



# The future of personalisation in the membership sector\*

A ReadyMembership guide



\*It's not AI

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# Introduction

**OK, hands up.** We were trying to grab your attention. Of course the future of personalisation in the membership sector will involve AI. But it's only part of the story. To overly focus on what is a tool to deliver personalisation, rather than your data and strategy, will not create the trust and emotional connections that are the heart of membership recruitment, engagement and retention.

Personalisation, or more specifically, hyper-personalisation, needs to use behavioural and contextual data, not just demographic, to create experiences that can break through the vast digital content and channel noise; and are seamless, useful and meaningful. To do this, it also needs to be informed by the whole picture, a unified view of your data. Not just a slice that is integrated from different systems and platforms.

This guide will help you understand how to use your data and technology in the context of current and predicted trends and developments (behaviour and technology). Including:

- The difference between hyper-personalisation and traditional personalisation
- The key steps to getting ready to deliver and enhance your personalisation (it's all about your data)
- Learnings from two membership CEOs whose organisations are at different stages of personalisation maturity
- Overview of the personalisation technology options and trends
- When and when not to use your data for personalisation (or – how not to scare and annoy your members)
- Legislative trends to keep an eye on and consider

# What is hyper-personalisation?

How can membership organisations stand out in an increasingly competitive digital content and channel environment and provide genuinely differentiated experiences?

The answer is hyper-personalisation. Unlike traditional personalisation, hyper-personalisation is the use of real-time data (e.g. Data signals that indicate members' interest in specific elements of your offering and engagement with them). This can include AI, machine learning, and predictive analytics but is fundamentally about looking beyond your demographic data and combining your other different sources of data with context. This means you will get better information from your membership (and / or prospects) at an individual level and, in turn, are able to act appropriately on that information.

## Why hyper-personalisation over personalisation?

A great starting point when trying to understand your members is to build member personas. When well-researched, they give us an idea of their pain points and needs, all of which feed into the traditional membership life cycle view and service offerings.

However, personas and demographics can only take you so far. Let's consider the two personas below...

### Person 1

- Born 1948, grew up in England
- Married twice
- Two children
- Successful in business
- Wealthy
- Spends winter holidays in the Alps
- Likes dogs



Ozzy Osbourne

### Person 2

- Born 1948, grew up in England
- Married twice
- Two children
- Successful in business
- Wealthy
- Spends winter holidays in the Alps
- Likes dogs



King Charles III

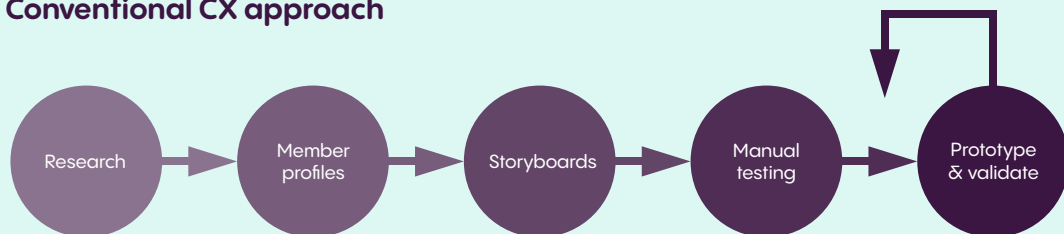
Source: [The Travel Vertical](#)

Their shared baseline demographics could put them into the same persona category. One's a King and one's a Prince (of darkness)... Yes, personalisation lets you address them individually, but beyond that it's unlikely the same content and messaging would be effective for each.

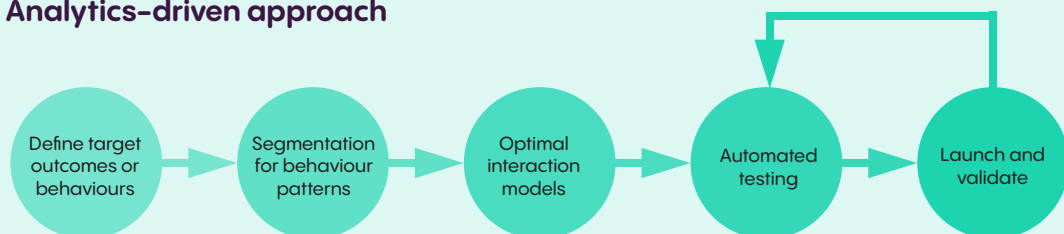
We're using a fun example, but the point is serious - your membership value proposition and experiences need to be based on more than generalised information if they are to feel truly (hyper) personalised.

## Building a Hyper-Personalisation Framework

### Conventional CX approach



### Analytics-driven approach



Behavioural data / analytics

Source: WNS

# Future factors – which will impact you?

The membership sector is special. Organisations are much more collaborative and share knowledge more readily than those in other sectors.

However, we mustn't operate in a vacuum, it's important to remember your members are also consumers. The digital experiences they are having outside of their relationship with you will directly impact their expectations, the technological advances and data legislation impacts us all.

Let's look at each in turn and consider the impact and/or influence it will have on your personalisation approach.

## Behaviour (or how not to scare your members)

It's no surprise that the trust consumers have in everything from brands to Government is at an all time low. In the wake of the cost of living crisis, and fake news, combined with data and privacy scandals, anything involving a digital interaction is also being far more scrutinised.

**Edelman's 2023 Trust Barometer** research shows a depressing picture of a society that has never been more dangerously polarised. However it also shows that the majority of consumers agree that trust is a critical deal breaker or deciding factor in their buying decisions.

**Trust and unification are a membership's super power – understandably, trust is becoming more important as it becomes scarcer. This is both an opportunity and a risk for membership organisations.**



## The future (continued)

### Build trust – treat data equally

For example, from a legislative and ethical perspective, profiling a member and having knowledge about them but failing to promote or treat them equally is a key concern. This is especially relevant when considering EDI (Equality, Diversity and Inclusion) data. This data is vital in tracking the success (or not) of EDI initiatives in your membership; however, using it for any kind of personalisation should be considered very carefully. We recommend you seek advice from professionals if being asked to do so.

An exception to the above may be to prompt a user to provide EDI data if there is no EDI data on their profile, but any prompts should be subtle and rarely used.

Looking after your members' data and using it carefully for personalised, responsive experiences will build their trust. But getting it wrong could damage trust in your organisation.

### Data protection regulation and privacy

Further proof of the fall in trust is demonstrated in research by [Adobe for the 2020 Digital Trends](#). It shows that customers' data and privacy ranked in the top three most significant business worries.

The response to this rise in data management mistrust has been a raft of legislation and data targeting constraints. First there was GDPR. In 2019 Firefox and Safari started blocking third-party cookies by default and Chrome introduced anti-tracking measures. Big tech companies, such as Apple and Google have established new privacy protections to address consumer demands for more transparency regarding how their data is used.

And this feels like just the beginning. So how will personalisation even be possible?

## The future (continued)

Well it's important to remember most of the new restrictions don't apply to zero party data sets (data willingly given to you by your members) - which will be the majority of what most membership organisations hold.

However, in the **Audience of One 2022** survey, it was found that one in five (20%) consumers say a lack of transparency around how brands use data is a top concern when sharing information about themselves. Misuse of personal information can have dire consequences with 39% saying they would cancel services or not purchase from the company again.

The key thing for membership organisations to learn from this is that it is all about engendering trust. This can be achieved through being consistently transparent about how you are using your members' data. Embrace consent driven data capture and invest properly in the technology that will keep your members' data safe.



# Technology

The rapid development of technology is intrinsically linked with the delivery of personalised experiences and the list of platforms we could discuss is vast.

Let's start with the one at the top of everyone's "future list":

## AI and machine learning

"AI has the potential to significantly impact the membership sector in various ways:

- **Personalized Member Experiences:** AI can analyze member data and behaviour to provide highly personalized experiences.
- **Predictive Analytics:** AI can help organizations predict member churn or identify potential new members. By analyzing historical data, AI algorithms can identify patterns that indicate when a member is likely to cancel their membership or when someone might be interested in joining.
- **Membership Retention:** AI-powered chatbots and virtual assistants can provide instant support and answer common member questions, improving overall member satisfaction and reducing churn rates.
- **Customized Content:** AI can generate content tailored to individual members' interests, such as newsletters, articles, or event recommendations.

It's important to note that while AI offers numerous benefits, there are also ethical considerations related to privacy, bias, and transparency that need to be addressed in the implementation of AI technologies within the membership sector. Additionally, organizations must ensure that AI is used in a way that aligns with their mission and values and does not compromise member trust."

## Technology (continued)

We didn't write any of that. We asked ChatGPT (the "zs" give it away).

It's not wrong. AI will help us all and certainly enable vast processing of data to create ever more detailed personalisation.

It also flags the danger. As we all become increasingly aware of how AI is being used to target us, the level of trust in authenticity is dropping. This combined with it lowering the barriers in content creation could undermine most membership organisations' USP - your member value proposition.

# Composable Digital Experiences

***“Gartner predicts that organisations that have adopted a composable approach will outpace competition by 80% in the speed of new feature implementation.”***

Source: Gartner

Composable digital experiences are a great example of how our approach to optimising our technology has changed in recent times. It refers to the practice of creating and managing digital assets, such as CRM, CMS, portals, event registration, ecommerce and content, as modular components that can be easily assembled, customised, and reconfigured to meet specific needs and preferences.

In the context of membership professionals, this approach enables you to build tailored digital experiences for your members by selecting and arranging different components, features, and content, allowing for greater flexibility, personalisation, and efficiency in delivering member services and engagement. Composable digital experiences empower membership professionals to quickly adapt to changing member needs and preferences while maintaining a cohesive and user-friendly online environment.

Traditionally membership organisations have elements of their platform handled by one dominant platform such as their CMS or CRM; in addition to transactional areas and workflows that are more commonly associated with portals or e-commerce platforms.

To be future-proof it is vital to recognise the ever increasing variety of touch points that your members (and other users) interact with and, as such, ensure that your technology platforms support a “composable” approach to that overall solution.

# Composable Digital Experiences

An excellent example of what this enables is when presenting a member with an event booking flow or joining journey. Having the flexibility to personalise messaging or alter the flows and pricing based on personalisation, will make this journey hugely more efficient and effective for both the user and you.

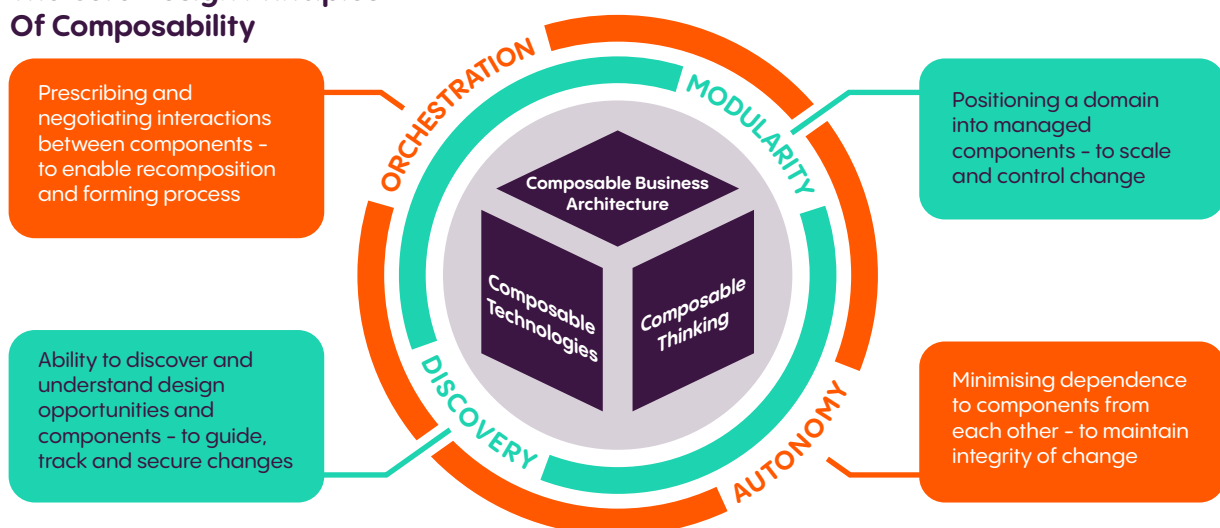
Another example would be sending a digest email of the latest activities within your organisation that is personalised, not just based on who they are, or their interests, but granular messaging based on previous transactions or activity.

A composable platform's strength lies in its ability to gather, process, and utilise diverse data types in real-time, allowing for dynamic and highly personalised member engagement experiences. By harnessing these data sources, membership organisations can create experiences that are not only tailored to individual preferences but also adaptive to changes in member behaviour and interests.

Even better, a composable platform simplifies and streamlines multi-channel personalisation for you as an internal user by offering one centralised, user-friendly interface.

In short, it enhances member engagement and saves you time.

## The Core Design Principles Of Composability



Source: Gartner

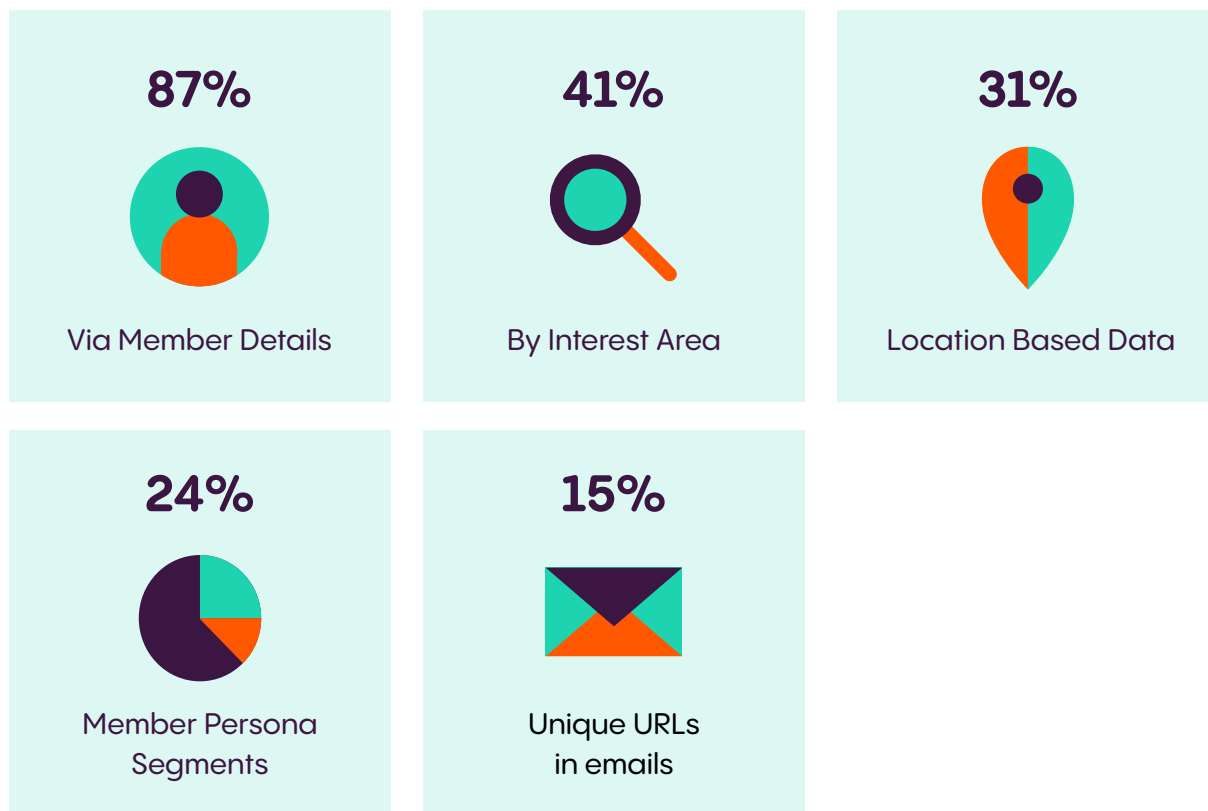
# Membership personalisation trends

According to the Memberwise Digital Excellence report 2022, the percentage of membership organisations that currently deliver a personalised online member experience are:



\*Under £1.5m annual subscription income \*\*Over £1.5m annual subscription income

The top five ways membership organisations are personalising the online member experience:

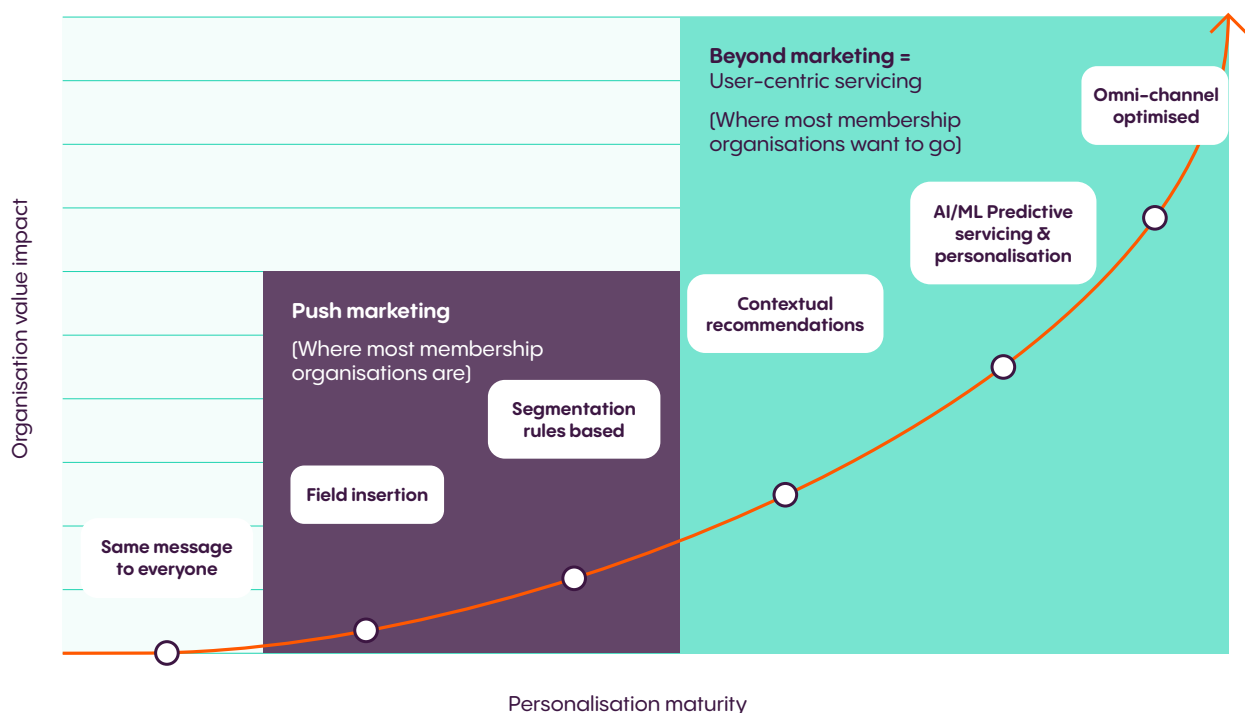


## Membership personalisation trends (continued)

As Richard Gott, Memberwise Chair and Founder, observes “On average the Membership Sector is still taking only a basic approach to online member personalisation due to AMS, CMS and/or integration issues. If a more sophisticated approach is to be taken, this will require investment in new systems.”

This research shows that the membership sector as a whole is being left behind. It doesn't need to be. Gone are the days when huge investments in expensive best of breed technology platforms are needed. The advancement of technology and the modular approach described above can enable a sophisticated level of personalisation and hyper-personalisation.

Choosing the right technology and technology partner is important but the key for membership organisations, goes back to thinking about your approach to personalisation and ensuring your data is fit for purpose.



# Case study



## Getting ready for personalisation

**Jennifer Sproul, CEO,  
the Institute of Internal Communication**

***"Membership is more than 'stuff' or the letters after your name. We needed to create an emotional connection between IoIC membership and professional standards, so members would feel real personal value. But to make that happen we had to sort out our data first."***

A membership that was growing but had a high churn rate was at the centre of the IoIC's challenge. Jen Sproul's team of eight's focus was to increase retention through improved personalised online user experience – delivering easily accessible, relevant content that members would value.

***"Our biggest competitor is time," says Jen. "Our members don't have time to spend searching for the information they need. They will go elsewhere. Our old website made it hard for them to find the content that was relevant to them."***

The first step in creating a more personalised membership, a membership that matters, was restructuring grading and capturing better member data. The IoIC used this data to develop a new professional map which these new designations were mapped to – giving greater clarity and meaning to IoIC membership.



## IoIC Case study (continued)

Their new ReadyMembership platform, which includes a new self-assessment as part of the join process was key to this. It captures better information about career, experiences and interests. This ensures that members join at the right grade and receive relevant resources, events and training that are right for them.

Data capture in ReadyMembership CRM means that the team has better insight into their members' interests and what they engage with. A clearer, organised website with Learn and Develop, Knowledge Hub and events sections includes personalised content on member login.

With the member data captured in join online self assessment and first time login, combined with website user engagement data (renewals, event bookings, logins and resource downloads), the IoIC is now ready to deliver even greater personalised experiences.

"I have a lot of data - the challenge is which data, rules and structure do I need to do what - it can be complicated", Jen explains. "But we have the personalisation vision and the single view of data to do it, thanks to ReadyMembership."

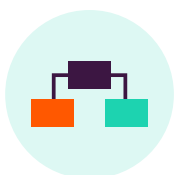
### The IoIC's new approach has already delivered impressive results:



In 2023 membership has grown 26% (with 52% increase in new member applications)



Festival sales grew by 100%



10% increase in website traffic and 80% of members cite the Knowledge Hub as their favourite area of the new site



Overall turnover is up 13%

The IoIC's personalisation journey is off to a flying start.



# Case study



## Stepping up to hyper-personalisation

**Rennie Schafer, CEO, FEDESSA**

***"We're influencers, not dictators - we can't force our members to do anything. The best way to influence people is to understand what will make them change."***

Rennie Schafer is the CEO of FEDESSA – the Federation of European Self Storage Associations. FEDESSA represents over 2500 self storage facilities across Europe – all members of 17 national associations who are themselves members of FEDESSA.

For Rennie, personalisation starts with what and why. What is your primary goal as an association and why do you want to collect member data.

***"Do you want more members? Or are you trying to increase event attendance? There's no point sending a 20 point questionnaire that overwhelms new members and makes it more difficult to join. Are you going to use that data, do you need it?"***

Over the last 4 years FEDESSA has been getting to know its members by observing their behaviour in the ReadyMembership platform. Using these insights they target members across Europe based on their interests, job seniority, engagement with the association or specialism using filters and rules to send emails and distribute relevant content. Conditional content filters let them send different messages to different members on the same email. This has allowed FEDESSA to attract more members to events and reduce membership attrition.

FEDERATION OF EUROPEAN  
**FEDESSA**  
SELF STORAGE ASSOCIATIONS

## FEDESSA Case study (continued)

The impact of greater personalisation is clear; in 2021 50% of FEDESSA's members had renewed two months before their renewal point and retention increased from 85% to 94% – thanks to automated and personalised reminders. The team is benefiting from spending less than a third of the time managing membership than did before moving to ReadyMembership.

***“Personalisation touches every point – from member journeys, to retention to events. If you get it right it gives you the ability to give members what they want, when they want it. Asking the right questions and collecting the right data at the right time is allowing us to do just that.”***

# Conclusion (or does size matter?)

The short answer is yes. Size does matter in both data and technology contexts. But perhaps not in the way you expect.

## The size of your data

Delivering any type of meaningful personalisation doesn't actually need huge quantities of data. The quality of your data is far more important along with having a clear plan on what you want to use, how and why.

Additionally, the membership sector is unique in that the absence of data can be as meaningful as its existence. If a member isn't engaged, isn't interacting with you, there is no behavioural data to capture. However, unlike a consumer setting, this in itself tells a story of a behaviour type that you can respond to – a disengaged member segment should be your priority. It's important to know why they aren't interacting with you. There's no point investing in member recruitment if you can't retain them.

## Right sizing your technology

The right technology platform is critical to managing your data. Keeping that hard-earned member information up to date is vital and not just for personalisation. However, all encompassing, all powerful CRMs (such as Dynamics or Salesforce) or CMS platforms are not necessary to enable sophisticated, personalised member experiences.

Member focused, single platforms (CRM, CMS and everything you need in one place) have evolved hugely in the last few years. A modern single platform reduces the complexity around integrating the data across multiple systems giving you clearer data insights at your fingertips .

It also makes it easier to keep all your technology platforms up to date. Upgrades move everything forward, not just a few new features to the CRM. Plus, as they integrate seamlessly with your frontend (e.g. your webpages) no advanced coding is needed to create easy personalisation. All this means the personalised composability options will be almost endless.

## Conclusion (continued)

### The size of your ambitions

Have big ones!

Hyper-personalisation should be a key focus for any ambitious membership organisation's strategy. Its benefits go way beyond marketing, they can directly impact your member's experiences and your member value proposition.

But it's important to remember why you are doing it. Consider whether your real reason for adding personalisation is because you want better usability to compensate for a confused service or poor quality, unorganised resources.

Personalisation won't help you fix that. Instead it should be used to address the needs of a diverse user base with a broad range of quality content and resources. It can't correct a poorly considered knowledge management strategy.

It's why AI tools won't help either – your data set and strategy need to be in good shape first. And AI can't help you with that either. Well not yet anyway.

Ultimately, success in this hyper-personalised era will hinge on your ability to strike the right balance between customisation and ethical considerations while remaining agile and responsive to evolving trends and member preferences.

With the right approach to data and technology selection you can deliver hyper-personalised experiences that members will love. This will build their loyalty, increase your retention and ultimately grow your membership. The future is personal and it's time for your organisation to get ready.

# Our top 5 recommendations for being future ready

1

## Invest in Data Governance

Membership organisations should prioritise data governance, including data collection, storage, and usage policies. Look beyond traditional personas and member life cycles, avoid vanity metrics and focus on results – what are your members actually using? When, where and how?

It's about data quality over quantity – don't collect the data unless you can use it and you really need it to achieve your goals.

This must be combined with implementing robust security measures and compliance with data protection regulations to build trust with members.

2

## Fully utilise your technology (yes, including AI and Machine Learning...)

Yes, we said AI isn't the future of personalisation but that's because there is a myth that it's all you need. However, leveraging AI and machine learning to automate data analysis will short cut the ability to deliver hyper-personalised experiences. Chatbots and virtual assistants can provide real-time support and recommendations, especially helpful in low resourced membership teams. However to do this your CRM or AMS needs to be right for you with the right partner.

3

## Be Transparent in your use of Personalisation

Give members control and visibility over their personalisation preferences in your member portals and/or preference centres. Allow them to opt in or out of specific personalisation features, respecting their boundaries and validating what you "think" you know about them.

# Our top 5 recommendations for being future ready

4

## Focus on Value

Ensure that personalisation efforts add genuine value to members. Avoid pigeonholing members into stereotyped categories that won't deliver real personalisation.

If you have limited content, focus on matching it to the optimal user profile instead of anyone with a general interest. This will make your content more relevant to those who will really value it.

Equally, don't personalise for the sake of it, keep your focus on improving member experiences and outcomes. For example, on your digital channels, try to surface personalised member content with boosting or ordering, rather than hiding other content.

5

And remember what works today might not tomorrow. Your member value proposition will need to evolve as your members' needs and the world we operate in changes.

## Continuously Monitor and Adapt

Regularly assess the effectiveness of your personalisation and hyper-personalisation efforts through member feedback and data analytics across your interaction points.

Don't be scared of failure (if you are really being brave and trying something new it won't always work) but learn from that failure. Adapt your strategies to changing member preferences and technological advancements. If personalising the journey or messaging doesn't have the desired effect then look again at your data and simplify your approach.

We are all on a journey of continuous improvement and evolution.

[#joinourevolution](#)

# How can ReadyMembership help?

## Membership evolved

### What is ReadyMembership?

ReadyMembership is a single composable member experience platform.

Built for membership organisations wanting to supercharge their member experiences, it's intelligent, flexible, upgradeable, right sized and hyper-personalised. The result? Behaviourally driven experiences that will excite your members.

### How does it enable hyper-personalisation?

It enables you to easily create personalised journeys across channels. You can do so without needing to be technical and understand where your CMS, events platform and portal or bespoke functions stop and start.

Once you have structured your data and content (with our help!) you can use our rules engine to reach any segment of your membership you want and create behaviourally driven personalised user journeys that can stretch as far as you like – across your website, email, CPD, events and beyond.

Want to take things even further? ReadyMembership easily adapts if you then customise or develop bespoke elements of your platform to ensure hyper-personalisation consistently reaches across every area you utilise. How? By simplifying and streamlining multi-channel personalisation for the admin user through one unified, user-friendly interface.

Explore all the features of ReadyMembership [here](#)

Watch practical demos of ReadyMembership [here](#)



Website



Subscriptions



Payments



Marketing



Events



Email



CMS



Conditional content



CRM



Personalisation

# Membership evolved

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 **Ready**Membership