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HOW

ASSOCIATIONS

WILL



THRIVE

OR DIE

THE 2020 RULES OF
MILLENNIAL ENGAGEMENT

& mobilize

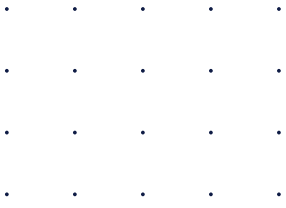


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Dave Hersh is the owner and CEO of Mobilize. He was the founding CEO of Jive Software, which he led up to its IPO, and has been in community and collaboration for 25 years. He was also a Board Partner at the VC firm Andreessen Horowitz prior to Mobilize.

Recognized as one of “Five to Watch” by ASAE’s Associations Now magazine, Ben Martin is an association executive with over 15 years of experience in online communities and membership organizations.



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Foreword

(Dave Hersh, CEO at Mobilize)

When I acquired Mobilize in 2018, I was the only non-millennial in the company. I had worked with millennials before but **now I was outnumbered**. There was learning to be done.

My generation was raised differently. Divorce rates had tripled in the 70's and the parenting style meant that we were fending for ourselves at an early age. This led to good survival skills, but poor self-actualization. We were rugged individualists with a chip on our shoulder. Joining Mobilize I saw how that **approach was going to be challenging in this new world**.

I could be brusque. I just wanted results. Not the most sensitive leader at times, I could get frustrated easily. On top of that, I was overwhelmed by the amount of tools / tech. It seemed like there was a **separate tool for every single process**.

But I did have something in common with my younger colleagues: we were all driven by purpose. And in this case, my sense of purpose drove me to learn more about our differences. To bridge the generational gap. To get past the stereotypes and my own shortcomings, and dive into the depth of **real understanding**.

This generation grew up with the will and freedom to question assumptions, take risks and embrace experiences. They also lived a more robust digital life than we ever imagined. I had a lot to learn from millennials, not to mention my Gen-Z teenage daughters who are even more tech-native.

I could fight this change and proudly highlight my generation's differences from my pedestal. Or I could embrace the new reality, learn from each other's



perspectives and live a fuller life. I chose the latter and have grown as a person thanks to this brilliant, life-affirming group of people now **taking over the workforce**. I also have more faith in our future.

Organizations are facing the same dilemma: the old skills, techniques and approaches are not only ineffective, they exacerbate the problem. Traditional marketing turns off this generation. Content shouldn't cost money. **One-to-many communication is ignored at best and reviled at worst.**

What matters most? Human connection. To take a page out of the millennial playbook, it's time to **work smarter not harder**; to embrace a new world order. One that is driven by meaning, intelligent technology and authentic connections.

Organizations that embrace this change will transform into a true community - people across the generational spectrum learning from each other and building a sense of belonging. Just look at the most successful and innovative organizations born in this era, from WeWork to Peloton to AirBnB - they are communities at their core. They are open, collaborative, purpose-driven, mobile-first and, above all else, **real**. They stand for the change they seek in the world. And they don't just appeal to younger generations, but bring everyone along for the ride.

Now is a critical time to decide if you're busy growing or busy dying. If you want to stay relevant, it's time to embrace a new, enlightened model of member engagement.

CHAPTER 01

INTRODUCTION

Your biggest problem is your biggest opportunity



Your biggest problem is your biggest opportunity

***By next year, it's expected that
Millennials will dominate the workforce.***

*But the methods that membership-based
organizations have traditionally used
to spark engagement are anathema
to the way in which Millennials
like to engage.*

IN SHORT: for your association to survive, you must change.

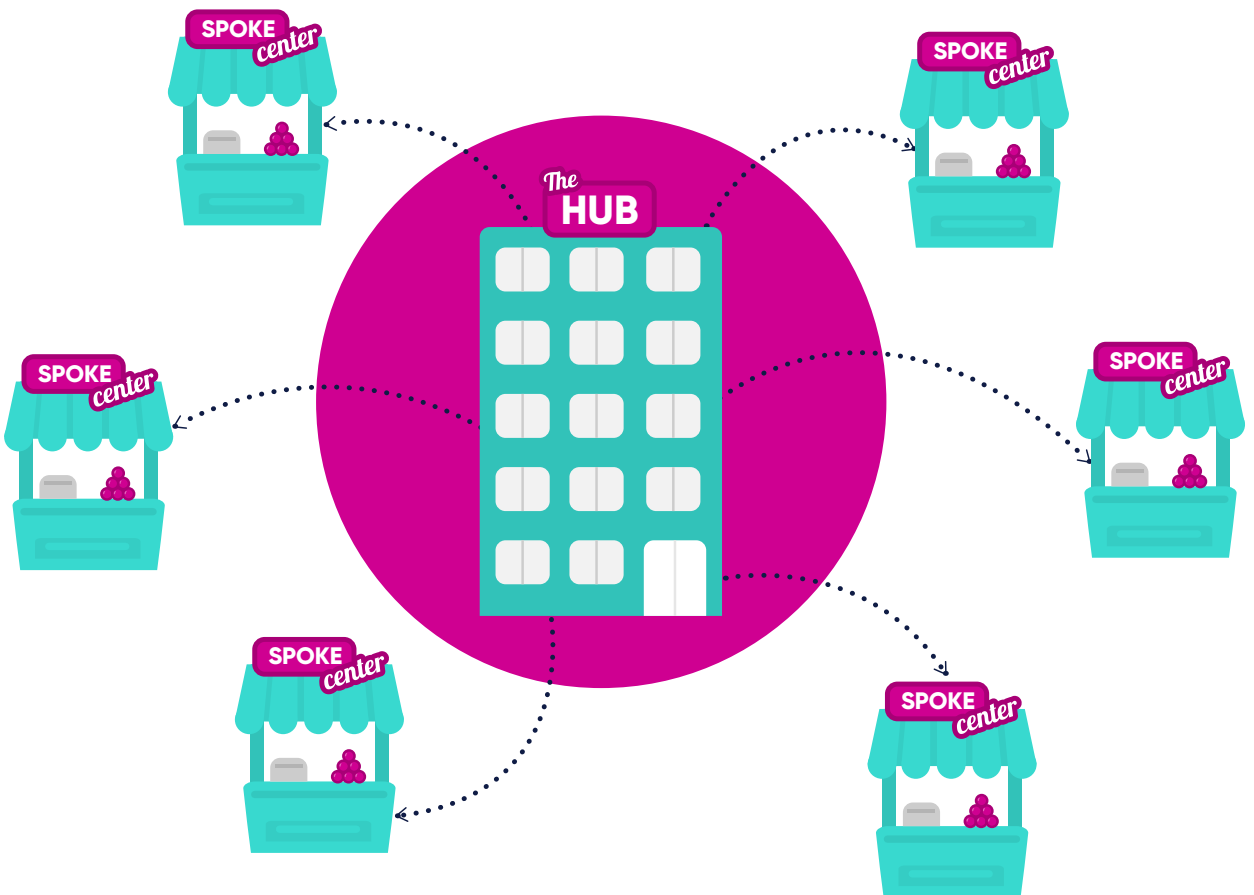
We are at a tipping point. Millennials are on track to comprise more than **50% of the workforce in 2020, but still make up only around 20% of association membership.** Part of the participation gap has to do with career phase. Professionals who are earlier in their career lifecycle are less likely to be able to afford organization dues. But that isn't the whole story.

Studies show that Millennials **don't respond well to traditional forms of marketing** and content sharing. According to a study by the McCarthy Group, 84% of millennials did not like or trust traditional marketing.

In our digital-first society, the ability to create and curate new communities is

less expensive than ever before, and competition is fierce. If associations are not the authentic communities Millennials crave, they can simply turn to their social media platform of choice to find other communities or create their own.

Having grown up in the social information age where the world of contacts is at their fingertips, Millennials don't appreciate an organizational "gatekeeper" when they engage with people online. The **hub and spoke model** that used to work so well, where the organizations were responsible for the "one to many" communication of newsletters and information, now threatens to alienate a growing audience. On top of that, it's expensive. Associations struggle to create enough content, make introductions and facilitate connections. It's costly, inefficient and in conflict with the millennial approach.





To align with today's expectations, you must be less of a one-to-many mouthpiece and more of a **platform where members can learn, discover and make their own connections** without friction or walls. Allow members to network, create their own content, fuel

“

As the first generation of digital natives, they have a hard time understanding why the way things are done in organizations today seems to ignore today's digital reality.

— Jamie Notter, *When Millennials Take Over*

”

their own thought leadership and get involved in small groups that give them a sense of belonging.

The good news is, this approach not only engages millennials but deepens the participation of older generations as well. The rising tide of authentic connection lifts all generational boats.

To illustrate the **difference between the old approach** (hub and spoke) **and the new** (platform for connection), imagine a classroom where students are

forced to listen to a lecture, with zero participation allowed compared that to a Socratic model, where students are actively engaged in discourse. When students feel seen, heard and valued, their participation skyrockets along with the learning and overall enjoyment.

According to a Gallup Report^[1], there are four themes that collectively describe Millennials: **unattached, connected, unconstrained** and **idealistic**. They are striving for a life well lived. They want good jobs and engagement in those jobs. They want to have a purposeful life, be an active member of their community, and enjoy financial stability. They are passionate. They are career-focused.

And if your association answers the call, **millennials will help you reach unprecedented levels of engagement and success**. Are you ready?



[1] What Millennials Want From Work and Life, Gallup Report: <https://www.gallup.com/workplace/236477/millennials-work-life.aspx>

CHAPTER 02

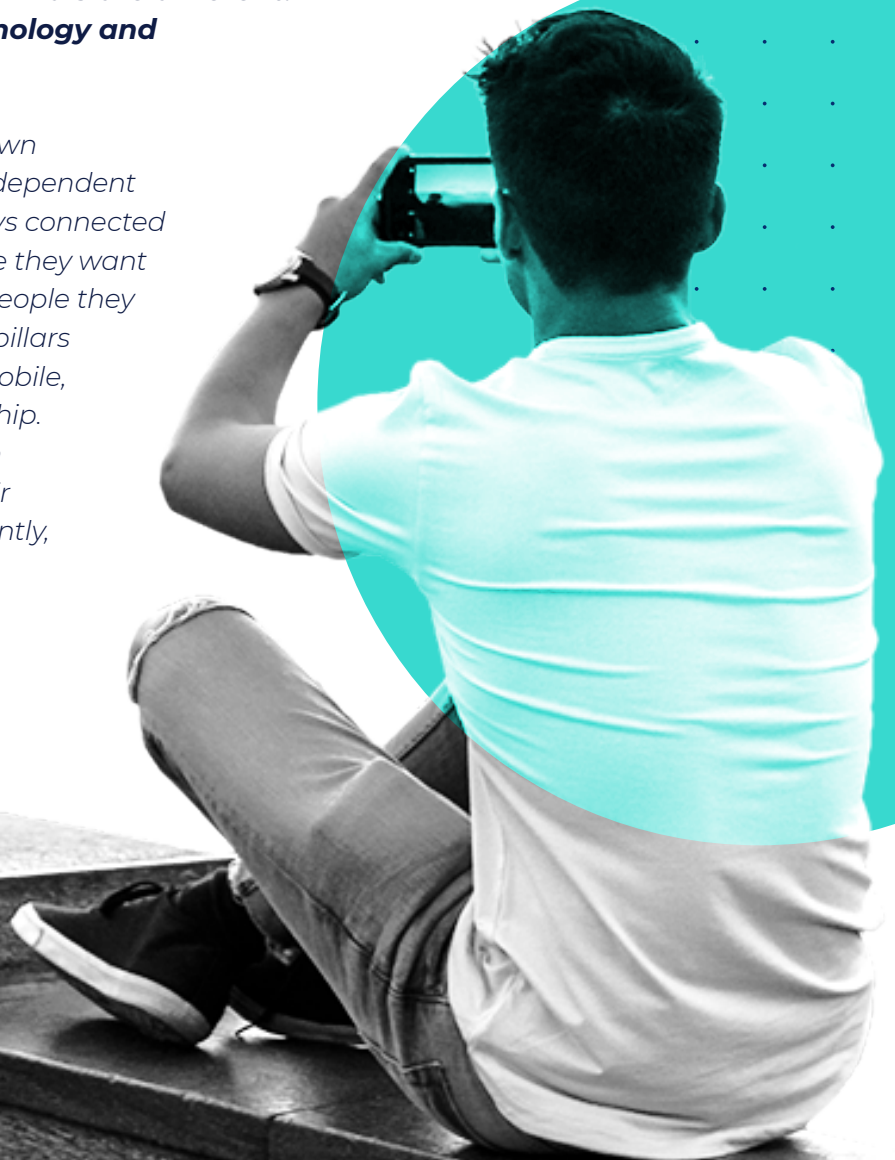
WHAT MILLENNIALS WANT

Think digital, act human

Think digital, act human

Let's get right to it. Millennials are different. They grew up with technology and they're always on.

A whopping 92% of them own smartphones [2]. They're independent and unattached, but always connected via apps and chat, because they want to be in the loop with the people they care about. There are four pillars of mobilizing millennials: Mobile, Modern, Mission, Membership. You'll need to address each of these in order to win their hearts... and more importantly, their membership.



[2] Millennials stand out for their technology use, Pew Research: <https://www.pewresearch.org/fact-tank/2018/05/02/millennials-stand-out-for-their-technology-use-but-older-generations-also-embrace-digital-life/>

MOBILE

Millennials want access to whatever and whoever they need... whenever they need it. They expect technology to be **simple, frictionless, automatic, helpful** and **mobile**. They don't want to learn a new interface in order to join an online community. And they definitely don't want to be tethered to a desktop.

MODERN

An interface that is too feature-rich and complicated is a turn-off. Tactics like gamification or ad saturation feel manipulative and contrived. The bar has been set with user-friendly tech like **voice recognition, smart homes, device integration** and **IoT**. Think about the virtually frictionless Amazon member experience. Users can push a dash button and have laundry detergent or coffee delivered within a day or two. When those same users try to register for an event or connect with others in your community, that is the standard against which your experiences are being measured.

*The bottom line is that reaching millennials requires a **digital-first, human-centric mindset**. It's about making sure that all of your workflows facilitate easy, authentic connections that make them feel like they are truly part of a rewarding, supportive community.*

MISSION

Millennials have a deep sense of purpose, and so should you. Everything you do has to be aligned not only with the purpose of your organization, but also with the purpose of each individual in your community. **They want to feel like they're seen, heard and valued**. They want to feel like they matter to the group, and that only happens when your interface encourages camaraderie and quick responses.

MEMBERSHIP

Thanks to years of social media data mining practices, savvy millennials are wary of joining new online communities. But you can reassure potential users **by letting them test out a free version before they buy**. This paves a path of trust, and invites them to experience some of the benefits of membership.



ENGAGEMENT

THE OLD WAY

Antiquated forums



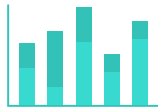
Unnecessary features



Built for desktop



Years of technical bloat



Complicated tools



Manipulation



THE NEW WAY



Frictionless engagement



Simple and precise



Mobile friendly



Familiar



Purpose-built tools



Belonging

CHAPTER 03

**GROWING A MILLENNIAL MEMBERSHIP WITHOUT
ALIENATING OLDER MEMBERS**

The funnel has changed



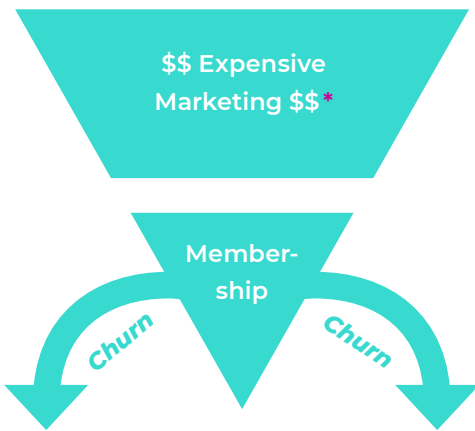
The funnel has changed

The good news is that **millennial preferences are not exclusive**. Gen Xers and Baby Boomers have come to expect similar types of online experiences. It's just that millennials have never known any other way of doing things, so they are less tolerant of outdated and clunky user interfaces.

The bad news is that **engagement and retention are more challenging than ever**. The funnel has changed. Historically, outreach began with direct mail and traditional forms of marketing, followed by hosting big events and trying to get conversions on the spot. That's not only difficult, it's expensive. And **it's not how the millennial generation responds**.

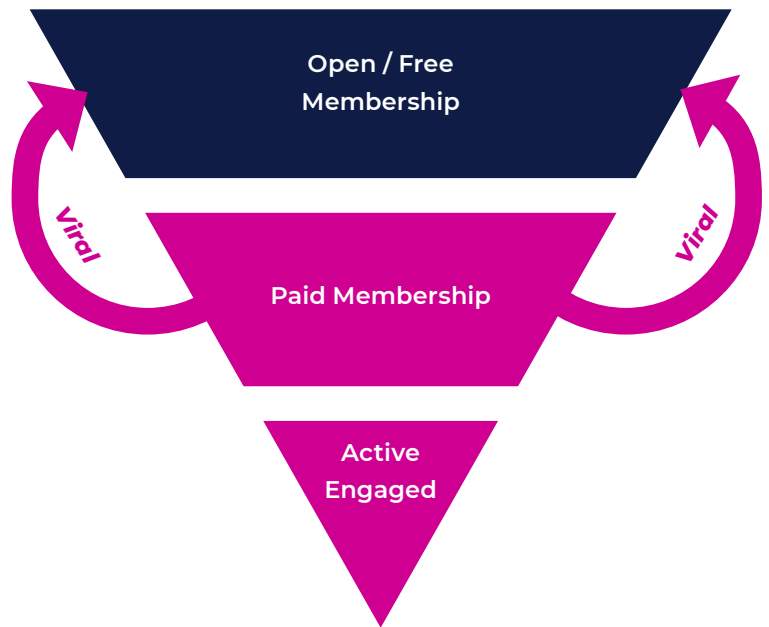
GROWTH = REIMAGINED FUNNEL

GONE



- Compete with other assn's and social media groups
- No leverage
- Expensive recruiting
- No easy on-ramp

HERE



- Easy "free member" options
- Requires little add'l work
- Millennials expect it
- Viral loops boost leads
- For tech firms, 50% lower
- CAC and 2X NPS scores**

* 46% still use direct mail, 17% digital marketing - Marketing General
 ** ProfitWell 2018

One example of a successful freemium rollout is the Texas Computer Education Association. It had 15,000 members before introducing a free tier. Afterwards, their user base doubled to close to 30,000 members almost overnight. Now, they have a total of 200,000 users in their funnel, they've **increased non-dues revenue**, and they've **strengthened their lobbying efforts**. When you compare that to the time, effort and costs required to achieve those results from a traditional membership drive, the power of **"free"** suddenly becomes crystal clear.

Integrating millennials with an older membership base isn't difficult when you've built a **frictionless online community** where all can freely communicate. Millennial members benefit from interactions with more experienced, mature members, and vice versa. In certain cases, it can be helpful to form additional subgroups for emerging professionals or those nearing retirement, where age-specific issues generate a need for peer-to-peer discussion.

Because expectations bleed over from one generation to the next, growing membership in any demographic is really about **engaging people** in a way that lives up to or exceeds their need for a **valuable, seamless user experience**.



CHAPTER 04

THE NEW FORMULA FOR ENGAGING AND RETAINING

Human nature & nurture

Human

nature

& nurture

Think of some of the most successful organizations today. From WeWork to Harley Davidson, customers love these companies because they love the communities those companies have built. It's human nature. People want to feel like they are part of something bigger, a movement that matters.

They want to feel connected and aligned with the purpose of their group.



Restructuring from having your organization at the center (the old hub and spoke model) to **focusing on your community** is a big part of retaining members over the long run. But building a community-centered model is not enough. You must **nurture that community** in order to build engagement and ensure that retention stays high.

One aspect of community nurturing is **personalization**, making sure to get the right content to the right people at the right time. Another part of it is encouraging and engaging with subgroups — so that **members feel like they're making real connections** without getting lost in the crowd. The best organizations are obsessed with listening, getting feedback and improving the overall community experience. Targeted outreach and polls can engage your subgroups and facilitate the one-on-one connections they crave... in addition to providing immediate, valuable information that can help you optimize your organization's efforts.

This new playbook of features — appealing to human nature while provid-

ing the communication that nurtures — fits seamlessly with a **Community Commitment Curve model**. Instead of high-pressure, high-volume membership drive tactics, this millennial-friendly model is about taking several small actions that help users feel increasingly more comfortable participating. It's about holding their hand and welcoming them in. Post a poll so users can express their opinion without the pressure of writing their own new post. Ask for comments, host online events. Nudge them along the path to belonging.

But engagement and retention are no longer just between you and your members. It's also about what's happening **behind the scenes between members**. This is a new era where human connection, networking, conversations... they matter more than ever before. When these types of personal relationships are formed, value is created. And value is the key to more membership. Facilitating more behind the scenes engagement is an important way you can add value and move people along the **commitment curve even faster**.



CHAPTER 05

GETTING STARTED TODAY

A new kind of leadership

A new kind of leadership

Millennials are already members of online communities. They're used to chatting with groups and receiving phone notifications throughout the day. In this way, they're constantly reminded of their sense of belonging.

Winning and keeping their loyalty requires not only giving them that sense of belonging, but also encouraging them to become leaders within your community.



HERE'S WHY: millennials don't need or want a third party inserting itself into the middle of their conversations, or worse yet, forcing them to have some contrived version of a conversation for its own sake. But this doesn't mean there's no place for your organization. The key is to host and facilitate **organic gatherings while measuring the data** and capitalizing on it in a way that provides mutual benefit.

The most successful interactions (both in terms of engagement and data) will come **from the members themselves**. To encourage more organic conversations among members, find millennials and Gen Z members to act as your community leaders. Give them the support that they need to help you scale engagement in a way that feels more personal.

Imagine this: a question is posted in your online community, and it is promptly answered by an official from your organization. While members will appreciate the fast response time, it will not feel like you have a genuine community. Conversely, if the question goes unanswered for too long, it will not feel like you have a community at all. Community leaders can help by stepping in and responding to the question as a member of the group, or by reaching out to others in the group and encouraging them to answer. **The best community leaders function more like a coach or MC.**

This doesn't mean your association can't be part of the conversation. Be proactive about building an engagement strategy, one that feels genuine and authentic. Create content that **connects** your members to a cause.

Provide **conversation starters**. Encourage dialogue. Be transparent. Have a meaningful mission and celebrate it with your members.

Crafting content that resonates starts with listening. **Ask your community** what it wants.

Run a survey. Find out what they value and what makes them feel a sense of belonging. In addition to providing valuable answers that will help you build your engagement strategy, it also kickstarts engagement itself! Once you determine the substance of the content you'll offer, it's time to think about packaging it. Polls, videos, photos and aesthetically pleasing content are all crowd pleasers. But so are old fashioned words... if you keep it short and meaningful and ask for comments. People who grew up on the internet **want to be entertained and expect to be entertained**, so don't be afraid of a little humor now and then.

Get your content in front of the widest possible audience by removing barriers. Build a **free membership tier** allows users to try before they buy. It gives them a chance to get to know the community, to start experimenting and making connections. Then, as their engagement builds, you can slowly move them up the commitment scale.

CHAPTER 06

QUESTIONS

Nobody has all the answers (but here are some good ones)

Nobody

has all the

answers

(but here are some good ones)



How can we tell if our engagement strategy is working?

Every interaction — message, comment, question or share between members — is considered a **one-on-one engagement**. Since these types of activities are so important for building **long-term loyalty and membership**, tracking them is critical. After all, you can't improve what you don't measure. Create a tally of all one-on-one engagements by adding them up into a **net connections metric**. Follow this metric over time to gauge success and optimize your engagement strategy as you go. If net connections are low, ensure that you have the right tools in place for members to easily find and **interact with each other** (e.g., search and filter functionality). Don't be afraid to provide your subgroups with **ice-breakers** and **conversation starters** to get the ball rolling.

With so many platforms available to communicate with members, what is the simplest way to reach the broadest audience?

Don't be fooled by this question — **"simplest" is not always "best."** While some applications can help you repurpose and blast text out to various social media feeds, any communication from your organization should ultimately be proofread and **optimized by a human being**. Because the goal is to encourage personal interactions between members, your outreach needs to have a personal element as well. **Over-automating**, by way of robotically replicating messages across platforms, gives the impression that they are **less authentic**. In this case, "simple" is a double-edged sword. On one hand, it's efficient and consistent, but on the other... it has the potential to alienate the very members you seek to attract.

The holistic solution is to use a **distributed leadership model**. If the challenge is to get a lot of messages out at once in an authentic way, call upon community leaders to help. Empowering your leaders to send messages encourages a snowflake model of leadership, where members train and empower other members **to become leaders as well**. Over time, the model gradually builds efficiency and broadens its reach. You could almost call it "human automation."



CHAPTER 07

CONCLUSION

Putting it all together




Putting

it all

together

***If you want to speak
“millennial,” you need
to be focused on ways
to foster belonging and
human connection.***

*Get ready to live and breathe
your members' modern dichotomy
of wanting to be connected yet
independent.*



Let members **speak for themselves**, encourage them to interact with one another. The more belonging they feel, the more they will engage. **And the more they engage, the more loyal to your organization they become.**

It's time to reimagine your **membership funnel**. The entire journey from awareness to viewing content to joining as a free member to becoming a paid member to attending events to joining SIGs to attending national events needs to be transformed to reflect this new era. It also needs to be closely **measured, monitored** and **optimized** to ensure you are driving the right engagement at every step of that journey.

It's time to open up and let potential members get to know you on their terms, and to invite participation, and show your organization's **"human" side**. Then, step back and watch as your members naturally form the type of community that wasn't even possible a decade ago. Welcome to the millennial age. **The future looks pretty bright from here.**

For a follow-up millennial strategy session (with our in-house millennial and community expert, Alexis, reach out and connect. We'd love to hear from you.



 mobilize

www.mobilize.io