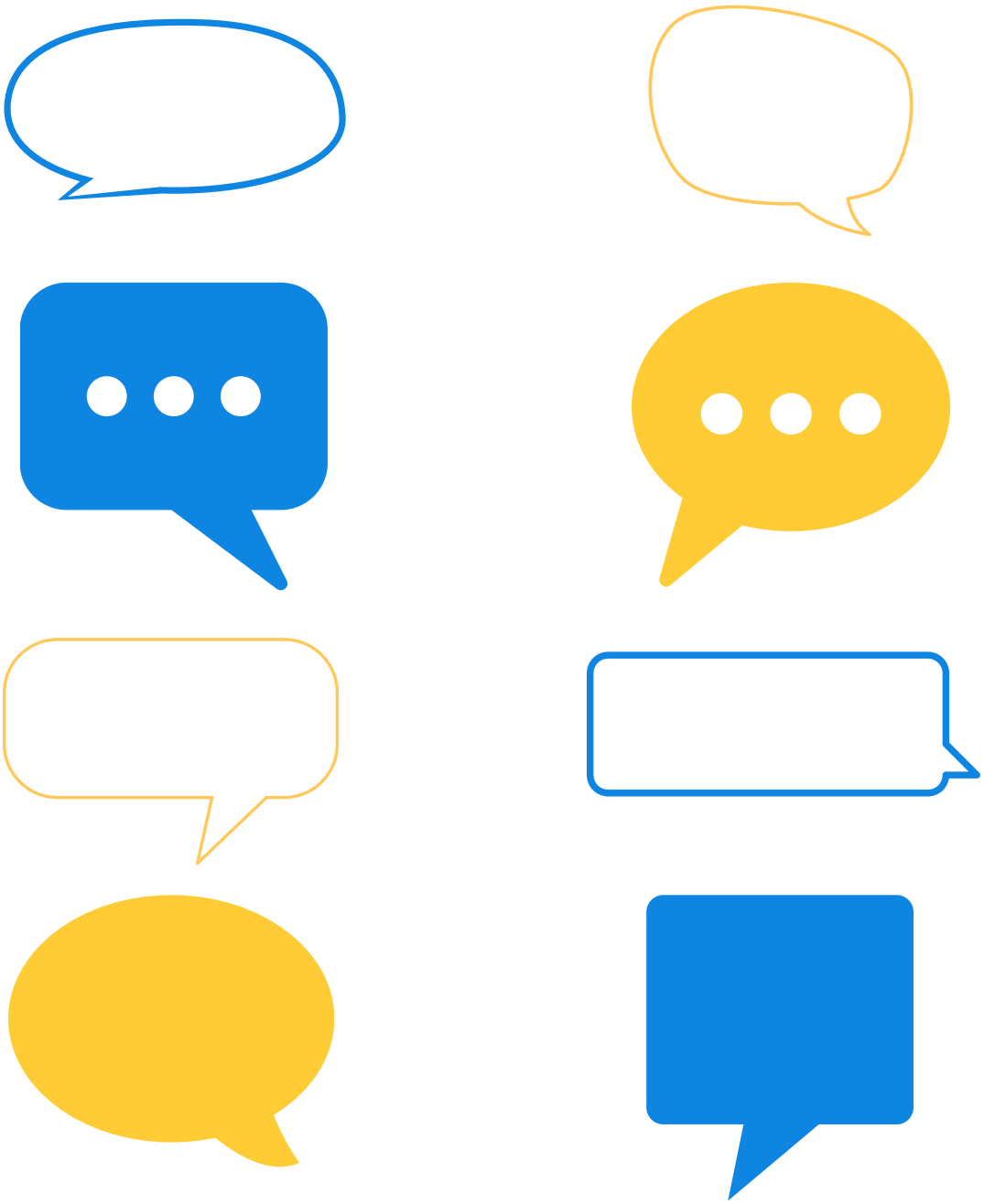
AN EBOOK FOR ASSOCIATIONS



CONVERSATIONAL ENGAGEMENT

Prop Fuel

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MESSAGE FROM OUR LEADERS

PropFuel's birth certificate says that we started in January 2017, but to tell the story of our business, you need to travel about 17 years back in time. That is when Dave Will, one of our two founders, started a business called Boston Conferencing. What started out as a teleconferencing reseller (yes, there was a time when you couldn't just sign up for Zoom in 30 seconds online) evolved into a full featured LMS for associations. In 2008, Cameron Aubuchon (our other founder) joined the business, which would eventually rebrand as Peach New Media, to lead development of our flagship product, the Freestone LMS.

Over the course of that journey, we learned a lot about associations, and about building a business. Creating an LMS to serve the mandatory continuing education market gave us exposure to the ins and outs of associations, their internal culture, and the regulatory environments in which they operate. Scaling a business gave us exposure to the challenges of growing an organization from a small team on a mission, to a collection of individuals, spread across the country, who need to be brought into the fold, motivated and all working in the same direction.

When we sold Peach New Media in 2015, we knew that we both wanted to start a new venture together. The question was, what should we create? We threw a ton of ideas back and forth for a year or two, but one theme kept coming up that we knew we were positioned well to work on. The biggest challenge that we saw, especially when it came to building a business, was communicating well. Keeping the lines of communication open and productive between the highest and lowest points on the organizational chart. This is something we took pride in – and worked hard on systematizing – at Peach. We knew the problem; we had experienced the pitfalls of not solving it, and we had some ideas on how we could build software tools to help other businesses thrive in this area.

So, in January 2017, we left the corporate world behind and founded PropFuel. Our mission at the time was to empower communication within companies, both peer to peer, as well as between management and employees. In fact, that is where the name PropFuel came from. The first piece of functionality we built into the product was the ability for employees to give "props" to each other, giving thanks for a job well done. The next feature to roll out was the ability for leadership to ask questions on a regular cadence, soliciting feedback from their employees and getting conversations started.

Over the next couple of years, we onboarded new clients, helped them design their employee engagement programs, and watched as they used our software to gather feedback and start conversations. Using our connections in the space, we even onboarded a handful of associations and helped them implement employee engagement programs. Over time, there was a theme that kept coming up in conversations with clients and prospects – "This is great for talking with our employees; I wish there was a way for us to have these types of conversations with our customers/members."

That idea laid the foundation for the identification of a larger problem that we could help solve. Every organization has employees and the customers who they serve. We had started with our focus on

employees, but most organizations have way more customers than employees, and everyone was struggling to effectively engage with them at scale. That is also when we decided to shift our focus to primarily working with associations. They have a special bond with their members, working together on a shared mission, and effectively engaging them is essential in their shared quest to fulfil that mission.

So how can we help you better engage your members? A key insight we learned in employee engagement, both in building a business and building a product around it, is that two-way communication is key. Sending an email blast telling people what they need to do is not the best way to motivate them. The best way to motivate people to take action is to draw them into conversation, figure out what their individual goals and needs are, and then find a way to turn that into a plan of action for how you, as an organization, can use them most effectively to meet their needs and advance your own.

When we look at how we communicate within our organizations, we take this seriously. We have management structures set up to make sure we are getting the most out of our people, that they have clear goals, that they feel heard and understood, that they are aligned with our mission.

But, when we look at how associations communicate with their members, most of these principles are thrown out in favor of things that are much easier to do at scale. Emails are not two-way exchanges, they are broadcasts full of information about ourselves, with no ability to learn about our members. Marketing efforts are driven by our assumptions of what people want based on a mix of demographic and transactional data, rather than the actual, stated needs of the individual.

Of course, there is an obvious reason for this. It is much easier to have a conversation with 40 employees than it is with 4,000 members, let alone 40,000. This is the problem we are determined to solve. Our mission is to enable organizations to have relevant, meaningful conversations, at scale, with their constituents, wherever they are.

This ebook is a glimpse into the “how” behind that mission. The principles outlined are things you can do with or without PropFuel, but our goal is to get you to buy into the concept of Conversational Engagement. There are ideas here you can implement manually, and there are also ideas in here that will require a system to give your team conversational super powers. That is what we are building, and we are looking forward to advancing this idea in our community, and empowering our clients to build stronger connections with their members.

If you have any questions, let us know. We’d love to have a conversation.



Dave Will & Cameron Aubuchon
Co-founders, PropFuel

INTRODUCTION

Imagine you have a single objective for the day. You have one member to work with, and you need to help her get as much value as she can from your association. You have no time restraints, you don't have other people who need help; it's just you and your member.

How do you help her?

My guess is you aren't thinking about sending her some informational emails, hoping the thing she is looking for happens to be in your latest newsletter.

Instead, you are probably thinking of connecting with her directly and asking some questions. You might ask about her background, her career, her goals. You'll ask her why she joined, what she is interested in, or just a simple "How can I help you today?"

You are thinking of having a conversation.

This is how humans communicate. We ask questions, we listen to the response and we take action on what we have heard. In fact, if we are trying to help someone, the goal in that conversation is to get the other person to talk about herself more than we talk about ourselves. Sure, there is a time when it is our turn to tell her how we think we can help. But our information is in response to what she has told us, and not how we lead.

This concept is what we call Conversational Engagement.

Now, you are probably thinking something along the lines of "sounds like a great way to help one member, but I have hundreds of members," or thousands, or tens of thousands. And you are correct: you can't have thousands of personal, one-on-one conversations every day. Engaging members at scale has to look different than engaging one member at a time.

That is what Conversational Engagement is all about. How can we take the basic concepts of communication that work so well one-on-one, and apply them to our communication efforts at scale?

Let's dig in.

WHAT'S MISSING?

Before we dive into how Conversational Engagement works, let's take a look at what most of us are doing now and what we are missing.



Broadcasts
Today, most communications are done via what we call broadcasts. We have a lot of information about us — announcements, articles, events, courses — that we want to share with our members. Without a better method of mass communication, we send it all in a broadcast. Maybe it is via a newsletter that lists everything that is going on this week, or maybe it is via targeted emails to people who we think might be interested in hearing about a specific topic.

Ultimately, this style of conversation is one-way. You are telling people about your organization, but the only thing they can tell you about themselves is whether they are clicking on the links. Sure, an individual recipient could reply to the email, but you aren't asking them to reply. And imagine if all of them actually did? You would be back in the place we were picturing a minute ago, overwhelmed at the prospect of having a one-on-one conversation with one thousand people, with no systems or automation to help facilitate it.

There is a place for broadcasts; they are useful for keeping people informed. **But if you are only doing broadcasts, you are not engaging your members as effectively as you could be. The missing element is the difference between one-way and two-way communications.**

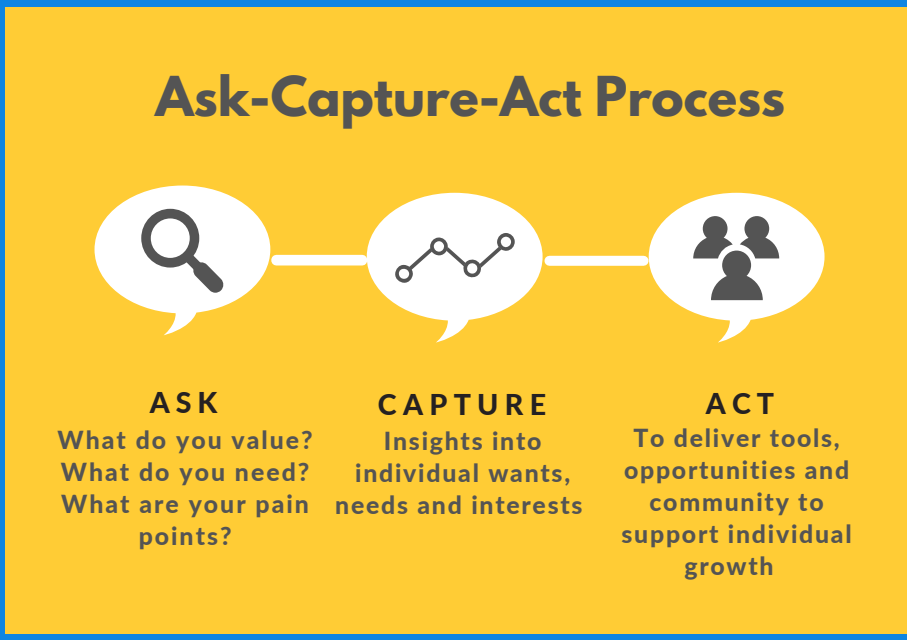
TWO-WAY COMMUNICATIONS

Conversational Engagement is based on the premise that what your members have to tell you is just as important as what you have to tell your members. There are many ways to get your members to talk to you; we call them **conversation starters.**

The simplest way to get people talking is to ask them a question. We call this process **Ask - Capture - Act.**

Go back to the example of how you would best help a single member:

1. You ask her a question.
2. You capture her answer.
3. You act to help her get what she needs.



This isn't a linear process, nor is it necessarily a single step process. Your action may be to ask another question to learn more detail, or it may be to tell her to go take a course and come back to tell you how it went. It may be to get her to pay her membership invoice that she forgot to pay last month, so she has access to all of your wonderful benefits.

The key concept here is that you want to engage in an ongoing, two-way conversation with your member, where you are constantly learning more about her. And in return, you are delivering value that helps advance her interests, and building a stronger connection with your organization.

At PropFuel, we have a platform that can help facilitate the Conversational Engagement process between you and your members. **We will discuss some of the functionality that enables two-way communication in this ebook, but the primary goal here is not to sell you on a piece of technology; it is to sell you on a mindset.**

HOW WELL DO YOU KNOW YOUR MEMBERS?

Most associations have a pretty good idea of what their members need at an aggregate level. After all, you are the experts in the industry which your association serves. Maybe you run an occasional survey, maybe you have a feel for it from anecdotal conversations, or maybe you can parse it out from transactional data. When asked why members join their associations, most leaders can put together a pretty accurate guess of what the reasons are, and what percentage of people would choose each one as their primary motivation.

In fact, we see this play out with new member campaigns in PropFuel. A very common question to ask is some variation of, “What is your primary reason for joining our association?” This is a multiple choice question, so we present the new member with a list of four to five reasons to pick from. Our client will need to come up with a handful of options, with “other” being the final choice.

Generally speaking, most of the respondents fall into one of those preselected categories, with very few selecting “other." This result tells us that the association has a pretty good understanding of why people are joining. In addition, the association leader who sets up the question is usually able to make a pretty good guess as to what percentage of people will fall into each category. This shows that they have a good understanding of what motivates their people to join as a whole.

The problem is, your members are not all perfectly representative pieces of your whole membership. They are individual people with individual needs. Knowing that 35 percent of your members are interested in online learning does not tell you what Britney is looking for right now. Statistics are useful for looking at the big group, but they do not apply to individuals.

"What is your primary reason for joining our association?"



This is the problem with relying on surveys to dissect your membership. A survey can tell you what people wants as a group, when it is a representative sample of the membership, and when the average 10 to 15 percent of a membership responds. However, surveys cannot take that aggregate data and apply it to the individual needs of any one person.

That is the difference between surveys and conversations. Both activities involve asking people questions; a good conversation may contain as many questions as a survey would. But when you are having a conversation with someone, your goal is not just collecting data to put into a pool for analysis. Your goal is to interact with and help that person as an individual.

Conversations allow you to connect with Britney at an individual level and serve her particular needs. Rather than guess which category she belongs to, based on her demographic information, and take her down a path she may or may not be interested in, you are allowing her to drive the interaction, learning more about her needs as you go through the process. Being able to have that conversation enables you to take the guesswork out of meeting Britney's needs. You no longer have to use her demographic information to try and put her in the correct bucket for communications; you let her drive the conversation, and the more she tells you, the more relevant value you can deliver.

Consider for a moment:



What would it look like to shift some of your current communications from one-way broadcasts to two-way conversations?



How can you build more personal connections with your members at scale?



Do you have the systems and processes in place to carry on an ongoing conversation with a member over the course of their membership?

To answer these questions more thoroughly, we are going to take a look at some examples of how you can leverage technology to have meaningful conversations, both automated and personal, with your members.

First, let's dig a little deeper into what makes Conversational Engagement different from traditional association engagement strategies, starting with the concept that comes closest to hitting that sweet spot of one-to-one member communications.

ENGAGEMENT VS. PERSONALIZATION

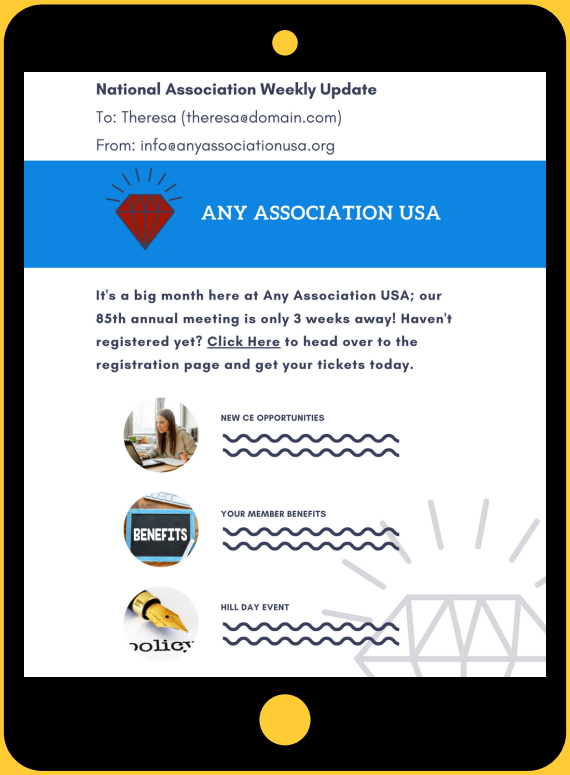
We all want our member's experience to feel as personal as possible. One way to create that experience is through personalization of our communications.

Personalization is the process of tailoring our communications based on what we know about each individual who receives them. This process can range in complexity from a simple addition of a few words to modifying every component of an email in an attempt to be more relevant to the person on the receiving end.

Let's take a look at a typical weekly association newsletter and see how personalization can make a difference.

GENERAL BROADCAST

- **Most common; not personal/ personalized**
- **High-level opportunities for engagement**
- **Exact same email broadcast to thousands**

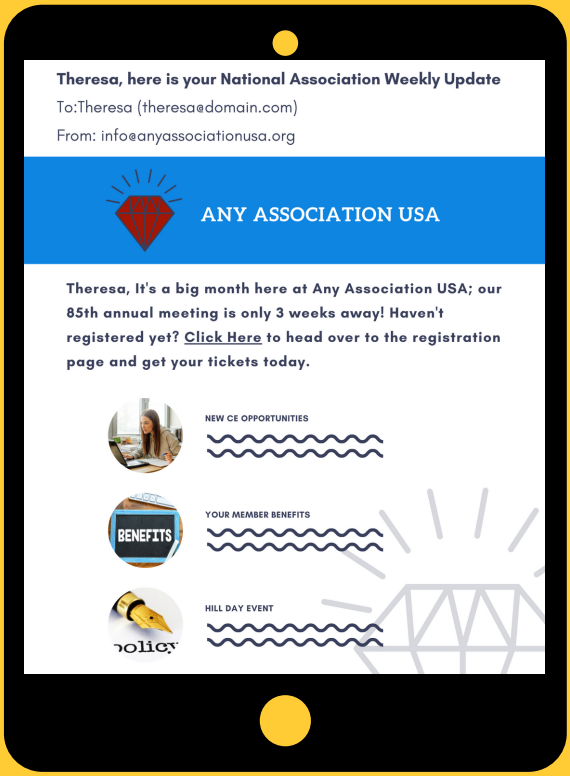


Most organizations send some form of this email on a regular basis, and it serves an important role in communicating, at a high level, what is going on and what opportunities are available for engagement. However, this communication is not personal or personalized; you may send the exact same email to 15,000 people.

BASIC PERSONALIZATION

How could personalization help make this newsletter more relevant and hopefully more likely to drive action?

The most basic form of personalization is to include the recipient's name in the subject line and email body. The rest of the email is the same, but at least your member sees that you know who they are. Doing so would make your email look something like this:



BASIC PERSONALIZATION

- **Most basic form: name personalization**
- **Demonstrates some knowledge of individual**
- **Other content not personalized**

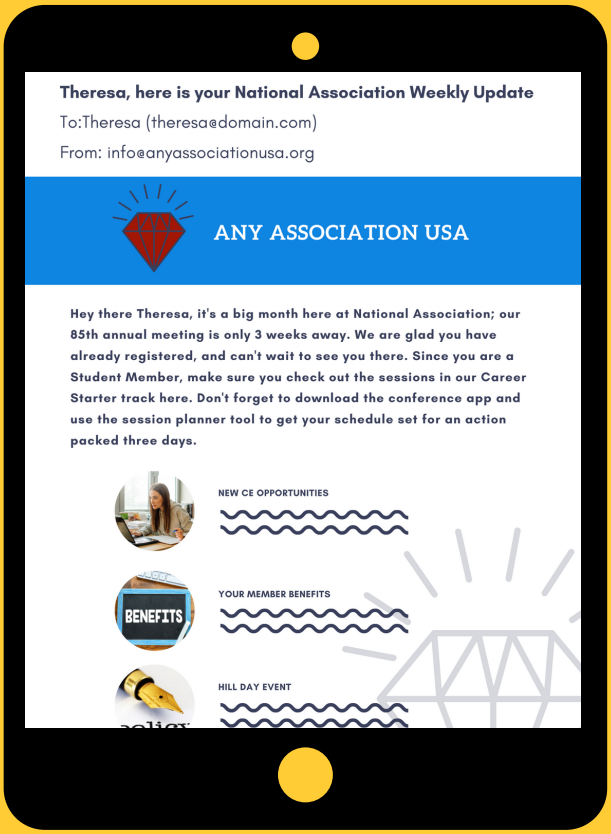
It's a start. We've demonstrated that at least we know who Theresa is, but we can do better. Let's take a look at the welcome message. Since we are sending this to a large group of people, our biggest objective is to drive additional registrations; that is our clearest path to ROI on this broadcast. But Theresa has already registered for the conference. Shouldn't we know that? In her case, asking her to register doesn't do her or us any good, since she's already done it.

SEGMENTED PERSONALIZATION

Let's dive deeper and see how we can make this message even more personalized:

SEGMENTED PERSONALIZATION

- **Name personalization**
- **List segmentation**
- **Knowledge of member type**
- **Suggested content based on persona characteristics**



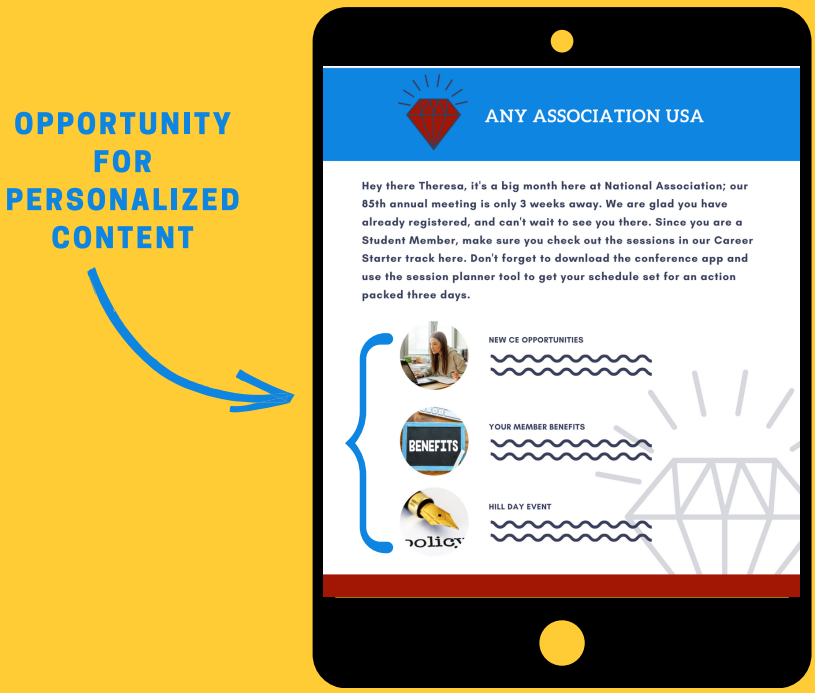
In this scenario, we have started by splitting our list of newsletter recipients into two buckets: those who have registered and those who have not. We shouldn't be asking people who have already registered to sign up again, so we need to find some other way to deliver value to them with this message. In this case, we know that Theresa is a student member, so we can mention a session track that she may be interested in. This is another level of personalization that applies to an even smaller group of people.

CONTENT PERSONALIZATION

Different organizations, and different communication tools, will have different capabilities around how personalized you can make messages like this one. You can see how this process of personalization requires more effort on the front end. Instead of one welcome message, we now have one for the registered, and another for non registered cohorts. In addition, we may want to add a line in there for four or five different member types.

There are tools that will handle personalization in an entirely automated fashion. Let's take a look at the three courses that were recommended at the bottom of the newsletter. Instead of those being manually selected by your education team to be highlighted this week, what if there was a tool that used AI to analyze what courses Theresa has previously purchased, along with her member type and demographic information, and recommended three courses most likely to be relevant to her?

There are even tools that will do the same for articles or content in your newsletter, tracking what Theresa clicks on and personalizing the content she receives in subsequent newsletters to maximize the odds of her seeing content that is relevant.



WHAT'S MISSING AFTER PERSONALIZATION?

These methods of personalization are all good. If you have a choice between sending non-personalized or personalized broadcasts, personalized is clearly better. They are more relevant to your member's experience and offer a higher chance of engagement.

But there is something missing here: these communications are personalized, but they are not personal. At the end of the day, you are still starting with a mass communication, and shuffling things around to get at your best guess as to what each member wants to see at this particular moment in time. That is a good approach for mass communication, but it is still not how you would help someone personally.

If all your organization ever does is send out broadcasts and track what people read and click on, you are defining the entire range of possibilities for what that person can do with your organization. Someone may be dutifully clicking on the links that you send them. But what if they are also interested in an entirely different topic area that you never even give them a chance to explore, because they don't match the persona of the person who is generally interested?

Let's go back to our definition of personalization: it is the ability to tailor communications based on what we know about people.

But you have a blind spot; you don't know what you don't know.

"Ask your audience a question, allow them to answer it, and then act on their response with more information, help and support to create a satisfying, engaging interaction. The ways you can use this to create a conversation with your constituents is limited only by your imagination."

- Teena Austin, ALA

MAKE IT PERSONAL

This is where Conversational Engagement comes into play. The goal is to be personal, not just personalized. Ask questions, be curious, turn some of your one-way broadcasts into two-way conversations.

Conversational Engagement flips the personalization aspect on its head. Instead of you deciding what that person is most likely to be interested in, you are starting with a question and asking them to tell you.

This strategy has a few advantages. **First, it feels more personal.** We can ask a question; then, using automated workflows, we can take the member down a path that is most relevant to them without any additional work. Or, maybe they need additional help, or want something that we didn't offer. In that case the system can bubble them up to one of your staff to continue the conversation for a truly personal experience. The whole experience is driven by the member and what they tell you, rather than what you tell them.

"...We can engage our members and give them an opportunity to provide feedback while still providing important information. Their feedback allows us to customize our follow-up with them and better meet their needs."

-Brad Martz, NRCA

Also, we have eliminated our guesswork from the equation. Let's revisit Theresa for a moment. You may know from a survey that 65 percent of our student members say their primary reason for joining is access to discounts on exam prep materials, but that doesn't mean that is necessarily the case for Theresa. She is a unique member with unique needs. By lumping her into a persona you are forcing her down a path that she may not be interested in. By asking the question, you put her in control. Maybe she does go down the 65 percent path, maybe she picks another one, or maybe she tells you something you hadn't even thought of and makes her own path.

Finally, using these conversational methods, **you learn more about your individual members than you would have otherwise.** Transactional data can only tell you so much about a person. By asking them questions and automatically pushing those responses into your existing systems, you can learn more about that person to help deliver more relevant service later, whether through a personal conversation, or personalization of your other offerings.

CONVERSATIONS AT SCALE

We understand how helpful having a conversation with someone can be, because we do it every day with our friends, families and colleagues. The challenge in embracing Conversational Engagement is figuring out how to have those conversations at scale. How do you take a concept that works well when you have one person – or 10 people – to talk to, and make it work with 1,000, or 10,000, or 50,000 people? Much like everything else in life today, the solution to that challenge can be found in technology.

Technology can help in two ways:

By using **automation and AI (artificial intelligence)**, you can lead people through a process that feels like a conversation (Ask - Capture - Act), but does not require anyone on your team to actually carry out the interaction. You set up the automated experience, and your members can have that two-way interaction sitting on their couch with their smartphone.

Sometimes, a **little human touch** goes a long way, especially today when people are so used to having to figure things out on their own. Technology can help you identify who to talk to, when to talk to them, and what to talk to them about, all while giving your staff tools to make them much more efficient at having those personal conversations.

This is where PropFuel comes into play. It is the first Conversational Engagement platform built for the unique needs of member-based organizations. Our goal is to build tools that allow you to target your members with questions to get conversations started, as well as allow you to be available to them when they have a question for you. This concept is about more than a new way to send emails to people; it is about a new way of communicating with your members. One that puts them and their needs at the center of the interaction. This style of communicating lessens email overload, re-connect to a disengaged membership and uncover changing member expectations and needs.

Let's dive into a few ideas on how you can make the leap from broadcasts to conversation starters.

ENGAGEMENT VS. OPENS

Email is a naturally conversational platform; after all, the most prominent button in most email clients is “reply.” **It was invented to enable two-way conversations, but over time, another class of communication has taken over the platform.** And now, if we are being generous, for every email we end up replying to, there are probably 10 others we don’t read and just delete.

This reality may lead us to the conclusion that email doesn’t work. That we just send things off in hopes that maybe half of the people will actually open it, and if we get really lucky, maybe a couple percent will click something. We think that low open and click rates are just how email works.

What is your open rate on emails from your mom? I’m guessing it is pretty high. How about if your daughter sends you a link, what is your click-through rate? Probably pretty close to 100 percent, certainly more than the industry average of 2.5 percent.

Low engagement isn’t inherent to email. It's inherent to the model of email communication everyone has adopted, consisting of blasting out broadcast communications that function as a one-way experience. We have trained our audience that we are just sending them information – not trying to interact with them – so that they do what we ask. Every once in a while they open the email, and an even smaller percentage of the time they click on a link. We are using email to inform people of things, but we are not using it to engage them.

So, how can we get back to the way email is meant to be used, starting conversations rather than simply broadcasting information? Over the next few pages are a few principles that can help get you back on track.

"I really like how it gives a personal touch when reaching out to members and prospects via email. It can be used to interact with our members (I'm using it now to ask for testimonials) and we've used to gain insight into what topics are most important to our meeting attendees. It's very versatile!"

-Suzanne Fraga, ISMPP

EMBRACE TWO-WAY COMMUNICATIONS

Have you ever sent an email from a "no-reply" email address?

Would you ever walk up to someone, tell them something, and then walk away when they try to respond? Of course not! So why is it okay to do that with email?

Even if you don't use a "no-reply" email address on any of your emails, ask yourself: Do I really want people to reply to my broadcast email? Imagine that 10 percent of your members replied to your email newsletter next week. Are you jumping for joy at all the engagement you are getting? Or are you dreading having to work through all of those replies, with no systems or processes in place to help you be more effective?

Email is a two-way conversation platform, but when we don't have a system in place to handle inbound email efficiently, we tend to treat it as a one-way communication tool. Even if we do it not explicitly by sending from a no-reply address, we do it implicitly by designing our content in a way that discourages replying as a valid option for engagement.

In fact, email has been abused as a one-way communication tool for so long that your members probably don't think of replying as an option. We have helped our clients ask millions of questions of their members over email. Even then, in a situation where our clients are asking people to give them information, we regularly see responses that give good feedback, but end with "but you probably won't ever read this."

Occasionally, when a staff member does respond directly to a comment from a member, it is greeted with disbelief that a real person from the association is actually behind that email. We've even heard debates as to whether it's a real person or a bot.
That is the downside to the current state of email communications. People are tired of being marketed to, and they don't think you want to hear from them.

But, there is a silver lining to this cloud. The bar for email is so low that you can delight your members by simply engaging them over email like you would with any face-to-face conversation. The flipside of the "you'll never read this" comment is that if you do read it

and respond, continuing the conversation with by replying, the member will be blown away. The simple act of listening and responding shatters their expectations, and lets them know that you and your organization are there to help and serve them.

So how can you take advantage of this opportunity to turn email into a two-way conversation?

You need a system in place that allows you to handle the volume of having these conversations at scale. You need:

1. A better filter for the wave of automated out-of-office replies that come after reaching out to thousands of people.
2. A central place where your whole team has visibility into, and can contribute to, the conversations that are happening with your members.
3. Templates and workflows that help you work more efficiently, so you can quickly get your members the answers they need without spending tons of time crafting responses.

If you do this right, you will train your members that if they need something, help is only an email away. No more sifting through links on content emails from a no-reply address hoping they can find that one thing they are looking for. Or perhaps, you've created an inviting enough environment where they're comfortable picking up the phone and reaching out in person. Now they have the ability to start the conversation, and you have the ability to help them when they need it most.

"We have exceeded our expected engagement efforts with our members and provided our members with a space to inform or communicate with us, not just at the usual once or twice a year ask."

-Amy Hemphill, ASAE



ASK QUESTIONS

What's the easiest way to engage people over email? Ask them a question.

Think about how you engage your friends, or even strangers, in conversation in real life. You greet them with a brief comment and a question. "What a beautiful day today. What are you going to do?" Or, "I love your sweater, where did you find it?" Perhaps, "Your dog is so sweet. Is she friendly?"

Like we mentioned earlier, every mass email features a prominently placed reply button, but few people ever use it. Why? Because we are all trained not to use it. Emails from organizations are meant to be read and clicked on, not to start a conversation.

So if you, representing your organization, actually want to engage people over email, you are going to have to do something different. And the simplest way to make it clear to someone that you want them to tell you something is not to send them yet another email full of information about you, but ask a question about them.

Keep it as simple as possible. Don't bury a question at the bottom of an email newsletter and expect people to answer it. You may get a few responses, but you will get far more engagement by sending a dedicated email, with a brief prompt, and just asking the question.

What does it look like to ask questions rather than just send information? Let's look at how we attempt to engage people around the renewal process. You are probably sending email after email telling people that their membership is expiring. You send them a:

- 90 day notice.
- 60 day notice.
- 30 day notice.
- 15 day notice.
- Countless other notices once the grace period begins.

You send, maybe quite literally, a dozen reminders. And yet, you have tons of former members who let their membership lapse that you never heard from. We've trained them to ignore our emails.



One of the most popular Conversational Engagement campaigns our clients run attempts to win back lapsed members. It all starts with a simple question: “Did you know your membership lapsed?”

Remember, these are people who have probably received 12 emails by this point telling them their membership was going to expire, warning them that it will expire soon and finally telling them that they lapsed, so you would think they would know by now, right?

Almost every time we ask this question, more than 50 percent of respondents say, “No, I didn’t know my membership had lapsed.” Sometimes it’s as high as 80 percent, and rarely is it below 40 percent who didn’t know.

If you send people informational emails, the odds are they will do what they have been trained to do. The best case is, they glance at them and move on. But, if you send someone a question, they are more likely to do what they’ve been trained to do when someone asks them a question: they will answer.

Once they answer the question, you can have a back-and-forth conversation with them. In PropFuel that can be facilitated by automation, allowing you to ask follow-up questions and redirect them to where they need to go, without any human interaction necessary. You can also flag respondents for manual follow up, and reach out personally to dive deeper into what matters to them and get them renewed.

By taking this approach, you can direct the people who are willing and able to renew on their own through the process, and those who want or need your help are able to raise their hand to continue the conversation. Make sure you get in touch with them.

FOLLOW UP

Your most important contribution to Conversational Engagement is follow up. The concept is simple: a conversation requires two people to participate, so if you don't follow up, the conversation is over. Of course, this is easy to do in person, or when carrying on a few conversations with a few people over a few days. But how do you keep a conversation going with hundreds of people at the same time? **You need systems and automation to give you conversational superpowers.**

Automation gives you a few advantages. The first advantage is that a lot of conversations can happen without you even knowing about it. How does that work? Well, remember that a conversation is a back and forth exchange of information. This is something you can do entirely with technology, taking advantage of workflows that analyze what people tell you, and take action to deliver additional content, more questions, or whatever process you design.

Using workflows and automation, you can have a conversational interaction with 90 percent of people who interact with you without ever needing personal intervention. Of course, not all requests fall neatly into a bucket that can be handled via automation, and that is where systems come into play.

A good Conversational Engagement system will surface those instances where you do need to get involved and give you tools to easily handle the flow of those conversations as they progress. An easy way to do that in PropFuel is to tag people who respond to a question with an answer that requires follow up.

For example, let's look at renewals again. If someone says “Yes, I’m planning to renew,” tag them for follow up. You can then build a list a few days later that contains the people who said they were planning to renew, and using the data from your AMS through an integration, filter out those who did actually renew. Now you have a list of people who have shown intent to renew but haven’t done it yet: a perfect opportunity to follow up manually via email or phone call to complete the renewal.

Another example where categorizing people for follow up is useful is with Net Promoter Score (NPS). In this case, you are asking people to rate how likely they are to recommend your organization to a colleague of theirs. This tactic gives you a net score that you can use to benchmark your organization, but it also allows you to slot the respondents into three categories.



You have your promoters, those are the ones who think you are doing great. You can reach out to them and ask for referrals and reviews.

Then you have the passives and detractors; those people often leave a comment telling you why they didn't rate you higher. You can go a long way toward improving their opinion of you by reaching out to them and addressing their issues. Conversation solves a lot of problems and changes sentiment dramatically.

Another example of how systems can help you better follow up with people is with response templates. Quite often, you will have a group of say 20 members who are asking for the same or similar thing. Response templates allow you to craft a personalized response and use it as a starting point for each email you send, allowing you to include small tweaks to each personal response that you send, without having to start from scratch each time. Templates also allow you to choose who you are sending from; so for example, staff can send personal responses from the Director of Membership without the Director having to do all the work from their inbox.

The good news is that the way your organization chooses to follow up can be catered to the human and technological resources you have available. For example, if your staff is maxed out on time and won't have enough time to follow up via phone or email on open text replies in a campaign, no problem. There are other options, like adding those who respond with open text to another campaign that asks additional questions, which can narrow down the number of individuals who need one-on-one assistance. The possibilities for follow up are unlimited and can be as unique as an individual, in person response would be.

GETTING STARTED

Systems like PropFuel can help you implement a Conversational Engagement strategy across your organization, but you don't need a system to take the Ask - Capture - Act methodology and try it out in some of your communications. Next time you send an email, think about how you can make that communication a little more conversational.

It may be as simple as adding a quiz question at the bottom and asking them to reply with the answer. It could be simply emailing 100 random members and asking them how you can help. Start small and work your way up.

The one thing you will find, no matter the scale at which you are operating, is that your members will be grateful for the attention. They will get more value and feel more connected to your organization because you gave them an opportunity to speak up rather than only consuming what your organization is communicating.

"In just one month we were able to identify over 200 members that wanted to upgrade to a paid subscription just by asking the simple question, "Would you like to upgrade?" I never realized that our members wanted simple, straight forward communication vs the daunting, long emails. It's an amazing supplemental form of marketing to pair with our educational content. Did I mention we increased our webinar registrations by 830%...?

-Whitney Kendrick, Chalice Network

Start a Conversation with Us
www.propfuel.com