

**2016-04-04-14.54-Attract-Recruit-and-Engage-New-Members-with-a-Marketing-Funnel**

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Lori S: Hello everyone, hope you can hear me okay. Welcome, welcome to Wild Apricot's Membership's Growth Online Summit. We're really excited to have you all here today 'cause this is the first time we've held a summit, which means there's a free webinar every day this week. So, congratulations, you've joined the very first one the first day of our summit, so welcome.

So, today's webinar we're kicking things off with John Haydon who's going to tell us how you can set up an online marketing funnel. And we've focused specifically on how to attract and recruit members so you've come to the right place if you want to learn about funnels.

And well we're just waiting for people to log in I'm going to introduce myself. My name's Lori Smith, I'm the community manager here. And on chat to help you with your questions or technical issues is [Terry Ibell]. And just as a reminder you as a participant are muted but we encourage you to use your chat box, which you can see right here, to ask your questions. And we're going to try and make this webinar as interactive as possible.

And finally please to Tweet about this, share your thoughts, your insights or just tell people to sign up for the rest of the summit. Our hashtag is [@wasummit2016](https://twitter.com/wasummit2016) and if you're earning CAE credits by attending today you can earn one credit and Terry will share a link to that.

Finally we are recording this and will be sending out the recordings to all the webinars next week. So, just relax and enjoy everything.

So, now I'm happy to introduce John Haydon. John helps non-profits and associations with social media and digital marketing. And he's actually the go to guy for Facebook and actually literally wrote the book Facebook Marketing for Dummies. He also - he's got a ton of online trainings available that he'll tell you about at the end of his session. And he's got a new book coming out in 2017 on online fundraising. So, lots of good stuff.

And outside of work John can ride a unicycle as well as a bike backwards, which is very exceptional, so multitalented guy. So, without further ado, John welcome, welcome to the growth online summit and thank you for being here with us today.

John H: Thank you so much, I really appreciate the invite. So, I guess you're going to pass me control, yep. Here we go, I'm going to show my screen, beautiful. Yeah, I've actually won a lot of bets, easy money, betting kids that I meet saying hey, I bet I can ride your bicycle

backwards. I bet you five bucks, oh I'll take that bet. So, maybe I should make a career out of that.

Lori: That's a good bet.

John H: I know. So, welcome everybody. So, I will - we're going to talk about attracting and attaining members by using a marketing funnel, so basically this is a process to build a funnel where you're effectively engaging people and converting people into members. Now we're going to cover a couple of topics today then Lori will actually be monitoring the questions box along the way. So, that if there's anything that's unclear, I'm going to pause every now and then to answer specific questions.

So, the first we're going to cover what is a member funnel first of all, right, just to level the playing field. And then we're going to talk about people, human beings that what makes them decide to do things and take that next step? And then we're going to go through the process of building a member funnel for your organization. I'm not going to get into the specific software and the technology piece of it but basically the process and the important components of a member funnel and then we're going to finish up with five ways to measure funnel health.

So, first question is pretty obvious. What is a member funnel? So many of you have seen this image before I'm sure, very versions of a member funnel or a marketing funnel or a sale's funnel and it looks like this. Okay, so at the top we have, you know, we're basically attracting and kind of sending people to the top of this funnel using a number of different marketing channels like advertising, search engine optimization, social media and so forth. And at some point we want to capture them. So, the first part of the funnel is capture and then we're going to nurture them. Now obviously a lot of people that say hey, we're interested me might capture their email address. You know, and we might send them a few email messages.

But not everyone of them of course is going to become a member, right? We all know that. So, that's why the funnel at the bottom is very narrow. So, you put a lot of people in the top of the funnel and at the bottom is what you get the money, right, people becoming members. So, this is, you know, it's a useful model. That's really the point of the member funnel is really kind of forces you think in a very member centric way, right?

So, all too often we think as marketers and as communicators, we think we've got to get the word out about our organization. If they only knew how good we were then they would join. So, we don't really understand the process that they actually go through to make decisions and we're going to get to that in just a second.

But the faces of a funnel that we're going to talk about today, the member funnel, it's a series of traffic sources landing pages and emails

that work together. So, this is a system that we're creating. And what we're doing is we're capturing interest in the form of an email address so that's what I mean specifically by capture. And then we're going to nurture that interest and build arousal. We have to get people excited about becoming a member and what that means emotionally. And then we're going to convert the new members. So, some of those people are going to be ripe and other people, they may not be interested at all but we want to identify those folks and give them the optimal opportunity to become a member. And then of course once they become a member, we're getting into the last, the bottom of the funnel, which is really partnering.

Okay, so converting is when they sign up as a member, partnering is when they're now sharing our organization with their friends. Hey, you should definitely join this association, you should definitely join this member - sign up as a member, I did and look at all these great benefits I did and you should too, right, so that gets into word of mouth marketing, which most of you know is the most powerful form of marketing that still exists today.

So, this is a big question that I'm sure a lot of you have asked. Maybe some of you stay up at night saying geez, if we could only get more people to become members, right? We have lots of Facebook fans, lots of people following us on Twitter, we've got an email list of umpteen thousand emails but, you know, only a certain percent of them are becoming members. How can we improve this process?

Well, before we go further we really have to start with the fact that we're dealing with human beings. We're not dealing with emails, we're dealing with people. So, people today as you know, if you think about your life and your own work, you're distracted. You're constantly bombarded with different messages and not only that but you have a different agenda every single day.

So, even though the retailer around the corner from your house would love to have your attention every single day, it's probably very rare that you actually give that retailer any attention at all. And it's the same thing with a member. So, your members, current members, soon to be members, they're not thinking about you all the time. They have a lot of things going on. And this is of course compounded by social media and mobile. So, this is a picture of a guy in front of a lap top but I think what might be a more accurate picture is if he has a Smartphone in the other hand, a newspaper and of course he's pouring orange juice still on his cereal. I don't know if that's a good combination. So, we can't - we have to understand that people are really distracted.

The other thing we have to really work with is that we can't approach people and say hey, you should join our membership, you should - here's why. So, if we start coming across and start pushing something too hard at people that aren't even interested, we're not even on their radar. You know, we could turn them off, okay?

Now most organizations, and I've worked with a lot of non-profits and different associations. And all too often the idea is well, if we just have a link to sign up as a member and we list all the benefits of becoming a member, that's great, right? So, but we're really not responding to their interests. So, we're basically just kind of spamming or email blasting everyone, taking out a Facebook ad and just trying to get our membership sold to as many people. So, if we're trying to see at the top of the funnel and I'll get into the different phases in a second. We can come across as too salesy or too pushy.

You know, someone's a Facebook fan, this is a specific example, someone's a Facebook fan and you start saying hey, join our membership, hey join our membership, hey you should join up as a member, here's a discount on our membership. People are kind of like hey, I'm a Facebook here. I'm just getting to know you, it's a little too early. And the purpose of the funnel is to honour those feelings and develop a membership focused approach rather than thinking we should get the word out about our organization.

So, let's dig into this a little bit deeper now. Let's talk about how do people decide to join? Now Lori I just want to ask are there any questions at this point that are kind of standing out to you?

Lori: Not yet John, we're just kind of working on technicalities so keep going.

John H: Perfect, alright, excellent. Alls fine on my end technicality wise. Okay, great.

So, let's talk about how do people decide to join? And I'm not talking about well, they go to our website and they click on a link and that gives them all the information. I'm talking about people again. The funnel, marketing funnel basically honours the fact that people are individuals, they have all sorts of interests and desires and so forth. And generally speaking, regardless of how different people are, they generally go through the same stages when it comes to making a decision, okay? And when I say make a decision we could talk about getting married, we could talk about buying a new car, choosing a college to go to or signing up as a member.

All these decisions follow a very similar path. Now in terms of consumer decisions, which is really what we're talking about here, a potential member deciding if they want to become a member, right? There's four phases that we're going to talk about and I outlined this in the funnel before. At the top of the funnel, even before everything, even before people convert, they become aware of your organization.

So, these are non members that become aware of your campaign or your event and they become aware because they search something, they do a website search or a Google search. They arrive at your website, they see a Tweet about a blog post on your website and that seems

really interesting so they become aware of your organization. At some point they say yeah I want to sign up for that free webinar or maybe I'm going to attend this free event or download this free e book or some other valuable offer, something that's in it for them. They make that decision, well let me take the next step, let me find out what else they have?

And before we went live today Lori and I were talking about Trader Joes. And I shop at Trader Joes. You go into Trader Joes and of course at the, you know, one of the counters they always have the free food. So, this is really the Trader Joes free food sample approach where we're capturing people's email. And I'm going to get into this in a little bit more overview but I'm going to give you an overview first. The next phase, and if you could see up on the top right we're building a funnel as we go.

We're starting from 30,000 feet here by the way. So, I'm just going to back up a little bit so people become aware of your organization, they join your email list but really what they're doing is they're downloading a valuable resource or signing up for that really cool free webinar. And then through email messaging, through follow up emails and drip campaigns, you're kind of peaking their interest so they attend that free webinar or they download that free e book, and automatically they're receiving these emails and these messages that say hey, if you like that you might want to check out our membership. In fact here's a discount code or some other kind of offer where you're kind of nurturing them.

And eventually some of them will convert. So, when I say convert I mean they're pulling out their credit card and they're signing up to be a member. And they do that because you've demonstrated some sort of value. First of all you've given them something value to begin with, you know, your monthly newsletter which is awesome, a free webinar, attending an event and so forth and I'll share more examples as we go on. And then so, they convert and then of course the last step is that they partner. So, they begin to recruit their friends after having a really great experience with your organization.

So, let's slow this down a little bit and get into each one of these phases of the funnel. So, the first one is become aware. People become aware of your organization. And there are a number of different ways to become aware. The example that I'm going to propose, this is just an example, is that a member, a current member of your organization invites a couple of friends to your upcoming event, which is open to anyone. Now the event is open to non-members, members, whoever it might be.

And here's an example on the screen right here, The Young Man's Business league of Austin. So, they invite friends, friends attend the event. Okay, so that's one example. They might hear about your organization on Twitter, on Facebook and some other way but they're not directly connected just yet. They don't - they have not joined your

email list, they are not in your database just yet. This is really where awareness sits.

So, non members, they don't know about your organization at all until they become aware, that's always the first stage. And our goal at this stage is really eyeballs. So, what creates awareness? When we're looking to expand awareness about our organization, and again we can dive, we can in fact this week there are webinars covering much of what I'm showing you on the screen right now.

So, what creates awareness? There are three things in my mind, stories that engage, community that raves and advertising. So, stories that engage, that means your members love these stories, they share them very easily and they're easy to find meaning people could search for you on Google and they could find your really useful information. Community that raves, that means that you have taken really good care of your members, you're doing good community management, good customer service and then naturally the feel great about you, they want to tell their friends about your organization. So, they create an awareness in that way. And then advertising, of course there's paid reach, there are native ads like on Twitter, Facebook and Instagram promoting an event that's coming up and there's also Google ads. So, advertising enhances the awareness even greater, even more awareness than that, okay?

Now the next stage, so let's say that somebody does become aware, the capture phase, and again we're at the very top of the funnel, we can see right here we're starting to build this funnel, the capture phase is when they join the email list. Now let's be really clear about this, no one wants to join an email list. If you have the greatest event in the world and you have, you know, a laptop and they say, hey would you like to join our email list? Naturally somebody's going to say well, why, why should I join the email list?

And so, the example that I'm going to share, again we're going back to this free event that the Young Men's Business League of Austin is having, and these people are invited, they're guests. They become aware of the event, oh I'm going to attend this event and at the event they join your list on a laptop. So, what I've seen done and maybe Lori and some other people have some examples is that get the show notes from this event. You know, there's some speakers, some presenters, join our email list and we will share all the presentations that have been shared. We'll create a networking opportunity for you. Sign up for our newsletter, you know, get discounts from the retailers who are supporting this event and so forth. So, there's some sort of offer that the guest sees and then of course that's the reason, that's really the motivator behind joining the list. And you've captured this email.

So, people, generally speaking, people will join your email list when you offer value, okay? You're offering value, the expectations are clear, in other words what am I going to get when I join your email list? Well,

you're just going to get our monthly newsletter and a few other items and only one email once a week. And of course the offer's relevant too. So, some examples register for this free event that's coming up, download a resource, attend a free webinar, these are really offers. It's going back to that analogy of Trader Joes. It's the sample, just to get their name added to your email list.

Now I'm going to pause here because I know somebody's asking this question right now. Somebody's saying well, you know, why should we go through all the work of having someone get our email list? Why don't we just tell them to become a member, right? Well the problem is if we think about the funnel again a very small percent of people are going to be that receptive and we know it. If this was not the case we wouldn't have this webinar, we wouldn't have the need for it.

But the reality is that we know that if we go out and we start to sell our membership on Facebook, Twitter and kind of spamming people for lack of a better word, you know, it's kind of a turn off for some people. So, what we want to do is we want to identify people that are interested and the capture phase is not only capturing the email but capturing the interest, right? So, you're recording that interest, this is someone who's interested in this webinar, this is someone who came to this free event that was on this specific topic, okay?

And the next phase is nurture. So, once someone downloads that free resource or registers for the webinar, of course you have to do your job, you've in a sense kind of earned the right to tell them your membership. You've earned the right to sell their membership. They've opted in for something. And this is implied idea of [reciprocity]. So, someone joins the list, they attend the free webinar, of course they expect that they're going to hear more about how great your organization is. And this is where it happens, in the nurture phase. You're kind of saying, you're kind of selling the idea of becoming a member. Hey, you're going to love this free webinar. In addition to the free webinar, you're going to get all this other cool stuff if you become a member. So, that's really what we're talking about here. And so, you know, we have to - we've earned that right to sell them our membership, they've basically opted in.

The other analogy I love to use here is when you go to buy a car, if you've ever gone to a dealership and bought a car, the dealer always offers you a cup of coffee. The sales person will offer you a cup of coffee and if you take the cup of coffee, they know that you're a good prospect because this is implied value exchange that's already been tipped in the salesperson's favour. You know, you - they gave you a cup of coffee so you kind of owe them something so the leverage is kind of shifted sides a little bit.

So, that's really what happens in the nurture phase. And then so the guests during this phase, which is going to happen largely by email because you have their email address, you're able to send them

messages, a few messages via a drip campaign. You can also obviously publish social media updates and personalise offers that are targeted to them using Facebook ads or any sort of native ad. And I'll show you that in just a little bit.

So, at this point we're going to assume that the guest who has signed up on the laptop, they're receiving special offers to become a member. So, they go to this event and they get this really cool offer on this laptop. Hey, enter your name and email here and you'll be entered to win something, you know, some sort of offer that they're getting. And I've shared several examples before. So, they get that but they're also receiving other emails prompting them to sign up as a member and here's valuable reasons to sign up as a member.

So, what are we really doing at this phase, in terms of building our funnel? The nurture phase, our goal is to build arousal and intimacy. We want to send them personalized messages and we want to build up that excitement. In other words we want to build anticipation and build value or perceived value in joining up as a member. And this could be in the form of member stories, this could be sharing the member benefits. This could be communicating a limited quantity of something. If you register as a member before Friday you'll be, you'll get this extra other resource, which is quite limited. That's more so, more helpful around physical events, where people are going to physical events 'cause then you can literally say there are seriously a number of limited seats.

So, the strategy here is really less email blasting and more personalized email responses. Now this is really critical here. And this is what software like Wild Apricot and other tools allow you to do, is that once someone joins your email list, that contact is tagged a certain way. Either they're added to a specific email list or they're contact record is tagged in a certain way or a checkbox is added to their contact record. So, that now we've identified this person. This person attended a free event and they will automatically by using follow up emails or targeted emails, they will automatically receive a series of say two or three emails building up that anticipation and selling them on the membership.

So, the stories, the other thing is that the stories are targeted to their interests. So, for example if someone attends an event on a specific topic, the follow up emails, ideally you want to have them related to that topic that that person was interested in hearing about.

And I mentioned native ads and supporting email offers or native ads supporting email offers. So, I know for a fact Facebook ads you can actually target a specific email list with what's called custom email targeting. So, you create a custom audience within your Facebook ad account and you can actually target them with ads, which is so powerful. And I've done this with a number of clients. Basically what you're doing is you're sending out an email message along with an ad

supporting that message. So, they may or may not see your email message in the inbox but they will certainly see that Facebook ad. The combination of the two increases that conversion rate just as a general statement there.

So, email messages again, they're invited by their interests so they've opted into these messages, that's why this nurture is even happening. They've invited the contact. It's triggered by their actions and it's simple and easy to opt out. So, email messages, you know, you want to give people an opportunity to opt out of contact as well, right?

A quick note here, I'm just reinforcing this, a contact or a lead, whatever you call the person in your database, you always want to update them with a campaign, the interest and other criteria. So, if someone attends a free webinar on a specific topic or a free event on a specific topic, you want to capture that information. Because over time what you'll do is you'll build a profile of this person. They may or may not become a member but what you're doing is you're collecting information on their interests.

And the member funnel idea, I mean as a general idea, you're doing this in a number of different campaigns. It's not just one funnel for your events. If there's going to be a funnel for your newsletter, there's going to be a funnel for your free webinars, maybe there's a e book, so you will have several different funnels happening, okay?

And then we convert. So, they become a member, they click on an email, they go to the landing page and they see some sort of, or they see some sort of personalized offer. You know, if you join today you can get X percent off, click this link. And here's an example here from this organization giving people different levels.

Now what's brilliant about this model, these different levels of membership, is that when someone joins this, the lowest level here for \$10, right, for one year \$10 a year, this person is very, very different from someone who's a Facebook fan, okay? So, it's only \$10 but this person, what's more important is that this person has proven that they are interested in the organization, the association, and they are willing to take out their credit card and sign up as a member, right? Yes, there's a big distance between \$100 and 10, but this is a very, very powerful audience that we can start targeting with email messages eventually promoting and kind of upgrading that membership to, you know, different levels, okay?

And then so what makes people buy a membership? Relevant offers, demonstrated value and trust, that's going to happen during that nurture phase and you've got to make sure it's a painless process to become a member. If they download a free resource and then they get a few emails and then they get this really great offer, become a member today, they're motivated. But then they can't really do it that easily. That's where we're going to hurt ourselves. So, the conversion points are going

to be really critical and I'll get into that in a little bit. And then at the end we partner, right? Now I have a picture of a brain here simply because really that's what we're dealing with in this whole process. So, if they decide to sign up as a member and they get value, naturally they're going to want to tell their friends about this. This happens as a matter of course and this is why the word of mouth marketing is the most powerful form of marketing and the funnel kind of leverages that.

So, we're doing two things from a 50,000 foot level. We're doing two things, we're identifying the right people that are interested in our organization, we're sending them very specific messages in the nurture phase, we're nurturing that interest, we're converting folks. And then the newly converted, we're turning them into spokespeople or partners or super fans, whatever you want to refer to them as, okay?

So, now we're going to get into a little bit more detail on each phase and what you need to build this funnel. Lori, are there any - should we pause right now?

Lori S: Yeah, I think we should take a quick pause, a bunch of questions came in there.

John H: Awesome.

Lori S: So, let's see, so on the nurture phase of things, how many emails or how often is it considered appropriate to send something during that phase?

John H: That's a really great question and actually I'm going to cover that. There's a drip campaign example I have. So, I'm going to talk about that in a little bit. But you should always send an email right away. So, when someone signs up for your event or your free event or free webinar or downloads an e book, they should always get an email right away and obviously at least one more email following up on that and promoting your becoming a member.

Lori S: Great, yeah. And someone was asking about the drip campaign but we'll get into that and then so maybe one or two more quick questions. So, what would you consider, I mean you talked about events and just as a context everyone, we asked John to talk about a membership funnel, but you apply this to donors or volunteers, it's the same kind of thing. What would you consider the top three nurture tools? Like would it be an e book or an event or what do you think works best?

John H: Okay, so the thing that works best is actually something that's very close to what they're going to be getting as a member. So, in other words you don't want to say hey, here's an Amazon, you know, if you give us your name and email, we'll give you an Amazon gift card. Great, you're going to build an email list full of people that want an Amazon gift card. They're totally unqualified.

But rather if they offer is hey, attend this free event and meet other cool members or attend this webinar on this super specific topic, that you can learn much more about if you become a member but as a non member you're still going to get tremendous value. So, it has to relate, that's the key thing. It has to be almost a sample, like I said at the Trader Joe's example, hey do you want some sample crab cake? Oh, sure. What are you trying to do? You're trying to sell crab cakes so you're going to give away sample crab cakes. It's a similar idea.

Lori S: Yeah, that's really great advice. There's tons of great questions but I think we should keep going and everyone just keep putting them in chat and we'll have some more Q&A time at the end.

John H: Yeah, absolutely. And I think many of the questions might be answered as we go along. This today is really designed to build a process about the plan, basically the plan. Certainly we're going to answer a lot of nitty gritty questions as well.

So, let's talk about building the member funnel. And we're going to go through this from left to right. So, instead of top to bottom like a funnel, is from top to bottom. We have again capture, nurture, convert partner. We're going to go from left to right. And we're going to talk about a free webinar or a free event as an example.

So, Jane becomes aware of a free webinar and she registers to attend. Great, she's excited about this webinar. She received personalized email messages and this is what's so powerful today about email marketing tools and tools like Wild Apricot is that you can send personalized messages based on how people have joined your list. You know, if they sign up for a free webinar and they've been tagged as such in the contact record then of course they're going to receive an email that says hey, thanks for signing up for the free webinar, here's what you're going to get. They get that email and then Jane - so, during the nurture phase she's receiving maybe a couple of emails about saying thank you, maybe there's an offer to join as a member, maybe a member's story. It may be, it's not one email, it's maybe not two emails, there might be three emails over the course of say five days. And I'll show you one quick example.

And then eventually Jane decides to become a member. And again as I said before, the reason why these are getting smaller as time goes on is because in a sense you're losing people, that's one way you can think about it. The other way you can think about it is you're just simply identifying the right people and the group that initially said yes, we want to attend the free webinar, you know, a smaller percent of them are actually going to take that next step and become a member. And of course Jane after she joins, she has a great experience and she decides to share the organization with her friends. Obviously you want to prompt her to share. So, hey Jane we know you're really happy with your membership, we see you logging in all the time or we - you've

been at a few events. Why not share this membership with your friends? And you can offer some incentives around that as well.

So, there are five parts of every member funnel and I'm going to talk about each one of these in just a moment. There's the thank you page. We have to build a thank you page. We have to come up with some sort of incentive, a free offer, something that's going to be valuable to them. And a free offer can be anything like a newsletter, joining our monthly newsletter, getting an e course, downloading an e book, attending a free webinar or coming to an event, a free event. So, there's some sort of value that you're going to have to put out there like a carrot in order for people to begin the journey down the funnel.

There's our landing page, which really will decide how effectively we're going to convert visitors. So, in other words we might have, you know, 1,000 going to the landing page just to sign up as a member. And if only five people sign up out of the 1,000, we know that we have some issues there. And I'll get to that in just a second. And then we have our email messages, right? Someone decides to sign up for that free webinar and they're going to receive a series of emails. So, we have to write these email messages and we have to consider other marketing as well.

So, some of the examples here aren't necessarily associations but I'm showing you just to have an example of what it might look like. So, the first thing we want to do is we want to create a thank you page, thank you/sharing page. Now the reason why this is important is twofold, one is when someone hits the thank you page, when someone completes their transaction and they arrive at the thank you page, you can count that as one conversion, one person, right?

So, now in Google analytics and other web stats tools we can look at well how many people saw the landing page? 1,000. Well how many people saw the thank you page? 100. Okay, well that's a 10% conversion rate. Is that good or bad? It really depends upon what our last conversion rate was. It's hard to say what the industry standard is. But 10% in my experience is pretty good.

And then the other factor is the sharing. So, the reason why we want to have something that prompts people to share the membership with their friends is because that's when they're more likely to do it, someone just signed up as a member, they're really excited, the honeymoon phase is just beginning, that's when they are very likely to share that with their friends and especially right after they make that decision to join.

So, right when they join make sure at some point very soon preferably on the thank you page, encourage people to share their membership with their friends, okay? This may not apply to every organization. So, for example an association for chiropractors probably won't tell other Facebook friends hey you should join this association for chiropractors. So, it does depend upon the organization. So, that is the first step you

want to do, you want to build that thank you page and keep it very simple and encourage people to share or take that next step, whatever that next step is.

The second part is the free offer. So, this is all about 100% about the carrot, what is in the incentive? What are you going to give people that gets them over the hump to say you know what? I want to learn a little bit more. I'm willing to give you my name and email. And in exchange you're going to let me see a free webinar, come to a free event or download this resource or register for some physical event.

And I have a bunch of examples of free offers. In general just to answer the previous person's question was whatever you're offering has to be almost like a sample of what you offer your members. That's the way to think about it. It really has to be a sample of what you're going to offer when they become a member, connection here's all the - that's why I love a free event, a physical event where people come and meet people and current members are talking to perspective members.

That's a really great opportunity because then one reason why people join as a member for associations or for most, really any sort of most sort of organization is for the community, right? They get to meet other people like themselves and they might learn and they certainly will learn really great things from these other people, right? And not to mention the professional connections that they might develop and again that depends upon the organization. So, we have that free offer, we have to really come up with that and see what that is.

The landing page, so the landing page, should be obviously very simple. I have a screen shot here kind of a diagram of mobile. So, the landing page should look beautiful on a Smartphone, an iPhone or an Android. You don't want to send an email saying hey, here's this really cool if you become a member by the end of the day or by the end of the week, someone is clicking on that and they go to your landing page and they say to themselves geez, I guess, I might, I'll see if I can do this later when I get home in front of a laptop. You might have lost the moment, you've lost the momentum, the moment was then, right? You know, expecting that they come back when they get home on their laptop is kind of wishful thinking. So, you want to explain what the benefits are of joining and make it really simple to join on the landing page, okay?

And then the email messages, that's another part of this. Now in terms of the email messages, this is where it gets a little bit more complex. Because what you're doing you're writing a series of email messages. In the past many of you, before even thinking about this idea, this different strategy, you might have said well we need member so let's just send out a big email blast to all these people who aren't members.

But the problem is, is that that's on your timeline. You're just simply kind of sending out email messages to everyone. The funnel idea is

where people are opting into something, a free offer. Wow, I'm interested in this free sample. And they in a sense are kind of inviting you to send them email messages. They're giving you permission to send you messages. So, the timeline is ultimately on the member's timeline, which is where you want the timeline, right? You don't want to have to worry about interrupting people. So, you're going from interrupting people by doing email blasts to inviting people, right, to receive your messages.

So, what does a drip campaign look like? First of all when someone does take action, you know, they decide to register for an event, a free webinar or whatever it might be, it's always a good idea to follow up immediately. So, whatever they do you always want to follow up and tell them what's next.

Now the example I have here is around a petition but it's the same idea. It really will work for any sort of situation in terms of a drip campaign. So, the example that I mentioned before was signing up for a free webinar. This example here is they're signing a petition; it's really the same idea.

So, a drip campaign looks like this, this is an example of one. So, someone signs this petition and right away they receive an email that says thank for signing the petition, here's more information about this topic or this cause, in this case it's a course, and share. So, learn more and share. That's what a person immediately signing a petition, that's what the most likely action is.

And when you're designing your drip campaign by the way, the series of messages, you always have to think what's the action that people are most likely to take? So, if they sign the petition, probably the next action, you know, you could ask them to make a donation but you might be a little bit more successful in asking them to share the campaign with their friends, right? So, now they have more invested, they have a little bit more invested.

A couple of days after that you can ask them, you can present some sort of offer and we're just saying donate now, you can put an end to the horse abuse, thanks for signing the petition, here's what else you can do. We know that you care about this issue, here's what else you can do.

And then we have another email message and this example, so a matching donor has come forward and they're willing to match dollar for dollar up to X number of dollars but only until this date. So, there's some sort of emergency in encouraging people to and eventually they do, you know, many of them will join, okay? So, we write our messages, right? We have to write out each message in the series, always asking ourselves what is the action that people are most likely to take?

And then we simply schedule these days and we can - let me just talk about the benefits. So, in terms of benefits you're going to drive a lot more traffic to that landing page, right? So, instead of just hoping and praying that someone will visit your website and somehow click on join as a member, know that's kind of wishful thinking. It's kind of better to control the message in a sense, having them opting in for something for free and then you're automatically sending them - you get to send them a few messages, a few links to your website, a few chances to ask them to be a member. None the less, this is going to be a lot more traffic to that landing page. We're going to nurture secondary actions as well. By secondary actions I just mean actions like sharing the campaign, any sort of follow up actions. And the great thing about a drip campaign is that you can set it and forget it.

Now of course this is - in the interest of time I'm not going to dive down to detailed into this, but you can create a more complex drip campaign. So, for example you can send emails, some solutions allow you to send emails based on how they've responded to prior messages. So, let's say that someone signs the petition, they receive message one, but they don't open it. Well, if they don't open it they're going to receive a different message than if they did open that message. So, you can get pretty granular in terms of the cause and effect of the messages that are going out.

And then the last part of the funnel is other marketing. So, in terms of other marketing what we're looking at now is we're going to use all of our marketing levels to really put people at the top of the funnel, even our existing email list. So, don't forget our current members, they're the ones who are probably your biggest spokespeople so we want to send our emails to our current members and say hey, here's this great resource for you, right? And get them going at the top of the funnel as well. Of course we're going to, you know, configure those messages so that they're not being sold. We don't want to try and sell them a membership, so they're going down a different path, okay?

The last - actually just one more thing I want to show you about a funnel. So, this - the only downside with a funnel is this. It kind of conveys this idea, it's a mistaken belief or mistaken idea that people go from one end and they go out the bottom and that's it, a very clean, a very clean process.

But we have to understand in the days of social media, someone who's being in the nurture phase, receiving those emails after recently signing up for a webinar, many of those folks are also following you on Facebook and Twitter. And so their interest is maybe getting greater dynamic process. You might even call it a vortex. So, people are always at the top of the funnel in some ways and they're coming down into the nurture phase, current members who last year were really passionate about their membership, maybe this year they're kind of not really that interested or they have other issues going on. So, the interest and where they're at in the funnel is always changing, okay?

So, now the last topic here is measuring the funnel. So, once we put together these components, and again I'm just going to show you the components again. We're talking about our thank you page, our offer, right? And the offer isn't something physical, it's more of an idea. It could - you know, free webinar, that's not a physical thing, it's an idea. And then we have our landing page, email messages and then other marketing.

So, how are we going to measure our funnel? We're going to look at a few different sets of metrics and the great thing, I'll just go back to this image here, in terms of a funnel. So, each one of these points, if we can increase the conversion rate for example, in other words the number of people that see our free webinar page, if we actually increase the number of people that actually sign up, we're really making, we're kind of leveraging that all the way through the funnel.

So, if we increase our conversion rate here, capture and prove our email messages so more people are opening and clicking on those emails. If we improve our landing page so the higher percent of people that visit that landing page, they're actually signing up to be a member and so forth. So, each point, this is where measurement, you know, kind of measuring out funnel, this is where the measurement effort goes directly into our bank account, okay?

We have consumption metrics, acquisition metrics, engagement metrics, nurture metrics and conversion metrics. And I'm just going to go through each one of these very quickly in the interest in time. So, in terms of consumption metrics, this is really about awareness, so page views, unique visitors on Twitter, on Facebook, on your website, the time that they spent on your site, this is all Google analytics, or most of it is. We can also look at Facebook insights but we're looking at the very, very top of the funnel, which is basically about awareness, people seeing your content, becoming aware of it. Maybe engaging with your content, you know, on Twitter or Facebook or LinkedIn.

But the capture phase is really where we're asking for their email address. So, new subscribers, webinar registrants and so forth, that's going to be email, right? And then the nurture phase is where we're looking at website visits, opens and clicks. In the nurture phase we're going to be looking at Google analytics, how people are behaving on our landing page. And also we're going to look at our email messages. Let's say we have three or four email messages, we're going to look at the open rates and the click through rates on those email messages.

And our constant question is how can we increase the open rate? How can we increase the click through rate? How can we increase the conversion rate even just a single percent, right? Because if we increase it just a single percent, it's going to impact the overall revenue that that funnel is driving. So, that is the end of my presentation. A couple more things before we open it up for Q&A. If you're interested I do a lot of online training and I actually have a number of courses people can take,

self paced as well. And I do a free weekly training; I call the Hump Day Coffee Break. This would be the top of my funnel in terms of capturing people, they're interested, I'll attend this Hump Day Coffee Break. But regardless it's basically a 15 minute training followed by 15 minute Q&A and then we're done and everybody gets access to the archive recording. So, with that Lori do you want to open it up for questions now?

Lori S: Yeah, I've got lots of great questions here that I've been collecting. So, I'm going to start with Cindy, Cindy and Macarana sort of had similar questions. So, Cindy runs a bike club and she welcomes non members to all of these scheduled rides. So, they have a big event and non members come. But only paying members get the newsletter. So, she's wondering if she should sort of flip this around? And on the same note Macarana asked the same question, like when should you sort of order these things? When someone gets your email or you capture their email, should they be getting the newsletter and your blog post right away? How do you suggest going about that?

John H: So, however you capture someone's email it's always good to be very clear about what they're going to be getting. So, in other words don't add everyone to receive your newsletter, regardless of how they joined. Don't just assume oh, we just also send them the email newsletter. It might be kind of tempting because it's just so easy to add that checkbox and then more people receive your newsletter, isn't that great? That seems great but if they haven't given you permission and they're really not interested in it then don't - I wouldn't add them to the newsletter.

So, but in the - I'm not sure I understand about flipping things around but in terms of the bike club, so think about the value, right? I don't know how these people are finding out about going on a bike ride as a non member but one value can be hey don't miss out on the bike rides, basically get your name on the calendar, you'll be on the distribution to receive - to be on the calendar for an upcoming bike ride. So, that in and of itself is value. Wow, now I know I can kind of organize my schedule to kind of fit this activity into my life a little bit better. So, even just that one simple thing, that's an offer that gets people going at the top of the funnel.

Lori S: Okay, good stuff. And then I'm hearing from a lot of people here, Seth and a few others, that they've got this sort of nurturing set up but then the actual conversion doesn't happen. So, you know, they like things on Facebook or the subscribe or they get the emails or they show up to the free events, but then they don't actually become a member or a donor or what have you.

John H: Yeah, so, you know, not everybody's going to become a member or a donor but what is the two parts that really influence that are the follow up emails, right? So, the emails should be, and again I think there are a couple of webinars this week talking specifically about content and, you know, developing stories, but the emails should be written in second

person, hey thanks for attending the free event the other day, we hope you enjoyed it and using their first name and kind of personalizing it but conveying the value. And even some sort of incentive, if you register as a member now, anybody who attended this webinar, here's a code that you can use to get a discount on the membership and presenting some sort of offers to encourage people to join.

The other piece of that however is the landing page, right? So, we always have to reinforce the benefits of joining, not the features, but the benefits of joining. So, for example at the Young Men's professional organization, they don't have the benefits listed but the benefit isn't, you know, come to our free events, that's not really a benefit or it wouldn't be come to insider events. The benefit is get valuable connections, develop your professional persona, become a stronger networker. Whatever the association, whatever they're trying to do in terms of the benefit, the value and the reason why they exist, that's really the benefit, it's not, you don't want to sell features of becoming a member. So, that's often a mistake I see, people are selling features rather than the benefits of becoming a member.

Lori S: Yeah, that's super important, just highlighting that. And you mentioned as well the mobile is a big issue here and someone said they have a lot of trouble reaching out to younger people, millennials who do not open the email, they find it archaic. So, Judy was asking how do I make this mobile friendly and a lot of people are asking how can you automate a lot of this? So, what kinds of systems can you use?

John H: That's a great question Lori, I'm sure you can answer that. [laughs] No, so, yeah you have to automate this. Most email marketing tools out there, most CRMs, Wild Apricot software allows you to automate. The drip sequences, that's really what you're really going to have to automate is the drip sequences and the tag in, you know, people getting tagged appropriately in the database.

Lori S: Right. And that's where the database becomes important. And for those who are Wild Apricot clients, you know, our system isn't really set up like a full on marketing automation tool like some of the systems out there. And I don't know if John you know of some of those ones, but with Wild Apricot you can at least tag, you know, who are members, guests coming to events? And then send them dedicated emails.

And you can certainly set up sort of this concept of a drip campaign. Once someone becomes a member, you have dedicate emails to welcome them and so forth. So, that onboarding becomes really important. Oh and Heather here has mentioned that Infusion Soft is a good system for marketing or Hub Spot, I think Marketo.

So, I'm going to ask one more question here. This is from Jim and I think this is a good one. So, if someone's offering a free membership or a free subscription, does that imply that there's no value to the

membership? Like how do you approach that kind of free medium model?

John H: Well, you have to give - you're not giving away everything. So, if use the Trader Joe example, they're not giving away a whole package of crab cakes, it's one crab cake. So, with the free membership it's always you're giving a sample or this free event that you're attending. It's a sample, you're not giving away everything else. You're offering maybe a high level tutorial about something or even something very specific.

I work with a few organizations that do a lot of educational webinars. Each webinar is very specific and on a very specific topic. But as a member you can access all the other topics that they have in addition to that one specific topic. So, in terms of free webinars, I often recommend, or free webinars or free events, in terms of the content, don't hold back anything, give them the best possible content. Because what you're saying in that you're saying hey this is the good stuff, you're also - and then they start thinking wow imagine what I could get if I actually joined as a member. So, the assumption is they're going to get more, there's more value when they sign as a member and they should get more value for their membership.

Lori S: Alright, and that's a perfect way to end this presentation. John gave us tremendous value today so thank you John. Apparently your coffee hump break link wasn't working so Terry's sending out a new one.

John H: Oh no, I'm sorry about that.

Lori S: But you should definitely check out John's trainings everyone and I'm just going to thank you all for attending and let you know that tomorrow, so as we mentioned this is a full on summit, so tomorrow we're going to be talking about that sort of top of funnel that John mentioned. We will be looking at Facebook, that's out very own [Shiv Noradun] he's our chief marketing officer here.

And then the afternoon we're going to be looking at Google ads for charities and non-profit specifically because you get \$10,000 free Google ad account.

So, please do join us and if you're new to Wild Apricot you can also try a 30 day free trial and you can also email us at [coaches@wildapricot.com](mailto:coaches@wildapricot.com) to ask more specific questions about how the software might help you with all sorts of stuff, membership management.

Okay, so thank you John so much and thank you everyone for joining us, have a great afternoon.

John H: Thank you everybody.

Lori S: Thanks, bye.

[End of recorded material] [01:06:49]