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The Ingeniux Digital Playbook for Member Associations

Key capabilities and strategies to
build modern member association
websites and experiences

Trade Associations

INGENIUX

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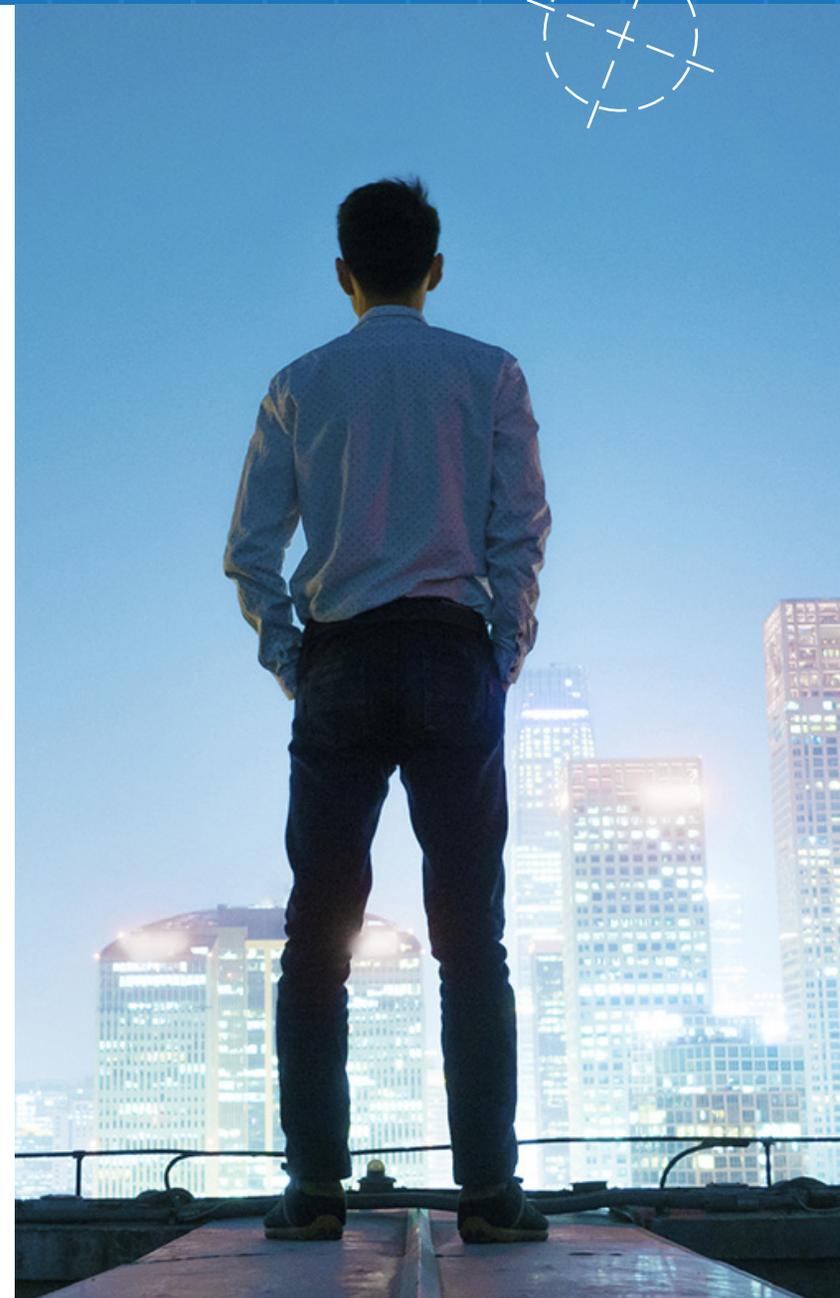
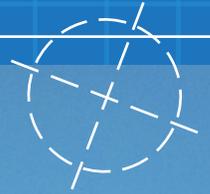
Introduction

High performing member associations understand executing their mission requires an intersection between digital and in-person communications. These associations know that the association website is as important, if not more important, as physical offices and meetings.

The website is the always-on hub for the community, delivering a tapestry of member services, business critical information, thought leadership, and networking.

But what does a member association website look like? What kinds of capabilities, integrations and experiences do you need to deliver to inform, encourage and support membership in your association?

The Ingeniux Digital Playbook outlines the key capabilities and strategies to build modern member association websites and member experiences.



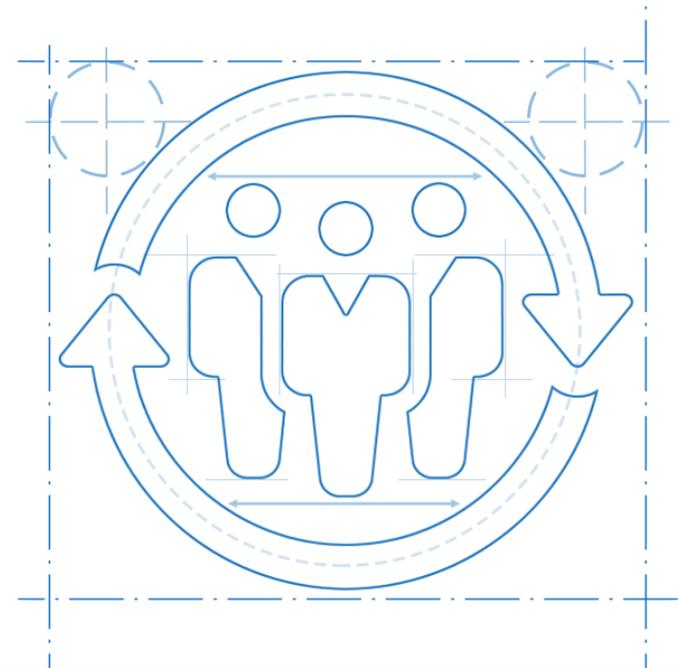
What is a Member Association?

Member associations are organizations founded and funded by groups around a particular industry, mission, profession or topic. Trade associations, professional associations, and not-for-profit associations are all examples of associations across the globe.

These associations are set up to support people who want to network with likeminded people, share ideas and experiences, get access to training and educational materials, attend conferences and more. In some cases, these associations may sell products and services designed to support businesses and professionals in the industry, or to help fund non-profit activities.

Components of an Association Web Presence

An association website offers a combination of secure and publicly available information. A secure login for association members gives access to a range of information and features that are discussed below. Also discussed are public pages required to tell the association's story and keep people up to date on what the association is doing.



Home Page

Purpose: Establish brand, initiate visitor journey's based on audience and visitor task or intent, surface important information about recent publications, events, and news.

Audience: Public, interested professionals

Security: Publicly available



Your association website homepage is the first page members and prospective members see so it needs to deliver the right experience from the start. This is where journey maps can help.

A journey map is a visualization that describes the journey a visitor takes when they interact with your association. It documents the different touchpoints where they interact with your association and what kind of information or capabilities they expect at each touchpoint. Create separate journey maps for members and prospective members because their prospective journeys will be different.

Members expect a personalized experience when they log in based on their profile, which might include preferences for alerts and notification, news topics, training and so on. If the member belongs to any groups, forums or training programs you can offer quick links to these areas. You also want to ensure you create a navigation structure that supports the key aspects of information they want.

For prospective members, understand how they move from research to decision and plan the content of your website accordingly. Capabilities such as geo-targeting or marketing segmentation enable you to customize the experience to some degree. You can also track anonymous visitors through IP tracking and/or cookies and tailor the experience on the website based on content viewed over the course of one or more visits.

Planning for content reuse is critical. Cleanly separating content from presentation enables you to deliver the same content, or different elements of a content item, depending on the audience or experience you want to provide.





The Mobile Experience

The ability to access information and services on your association website from any device is important. You cannot force your membership to view your website from a desktop. They want to interact with you from wherever they are and whatever device they choose.

Mobile access is critical for your member experience. However, it's not good enough to simply display your website in a smaller form factor. How your website looks and works on tablets and smartphones will play a role in how happy and engaged your members are.

There are different approaches to enabling mobile access for your association website. You may incorporate a responsive design approach that adjusts the website structure based on the device used. Or you might employ an adaptive design where you create a completely separate presentation for mobile devices.

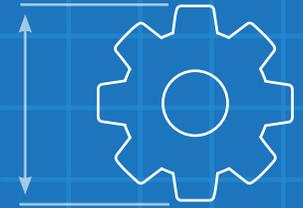
In either case, you need a clear separation of content from the website presentation so that you can adjust the interface without affecting the content, and you need your content created in such a manner that its structure is easily understood and can be delivered to different devices appropriately.

Services & About Us Information

Purpose: Describe the association and its services

Audience: Public, interested professionals

Security: Publicly available



Every member association website needs to provide information about the association and the services it provides. These web pages outline who the association is, why it was started and what services it offers its members.

A “Get Involved” section can include a contact form to request more information, and/or sign-up for information sessions that tell you about the association and why you want to be a part of it. It could also offer a Frequently Asked Questions web page that contains more details on why the person should sign-up to become a member.

These web pages that contain forms can submit the form data to an AMS (association management system) to be added to a list of interested/potential members. Here they are managed by association administrators.

Member Driven Services

Purpose: Provide registration, renewals, and membership profile management

Audience: Members and interested professionals

Security: Public Registration, Renewals & profile management for members only



Your Association provides a range of services for your members to manage their membership. Integration with your AMS (e.g. Personify or Aptify) ensures that any registrations and membership updates are automatically reflected in the AMS.

Account management is a primary requirement for a member association website and includes functionality such as:

1. Register to become a member (and pay membership fees)
2. Renew registration
3. Change Member information
4. Change Member Password
5. Join committees, groups or forums
6. Frequently Asked Questions (FAQs)
7. Manage preferences for news, alerts, newsletters and printed materials (like magazines)

A member directory is also provided on the association website to show who the members are, including links to their website (if it's an business).

Member driven services offer a mix of secure and public web pages. Member registration, directories, and FAQs are public sections of the website. Once a member is registered, they can log into the website and get additional member services such as managing their membership profile, including preferences, and joining committees and groups.

Personalization via Member Profiles

Studies have shown that personalizing the member experience drives greater engagement and loyalty. When a member logs onto your website they expect the experience to be tailored to their needs and preferences.

The Member profile is key to delivering this personalized experience. The profile is a combination of member information and their engagement on the website.

We talked about how you can leverage the member profile to personalize the homepage of your website, but it bears repeating. You can offer different levels of personalization depending on your website strategy and your members needs. For example, when a member logs in, you can display a customized homepage showing them recent research they read and/or purchased.

You can also add elements of personalization to other web pages on the site. Consider special content blocks that show the latest updates on the conference they registered for in the events section, or provide a reminder or additional incentive to register for an upcoming forum that they were reading about the last time they were on the website.

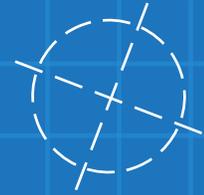
You may decide to use the member profile to simply recommend products and services to purchase or news/reports to read based on previous behavior on the website, or based on another aspect of their member profile (e.g. 5 other people from your company signed up for this course, maybe you should too). These recommendations can be mixed throughout the website using special content blocks, banners or call outs.

Newsroom

Purpose: Provide news and event information related to the association and industry overall

Audience: Members and the public

Security: Publicly available



Every association website offers a news section. This section might include association news, industry news, research notifications, survey requests, industry event updates, and more.

To manage this section of the website properly, taxonomy is critical. You need to outline how you want your news published and develop a proper taxonomy of topics and keywords to support it. News items are assigned to specific topics and associated keywords to enable members to quickly find the news they are interested in and to surface news items quickly and easily through website search.

In addition to news you add directly to the association website, you might also want to incorporate news feeds from other locations via RSS or through search-based integrations.

Site Search and Search-Based Architecture



Purpose: Search for information on the website

Audience: Members and the public

Security: Publicly available

Search is an integral component of any website, including those of associations. It enables the finding of information across the entire website, and is especially useful when there is a lot of information available.

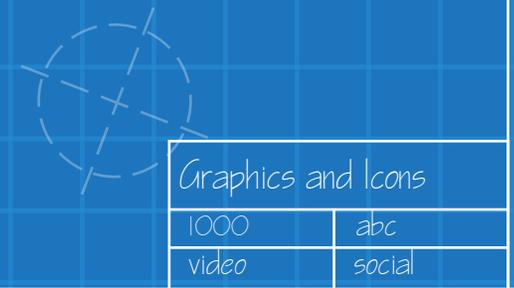
Add a search box to the top of your website that joins search results from all areas of your website from finding members, to asking questions about membership and services, to locating news, research and training materials.

Today you need to go beyond basic web search. We recommend taking an enterprise search approach that supports faceted search capabilities to narrow results by content type, or topic, as well as a federated search capability to index content across multiple applications and services. Using search to unlock information across multiple sites and applications makes content and information more discoverable and greatly multiplies the value of your digital content investment.

A search-based architecture takes search to the next level, by allowing members and site visitors to browse your website by content types and topics. We recommend supporting both a traditional information architecture to editorially define the key sections of your websites, as well as a browse by topic search-based architecture that uses a well defined taxonomy to organize content by audience, category, and other facets.

Digital Library

- Purpose: Provide a range of informational materials
- Audience: Members and the Public
- Security: Publicly available (although some content may require payment)



The digital library is an important feature of your website offering a range of educational material for your members, some of which is available to the public and some that is secure to your membership.

These materials might include research papers, publications, overviews of committees, forums, ongoing projects, videos, webinars, podcasts, and so on.

The digital library is often integrated with an ecommerce engine to enable the purchase of some content. Purchase prices can be different based on membership vs non-membership.

A website built on a search-based architecture ensures that all your content is organized by audience, topic or category and is easy to discover. You can also provide search results that contain both secure and public content based on the profile of the member logged into the website, clearly distinguishing between what is secure and what is public.

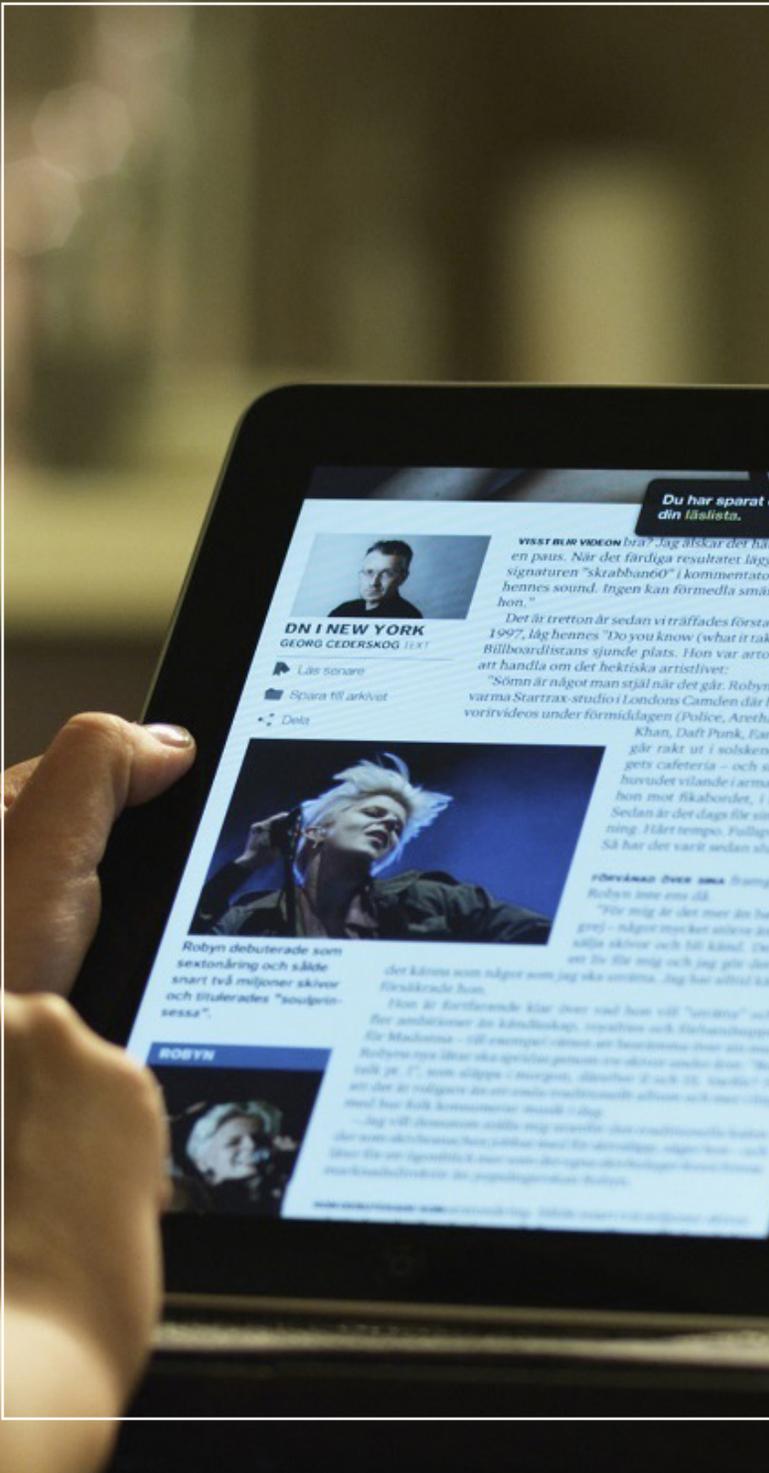
Newsletters & Magazines

Most associations offer an email newsletter to keep their members up to date on activities, industry news and provide editorial features on key topics of interest. Some offer a full magazine in both printed and digital editions, or digital only.

Your website should provide the ability to sign-up for newsletters and magazines, as well as edit those subscriptions easily. Here you also use the member profile to maintain subscription information and create personalized elements within newsletters.

The ability to create a newsletter or magazine by leveraging content already available on the website is a great feature that saves a lot of time.

Creating the content once, with the ability to use it in different channels, including offline (print) is key to a consistent experience.



Member Community

Purpose: Private community for association members

Audience: Members only

Security: Private

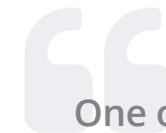


Part of the draw to be a member of an association is the networking they have with other professionals in the industry. To enable that networking, your association website should offer a community area where, once logged in, your members can connect with other members, ask questions, share ideas, work together on community projects and training courses, and so on.

Key features of a community include things like:

- Profiles
- Groups, Forums and blogs
- Knowledge Base
- User Profiles
- Photos and Video
- Sharing - Likes, Ratings, Facebook and Twitter sharing
- Private Messaging
- Commenting
- Email Updates

Your community should integrate with your AMS to connect member profiles, documents and other information, and training.



One of the biggest draws to a member association is the community. Communities enable open and vibrant discussions between like-minded individuals.

The ability to talk with and learn from your peers is key to both personal and professional development.

— Jim Edmunds
President and CEO, Ingeniux

E-Commerce

Purpose: Sell products and services

Audience: Members and, in some cases, public

Security: Publicly available



Whether nonprofit or for profit, many associations sell goods and services as part of their mandate. Your backend content management platform must integrate with an ecommerce platform to ensure a consistent experience between the shopping cart and the rest of the website.

Look for an integration that enables you to co-mingle elements of ecommerce in different areas of your website.

For example, training, conferences and other events, and some research require payment which would be performed through the ecommerce platform. On web pages where the detailed listings are published for the training or conferences, you could place a button or link to purchase which would then drive the member to the ecommerce shopping cart area of the website to complete the purchase.

You may also want to provide additional purchase recommendations when a member buys an item (a training program, a research report, etc.). By connecting your website CMS with your ecommerce platform, you can provide these recommendations in line with the initial purchase on the shopping cart page, or through other areas of the website using CMS elements such as content blocks, sliders, banners, or other methods.

It's important to make it as easy as possible to purchase one or more items in a single transaction, and to promote cross-selling where it makes sense.

Events Management

Purpose: Association events listing and management

Audience: Members and public

Security: Publicly available



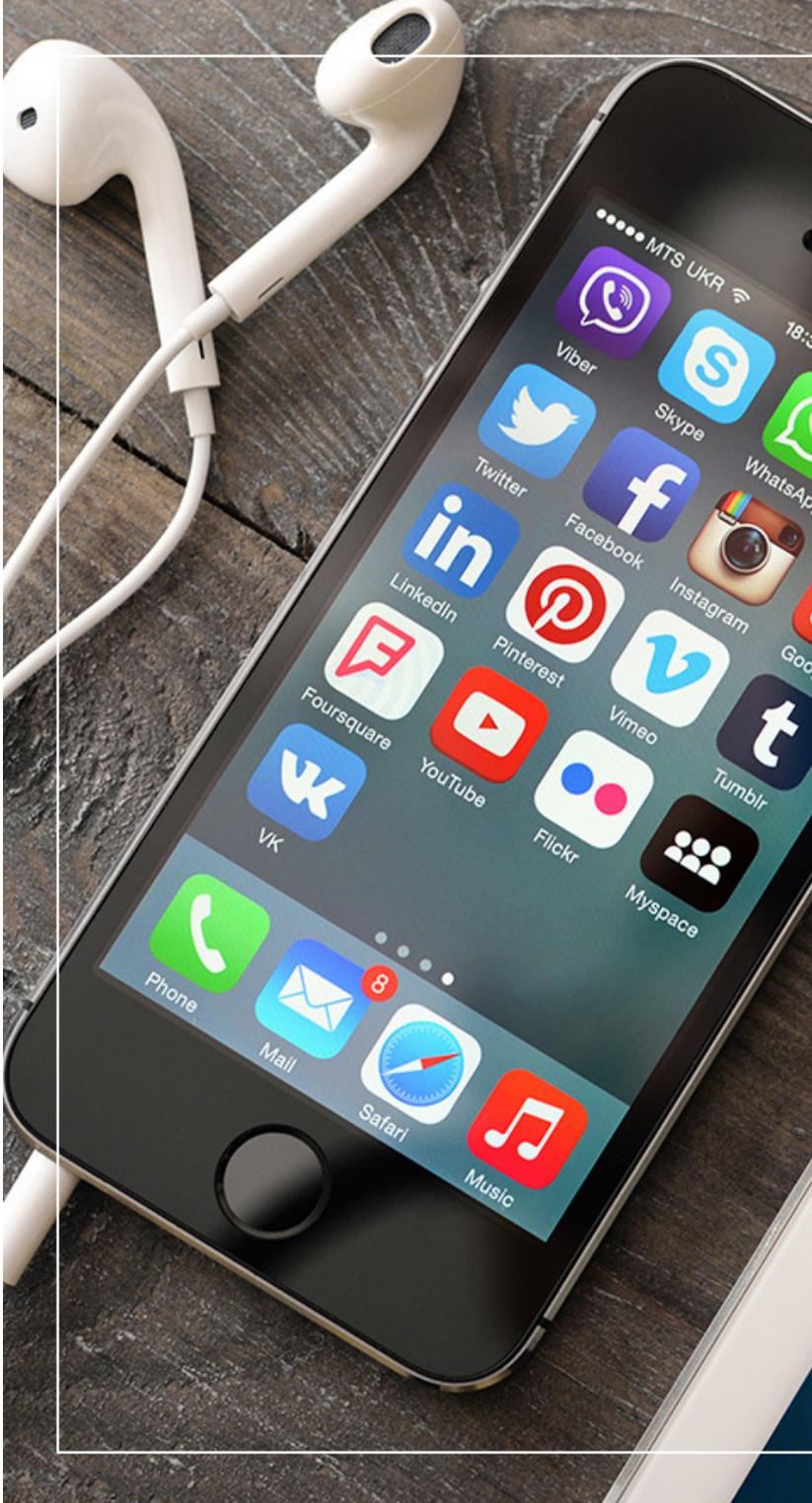
Events are a large component of most associations. From conferences to forums, to regular meetings, associations need a system to create, promote and manage their events. This is typically done through the association website.

Events are multi-stage and require a number of administration features:

1. Creating the event and event web pages.
2. Call for papers - inviting members to present during the event.
3. Registration to the event (integrated with the ecommerce platform if payment is required).
4. Event promotion across the website, social media, email, print and other methods.
5. Event updates to registered members via email and social networks.
6. Posting and updating of the event before, during and after the event has occurred.

In some cases, your content management system can provide most, or all, of these capabilities. In other instances you may have an event management system that you want to integrate with your website.

You want to ensure a consistent experience throughout your entire association website, so if you are using a third-party event management platform, ensure your CMS can integrate with it to include event content within the website using the same user experience and ecommerce engine.



Don't Forget Social

Social is another key channel to reach and interact with members and prospective members of your association, which makes integration with your web experience important. Your organization is likely present on a number of social channels - Facebook, LinkedIn, Twitter - so you'll want to leverage those channels to get the word out about your association and its activities.

Ensure links to your social channels are clearly displayed on your website, so members and prospects can sign-up for them.

As part of your content reuse plan, think about what elements of a piece of content you might use for a social posting. You may take a piece of the existing content item created or have a separate content element defined that is used for social.

Promote your website and association content across your social channels as part of your content marketing strategy. Plan for what content is promoted, when and how, as well as what content pieces are directed solely for existing members or prospective members. While you have, to some degree, a captive audience for existing members, social can be an important channel to get the word out to prospective members and can be a key touchpoint in the customer journey.

Research and Surveys

Purpose: Access to research and surveys conducted by the association and its partners

Audience: Members and the public

Security: Publicly available



Depending on your association's mandate, you may conduct surveys and research projects, or partner with someone who does this on your behalf. In some cases, you want to enlist the participation of your membership.

The association website is also a great place to request open calls for interviews with members for reports you are working on and to get feedback on the association's mandate, services and activities.

You will need the ability to create surveys, promote them on the website and send out requests for participation via email newsletters, social channels, and notification/alert areas on the website (when members are logged in).

While your website content management platform may not have the ability to develop the survey, you may want to publish it to a members-only area of the website. You also need to promote it to your members and provide survey results through blog posts, news items and reports on the website.

In most cases, surveys are created and managed through marketing automation and/or survey management software. Ensure your CMS and the survey tool can integrate to provide the capabilities you want to employ.

Customer Analytics

Like any organization you want to ensure the web experience you provide your members is the best possible.

A positive experience aids in loyalty and retention, as well as the ability to upsell or cross-sell training, conferences, and other products and services.

A positive member experience also increases advocacy, encouraging members to promote you to potential new members.

To ensure your experience is the best it can be, regularly monitor and measure your website experience using an analytics tool. Analytics will tell you things like the most popular pages on your site, the products and services/training that sold the most, how often your members are active in the member community and across social media, and so on.

You can also perform other activities that inform you on the member experience such as card sorts, surveys, customer feedback interviews, etc. These activities will help you understand if your website information architecture is easy to understand and navigate, if you are providing the right information (or missing key information), and more.

The important thing to remember is that you must regularly and consistently monitor and measure how your website is performing and put in place strategies and plans to continually improve it to support your members' needs.



Putting it All Together

Not every member association web experience will provide all the features listed in this playbook, and some may have additional requirements not covered here. However, this playbook covers the most common components.

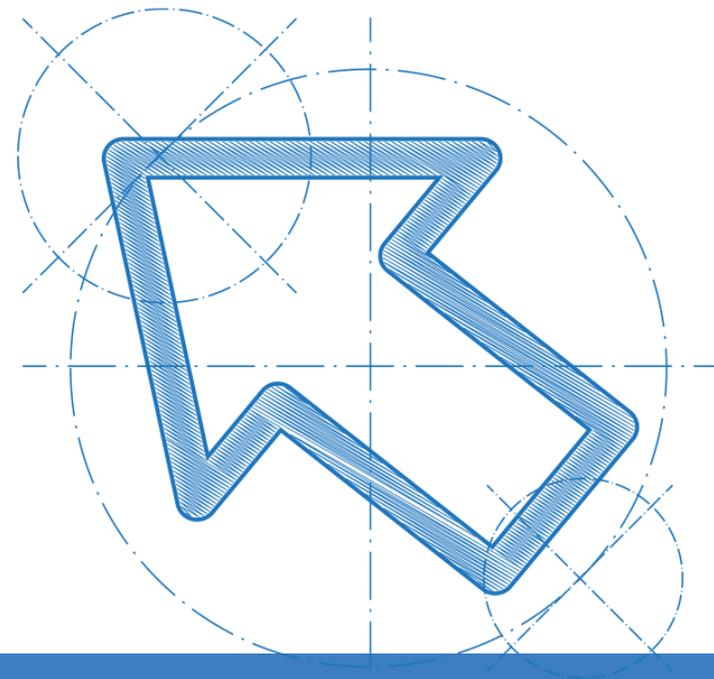
When you design your association's web experience strategy, think about what information and services your members expect and design your website experience to deliver it. You need to carefully design the user experience and create a content strategy that supports the reuse of content across your website and any offline channels.

You may decide to implement different content and features over a period of time. Plan your roadmap carefully and focus on the most important features first based on what your membership needs.

Continually monitor your website to find areas of improvement, whether it's updating the content, refreshing the design or removing content or functionality not needed. Content that is fresh and insightful is critical to your website and should be where you focus most of your effort on an ongoing basis.

To enable you to focus on your members' needs and the content required, look for a web content management platform that provides the capabilities required either directly or through tight integration with other applications.

Your CMS should integrate tightly with your AMS system, an ecommerce platform, community software, and marketing automation software to ensure a consistent experience across the entire website.



How Ingeniux Can Help with your Association's Web Experience

The web has changed. To support the modern web you need a digital content platform with intelligence to serve membership and optimize content, and the agility to connect an ecosystem of applications, services, devices, and member experiences.

Ingeniux is building the third wave of digital content management. Our CMS platform delivers modern association websites, mobile experiences, professional communities, and secure member portals.

The Ingeniux platform includes web content management, digital asset management, a responsive visual page designer, enterprise search application, member community, and more.

With the best support and service in the industry, 24/7 software-as-a-service plans, and value added partnerships, Ingeniux is the answer for managing member-driven websites and digital solutions.

Connecting with your AMS

Ingeniux provides connectors for leading Association Management Systems (AMS) like Personify, Aptify, and AVECtra, to enable you to deliver seamless member services across all your digital channels.

Work With People Who Understand

More than 50 percent of Ingeniux customers are not-for-profit institutions. Ingeniux is uniquely positioned to help associations and nonprofits increase their online capabilities, collaborate, and gain new efficiency. Our team understands your challenges. We are committed to providing cost-effective solutions that allow you spend less time managing the web and more time achieving your goals.

Contact Us

To learn more about Ingeniux web content management solutions for member associations, email us at info@ingeniux.com or call our solutions group at 206-788-4305.

About Ingeniux Corporation

Ingeniux Corporation (www.ingeniux.com) is the leading provider of web and social content management software. Its XML-based technology empowers Web developers and content creators to build the next generation Internet with products acclaimed for ease-of-use, rapid deployment, extensibility and low total cost of ownership.

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