

Feature

6 Lessons to Serve Members Better

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By: *Miranda Barrett*

Providing great customer service starts from inside your organization. The Entrepreneurs' Organization has spent more than a year building a new culture that puts members first and has boosted staff morale and member retention. (Titled "Red Carpet Member Service" in the print edition.)

"I cannot believe the indifference and inefficiency I have experienced. I needed a password to log in. I called and got a generic voicemail and no one called me back. Then I sent an email, and no one got back to me for two weeks. When they did, the password didn't work. Is this what I get for my dues?"

How do you react when a note like this hits your inbox? Do you fire off a defensive retort or just rely on the "delete" button? Or do you seize the opportunity to turn a negative interaction into a positive one? Does your organization have the culture of service to make that happen?

Building a culture of service doesn't happen overnight. At the Entrepreneurs' Organization (EO), we decided two years ago to make this a top priority as a tool of retention and as a value of the staff team.

As successful business owners, EO's members know exactly what good customer service entails, and they don't hesitate to tell us what needs improvement. Factor in the cultural differences and communication styles that come with doing business in 40 different countries, and customer service becomes more than a short-term project. We believe delivering exceptional member service is critical to everything we do, and the success of EO depends on it.

Over the last few years we have injected a strong dose of member service into every interaction we have with members. It hasn't always been easy and we're certainly not done. Here are some lessons we've picked up that may help your association along a similar journey.

1. Start With the Best and Never Stop Training

Imagine a day in the life of a member. EO members are small-business owners in a down economy who are letting employees go and struggling with sales and who might be willing to drop a membership organization in an effort to save. We also recognize that our members are high energy, living with stress, and short on time, so we must respond accordingly.

The ability to empathize with members is critical for our front-line staff, and we seek it out in hiring. When interviewing candidates, I've used challenging customer-service scenarios coupled with notes on exactly what responses I want to hear. For a recent position, I went through about 10 interviews before finding the person who responded with the level of personal empathy, ownership of the situation, and above-and-beyond response that I was looking for. It takes time

to find someone who fits, but the payoff of having the right person makes up for the time spent searching.

Constant training and reinforcement with current staff is equally important. We've brought in several customer-service experts to talk with the full 65-member staff of EO about our challenges and ways to improve, while trying to make it fun. We offer books that staff can read and discuss. We celebrate with "shout outs" at onsite events to recognize staff members who go above and beyond. We've also created staff core values together over several months and identified "trust and respect" and "professionalism" among them, and we hold each other accountable to our new standards.

2. Mistakes Are Opportunities

Mistakes are going to happen. You can limit them, but you can never completely control them. Here's the good news, though: You can control how you react to mistakes and how you train your team to react to them.

We send a short check-in survey to our new members about four months after they join. It has been invaluable; we learn who still can't get into the website, who never got a new member kit, and who is having a negative experience with a chapter. A few of them are pretty mad about something. The efforts we take to rectify every situation result in building a great relationship with a new member who might never have known us otherwise. We go from being faceless to helpful with a few quick emails, and we open the door for conversations about benefits and upcoming events.

Members experiencing their own hardships are another special opportunity. We have a number of members in the Middle East whose businesses were greatly impacted by the recent turmoil there. They need flexibility on their renewal payments. We have members in Japan who are struggling to recover from the earthquake there. We have members called to active military duty. We have members with sick children. It takes time and effort to accommodate special situations, but the loyalty you build from doing so makes it an easy return on investment. And in this age of social media, when every member can reach thousands of people with a few clicks, the value of having a rave review about service is better than a rant about unsympathetic policies. (See sidebar "[Handling Negative Feedback](#)".)

3. Examine Every Interaction

Is your phone system easy to navigate? What about that registration line at your big event? Can members quickly find what they need on your website? What happens if they send an email to a generic account? All of these tiny, seemingly insignificant interactions add up to create your members' overall perception of your service.

So how do you create a polished experience? Going back to empathy, put yourself in your member's shoes and look at your organization from the outside. Try calling the office after hours and see what the phone system does. Send an anonymous email to your generic account and see what the response is. Most important, ask your members. You may be surprised to hear what

small and easily correctable problems are causing pain. Start a list and start empowering your team to find solutions.

4. The Abundance Mentality

The president of a chapter asks you for a list of members. But you know that what he really needs is a list of members by last name, with their emails, phone numbers, and years in the organization. Maybe he could also use a list of members who didn't renew last year and a list of prospective members waiting to join. What do you send him?

On the membership team at EO, we adopted the phrase "abundance mentality" to mean actively seeking ways to overdeliver, both to members and to each other. It's a promise to each other to work together to exceed expectations.

5. Be Proactive

How do you demonstrate your commitment to service to your members? You can wait for those ugly problems and mistakes to pop up, or you can engage in systematic outreach to show you care. There are so many low-cost, high-impact ways to reach your members. (See sidebar "[Building Stronger Relationships](#)".)

EO had members who traveled to the Washington, DC, area frequently but weren't stopping by our office. So, we made a nameplate that reads "EO member," hung it over an empty office and offered the space to members as a place to work. Not many have taken us up on this yet, but just the gesture has led to great feedback. And for the few who do stop by, we treat them like visiting royalty with a tour, lunch, and soon a commemorative office gift.

Never underestimate the value of saying "thank you," either. Two years ago, we reached out to every one of our members with a personal call, and we are considering doing that again this year following our upcoming renewal cycle. (Read about the calling campaign in "[7,300 Ways to Say Hello](#)" from the January 2010 issue of *Associations Now*.) That means reaching out to more than 7,000 members in 40 countries to thank them for renewing. It is a huge challenge in terms of time and manpower, but we made the decision that it was in line with our value of member service. It puts every single staff member in direct connection with members. It opens the door for dialogue and reduces the faceless-headquarters factor.

6. Measure Your Progress

How do you measure something as fuzzy as good member service? You might feel that you'll know when it improves and life is good. But without systematically creating short- and long-term goals and strategies to achieve them, plus metrics to support them, you'll never know where you really stand.

A survey can be a great way to gauge the year-over-year changes in the mood of members toward your staff and the service delivered by the organization. At EO, we track this every year when we ask members to rate their interactions with the global staff on a scale of one to 10, and

we celebrate that the average has gone from 7.7 to 8.2 in the last year (with a response rate of 55.5 percent).

Creating metrics for your staff is another way to measure your efforts. What's the average response time to an email to the general information account? How long does it take to respond to each other's requests internally? Building a culture of teamwork and service on all levels is just as important as having a good front line.

Anecdotal feedback through unofficial channels can be a great pulse point as well. Make sure that someone is regularly reviewing the questions and comments that come into your organization and monitoring the discussions on your social media sites. Consider having a senior leader post a question for discussion. Encourage members to give you the gift of open feedback so you have the opportunity to improve. For example, during our annual renewal period, we encourage departing members to complete an exit survey and share everything that led to their decision to leave. All that information is compiled and delivered to our global board of directors and executive staff team for review and action.

So how is all of this working for us? Our retention rate stayed between 85 percent and 90 percent in a down economy. Our survey ratings on staff interaction improve every year. Our team seeks out positive interactions with members. We're never going to be finished with this initiative, but it's the right path for us. We know that excellent member service may not make a member stay, but bad member service can easily be the reason a member leaves.

Sidebar: Building Stronger Relationships

Try these easy steps to build better relationships with your members:

Google News Alerts can tell you when your members are in the news. You can set the search terms for your organization or names of particular members. Congratulate them with a handwritten note or even a framed copy of the article.

Celebrate new additions. We made baby Onesies with "Entrepreneur in Training" on the front and our logo. They cost about \$7 each, and our members go crazy when we send them. I ask them to send photos of their babies wearing them to post in the kitchen here.

Recognize membership anniversaries. A member in Korea approached me at an event to tell me he received a letter from our executive director congratulating him on his second year with EO. Something as simple as a letter made a difference to him.

Recognize birthdays. What's easier than wishing a member a happy birthday? Why automate it when you can involve the entire staff team? We post a calendar in the kitchen, and staff sign up for days.

Don't underestimate inexpensive giveaways. When I have an upset member sharing a negative experience with me, he gets a handwritten note and an EO hat in the mail.

Sidebar: Handling Negative Feedback

How should you react when you receive negative feedback? Here are a few things to try.

Let them have their say. Sometimes people just need to vent. Take good notes while they're letting it fly, and don't even think of getting defensive.

Show empathy. Responses like "I can see how that must have been frustrating" or "I'm really sorry you had that experience" can calm complainers down.

Repeat back what you heard to show you were listening. "What I'm hearing is that you're getting way too many emails from us even though you opted out of that."

Propose some kind of solution, even if it's not exactly what they want. Attach a timeframe to it that you can absolutely stick to. Say, "I'm going to check with our communications team on why that's happened and get right back to you. Can I call you on Monday at 2 p.m.?"

Close on a positive note. Say, "I really appreciate your time. Is there anything else I can do for you?"

Don't take it personally, and don't take it home with you. You can deliver your best service every day, and problems will still happen. If you internalize every negative interaction, you'll burn out fast.

Become aware of the customer-service interactions you have personally. How was your phone call with the cell phone company? What did they do that drove you crazy? The tools to learn and improve are all around us.

Online Extra Sidebar: A Few Good Books

There are hundreds of great books out there on customer service, but here's a few of my favorites (full disclosure, the first two are EO members who came to speak to us; great books).

The Amazement Revolution and *Cult of the Customer* by Shep Hyken

Secret Service and *What's the Secret?* by John DiJulius

Creating Magic: Ten Common Sense Leadership Strategies from a Life at Disney by Lee Cockerrell

Good to Great by Jim Collins

Online Extra Sidebar: 5 Ways to Provide Better Member Service Today

1. Seek staff input.

2. Seek member input, and not just board members. Find those quiet members who don't know anything about "headquarters."
3. Create a core team of staff, ideally from all department, with people who are passionate about the member service to identify member pain points, resources available, interactions with members that can be improved, and metrics to measure it all.
4. Build a 12-month plan with owners and measurements. Hold regular check-in meetings.
5. Collect member feedback along the way.

Miranda Barrett is vice president of membership development at the Entrepreneurs' Organization in Alexandria, Virginia. Email: mbarrett@eonetwork.org