Member Strategy & Execution Worksheet - Guiding them to Member Success

Member Name: ____
Address: ______________________________________ **City:** ___________ **State:** __________ **Zip:** ___________
Phone #: ______________________________________ **Ttl # Staff:** ________ **Date Established:** __________________
Owner /Pricipal: ____ **Birthday** (for Recognition)**:** ______________
Email Address: ____ **Date Membership Established:** ___________
Primary Business Email Address: _______________________________________ **Membership Dues (Anum):** ____________

Desired Outcome - Our Members achieve their Desired Outcome through their Relationship with us, leading them to stay longer, use more resources, and advocate for us.

Goal (Objective they're trying to reach or accomplish or resolve):

Conditions (what really matters to them):
- ____
- ____
- ____
- ____
- ____

Timeframe (The Time at which they need to complete their Goal):

Appropriate Experience:(Refer to https://membershipsmatter.com/2023/07/16/the-definition-of-member-success/)

Coverage Model (what Resources are Organized, Operationalized, and Mobilized to deliver your Customer's Desired Outcome):
• Inbound Coverage Segment: This segment is characterized by Members who engage with you on their terms. • Asynchronized Coverage Segment: These are Members who prefer asynchronous engagement – emails, chats, videos – rather than regular one-on-one or group meetings. • Synchronous Coverage Segment: Balanced by asynchronous carve-outs that help provide scale and prevent overwhelming your MSMs. • Task Force Segment: Multiple contributors from your membership team work with the Member simultaneously, providing their Appropriate Experience while boosting Member satisfaction and advocacy.

Relationship - Interactions + Context. (All relationships exist on a spectrum between interaction-only and context-only; Member relationships generally fall somewhere in the middle)

Engagement (To ensure interactions are effective and appropriate, consider What is the Direction of the Interactions):
- Inbound – Reactive (Member contacts you - they need something)
- Outbound – Reactive (MSM sees something / initiates contact)
- Outbound – Proactive (MSM gets out in front of the Member, analyzing data from ASM, allowing for longer-term, strategic planning)

Engagement Types (a few examples; not exhaustive):
- 1:1 Meeting
- Asynchronus 1:1 or 1:Many on Video
- Broadcast or Recorded 1:Many on Video
- Phone
- Email
- Chat Message

Relationship - Interactions + Context. (All relationships exist on a spectrum between interaction-only and context-only; Member relationships generally fall somewhere in the middle)

▪ Activity – Joint Accountability ▪ Usage – Product-centricity ▪ Changes – Team, Company, etc. ▪ Goals – Changes to current, pivot to new ▪ Membership – Renewal	▪ Operational – Actions supported / enabled by the product ▪ Opportune – Event supported by the Operational progress ▪ Strategic – Their Goal

Strategy - Properly managing expectations with Members that certain things are going to happen in the future and ensuring that when they do, they're not just expected, but anticipated.

Joint Accountability - The shared obligation or willingness to accept responsibility for each party's actions leading to an outcome, including the consequences of inaction or insufficient action

What the Member needs to do on their own outside of your resource offering	What the Member needs to do on their own inside of your resource offering	What we'll do with the Member inside your resource offering	What we'll do for them inside the product behind the scenes

Success Vector - Member Health Score, the Key Success Indicator (KSI) of Member Success. These are 100% Required for SV to be meaningful

Success Potential - Does the Member have…?:	Success Potential - Does the Member have…?:
▪Technical Fit - They aren't using or don't have and can't / won't acquire a key piece of technology	▪Meaningful Product Activity - Can we track their product usage data? Has there been meaningful activity with the product for them?
▪Functional Fit - Our product is missing a key piece of functionality for them	▪Adoption - Did they meet initial adoption goals? Are they meeting ongoing adoption goals?
▪Resource Fit - They can invest – beyond simply paying our fee – in what's required to be successful as our member	▪Usability Issues - Are there problems or missing features keeping them from achieving success; missing features would indicate a lack of Success Potential and should be noted as such
▪Competence Fit - They have – or will acquire – the expertise internally required to be successful?	▪Member Company/Agency - Are negative things happening with their company? External triggers, bills not being paid, M&A, etc.
▪Experience Fit - They do not have the experience internally and cannot get / are unwilling to source or train resources that have the necessary experience to be successful with our product	▪Support - Are their Requests for Support being closed in a positive way quickly; Have Support Requests become slow or stoped?
▪Cultural Fit - They have beliefs, morals, attitudes, etc. that won't align with the same of the associaition	▪Satisfaction & Confidence - Have they recently been surveyed for an NPS?
▪Ascension Velocity - Are they accepting our other resource options when they're logical?	▪Advocacy - Are they advocating for us in appropriate ways where logical?

Churn Reason Analysis - **Analyze the "churn reasons" in a way that will get you much closer to the truth and help you take appropriate action to keep that churn reason from returning.**

Internal Churn reasons:

- Financial Data (if available)
- Support Requests (or the lack of)
- Pre-Cancel Usage Data
- Other

External Churn reasons:

- Product Usage Activity - Can we track their product usage data? Has there been meaningful activity with the product for them?
- Adoption - Did they meet initial adoption goals? Are they meeting ongoing adoption goals?
- Usability Issues - Are there problems or missing features keeping them from achieving success; missing features would indicate a lack of Success Potential and should be noted as such
- Member Company/Agency - Are negative things happening with their company? External triggers, bills not being paid, M&A, etc.

Questions to ask:

- Was the Member Good-Fit or a Badly Fit Member?
- Did they have Success Potential? - If a member was a Good-fit but lacked Success Potential, there are actions to be taken, such as looking at the lack of Success Potential to see if it's tied to member characteristics.
- Do we need to adjust our Bad-fit Member profile? - so we can ensure we're only bringing-in members that have the potential to be successful with us.

◊It's also important to recognize whether a member came in with Success Potential but, due to some change on either their end or ours, the bit got flipped from "Has Success Potential" to "Doesn't."

Different "Churn Reason" Sources:

1. The reason they gave (External churn reason)
2. The reason their comments and actions indicate (Context Clues)

Performing the Analysis and Taking Action - 5 things to get your brain moving in the right direction:

▪By comparing Internal, External, and Context reasons, is our signaling (what we get from our member data systems – AMS, our app, support, etc. – on point or are we missing things? If the latter, fix it.

▪Are there missing / broken features, workflows, or other UX issues that are causing the member to not be able to realize value? If so, this could be used to reprioritize your product development roadmap.

▪Are there service issues – Member Success, Support, Professional Services, Integrations, etc. – that are lacking or broken that are leading to churn? If so, this should be the catalyst to examine those services and fix whatever glitches are present.

▪Are there pricing, positioning, or other marketing things that are either leading to mismanaged expectations or simply attracting members with misaligned Use Cases? This should be the catalyst for aligning Member Success with Memberships, Marketing, and Product Teams to ensure this does not happen again.

▪Did something change that turned otherwise Good-fit members with Success Potential into members that were not able to realize value from their relationship with us? For things that happened on our side to cause the switch, this is an internal alignment issue where Member Success and Product need to work together closer. For things that happened on the member's side, this may be a signaling or engagement process issue. Either way, both are fixable now that we know it's happening.