



# Member Experience 2.0

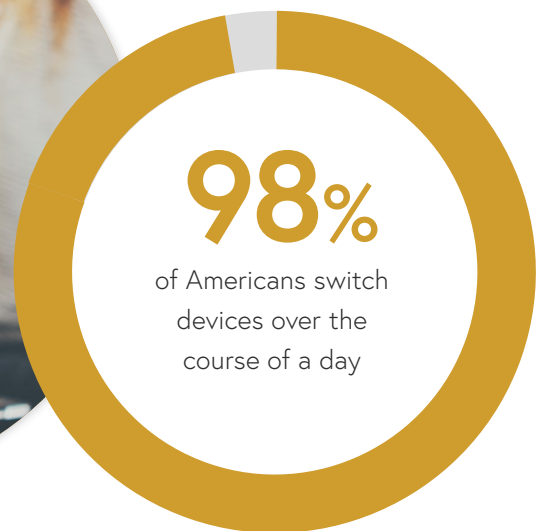
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# Multichannel, Omnichannel and the Future of Engagement

## Did you know Americans spend 11 hours a day engaging with electronic media?

That's not all. According to Google<sup>1</sup>, 98 percent of Americans switch devices over the course of a day and IT research firm Aberdeen Group reports<sup>2</sup> more than half of all companies are trying to reach us through no fewer than eight channels. And still, consulting firm McKinsey reports<sup>3</sup>, 45% of Americans report companies aren't delivering multi-channel experiences fast enough.

Today's consumers demand high-impact, deeply relevant and personalized experiences as they engage with brands across a growing number of devices. While the technology powering these interactions continues to evolve, the trend itself isn't new. As early as the 1970's, economist and psychologist Herbert Simon outlined the potential implications of an information-rich world, where a "wealth of information creates a poverty of attention and a need to allocate that attention efficiently among the overabundance of information sources that might consume it."<sup>4</sup>



The dynamics of our content-saturated, attention economy incentivize organizations to draw users in to spend more and more time on their apps and sites. The problem is that attention doesn't scale. There is only so much time in the day to be messaged to; messages themselves risk becoming less effective, because messages now appear everywhere.

Savvy businesses have recognized this and taken aggressive steps to unify their online and offline channels, taking a hard look into the ways in which they look to connect with, and engage, us and inspire us to take action. All of us have become accustomed to what retailers dubbed the omnichannel experience, where a shopper engages through a series of channels to complete a transaction. Whether it's the appliance you started researching online and bought in store, or the beauty product you saw on the shelf and purchased via the web after reading reviews, the importance of a consistent experience designed to help the end user accomplish a goal has never been more important.

What does it all mean for nonprofits? As it happens, a great deal.

If you think consumer behavior isn't influencing your constituents and their perception of the value your organization delivers, think again.

Personify first noticed this phenomenon in our landmark [Young Members 2.0](#) research published earlier this year, where Millennial and Gen Z members reported engaging through a variety of channels in pursuit of what they understood as a single, consistent objective: to be a member. Digital, social, live events and even phone calls worked together to communicate value, creating a memorable, meaningful experience. We found ourselves asking if this was isolated behavior, unique to young members who we recognized as sophisticated... or was there more to the story?



This study seeks to expand on some of Personify's earlier discoveries, exploring how all members, regardless of where they are in their membership journey, perceive membership and engage with the various channels used by associations to create a clearer picture of:

- The differences between a multichannel and an omnichannel approach and the implications of each for membership
- The perception of membership, and the value it delivers at various stages in the membership journey from those in their early days with an organization through those more tenured members who have been involved for many years
- Digital engagement and unique roles played by email and the evolving portfolio of social media sites
- How in-person interactions complement digital activities to create a more wholly gratifying experience for members
- Valuable lessons and considerations for associations looking to leverage an omnichannel approach within their own organization

Attention is the psychological tool we use to tune out irrelevant information so we can focus on what is important to us. As the information available to us continues to expand and the diversification of channels associations use to engage members extends further, the attention of members becomes increasingly strained and challenged.

The conceit of multitasking is a canard: people can't attend fully to multiple things simultaneously. A member's attention, and the association's ability to capture it, remains among the most powerful assets in the relationship between the organization and its constituents.

Multi- and omnichannel engagement, the ability for organizations to deftly employ different channels to engage members to drive an improved experience has become the new standard. Organizations committed to long-term growth must take action. Now is the time to understand the members' perspective, look inward and evaluate opportunities to move forward.



## A Note from the Editor

The Harvard Business Review once observed<sup>5</sup>:

*"Customers only know what they have experienced. They cannot imagine what they don't know about emergent technologies, new materials, things you're not doing and the like. What customer, for example, would have asked for the microwave oven, Velcro or Post-It Notes? At the time the transistor was being developed, radio and television manufacturers were still requesting improved vacuum tubes."*

Organizations should take the opportunity to survey their own members and evaluate their responses against the trends noted in this study. Each organization has a unique membership, different engagement priorities, specific needs and values.

We offer these survey results as important data in furthering the understanding of the modern member, which can then be used to distill the multi- and omnichannel customer experience down to recognizable touchpoints, practical tips and places where associations can potentially focus to drive more meaningful results. While Personify believes our findings can help professional member organizations adjust their strategies to deliver a better member experience, we always encourage organizations to ask their own members and see how they benchmark against the trends seen in this study.

Survey questions were explored with more than 300 members in the United States. The online surveys were fielded in July of 2019.



# Key Findings

A trend first observed in retail, **omnichannel behaviors that members show as consumers is now influencing how they engage with membership organizations.**

With the ability to deliver a seamless and consistent experience across channels, omnichannel can boost both a deeper relationship between the member and association plus yield bottom line results driving a 30% higher lifetime customer value.

**Engagement via different channels isn't a phenomenon unique to younger members.** 73% of users across all generations report using multiple channels to engage with their favorite brands when provided with the option to do so.

**Membership is important...but it may not be enough long-term.** Nearly three-in-four of members surveyed reported it is important to them personally to be part of an association, with half contending it is very important. Younger association members (Gen Z, Millennial) were especially likely to find value, with a majority of Millennials telling us membership was "very important" while just one-in-five Boomers said the same.

While members of all ages and groups value membership, **43% of survey respondents say associations seem out of touch and close to one-in-three say they don't understand the benefits.** While we'd identified the lack of clear return on investment as a potential risk in Personify's [Young Members 2.0](#) research, the fact that a third of the broader audience reported a struggle to internalize and articulate the benefits of membership came as a surprise.

**Members of multiple age groups expressed a preference for digital engagement channels** with younger members more likely to choose digital channels over print (73% for Gen Z, 64% of Millennials). Hispanic members of all ages (73%) and those in the western region of the United States (70%) also expressed a strong preference for digital content.

Across all groups, given the choice of four channels, **a plurality report email is the best way to reach them with a large majority (82%) of those surveyed ranking email first or second.** Nearly half of all members surveyed report social media is the worst way to engage.

Across almost each of the audiences surveyed, members told us the social media channel most frequently used by associations is Facebook. Yet, **for two of the segments surveyed (Gen X and Gen Z), Facebook was also ranked as the least effective. Conversely, Twitter and Instagram – noted among the social media channels least used – are also identified by three of the four segments as the most effective.**

**A majority of all members surveyed (52%) told us events were "very valuable" in making them feel engaged with their association.** Large majorities of all age groups say this was at least "somewhat valuable." This number was significantly higher in a number of our secondary segments with African-American members reporting events were valuable in terms of engagement (75%, +23 percentage points higher than average), and LGBTQ members sharing the same sentiment (62%).

A trend originally identified in Personify's [Young Members 2.0](#) research, **the effectiveness and favorability of the phone proved strong in this survey as well.** The phone was cited as the best or second-best channel by 46% of those surveyed, almost twice as many who expressed a preference to engage via social media. Overall, 45% of members told us they liked or loved receiving a phone call from their association, with 51% showing the same level of appreciation for text messages. Less than 20% of members said they didn't like being contacted via their phone. Over a third report they "almost always" answer a phone call or text from their association and 19% report they are texting more than they were two years ago.



## Multichannel, Omnichannel: What's the Difference?

Multichannel is the simpler of the two terms as far as definitions go, and the older concept as well. A multichannel (or 'many channel') give members choice, providing opportunities for them to interact through the medium most natural to them or appropriate for situation they find themselves in at any given moment.

A helpful metaphor for multi-channel engagement is a wheel with spokes:

- At the center of the wheel is your organization (e.g. a membership).
- Each spoke is connected to the organization and its mission but offers a unique, separate and independent opportunity to engage. **73% of consumers will use multiple channels to engage with their favorite brands when provided with the option to do so.**

This could be how a member reads content, how they register for an event or how they obtain customer support. They aren't forced to place a call to your staff when they can send a direct message via social media. Or if they don't want to read the email sent to their inbox, a member may see it instead on Facebook. In other words, a multichannel strategy lets your constituent follow any path they like to your organization.

**73%** of consumers will use multiple channels to engage with their favorite brands when provided with the option to do so.



Multi-channel marketing is much more effective than single-channel marketing, not just in terms of convenience, but because consumers prefer to engage with brands and organizations via multiple channels. According to Sailthru<sup>6</sup>, three out of four customers prefer to engage with a brand through multiple channels. Similarly, consulting firm McKinsey reports<sup>7</sup> 73% of consumers will use multiple channels to engage with their favorite brands when provided with the option to do so.

However, an omnichannel strategy is not synonymous with a multichannel one. A multichannel strategy implies your member experience spans multiple channels. An association might have a website, a mobile app as well as an Instagram feed. The multichannel approach simply spreads the message and encourages the customer to complete a call-to-action.

An omnichannel experience means that your organization has a presence across channels — and all of those experiences are integrated in a way that enhances member experience. Rather than working in parallel, communication channels and their supporting systems are designed and orchestrated to cooperate. It is a modern approach to membership and engagement, focused on designing a cohesive experience for members at every touchpoint.

As marketing technology provider Hubspot<sup>8</sup> defines it, omnichannel is the ability to deliver a seamless and consistent experience across channels, while factoring in the different devices that members are using to interact with your organization. If we were to use the metaphor of our previously mentioned wheel, where multichannel is a wheel with spokes, omnichannel is the disc wheel favored by many professional cyclists, able to move faster without individual spokes that catch the air.

The digital and physical channels are combined to develop a single, cohesive member experience and any differences between two distinctive channels become avoidable and they disappear. For retailers, the industry for whom omnichannel trends have been most widely researched, the benefits of this integrated approach have proven substantial. Customers who engage with omnichannel marketing, according to the Harvard Business Review<sup>9</sup>, spend an average of ten percent more than those who do not. Omnichannel engagement has long-term value too, with **omnichannel strategies driving a 30% higher lifetime customer value** per research from Google<sup>10</sup>.



## Multichannel, Omnichannel and Membership

While a multichannel approach offers a great first step, omnichannel coordination of messages, content and activities hold the key to capturing the attention of members, delivering a superior experience and creating long-term, meaningful relationships beneficial to the member and to your organization.

Yet even if an organization recognizes the value of diversifying their engagement channels, understanding how to apply what's traditionally been a commercial sector strategy in a nonprofit setting can prove daunting. Absent the budget, staff and technology enjoyed by sophisticated retailers, how can associations realize similar gains – even if on a smaller scale?

The first step is to develop a clear understanding of channel preferences, both for those currently used in outreach efforts but also for those not yet part of your engagement efforts. Too, understanding how specific groups of members are interacting (or not) across these different channels can yield multiple benefits. First, organizations gain valuable insights to better optimize individual channels to support key groups within your constituency, perhaps young members you wish to target or those more tenured you hope to re-energize. Second, patterns begin to emerge that can begin to help influence how these optimized channels can be used in coordination to deliver a truly seamless, omnichannel experience.

In Personify's original [Young Members 2.0](#) research we found exploring these preferences by generation, Millennials and Gen Z, particularly helpful.

However, we recognize membership isn't generally isolated to a single generation. As we shared the research with the nonprofit communities we serve, Personify was often asked about other generations. What about Gen X, those members born between 1965 and 1980? Or Boomers, born between 1946 and 1964? Too, were there opportunities to glean additional insights by segmenting audiences in alternate ways, perhaps by gender, ethnic group or even the region of the United States they call home?

As we revisited our original questions with a broader group of members, there were notable similarities across all populations. Nearly three-in-four of members surveyed reported that it is important to them personally to be part of an association, with half contending it is very important. Younger association members (Gen Z, Millennial) were especially likely to find value, with a majority of Millennials telling us membership was "very important" while just one-in-five Boomers said the same. Notably, two of our secondary segments also felt strongly about membership, with **LGBTQ members 91% more likely than the average to report membership was "very important."**

All members also prioritized learning and networking as their top reasons for engaging with an association, with younger members earlier in their careers more likely to prioritize education (54% of Gen Z, 80% of Millennials) and those more tenured finding greater value in opportunities to create personal connections (48% of Gen X, 30% of Boomers). African American and Hispanic members were somewhat more likely than average to leverage membership as a means to learn new skills for their career (+19 and +25 percentage points higher than average respectively).

Yet while members of all ages and groups value membership, **43% of survey respondents say associations seem out of touch and close to one-in-three say they don't understand the benefits.** While we'd identified the lack of clear return on investment as a potential risk in Personify's [Young Members 2.0](#) research, the fact that a third of the broader audience reported struggling to internalize and articulate the benefits of membership came as a surprise.

Why? A strong majority told us high-quality, **informative content is important for engagement with Millennials (93%) and Gen X (88%)** especially likely to say this. **Over half, 54%, said receiving high-quality content definitely improves retention.** The majority of respondents to our survey also said associations contact them "the right amount."



However, perceptions of "the right amount" varied significantly. Our survey revealed notable differences in how often the different groups said they wanted to receive content (e.g. email, letter, call, etc.) from the association to which they belonged with **nearly three-quarters wanting something at least twice a month and only 35% of Boomers seeking the same:**

	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
More than once a week	13%	20%	12%	4%
Weekly	25%	38%	29%	18%
Twice a month	25%	16%	12%	13%
Monthly	22%	14%	34%	43%
Quarterly or more	15%	10%	11%	18%

Membership is important across different generations and groups with each looking to their association as a means for learning and connection with others who share their unique interests. High-quality content was reported as important in keeping members engaged and part of an organization but still, they struggle with comprehending and communicating the benefits of these programs in their daily lives and careers. The frequency with which members wish to engage, or the "when," provides an interesting first clue as to why, and reinforces the importance of a consistent, omnichannel experience always poised to deliver value on-demand.

The "how" members are engaging, the various channels they use individually or in combination, and the reasons they're using one channel over another to complete various activities, offers additional perspective and a second piece of the puzzle.

# Digital Engagement

Known for their digital savvy, it may not have come as a surprise online content is hugely important to Gen Z, who spends an average of six to ten hours a day<sup>11</sup> across five different screens<sup>12</sup>. Millennials also frequently switch between devices, with a study from Adobe<sup>13</sup> showing that almost a quarter of them will switch devices while reading and a third while watching video content. The result of all this information? A shrinking attention span, as little as eight seconds<sup>14</sup>.

When we asked, "If you could only receive print materials or digital materials from an association to which you belonged, **younger members were more likely to choose digital channels over print (73% for Gen Z, 64% of Millennials). Hispanic members of all ages (73%) and those in the western region of the United States (70%) also expressed a strong preference for digital content.**

Which digital channels performed the best? Across all groups, given the choice of four channels, a plurality report email is the best way to reach them with **a large majority (82%) of those surveyed ranking email first or second.** Nearly half of all members surveyed report social media is the worst way to engage:

	BEST WAY	2ND BEST	3RD BEST	WORST
Social Media	13%	16%	26%	46%
Direct Mail/Print	19%	25%	29%	26%
Phone Calls/Texts	25%	21%	31%	23%
Email	44%	38%	14%	5%

## Email as part of the Member Experience

If omnichannel is a journey, and engagement the destination, email is the digital passport to get there and a key part of creating a seamless experience for your members.

Generally speaking, email proved a stronger channel for older members (Gen X, Boomer). Hispanic members were somewhat more likely to suggest email was the best way to reach them at 58% (+14 percentage points versus average) as were those respondents from the Midwestern United States (53%, +9 percentage points versus average). Members were also most likely to engage with their association via email, with 83% reporting they'll usually or almost always read what is sent to them.

When asked, "Thinking about where you might get information from an association from, how do you feel about each of the following?" email, both in terms of e-newsletters and personalized messages, were strong channels, with over a quarter reporting they "loved" receiving email and at least half reporting they "liked" this form of communication. More than half of those surveyed suggested email was the channel association should utilize more for effective communication with their members.

Personalized email performed especially well. According to marketing firm Omnisend<sup>15</sup>, targeted campaigns with personalized messages generally attain an open rate of 28.05%. This is a 34.7% higher open rate than non-segmented campaigns, who had an 18.3% open rate. When a message is relevant, the member is much more likely to engage. By segmenting and personalizing your campaigns to each target, you're creating an ideal member for the customer to see, and absorb, your message.

**On average, 28% of members surveyed reported receiving personalized emails from their association "very often." Almost twice as many (43%) report these messages are "very effective" at keeping them engaged.**

	ALL	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Very Often	28%	23%	32%	40%	16%
Very Effective	43%	27%	47%	50%	36%

Email also provides your organization with invaluable data on your members. In addition to the opportunity to learn more about member behaviors by observing how and when contacts engage with your messages (in addition to what messages they prefer) you can also use email to learn how your audience spends their time online.

## Engaging via Social Media

Social media affords associations with another digital channel for member engagement.

**While 8 in 10 members report they like or love personal emails from their association and three-quarters have a favorable opinion of e-newsletters the same cannot be said for social media.**

As noted above, fewer than half – sometimes far fewer – want to receive information via these channels. When asked "And when thinking about where you might get information from an association from, how do you feel about each of the following (social media channels)?"

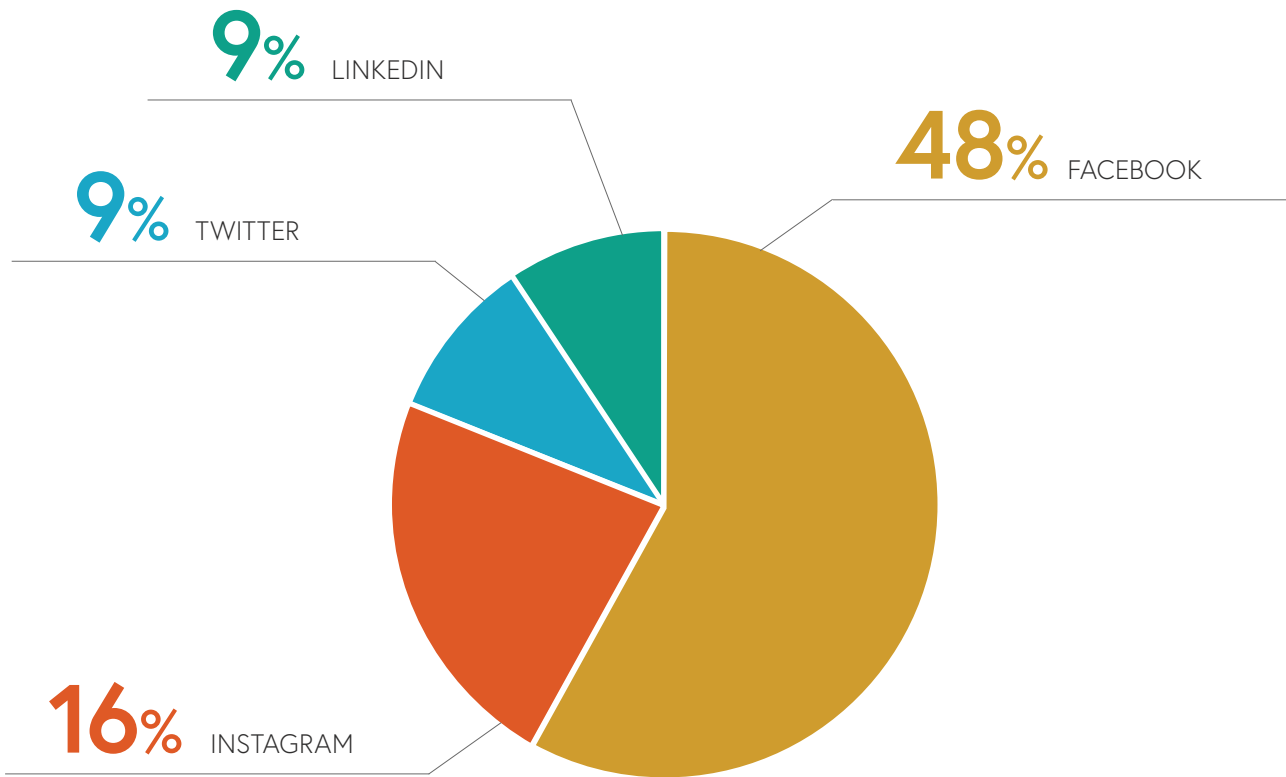
	LOVE THIS	LIKE THIS	JUST FINE	DO NOT LIKE/USE
Twitter	13%	14%	14%	56%
LinkedIn	13%	17%	18%	49%
Instagram	14%	13%	18%	52%
Facebook	19%	22%	20%	37%

African American members were slightly more likely than average to love Instagram (+17 percentage points) while those in the Northeastern United States showed a slightly greater affinity for LinkedIn with 20% reporting, they "loved" LinkedIn, +7 percentage points versus the average.

Yet social media usage continues to grow. When Pew Research Center began tracking social media adoption in 2005, just 5% of American adults used at least one of these platforms. By 2011 that share had risen to half of all Americans, and **today 72% of the public uses some type of social media.**

When asked we asked members to indicate whether their social media usage had grown in the last two years, Facebook (40%), Twitter (39%) and Instagram (44%) all saw adoption grow. For all segments except Gen Z, Facebook is the preferred social media channel. While three-quarters of Millennials and Gen X follow their association(s) on Facebook, there is a dramatic drop-off on both sides of the age spectrum. Two-thirds of Gen Z follow their association on Instagram. When we asked, "If you could only get information about an association you belong to from ONE of these social media channels, which would it be?" members responded:

**If you could only get information about an association you belong to from ONE of these social media channels, which would it be?**



As more Americans have adopted social media, the social media user base has also grown more representative of the broader population. Young adults were among the earliest social media adopters and continue to use these sites at high levels, but usage by older adults has increased in recent years. Reviewing usage of the individual channels by generation can also provide additional perspective:

### Facebook

	ALL	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Very Often	21%	22%	29%	30%	7%
Very Effective	39%	19%	51%	48%	14%

### Twitter

	ALL	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Very Often	12%	16%	14%	22%	1%
Very Effective	44%	38%	32%	66%	16%

### Instagram

	ALL	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Very Often	14%	26%	25%	18%	1%
Very Effective	44%	33%	41%	61%	23%

### LinkedIn

	ALL	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Very Often	11%	23%	12%	19%	1%
Very Effective	34%	37%	32%	52%	8%



Almost half of members report they don't want to hear from their association via social media, and each of the channels reviewed was significantly less preferred for engagement compared to email. However, understanding the effectiveness and usage of social media from the perspectives of members at different stages in their membership journey provides insights into some potential opportunities to move the needle. For example, consider which channels members told us were used most often and those that were most effective...and those which ranked lowest:

	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Most Used	Instagram	Facebook	Facebook	Facebook
Least Used	Twitter	LinkedIn	Instagram	All Others (Tie)
Most Effective	Twitter	Facebook	Twitter	Instagram
Least Effective	Facebook	Twitter	Facebook	LinkedIn

Across almost each of the audiences surveyed, members told us the social media channel most frequently used by associations is Facebook. Yet, **for two of the segments surveyed (Gen X and Gen Z), Facebook was also ranked as the least effective.** Conversely, Twitter and Instagram – noted among the social media channels least used - are also identified by three of the four segments as the most effective.

# Making the Most of In-Person Interactions

Digital channels offer a convenient, compelling way to stay up-to-date on the latest information. Young members have a strong articulated preference for digital engagement opportunities and even those more seasoned Gen X and Boomer veterans of your organization appreciate the convenience of email and follow your organization on social media. However, associations deliver the greatest value in the relationships they facilitate.

## Face to Face Events in an Omnichannel World

Noted above, the opportunity for networking is one of the most valued benefits of membership and an organization's ability to facilitate in-person conversations plays a large role in how engaged, and successful, a member is. In the omnichannel world of an association, this confluence of personal interaction and content offers perhaps the most important touchpoint in an organization's short- and long-term success with the organization.

In fact, two-thirds of members we surveyed have attended an in-person event in the past two years, driven heavily by Millennials, over three-quarters of whom have engaged via this channel.

	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Yes	59%	78%	66%	49%
No	34%	21%	32%	51%



A majority of all members surveyed (52%), with the notable exception Boomer respondents, told us events were "very valuable" in making them feel engaged with their association. Large majorities of all age groups say this was at least "somewhat valuable." This number was significantly higher in a number of our secondary segments with African-American members reporting events were valuable in terms of engagement (75%, +23 percentage points higher than average), and LGBTQ members sharing the same sentiment (62%).

Whether small-scale happy hours or annual conferences, events create one-to-one connections, engage all senses and spark the emotions that form long-lasting memories, creating a bond between the member and your organization. An integral part of an omnichannel journey, events can make your association more relevant, familiar, liked and preferred while serving as an excellent way to expose both current and prospective members to your programs, values and brand in an offline world.



## The Phone Rings True for Omnichannel

Physical events aren't the only opportunity for personal connection. Phone calls too present a meaningful engagement channel for associations, albeit one that may be underused. In Personify's earlier [Young Members 2.0](#) research, we observed that a surprising 78% of young members report phone calls are either somewhat or very effective in engaging them.

Broadening the audience to include Gen X and Boomers, the telephone remains a powerful engagement opportunity whether via conversation or text. When asked how members would prefer to engage, the phone was cited as the best or second-best channel by 46% of those surveyed, almost twice as many who expressed a preference to engage via social media. Here too, younger generations out performed their older peers, with Gen Z and Millennials most eager to engage via their phone:

### Percent of Members Reporting the Phone is the Best Way to Engage Them



Among our secondary segments, both African-American and Hispanic members were +20 percentage points more likely to cite phone-based communications as the best way to engage them. Overall, 45% of members told us they liked or loved receiving a phone call from their association, with 51% showing the same level of appreciation for text messages. Less than 20% of members said they didn't like being contacted via their phone. **Over a third report they "almost always" answer a phone call or text from their association and 19% report they are texting more than they were two years ago.**

However, when asked about the frequency and effectiveness of the phone, members of different generations surprised us with their responses:

**Phone Calls**

	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Very Often	15%	23%	21%	2%
Very Effective	45%	42%	51%	47%

**Text Messages**

	GENERATION Z	MILLENNIALS	GEN X	BOOMERS+
Very Often	19%	35%	19%	4%
Very Effective	41%	46%	41%	30%

With strong use of mobile devices, the frequency with which associations are communicating with their members via phone, either by phone call or text message, is not a surprise nor is the success associations are finding with this channel. Young members continue to overwhelmingly report the value of both communication tactics although associations appear to still be using phone calls sparingly in their outreach to this growing demographic. In this preference, the Gen X respondents appear more closely aligned with their younger peers.

However, Boomers offer significant opportunity for associations looking to increase the visibility of the phone channel in their efforts. Only two percent of Boomers report frequent calls from their association yet almost half report these conversations are very effective at engaging them. **Similarly, only 4 percent of Boomers report receiving texts from their association "very often" but a third find them valuable.** Have associations made an incorrect assumption about increasingly tech-savvy Boomers for whom text messaging is a valuable channel?



# Omnichannel in the Association World

Though the temptation may be strong, immediately thrusting your organization onto every available channel is neither strategic nor always effective.

The allure of omnichannel engagement is to create opportunities to connect with members in new ways, improving acquisition, engagement and, ultimately, retention. After all, marketing firm Omnisend<sup>17</sup> reports that **campaigns using three or more channels have 250% higher engagement rates than those which don't.**

But is omnichannel an imperative?

Omnichannel is not just having things work technically across channels or presenting members with coordinated messages. That's part of it, but omnichannel is about providing an incredible experience across channels and emotionally connecting with members at every opportunity. It represents a great way for organizations to simplify the way they connect to, and engage, their membership through different channels. Amid the enthusiasm it's worth asking how omnichannel furthers the overall strategy of your organization.

Here are some ways to get started.

## Stay focused on the experience

One of the most important steps in becoming a more effective experience for your members is to think like a member. You can't fully understand the member's experience, or identify the gaps within it, if you're not talking to your members. Focus groups, in-person visits, reading feedback, actually calling them and asking them is an essential step in informing your understanding of their journey, across all the channels they may interact with.

## Understand your options

Organizations that succeed in omnichannel don't just think about how to sell on different devices, they're also thinking about how members use different devices and channels to achieve different goals and within the overall context of their membership experience.

Don't waste time and money on a "shotgun" approach to omnichannel – or even multichannel – engagement. Remember that channels don't have to compete against each other and that you can grow your organization by strategically integrating all these channels in a way that will be most meaningful to your audience. Try to avoid applying the same goals to every channel and instead consider how each channel can contribute to your organization's overall engagement strategy. Understand your membership as a whole, the unique segments with your constituency, where they are and then be consistent across all those channels. To make channel switching easy for members, make sure your association's brand feels the same across all touchpoints.

Accomplish this by prioritizing the narrative and interconnectedness of the different channels in use. Instead of viewing the landscape as your website, your annual conference and Facebook page think of them as parts of the same story. The goal should be to bring as much of your brand experience as possible to each, reinforcing the value your association delivers, but not necessarily to drive traffic from one channel to another. Organizations often invest valuable time trying to generate new ideas for each channel when they should instead take a single idea and translate it in to as many different mediums and channels as possible.

Understand that members of all types are going to consume content how they want, when they want and where they want. By spreading an idea across multiple formats, your providing valuable flexibility that works across channels.

### **Get your technologies talking**

Integration is key. Even for large retailers, successfully delivering an omnichannel experience in real-time poses a formidable challenge. To get close, brands need to adopt a holistic strategy that loops in every avenue of customer engagement with systems that talk to each other and leverage the necessary data to drive the next interaction in the customer journey. This level of integration promotes consistency across all touchpoints and provides customers with a seamless experience that's channel-agnostic. Leverage automation and workflows wherever possible to keep things running smoothly and ensure the member's experience never suffers.

### **See the forest through the trees**

Nothing is more important than taking a data-driven approach to omnichannel engagement but don't let perfection be the enemy of progress. Data can be used at any stage (i.e. acquisition, engagement, retention). It is paramount in establishing the true value of each channel, helping you understand where your focus should lie and when to consider cutting back on a particular channel in favor of another that may be performing better. Instead of demanding perfection, embrace the data you're able to gather – and feel confident in – to identify patterns and uncover trends.



## Wrapping Up

Technology plays an important role in successful delivery of an omnichannel experience. The data it houses serves as the foundation of your organization's experience strategy. A strong association management solution, suite of engagement tools and a platform that makes integration streamlined will ensure you're able to seamlessly embrace new trends, incorporate to the latest technologies and provides you with a strong foundation that will be constantly improved upon by the application of new insights.

## About Personify

Personify is the market-leading Constituent Management and Engagement (CME) platform that empowers modern organizations to better engage their constituents, maximize revenue and optimize operations. For over 20 years, we have been driving growth for a diverse group of organizations including associations, nonprofits, event professionals, YMCAs and JCCs. For additional information, visit [www.personifycorp.com](http://www.personifycorp.com).



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