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Membership in the Digital Age: Navigating challenges for membership growth with modern technology insight

Exploring the journey of digital transformation that enables professional bodies and membership organisations to thrive and grow in the digital age.

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Content

INTRODUCTION

When finances are tight it's more imperative than ever that you deliver compelling value to your membership. However, great programmes, conferences and newsletters are no longer enough to ensure the long-term sustainable growth of your organisation. The modern world is changing at a pace never seen before. A new generation of digitally empowered citizens are finding new ways to connect and different spaces in which they belong.

For professional bodies and membership organisations the core challenges remain the same:
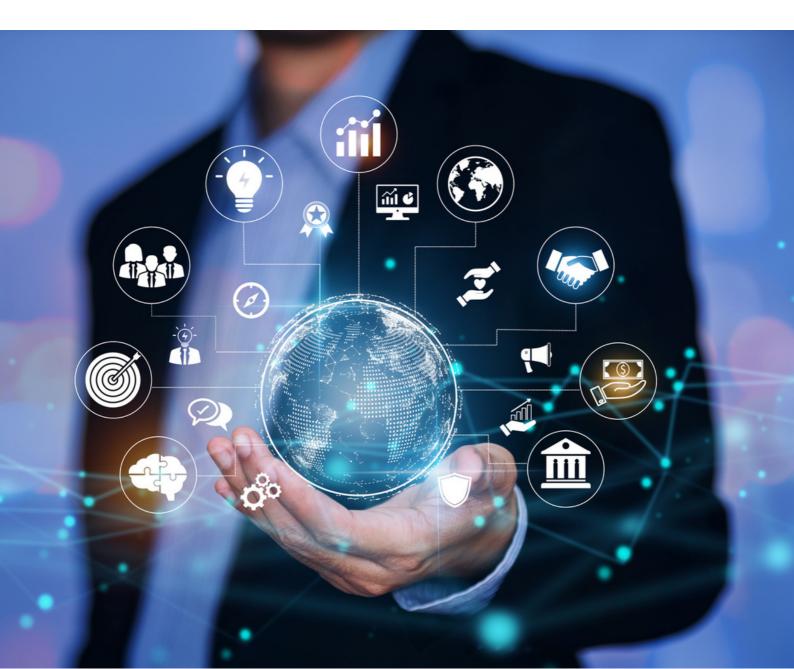
- How do we attract and retain members?
- How do we get them more deeply engaged and involved?
- How can we best represent our profession or cause in a way that makes a difference?

Increasingly though, the answers to those questions hinge on your ability to exploit digital channels and derive value from your data sources. For many organisations however, the underlying technology foundations present a barrier to achieving the kind of digital transformation that will propel you into the digital age. Worse still there are too many software and technology companies willing to sell you their next greatest CRM or event management technology without addressing those underlying barriers.

At Mason Advisory we've been assisting organisations like yours in establishing the right foundations and making informed decisions about software and technology purchases from a truly independent viewpoint. In this series of insight articles some of our leading consultants will provide expert insights into some of the key challenges for professional bodies and membership organisations in the digital age.

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Insight 1 of 4 - Memberships in the Digital Age: Laying the Technology Foundation for a Digital Association

How can Membership organisations and Professional Bodies best approach improving their technology provision to ensure current services are efficient and effective, whilst laying the foundations for a digital association?

Laying the Technology Foundation for a Digital Association

Common technology problems of Membership organisations and Professional Bodies

Many membership organisations and professional bodies have evolved their technology provision over many years, adding functionality and services that the wider business demands, and acting quickly to provide a good service to their internal customer.

Membership management, fee payments, access to professional development or other training resources, certifications etc. through mobile apps is increasingly recognised as a digital service offering that is expected by digital natives joining these organisations, and the underpinning technology platforms don't necessarily fit well with these ways of interacting.

This has in many cases led to technology decisions and implementations being driven ad-hoc in an effort to keep up and has often driven large amounts of customisation of software. This leads to difficulties in maintaining platforms to supportable software versions.

There is often not the focus or indeed the budget allocated to ensure technology platforms are managed in the optimum way. Over time, exposure to risks – of data loss, bad actor infiltration, poor service and poor reputation to name but a few – becomes increasingly a drain on the resources.

Understand the current state

In many cases, the evolution has been so piecemeal, that the IT department no longer has a full understanding of what it's dealing with.

A comprehensive review of the services offered through the technology - and explicitly which systems, applications, processes
and people combine to provide those services – will enable the IT department to understand the size of the technology problem they may have and equip them with the tools to do something about it.

Reconnect with the wider business

The next step is to dig into what is really required to support the business. Ask yourself – why are we doing this?

By delving into gaining a full understanding of fundamental business processes, the IT function can come to a view on where to focus the most effort in the short-, medium- and long term to bring the technology landscape under control. Armed with this information, they can define strategies to ensure they are able to manage the technology framework correctly, whilst supporting the business needs.

Technology can have a real influence on the actual service offering for member organisations; incoming technologies such as AI can provide services to members not previously considered, and the technology team need to stay
ahead of the game to make sure these are considered in strategic thinking in business as well as IT circles.

Plan out the opportunities for improvement or step-change

Of course, none of this is done in a vacuum, and the business still needs to forge ahead following the business vision and strategy they have defined.

A key element that is often missed in member organisations is that IT management is a part of the business too and has a responsibility to ensure the tools and services provided are secure, robust and fit-for-purpose. It is vital therefore, that the business strategy and IT improvement strategies are complimentary, and work in unison to deliver the ongoing improvements to service, and perhaps transformational programmes of work to make a step-change in IT provision, as well as supporting the business and moving forward appropriately.

Membership organisations and professional bodies, anticipating the future digitalisation of their services, may face a daunting task. However, this challenge becomes considerably easier when the correct steps on the journey are taken. Our experienced consultants, employing our best practice frameworks, can support you swiftly on this journey.

For more information or help on your journey to Membership in the Digital Age, email contact@masonadvisory.com to discuss further.

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Insight 2 of 4 - Membership in the Digital Age: Keeping your data safe from security threats

Information security is a key factor for Membership organisations and Professional Bodies undergoing a digital transformation, this article explores some risks that may be overlooked and how Mason Advisory can help.

Keeping your data safe from security threats

Security can either make or break your digital transformation

Membership organisations and Professional Bodies play a vital role in their communities. Their primary focus is on managing professional knowledge and facilitating the exchange of expertise among their members. Because the organisation's value to their members lies in the services they provide, and the information they hold about their members, protecting the intellectual property of both the organisation and its members is of utmost importance.

Information security is often just considered to be a compliance challenge, particularly in light of regulatory standards such as GDPR, ISO27001 and PCI DSS. However, proper consideration of information security requirements is a key success factor of membership organisations and professional bodies to operate safely and effectively in the digital age. A successful cyber-attack can have potentially fatal consequences for membership organisations and professional bodies – a data breach may result in loss of trust from members, loss of the organisation's reputation or even financial penalties.

Based on Hiscox Cyber Readiness Report approximately 45% of professional service organisations reported experiencing at least one cyber-attack in the last 12 months. Gaining back the member's trust and rebuilding the brand value might take years or even decades as is shown in the case

of British Airways (whose brand reputation plummeted to a four year low following their 2018 data breach) or Tesco Supermarket (whose brand was contaminated by a major data breach in their banking arm in 2016).

Key consideration of information security challenges

In the complex world of membership organisations and professional bodies there are three key risk areas warrant attention on the journey to being digitally powered organisation.

1. Attacks on the organisation and internal users

The core activities of these organisations involve utilising and safeguarding the personal data of their employees, members, or potential members, as well as handling sensitive industry knowledge as part of their services. For example, an organisation may hold:

- Members' CVs
- Members' personal details (name, address etc. bank details for direct debit)
- Professional training/certification materials or other valuable intellectual property
- Employee's personal details.

Organisations need to remain constantly vigilant to prevent various threats such as phishing, internal attacks, and malware attacks. Phishing attacks are typically carried out through deceitful emails. Internal attacks involve

attempts to gain unauthorised access to sensitive internal data, either by internal or external individuals. Malware attacks use malicious software to disrupt access to internal networks, applications, and data. Ensuring that your staff are properly briefed on the importance of data security and armed with strategies and techniques to spot and eliminate attempts to compromise your data is a crucial first step in protecting your brand.

2. Attacks on organisation members

It's not just your employees though! Your members are susceptible to phishing attacks that mimic communications from the organisation. These attacks can be highly sophisticated, employing the organisation's logo and branding to deceive members and extract sensitive information. To safeguard both their reputation and members, organisations must take measures to guarantee that communications are easily identifiable. It's crucial for members to be informed about verifying emails to prevent falling victim to such deceptive practices.

3. Target members and additional stakeholders

Target members and external organisations could be considered easier targets as they are not familiar with membership organisations and professional bodies behavioural patterns and
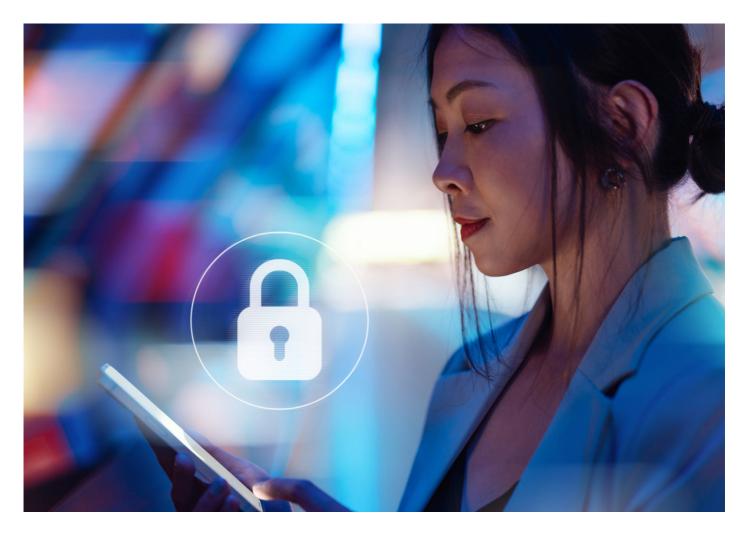
Keeping your data safe from security threats

tools e.g., website / application. The stakes may be high as they are not committed to the membership organisation or professional body and its quite likely they won't become members after a cyber security attack. Organisations must make steps to ensure that communications from them can be clearly identified.

How can we help

Mason Advisory is dedicated to assisting membership organisations and professional bodies in attaining an optimal level of maturity in information security.

Whether your organisation is embarking on a digital transformation or is already on the journey, we can help identify and mitigate risks while recognising and enhancing existing strengths.

We highly recommend our swift "Digital Association Readiness Health Check," a process that takes less than 5 days. Our adept team can rapidly assess crucial issues, pinpoint areas for improvement, and furnish a focused development roadmap. This modest investment in organisational review serves as a preventive measure, averting unnecessary expenses on tools or overly complex solutions for identified risks.

The article underscores the vital role of information security in the digital journey of membership organisations and professional bodies. Mason Advisory's solution provides a strategic approach to assess security readiness promptly, preventing costly investments amid the rapidly evolving digital landscape.

For more information or help on your journey to Membership in the Digital Age, email contact@masonadvisory.com to discuss further.

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Insight 3 of 4 – Memberships in the Digital Age: How to unleash the power of data with knowledge & insights

Maximising data as a crucial asset for driving business growth in Membership organisations and Professional Bodies: An Exploration

How to unleash the power of data with knowledge & insights

When it comes to data, organisations often tend to be stuck on the how and where to start – this becomes even more evident when we consider AI as a new layer to work with. In 2022, the MemberWise Digital Excellence report found 70% of membership organisations use data to make important decisions, however only 13% had trust in their own data.

Addressing the "Where to start" first

- Bridge the data gap – You can kick-start by ensuring the right stakeholders (Tech & Business) are collaborating at a strategic level. Those teams need to talk continuously and talk the same data language – bring to the table those individuals equipped with domain expertise and programming skills. If you don't have those individuals with such a profile in your organisation, consider starting to embed some of your data team directly within the business teams.

- Start with the end in mind – what are the strategic business objectives, the KPI's and the challenges you are working with? Ask which type of insights / actions are expected, so expectations can be managed. You will most likely need to educate the organisation and showcase how data & insights can be trusted and how it can help to drive membership value and growth.

- How well do you know your membership data? – What data do you currently have

about your members? How is your data quality? Do you have defined and aligned measures for all three key pillars – retention, engagement and recruitment? Do you maintain specific business views via targeted and easily maintainable segmentation? Do you run constant analytics & insights? Can you merge datasets from various platforms to offer a comprehensive view of the whole member journey through your digital channels? These are some of the key questions to help you identify where existing gaps might be so that you can define a place to start.

- Start small, iterate and fail fast – If you are embarking on your data journey, then identify those quick wins associated to no-regret activities. The ideal use cases often resemble clunky Excel reports stored on a shared space, manually updated weekly or monthly. These reports are sometimes heavily relied on by business teams to understand their overall membership offering, such as exam or membership performance, member engagement, etc. Once transformed through proper data modelling, visualisation, and interpretation, you can achieve FTE savings, improve data quality, and deliver business value through actionable data insights.

As far as the "How to start" is concerned

- Invest in data analytics expertise and tools – this is

pivotal, but make sure to maintain a well-balanced data capability between domain expertise and programming skills. There are now powerful open-source software's leveraging a low-code / no-code approach. Those can offer sought after capabilities in data science, machine learning and AI without the expensive price tag of a data / AI engineer – such hires could come later when you progress through your data maturity journey. Low-code / no-code allows for more time available to build domain expertise, drive insights and enable business actions.

- Don't expect the first draft of any data analytics solution to provide a perfect output. Instead, iterate rapidly and involve the business in the journey to align on the solution. This process builds trust in the data, your analytics team, and across the larger organisation, ensuring a solid end-user adoption. Success here often relies on fostering a culture of continuous improvement to reach marginal gains – stay close to those improvements and enable a regular process to recognise and celebrate those small but incremental wins.

- The enthusiasm for data from the business users often comes with "it would be interesting to know" type of requirements. Don't build data solutions around those and keep your focus on the initial objectives aligned with the business and tech team at a strategic level.

How to unleash the power of data with knowledge & insights

Remember – tangible actions should be the ultimate output of any data analytics & insights work.

Unlocking the true potential of your membership organisation requires more than just collecting data – it demands a strategic approach to create sustainable value. Discover how harnessing the power of your data assets can propel your organisation forward, revolutionising the way you comprehend, oversee, and cater to your members. Our team of consultants can guide your journey to not just stay ahead but to lead the way in providing unparalleled value and service through insightful data utilisation.

For more information or help on your journey to Membership in the Digital Age, email contact@masonadvisory.com to discuss further.

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Insight 4 of 4 – Memberships in the Digital Age: Crafting a digital experience to attract and retain the next generation

Exploring how creating the right digital experience will allow Membership organisations and Professional Bodies to attract and retain the next generation of members.

Crafting a digital experience to attract and retain the next generation

Retaining and attracting members is the top priority for membership organisations and professional bodies. Like all organisations today they must re-invent the way they interact with their consumers. One of the key enablers to this is the development of a digital experience. In today's landscape, consumers anticipate a consistent digital experience from the organisations they engage with.

Furthermore, digital channels are becoming key to ensuring membership organisations and professional bodies stay relevant today and into the future in the modern world and is now a key channel to be able to actively promote their members interests.

The initial step in any digital transformation is to clarify the essence of 'digital' and distil it into a more tangible concept. When we say digital, we really mean a business strategy and/or operating model that uses the capabilities of modern technologies to meet the demands of customers and deliver the organisation's ambitions in a different way.

For membership organisations and professional bodies successful digital transformation is not simply about the technical approach to delivery of a digital platform. The key to a successful digital transformation is to ensure it is part of an overall engagement strategy that is user centric and prioritises the customer journey.

The most visible element of digital is in the customer experience however, digital comprises several different layers, from the customer experience through to the infrastructure foundations required.

As technology evolves at a rapid pace, organisations now have the opportunity to formulate strategies that, until recently would have been financially unattainable. This trend is expected to continue.

While most membership organisations and professional bodies have significant legacy IT and some of this needs to be addressed as part of the digital journey, organisations need to move away from the traditional full stack model and towards a plug and play type model.

- Modern flexible architectures – how to move towards a capability-based and potentially subscription-based technology estate.

- Application estate – for those with legacy estates, how to advance to a simplified, configurable set of applications. And for the younger entrants, how to truly scale matching desired capabilities to the appropriate application functionality.

- Automation – driving automation within the appropriate areas and doing it right first time, rather than as an additional layer.

- Adapting to interact with connected devices, e.g., cars, sensors in property (residential and commercial), and wearables for health.

- Innovating with new disruptive technologies to enhance the customer and employee experience driving additional value.

- Ensure that sufficient guardrails and controls are in place to control the use of Lo/No code and SaaS offerings.

Getting the basics right is core to any business in its daily operations. Digital transformation is no exception. Unless the fundamentals are in place and working to the organisation's advantage, the ability to realise wider benefits can be adversely impacted. There are three areas that we believe are critical:

- ensuring an organisation knows their technology cost profile – what the levers are that can be pulled to make efficiencies; and understanding how that profile may change in a digital world.

- ensuring the IT and application estate performs to the service levels necessary to support the organisation's goals; are the service management capabilities appropriate for a digital business model?

- ensuring the right technology controls are in place to meet the regulatory standards e.g., vulnerability management, GDPR.

Organisations are starting to develop solutions to deal with the challenges and opportunities discussed above,

Crafting a digital experience to attract and retain the next generation

but the questions really need to be:

1. Are your solutions still fit for purpose in the digital world?

2. Do you have the right foundations and enablers in place to help your business

3. provide the experience and products that customers desire, alongside driving profitable growth?

At Mason Advisory we've been helping organisations like yours to get the right foundations and make the right decisions about software and technology to deliver a successful digital enabled organisation.

Mason Advisory experience consultants are able help you maximise the opportunities of digital and leveraging our digital readiness and our cross industry digital experience.

For more information or help on your journey to Membership in the Digital Age, email contact@masonadvisory.com to discuss further.

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About Mason Advisory

Mason Advisory has offices in Manchester and London and employs over 100 staff, with plans to continue its expansion. We enable organisations to deliver value through digital & technology transformation, solving complex business challenges, and helping clients set strategy through the intelligent use of IT resources including architecture, cyber, operating model and organisational design, service management, and sourcing. We operate in sectors such as financial services and insurance, legal and law, government, health and social care, emergency services, retail, FMCG, transport, and not-for-profit.

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