this new, digital world. And, by reducing the amount of time staff are forced to do administrative tasks -- as a CRM does -- there is more time to take care of an Association's core mission -- serving its members.

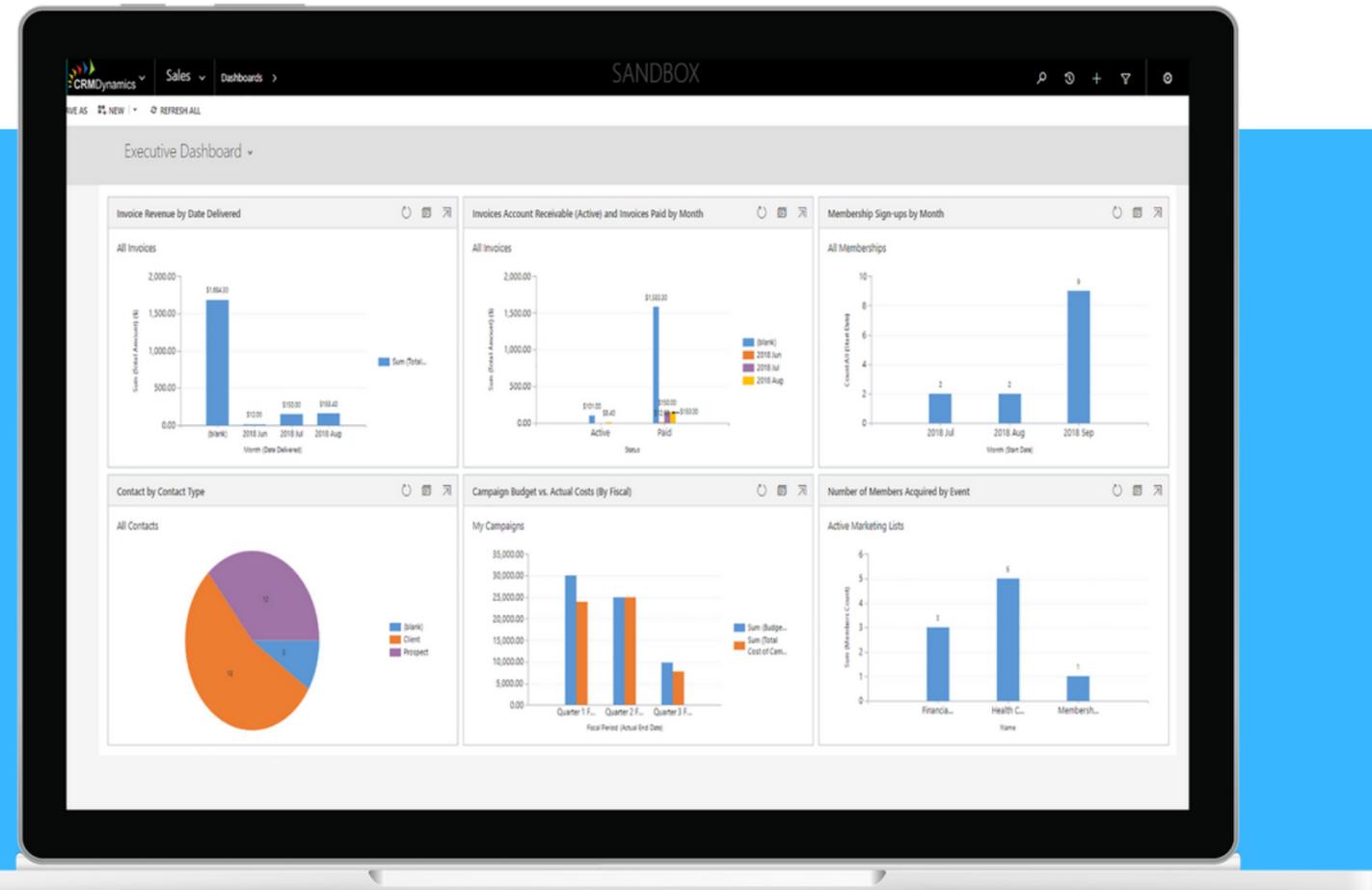
STILL NEED SOME CONVINCING?

HERE ARE

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**10 REASONS WHY  
MEMBERSHIP ASSOCIATIONS  
NEED A CRM**

# #1 - ONE END-TO-END SOLUTION



Most associations have a number of systems where you have to enter the same information multiple times just to manage the day-to-day aspects of the organization. When you create an event it affects your accounting system, marketing system, and website.

Imagine creating an event in single step on a single system. There, it automatically becomes visible in your internal system and on your website at the right time.

All of this means that your total workload is cut in half. Allowing you to focus on what really matters – helping your members and meeting your association goals!

# #2 - BETTER MANAGE YOUR MEMBER LISTS

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The most obvious benefit of a CRM system for a Membership Association is the ability to efficiently manage membership lists. Often when Associations are using a legacy system or Excel, doing anything with the list can be a daunting experience. A sea of thousands upon thousands of names that just blur on a never-ending scroll on your screen. Staff and volunteers feel defeated before even starting their task.

With a CRM system you can see your entire member list and easily sort it into logical and manageable ways. In turn, your staff and volunteers are able to do tasks quicker and your members aren't being contacted unnecessarily.

Let's say you run an organization that supports tradespeople. Although they all may work in a similar area, there may be different sub-industries within the overall umbrella. A good CRM will allow you to create easily manageable lists that are divided up into those sub-industries. You can sort by any number of classifiers – gender, age, experience, membership type – anything you can think of.

Basically, CRM can make the job of serving your members easier.

# #3 - A 360 DEGREE VIEW OF MEMBERS

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You'll have fast access to a members history and a single view of all of their information. It's not enough for a Membership Association to just collect dues and compile a big list of names. It's important to serve your members in a tangible way. Otherwise, members will just drift away the next time dues are owing.

Understanding a members' history of interactions with your association is key to providing them with the best service possible. Members that feel well served are happy to pull out the credit card once a year to continue their association membership.

Let's say a member has shown interest in a continuing education course in the past – you can let them know when the next offering is. You can even offer a discount to members who sign up for multiple courses as an incentive.

Maybe third party offers are something that your association does. With a CRM you can track what offers appeal to what members and target appropriately. One member might only respond to travel deals. Another may only like sports tickets. Yet another might not respond to any third party offers. Regardless, a CRM system will allow you to better understand your members' wants and needs.

By understanding your member's history, you can ensure a future relationship with them.

# #4 - A CUSTOMER PORTAL

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The biggest drain on human resources at most associations is dealing with the day-to-day needs of their members. Things like answering questions, processing payments, selling seats to events etc. can take up a lot of the work day. Instead time could be better used growing the association and creating more opportunity for the members.

The frustrating thing is that those tasks can be done by the members themselves. This can be achieved with a CRM-driven portal. The customer portal not only lets members pay dues, register for courses/conventions and look up basic information, but it also keeps the association at front of mind. It's right there on their phone or tablet reminding them of all that you do for them every time they look at it.

# #5 - TARGETED MARKETING MESSAGES

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One of the best ways to communicate with your members is through a newsletter or blog. You can provide both practical and fun information that is relevant to your members in a timely and helpful fashion.

However, that only works if the publication gets read. And, the reality is that most people today end up ignoring half of what gets sent to them because they simply don't see its value, or haven't been convinced of it. That's likely because they haven't been properly targeted.

Just because a member ticks a box that says they are willing to be contacted, or agrees to be contacted doesn't mean they have agreed to actually read what you send them. For that to happen you need a more active buy-in from the recipient.

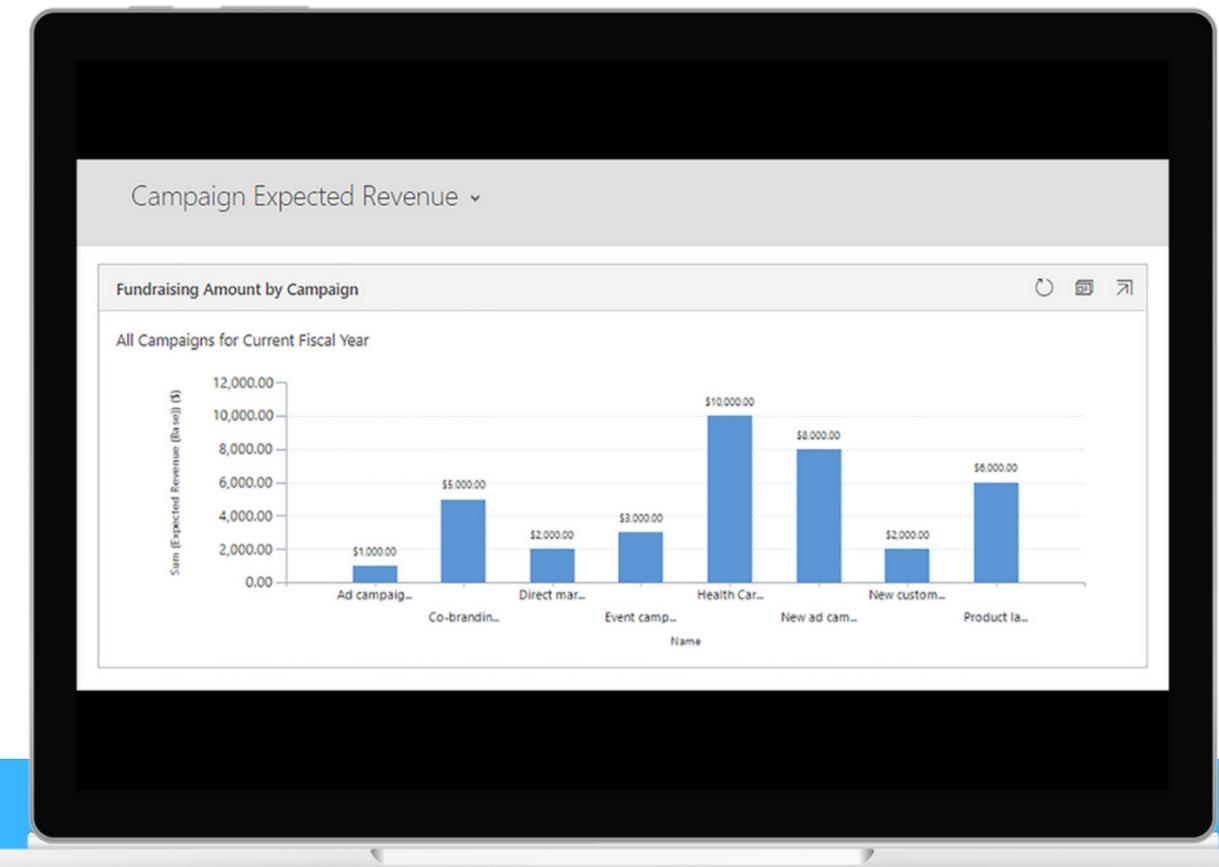
You can get that by using the capabilities of CRM to identify what individual members have been receptive to in the past and then grouping them into distribution lists with like-minded members. Then it's a simple case of developing tailored campaigns that will speak to each list which doesn't necessarily involve a lot of extra work. You can often simply re-arrange the presentation of newsletter so that stories that speak to the members are highlighted. You're sending one newsletter, just organizing it in many different ways.

If you do that effectively your material will get read more often. But, maybe your marketing is targeted more towards fundraising. Certainly, that's the case for a lot of associations.

Marketing lists with CRM will offer the opportunity to target very specific donors for campaigns that appeal to them, you also have fingertip access to their giving history. You may even have demographic information that can provide you with insights into what level of donation you might expect.

High end donors can be identified and events created for them to entice even greater levels of donations. More mid-sized donors can be nurtured into increasing their level of commitment ever so slightly by simply asking. If you know they gave \$100 last year – and a CRM can tell you that – You can send them a personalized appeal asking for \$125 this year.

You can even make it easy for first time donors to get involved by adding an option in their fee renewals to give a small amount during that process. Once they commit the first time, you can then add them to the nurturing list for the following year so that you can better show them the good work that their donation allows for.



# #6 - MANAGING EDUCATION REQUIREMENTS

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In many industries, there are continuing education and licencing requirements that you must accomplish in order to remain employed in that industry. Providing these opportunities or assisting members in obtaining them is a key service that associations should aspire to provide.

One way a CRM can help is by keeping track of what each member has accomplished already and what they need to move forward.

Let's say a member must complete 10 hours of continuing education each year and take a licencing exam every three years. A CRM will know if that member last took the exam 2 years ago and that they have completed six of the 10 hours this year.

Sometimes there might be educational videos that a member is required to watch - these might be short training videos, or safety related. In the past, you had to either trust the member to truthfully report whether they had viewed the video, or ask them to complete a quiz that demonstrated the required knowledge was obtained. With Dynamics Association Blueprint, you can actually track directly from the video if it has been viewed by the member and then store that information automatically into the CRM.

# #7 - EVENT MANAGEMENT

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Each year associations will often look to run events that are of benefit to their members. That could range from a small retreat for leaders in the industry to a speaking engagement by a well known industry expert to a massive annual convention. Sometimes all three and more!

With a CRM you can easily manage all logistical aspects of your events. Starting with marketing, you can narrow down your invite list to target only those that would benefit from attending and continuing through to registration needs.

Payments can be directly processed through CRM and third party hotels, car rentals or travel deals can be offered.

It's great for the association because it cuts down on the amount of resources you need to organize the event.

Additionally, members like it because they can make all the arrangements simply, in one place.

# #8 - AUTOMATIC MEMBERSHIP RENEWALS

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No one likes to chase people for money. It's time consuming and uncomfortable for all involved. However, for a membership association the collection of fees is absolutely vital. Without fees, nothing gets done!

A CRM makes annual fee collection simple. Everything is automated. At the start of each month you can set up the system to send out reminders to those that are getting close to renewal so that no one is caught off guard. You can even add a discount for members that chose to pay by automatic

renewal from their credit card to encourage them to do so. If someone has forgotten to pay on time you can easily create a time frame that sees their membership go from fully active, to partially active to suspended. These changes will be communicated to the member in a timely and fair manner.

Not only is that better for the association, but for the member as well. It's easy to forget when fees are due. A gentle reminder a month or so before helps the member plan ahead so as to not have a lapse in their membership.

Additionally, the ease of fee collection can allow associations to offer a tiered fee structure with little to no extra work. You could have a retired rate, student rate, or even offer discounts to members who complete certain courses through the association.

# #9 - SOCIAL MEDIA TRACKING

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It's impossible to ignore the world of Social Media today. It influences everyone and everything. However, it can be very difficult for an association with limited resources to track Social Media and to figure out what to do with the information they find.

With a CRM you can let the software do the heavy lifting. You can learn what is being said about your association and your industry on Social Media and then evaluate it. Knowing what is being said online allows associations to stay ahead of industry trends and to react to perceived shortcomings in the services provided.

Members will feel that their concerns are being heard and more importantly, listened to.

With a CRM system, your Social Media team will have the knowledge to participate in the conversation online with your members. Social Media accounts that are interactive are far more likely to be followed and taken seriously by the average user.

One of the biggest challenges for Membership Associations today is reaching potential members from the Millennial and Generation Z age bracket. The other great thing about Social Media tracking is that it can really help associations that are struggling to reach younger members.

The bottom line is that you need to do work to recruit younger members and a CRM can help you with that.

# #10 - INCREASE REVENUE WITH A STOREFRONT

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The advantages of having a storefront are obvious. Your association makes a little extra money while providing your members with access to hard to find items that are needed in their field.

Throw in a couple t-shirts with the association's name on it and you've even got a free marketing push as well. However, for many the hassle of running a shop has prevented them from doing so.

With a CRM it's easy. You can process payments, calculate shipping costs, and accurately predict inventory needs. You can basically have everything at your disposal to run a successful shop!

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At CRM Dynamics we don't view our clients as customers, but rather as partners. That is why we spent months talking to Membership Association professionals to learn what it was that they needed in a CRM solution. Dynamics Association Blueprint (DAB) is the result of that research. Every feature is designed to address an issue that those working in the field identified as being a significant pain point.

That includes pricing. We recognize that a fully customizable Dynamics 365 package is outside the budget of a typical Association. Although customization is still possible, DAB has been designed to effectively address the needs of most Associations out-of-the-box. With DAB you do not need to settle for systems that only partially work for you. This is a powerful CRM solution designed specifically for Membership Associations.



For more information on CRM Dynamics and our products please visit [CRMDynamics.ca](http://CRMDynamics.ca), email [sales@CRMDynamics.ca](mailto:sales@CRMDynamics.ca), or call +1 866-740-2424.