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# MEMBERSHIP 2.5 REINVENTING VALUE

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Erik Schonher  
Vice President  
Marketing General Inc.

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## ■ INTRODUCTION

Membership is a key, *strategic*, initiative that impacts every aspect of an association's business, from advertising to education and training to conferences. We generate dues revenue as well as establish a base from which non-dues revenue can be earned. We're asked to accomplish this using as few resources as possible—and, in today's economy, with **fewer resources** than ever before!

Therefore, we need the counsel of others who face the same challenges we do in the hope of learning from their experiences and making our own efforts more efficient and effective. In this white paper, you'll find the observations and advice of leading association and membership professionals who face those same challenges.

I personally want to thank each contributor for sharing his/ her time and knowledge to make this important material available.

Enjoy and learn!

Erik D. Schonher

Vice President, Marketing General Incorporated

## ■ BRANDING

**Caroline H. Fuchs, CAE**

*Director, Marketing & Communications, SmithBucklin Corporation*

We read about its importance, we go to seminars describing the wondrous effects, we know about Starbucks and Apple—but how should association marketing professionals really think about branding? It allows an organization to become well known—like AARP and the NRA—and, at its best, uncovers a core essence that directs activities and communicates value. So how does an association recognize and achieve branding nirvana?

### **Recognize the value of branding**

It is a process where an association defines itself and then lives that definition through its messages and actions. By understanding its core audience, how it serves that audience, and the differentiating value that makes it stand out from its competitors, an organization can develop its services, craft its messages, and inform its core audience and other constituents in a dynamic yet systematic manner.

### **Research is key**

Research (no surprise here) is the foundation of the branding process. The brand discovery phase informs you on how current/prospective customers and other constituents act and how they feel—the emotional pull to (or from) the association that makes them rejoin, participate, or react positively towards its messages. For example, the American Urogynecologic Society (AUGS) used a combination of quantitative and qualitative research to identify a lack of clarity surrounding the association's primary membership audience—whether AUGS existed to primarily serve fellowship-trained urogynecologists or the broader medical community. That research finding was a revelation that was later reflected in the development of the AUGS brand definition of core audience, benefits, and value.

### **Brand definition**

Brand definition is where association leaders and other key constituents come together to define the organization in a unique and compelling way. There are a variety of methods to obtain brand

definition, but the Health Industry Group Purchasing Association (HIGPA) selected a facilitated session with members of the board of directors and individuals representing additional key constituencies. The collective knowledge of the group was harnessed using interactive exercises to define the brand promise, essence, personality, and unique proposition. After intense discussion, the participants identified a target audience of health care providers and policy makers and distilled HIGPA's value proposition into the brand essence of "trusted advocate for effective supply chain management"—a theme for future messaging.

### **Brand marketing plan**

This is where brand identity (i.e., logo, graphical treatments) and key messages are developed, and the marketing and communication strategies and tactics are outlined that integrate the new brand into existing and future association products and services. The brand marketing plan can span several years and will typically include schedules and budgets. Message development is tied to identified audiences and specific activities, such as the prospective sponsors of an annual conference. The adoption of messages usually requires website and materials updating, talking points, and other internal and external outreach efforts.

But it is the actions and events that audiences experience on a daily basis that characterize the brand. The brand marketing plan should identify activities that align with the new brand. This could result in the design of a conference experience that better represents the brand in terms of issues, format, and logistics; or enhanced outreach efforts to accelerate the brand's reach into new audiences.

### **Living the brand**

Living the brand through implementation of the brand marketing plan is difficult because it requires focus, consistency, and alignment across all activities and resources. But living the brand is the most rewarding because it allows the association to proactively and creatively meet the needs of members, and other constituents, and deliver the promise of value.

## INTERNATIONAL MEMBERSHIP DEVELOPMENT

Linda G. Brady, CAE

*Director of Membership Development, International Society for Pharmaceutical Engineering*

*Those living outside the country are more likely to pay their own association dues than those living in the United States. They are also more likely to believe that their employment situation will improve in the coming year, and less likely to drop their memberships.*

ASAE & The Center for Association Leadership Impact Study:  
“Beliefs, Behaviors, and Attitudes in Response to the Economy”  
Winter 2009

International membership development can facilitate the growth needed for a healthier and more diverse organization. Crafting your value proposition to meet the needs of a global community of members is not a quick or simple undertaking; however, it could be a long-term solution for sustainable membership growth. Having greater diversity among your members can enhance the member experience and your organization’s membership value proposition. Your association can create enriching experiences by bringing people together from various backgrounds, offering different perspectives and approaches to solving challenges, and providing opportunities for professional and personal growth.

In this section we highlight areas to consider as you plan to grow your membership internationally, from the perspective of an organization based in the United States. There are numerous questions raised throughout the article. They are intended to help spark your association’s thought process. There is no “one size fits all” approach to international membership development. Your association’s specific goals and objectives will need to be fleshed out with stakeholder input and will require research, strategic planning, business planning, and both human and financial resources.

It is essential to begin with a good foundation of knowledge. Start by examining trends for your association’s discipline or industry. Once you have identified the potential markets, there are several key questions to answer:

- Where is the biggest potential for membership growth? Look for ways to validate your findings. By prioritizing your list, which will need to be weighed against a variety of factors specific to your organization, you will be able to crystallize your vision and plan a stepped approach to international expansion.
- Is there already another group serving your prospective members in the country or region? Is it a region- or country-based organization? What benefits do they offer their members? In what language? Do you have members who also participate in the local/regional organization? If so, find them and talk to them. They will provide you with valuable, firsthand insight.
- What can your organization offer that is valuable and unique from the locally based organization that is already established?
- Is there a partnership opportunity for collaborating on programming or a reciprocal membership program with the local organization?

Developing a research plan with a systemized approach to collecting qualitative and quantitative data will be helpful. As you conduct your needs analysis, keep in mind that member needs may vary based on where the members reside. This could be a different level of content, alternative delivery methods (e.g., online, print, or in person), translation of materials, or something else. Some benefits may be relevant to members worldwide, in a specific region or continent, or in a particular country.

An important component will be contacting members you may already have outside the United States. Telephone or face-to-face interviews are excellent ways to gain important insight that can help guide your organization’s membership development initiatives. What can you learn from their experiences? Do they have an interest in helping the organization grow your membership in their area? I have personally seen how one member can create a wave of membership activity through his/her personal grassroots initiatives.

Your research will fuel your organization’s strategic plan and business plan. We will not cover specifics in this area but know that this is an important element that should not be overlooked.

Your research also will drive the creation or revision of your association’s membership development plan to incorporate international expansion. It is important to cover the accessibility and relevance of member benefits as identified in your research and needs analysis. You may consider developing a matrix of the benefits, programs, and services relevant for each member segment based on their location. This will help drive your communication plan and identify potential weaknesses in your benefits package.

You may find that you have benefits that have worldwide relevance but accessibility is an issue. Look for creative ways to repackage existing benefits or redefine how they are delivered. A good example is how the International Society for Pharmaceutical Engineering (ISPE) delivers training courses. Previously, ISPE held four to six training courses at a hotel in the United States and Europe. Members would travel to the location and typically spend two to four days on-site. Many of the members could not access the training courses due to travel costs, time out of the office, or language (the courses were delivered in English). Through a collaborative partnership with ISPE’s affiliates and chapters, training course content now can be licensed for local delivery. Each course consists of multiple modules, which allows the affiliate or chapter maximum flexibility to deliver the content in a way that works best for the members in that area.

There are many other things to consider when thinking about the accessibility of benefits:

- Is your membership affordable to members residing in an emerging economy?
- Is it necessary to translate materials or do your members typically conduct business in English? How will you go about translation?
- Where are your educational programs delivered? Can members easily travel to attend conferences?

- How will your organization deliver education and training locally?
- For virtual events, such as webinars and online courses, consider the best times for scheduling. If the content has global relevance, programs may need to be delivered multiple times to accommodate for various time zones. Staff time can become an issue if live online events need to be scheduled overnight.
- Do you have an affiliate or chapter in the area? What opportunities exist for collaboration?
- How will members pay for membership, programs, etc.? What currencies will you accept?

Membership categories and dues rates are often discussed while planning for international development. Some organizations create a discounted membership dues rate for emerging economy members, while others may charge additional fees to adjust for an increase in international postage rates. There is not a right or wrong answer. Your strategy will need to reflect the unique profile of your members, represent your association's current structure, and support your organization's strategic plan.

Another consideration is how your organization will be *perceived* in other countries. Many U.S.-based international associations struggle with the perception of being U.S.-centric. This is a potential problem because members could feel that you are out of touch with their needs or not truly representing your global community of members. Whether or not you agree with this feedback, perception is the reality in the mind of the members. Shifting the perception of your association will need extensive discussion and planning. Many areas will feed into your association's strategy including the governance structure, policies, and organizational culture, and branding will certainly come into play. A few tactical areas are highlighted below that could be worked into your organization's overall strategy, style guide, and elsewhere:

- Staff may need cultural diversity training that will provide them with lifelong benefits.
- Avoid words, sayings, and references that may be commonly used in the United States but unfamiliar in other parts of the world.

- Understanding the fine distinctions in language will need to be learned (e.g., "to table it" in the United States means to put on hold for a later discussion but in the United Kingdom it means to discuss it now).
- Be sensitive to time zone differences when scheduling meetings.
- How will you list dates and times? 3:00 pm or 15:00? It can be confusing to post dates numerically (5/7/09 could be May 7, 2009, or 5 July 2009).
- Consider holiday schedules around the world in your planning (e.g., avoid scheduling a major global event over the Chinese New Year).
- Appreciate the diversity of your membership in your communication.
- When speaking to an international audience, think about English being a second or third language for many. What changes do you need to make in your approach? Providing copies of your presentation and speaking more slowly are often helpful to non-native English speakers.
- Work to have global representation on your Board, committees, and task teams.
- Understand that the volunteerism may be seen differently around the world.

Taking all of these elements into consideration, your membership acquisition, retention, and renewal campaigns will need to be tailored for your diverse audiences. When creating promotional materials for an international audience, think about the overall look and feel, messaging and tone, use of colors, paper size, and other elements that will support your image of being an inclusive association for a global community of members.

International development is a rewarding and exciting opportunity for membership professionals. At the same time, it will require patience, because progress can be slow, and an open mind for looking at new ways to best serve your members. It will not be "business as usual," which can be the key to transforming and growing your organization's membership base.

## DATA-DRIVEN STRATEGIES

### *Make Research A Priority During Troubled Times*

#### **Tip Tucker Kendall**

*Director, Membership, Exhibition and Convention Services  
Women's Basketball Coaches Association*

#### **Dean West**

*President  
Association Laboratory Inc., Chicago, Illinois*

During an economic downturn, research is often seen as a luxury. However, it's these times, more than ever, that associations must look to data to drive their decisions.

Why is data so important during a recession? The answer is simple: change is happening to your members' lives, both professional and personal, and if you want to align association initiatives with their needs, using data analytics is the best way to do it. By paying attention to shifts in how members are doing business, your association can adjust programs to more specifically meet their needs.

Additionally, an investment in frequent research is an investment in staff development, improving the amount of incremental learning within and across department lines as staff gain new knowledge about the market.

#### **Developing Data-driven Strategy**

Surveys, focus groups, and member interviews are all designed to help associations understand membership trends, attitudes, and behaviors so that decisions reflect this information. By implementing a

methodical process of research, the association can maximize the value of information and reduce costs.

The following are common questions used to help develop your data collection strategy.

- 1) What are your association's core objectives?
- 2) How do your programs, services, and other initiatives contribute to those objectives?
- 3) Do you have data, either internal or external, that can shed light on decisions relative to these objectives?
- 4) Can you design a meaningful metric that measures those contributions?
- 5) Is this metric truly necessary to explain the activity's contribution to the objectives?
- 6) How can you build a systematic and ongoing means of measurement of this information to guide decisions?

### **Planning and Implementation of a Data Strategy**

Implementing a data collection strategy involves some basic steps.

- Create an annual, written plan to guide information collection and research. Your plan should take into account when the information will be needed by association staff and leadership for decisions.
- Get input and buy-in from across all staff departments so that you understand their needs.
- Look at previous surveys and consider how this information was used. Determine if there needs to be follow-up research on specific topics to gain additional depth of knowledge.
- Make sure to collect specific data longitudinally over time so as to identify trends.
- Discuss results with staff and/or other decision makers and develop an action plan that incorporates the information.
- Finally, think about how fast your industry is changing and adjust the plan accordingly.

### **Consider the Decision Makers First**

Most associations stumble due to their inability to track the right things at the right time and then, ultimately, to put the right information in the hands of the right people. Communicating results should be considered at the beginning of the data collection process so as to avoid the following pitfalls.

- Decision makers are not informed about the information available to them,
- There are concerns about information quality due to poor question writing or an insufficient sample, or
- The format or means of communication of data is frustrating.

Bottom line: Implement your data collection strategy with the end decision maker in mind. After all, the entire purpose is to get answers, not for just the sake of the exercise, but to meet the informational needs of your decision makers.

### **A Dashboard Can Help You Stay Focused**

A dashboard is a tool used by decision makers to monitor association performance. The key point is that a dashboard is nothing more than a tool: A highly visual interface that includes graphs, color-coded gauges, stoplights, and other cues to highlight variance from performance targets. What's most important is the content: that is, what's being measured and displayed on the dashboard.

A dashboard consolidates information and presents it in a format that allows the decision maker to quickly understand the implications of the information and make decisions accordingly.

At a time when association recruitment and retention are the most likely to be in flux, a membership dashboard, a report often containing charts, graphs, and other gauges that display performance against targets, is an excellent tool for keeping your finger on the pulse of what is happening within the membership, allowing decision makers to:

- Monitor trends
- Diagnose problems and recognize changing attitudes/behaviors
- Develop or modify strategies for addressing issues quickly
- Build stronger lines of collaboration with staff on strategy development and implementation

### **Conclusion**

Many associations have worked hard to establish strong, member-driven organizations. By continuing to focus on building the association's understanding of the market and developing systems to more fully link member needs with organizational structure and resource investment, the modern association can maintain the highest levels of membership value and create long-term sustainable initiatives to improve member acquisition, satisfaction, and retention.

## OPPORTUNITIES FOR INNOVATION

**Andrew Calhoun**

*Vice President, Membership Services, AdvaMed.org*

Think outside the grape: Break the surface of a simple grape and you can make juice, jelly, pies, and wine. Puncture the business norm of your association and set up innovative opportunities that will enable you to grow even in a challenging economy.

Here are some inventive ideas that can expand your association's reach and strengthen your financial position.

### Remember your mission and demonstrate it

Since your organization is in competition with other companies and organizations for attention and member dollars, you must exploit your advantages. What is your group known for? Go past the delivery of benefits and make a statement.

**Shout out your competitive advantages.** My association AdvaMed is known as the author of a Code of Ethics for the medical technology industry. It has been adopted by manufacturers across the country and even was featured at a recent ASAE conference in relation to meeting planning. The Code is helping the industry and has had a corresponding positive effect on media and recruitment.

**Promote your professional development courses as the best,** because you bring the power of the industry. You can attract top-name government and subject experts that other groups cannot. Use a variety of media tools to get your message across.

**Focus in on your core business and organize your target audience** for effective action.

- Organize committees and working groups that will bring members together for consensus building on key issues. Make sure you make groups as inclusive as possible for all members.
- Use your website, micro sites, and targeted emails to customize appeal to member segments.

### Use expanded membership categories such as industry service providers to your advantage

**Create an "Associate Advantage" that goes beyond affinity offerings** to provide your core membership with *free* services from participating Associate Members. Negotiate the service offerings up front and make them available on your site. You will find that this drives interest from both sides of the equation.

**Facilitate matchmaking** to keep your membership strong.

- Provide access to members of your Board.
- Utilize a Partnering Program at conferences.

**Hold educational webinars and future podcasts that are led by "Gold-level" associate members.** They pay you a premium for the privilege of being a content leader for an agreed-upon session topic that is of value to your membership. Distance learning on a member's desktop certainly is welcome today.

- The topic must be of interest to your membership and not a sales pitch for the presenting company, let the quality of the content speak for itself.
- Beyond Member/Non-member, think about charging different

fees for different classes of member, with perhaps no fee for the lowest level as a member benefit. Keep the registration cost low—you make it up on the higher associate member fees.

- Record the session and sync it to slides, then offer it for post-call sale, with permission from the presenter.
- Share the participant list with the presenter.
- Publicize to as wide a list as you can find; it helps in membership recruitment as well.

### Re-visit the Value Proposition

Augment your offerings to boost your recruitment and retention efforts; make it difficult for members to leave.

**Look to modify the membership structure.** The most common type used by both trade and professional associations is where membership categories, benefits, and dues are determined by a defining characteristic. A trade association might determine member dues based on annual revenue, and an individual membership organization might set dues based on professional specialty categories.

- Maybe a tiered structure where membership and dues are based on levels or benefits packages rather than on categories determined by specific demographic criteria. The retention rate can be better at the higher levels of membership because members see value in all the deliverables they receive. Members are pleased when you introduce memberships at higher levels, because they want the highest level of service, and they are willing to pay for it.
- Give it away. Make the lowest level of membership very affordable, because these are the companies and individuals that cannot afford a higher cost and also are less likely to participate in association activities. They will not strain your resources, but they will help you to strengthen your industry and the other parts of your membership.

**Sell solutions.** Outcome-based planning means that you should articulate how the association can respond to identified needs and enhance the member's business.

- Facilitate connections for your members. One of the most desired association benefits is networking. This might be at a conference, at a reception, or by innovative methods such as social media or through online Partnering Software that we use to match people and to bring them together at the event to meet in person. Start a Mentoring Program that puts together larger company CEOs with smaller company CEOs or more experienced individuals with ones who are new to the field.
- Implement a retention scorecard that you complete 2/3 of the way through the year. Grade members on a point system based on metrics, such as meeting participation and the product purchase. If a member score is low, it is time to contact them. Certainly, this is not as easy for individual membership organizations.
- Brag about your success through testimonials and case studies; nothing sells better than a satisfied member.

# VOLUNTEERING AS A RECESSION-PROOFING STRATEGY

## Doing More with Less in Tough Economic Times

Elizabeth Weaver Engel, MA, CAE

Director of Marketing and Sponsorship

The National Association of Children's Hospitals and Related Institutions

It's become almost trite to mention it, but the Chinese character for "crisis" combines the characters for "danger" and "opportunity." In the current economic crisis, the danger is obvious. So we have to ask ourselves: What's the opportunity?

### The Sacred Cow Barbeque

Associations are notorious for *program creep*. Every new chief elected officer, every new board, every new committee chair comes into office with a new set of priorities and an attendant set of pet projects to launch. This might be OK, aside from concerns about constantly shifting strategic direction, were it not for the fact that associations are also notorious for never killing existing programs. The reasons are myriad, tradition, habit, lack of political will, powerful supporters, "we have always done it that way," but the result is the same: An ever-expanding list of commitments to staff and fund.

However, there's nothing like the power of significantly declining revenue to sharpen the mind and the will, particularly if the alternative is laying off staff (more about that below). Association professionals finally have the *opportunity* to kill some sacred cows.

How do you make tough decisions about which cows go back to the barn and which become hamburgers? Anyone who's ever studied for the CAE knows the answer: Ask. Ask your members what they value and, more importantly, what they don't. Once you've *listened* to your members and *learned* what they need, it becomes much easier to *limit* your focus to those programs and services they genuinely value. And to fire up the grill for some tasty sacred cow burgers.

### Climb the Ladder

"Engagement" has become the buzzword du jour. There's a reason for that: Engaged members renew. But fostering genuine member engagement requires more than just throwing out a bunch of scattershot "engagement opportunities" and hoping our members

decide to take some of them. Association professionals need to take the *opportunity* to define and work our ladders of engagement.

What's a ladder of engagement? The Ladder of Engagement is a simple way of ranking different activities in which members engage. Generally speaking, the lower something ranks on the ladder, the lower the level of commitment and effort involved. The idea is that over time, individuals will progress up the ladder, deepening their relationship with your association.

### So How Do You Create a Ladder of Engagement?

- Start with existing unmet member needs, not new ideas.
- Employ research methods that are based on deep understanding of and empathy for members.
- Focus on the members' experience, not the association.
- Identify moments of truth.
- Create low-fidelity service prototypes.
- Include the member from the earliest stages.
- Bring together a unique value network.
- Promote your brand attributes at every touch point.
- Use storytelling to convey your intent.
- Create compelling experiences.
- Have a broad view by going beyond marketing.

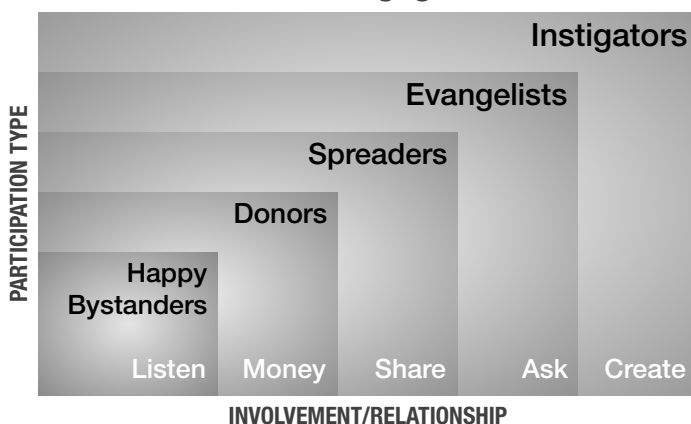
The rungs on the ladder will look different for every association, but the common theme is one of developing the relationship with your members over time so that they develop a deep identification with your association and view it as necessary to their professional and/or personal lives.

### It's Time to Do More with Less— And This Time, We Mean It!

Your association might be lucky and weather the economic storm without having to make drastic changes like reducing staff. But if you do find yourself in the unenviable position of having to get by with fewer hands to do the work, you have an *opportunity* to examine how your association is using technology. Historically, both for-profit and nonprofit organizations that use economic downturns as an impetus to re-tool their use of technology position themselves to emerge stronger when the economy inevitably turns around.

That doesn't mean you need to go out and spend hundreds of thousands of dollars you don't have on new systems. Any technology audit should start with an evaluation of how your association is using your current tools. It is a certainty that not every person on your staff is using the tools available to her or him to their full capacity. Associations that take the opportunity to train their staff members and use their available tools to their fullest

Ladder of Engagement



capacity will emerge stronger, more efficient, and ready to take advantage of the opportunities and options that will eventually be provided by economic recovery.

## Use 'Em or Lose 'Em

Most association staffs normally work at or near capacity, a situation which will only be exacerbated if your organization is required to let employees go in order to meet your budget under reduced circumstances. The work still needs to be done. But how?

Associations have a tremendous *opportunity* to engage our volunteers. The reason your volunteers stepped forward in the first place was because they felt a sufficiently strong sense of commitment to devote time they could be spending with their friends and families or on their personal interests and hobbies to work *for free* for the good of your association. These are people who have a powerful desire to contribute. Inventory their skills and begin thinking creatively about how your association can use them to supplement your over-stretched staff. Many hands make light work, and you might be surprised at what those hands can accomplish if you expand your definition of volunteering beyond participation in a monthly conference call.

There is no doubt that we are in the midst of an economic crisis. But if associations can finally kill sacred cows, increase our effective use of technology, and engage our members and volunteers in powerful and meaningful ways to promote the good of our industries, our professions, and our organizations, we will emerge from this crisis and we *will* be ready to take advantage of the future opportunities waiting for us on the other side.

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Ladder of Engagement Photo—[cambodia4kidsorg](http://www.flickr.com/photos/cambodia4kidsorg/2296887265); <http://www.flickr.com/photos/cambodia4kidsorg/2296887265>

ASAE sub-site on the economy—<http://www.asaecenter.org/economyresources.cfm?navItemNumber=39045>

## THE NEXT STEP

2009/10 marks a period where economic, business, and association models have been totally re-examined. Few organizations have not been touched by both the twin towers of the economy and the technology underpinnings of the Internet and social media. How individuals and organizations derive value from engaging with each other through associations or non-profits has never been more closely scrutinized. For some organizations it is the most demanding of times as resources are flowing to help shape the new regulatory and economic landscape, while others are redefining how their organizations can continue to withstand 20% to 40% drops in attendance at conference. The new “terms” that define this next wave include:

- A “Do-Over of Economy, for Better and Worse”
- Flat is the new growth
- Loyalty 2.0
- Leadership in crisis
- Globalization under fire
- Trust 2.0

- Bigger role for government
- Management as a science
- Shifting consumer patterns
- Industries taking new shape
- Innovation marching on
- Gen Y and boomers rule

The ASAE Membership Section Council has embarked on a series of “re-inventing the membership value proposition” as new models and strategies continue to evolve, while basic blocking and tackling processes are redefined as the twenty-first-century association management journey continues to unfold. We hope that you would use these strategies to help to jump start further exploration and application. Let us know how we can continue to write the next chapters.

Regards,

The Membership Section Leadership



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209 Madison Street, Third Floor  
 Alexandria, Virginia 22314-1764  
 703.739.1000

[www.MarketingGeneral.com](http://www.MarketingGeneral.com)