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Social CRM for Associations
What association executives should know about applying social media to membership management

By Lindy Dreyer and Maddie Grant, CAE

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ARE YOU READY FOR SOCIAL CRM?

Over the last three years, we've watched association executives grapple with social media—both the tools, and more importantly, the business implications. The progression has been amazing. The first stage was fear. The thought of losing control of communications channels, and the thought of public criticism was paralyzing for a time. The next stage was acceptance. Even as association executives accepted that social media would be a growing part of the work of the organization, they still struggled with questions of how to use social media tools effectively. So the next stage was experimentation—from public social networks like Facebook and LinkedIn, to private social networks, not to mention blogs and microblogs like Twitter, media sites like YouTube and Flickr, and a myriad of other tools.

ARE YOU READY FOR SOCIAL CRM?

Experimentation challenged staff skills, resources, business processes, and our ability to act collaboratively both internally and externally. Experimentation also challenged our leadership abilities. We realized that social media was going to change us, and change the way we work. That has led us to our current stage—impact. We are now looking for ways to apply social media strategically to give our work as an organization greater impact. That means purposefully plugging social media interactions into our business processes as a means to reach our objectives.

Social Customer Relationship Management (Social CRM) refers both to a business strategy for managing customer relationships in the age of social media and the evolving technology that helps organizations do this. The concept started in the corporate world, born out of the need to apply social media strategically to business processes. The term Social CRM continues to evolve, and can mean different things to different people. This white paper will deconstruct Social CRM into its basic parts and apply the concept to association management.

Whether you're ready to adopt Social CRM practices now, or you're thinking ahead for your organization's future, we hope this paper will help you imagine new possibilities as you move to plug social media into the daily work of managing your membership.

A ROSE BY ANY OTHER NAME…

When it comes to the data management tools that associations use, you may be used to different nomenclature. Does your association have an AMS (Association Management System)? An MMS (Membership Management Software)? Maybe you already think of it as a CRM (Customer Relationship Management system)? Or maybe you have a system that you just refer to as the Membership Database. Some of the bells and whistles might be different, but it really doesn't matter what you call it—the goal and objectives are still the same. **And it's less about the tools than the philosophies and business processes driving the people using the tools.**

> 66 *We are now looking for ways to apply social media strategically to give our work as an organization greater impact.* 99

WHAT IS SOCIAL CRM?

Before we jump too far ahead, let's define traditional customer relationship management (CRM). Wikipedia has an excellent definition of CRM.

Customer Relationship Management (CRM)

A widely-implemented strategy for managing a company's interactions with customers, clients and sales prospects. It involves using technology to organize, automate, and synchronize business processes—principally sales activities, but also those for marketing, customer service, and technical support. The overall goals are to find, attract, and win new clients, nurture and retain those the company already has, entice former clients back into the fold, and reduce the costs of marketing and client service.[1]

The goals of CRM are analogous to every association's goals of member recruitment, member retention, member services, and marketing. Your association might have other goals that align with CRM as well—attendee marketing, exhibit and sponsorship sales, advertising sales, and other product marketing. So even if the term CRM is unfamiliar, associations are definitely applying CRM strategies.

Adding a Social Twist

Social CRM is a CRM strategy that acknowledges and capitalizes on your members' empowerment through social media and other social technologies. Social CRM accounts for member engagement as an integral part of the CRM cycle. Paul Greenberg, author of *CRM at the Speed of Light: Essential Customer Strategies for the 21st Century,* offers this authoritative definition of Social CRM.

Social CRM

A philosophy and a business strategy, supported by a technology platform, business rules, workflow, processes, and social characteristics, designed to engage the customer in a collaborative conversation in order to provide mutually beneficial value in a trusted and transparent business environment. It's the company's [programmatic] response to the customer's ownership of the conversation.[2]

> 66 *Social CRM accounts for member engagement as an integral part of the CRM cycle.* 99

1. Wikipedia, *Customer Relationship Management, http://en.wikipedia.org/wiki/Customer_relationship_ management (February 24, 2011).*

2. Paul Greenberg, *"Time to Put A Stake in The Ground on Social CRM,"* ZDNet, July 6, 2009 *(http://www.zdnet.com/blog/crm/time-to-put-a-stake-in-the-ground-on-social-crm/829).*

WHAT IS SOCIAL CRM?

For associations, adding a social twist will challenge us on a number of levels. Let's break down Paul's definition and analyze the issues:

1. Social CRM is a philosophy and a business strategy

The most common misunderstanding of Social CRM is that it is a set of tools. It's not just about the technology. Technology plays a supporting role. *Above all else, Social CRM is a way of thinking and doing.*

2. ...supported by a technology platform

Granted, the supporting role of technology is important. Associations have a suite of technology platforms that support the relationship between members and the organization—your Association Management System (AMS) or your database if you don't have an AMS, your web Content Management System (CMS), your email marketing tools, your internal email system, your intranet, your community platform if you have one for members and volunteers. Not to mention the connections you've made through social media tools like Facebook, LinkedIn, Twitter, blogs, and other public sites. *The technology platforms we use will either help us or hinder us as we work toward adopting Social CRM practices.*

3. Also supported by business rules, workflow, processes, and social characteristics

Member communications and touch points that were once linear and predictable, are now multi-channel, two-way, and peer-to-peer. Things got unpredictable. And messy. Associations need to rethink the daily work of managing member relationships to accommodate the new channels members use to communicate with each other and with the organization. This is the one part of a Social CRM practice that is completely in the hands of association executives. *Association executives who are adopting Social CRM practices should focus 80% of their efforts on changing work habits, and 20% of their efforts on changing technology and tools.*

4. ...designed to engage the customer in a collaborative conversation

This is a different way of thinking about your members and customers. As opposed to designing processes to push them to buy or renew, Social CRM practitioners design processes to push members and customers to engage. By focusing on engaging members and customers, you are increasing the odds that they will join, renew, and purchase—and if they don't, you can better understand why not. This works well in a world of messy interactions, where a member relies on his or her own personal network when making buying decisions, and ignores traditional sales, marketing, and advertising tactics. *For Social CRM to be truly effective, your members must be ready and willing to hold up their side of the bargain, and participate in the conversation.*

WHAT IS SOCIAL CRM?

5. ...in order to provide mutually beneficial value

Associations exist to provide value, and much of that value is derived from the hard work of our members and stakeholders who want nothing more than to give back to the industry or profession. Social CRM is an extension of that value exchange. It drives not just business outcomes, but also mission outcomes of the organization. It gives us the opportunity to personalize our communications based on what each member really cares about. It also gives us a means to better understand the value of the work we do, based on a steady stream of feedback from the conversation. *Social CRM practices will enable associations to push timely, personalized content to members and prospects, and pull feedback and knowledge resources that members share back into the organization.*

6. ...in a trusted and transparent business environment.

Trust and transparency are both a prerequisite and an outcome of well-designed Social CRM practices. The more we are willing to share with our members, the more they will be willing to share with us. But openness has its challenges and drawbacks. *Social CRM will force associations to be more intentional about what information they share versus what information they keep private.*

Why Change?

We keep coming back to the idea that we need to change the way we work. That change will affect everyone. Staff at every level, in every department will have to collaborate and compromise—more people will need to take responsibility for the way social media impacts their piece of association business. Even the social media practitioners may need to change their habits to ensure their work is properly captured and measured. No more shortcuts. No more changing tools for the sake of changing tools.

Why is this worth doing?

- Members are more sophisticated, and have higher expectations for our responsiveness online.
- Even the most niche associations are competing with hundreds, if not thousands of online information sources for the attention of members.
- The philosophy of engaging members aligns with our missions.
- People are turning more and more to their social networks when making buying decisions. Thus member engagement is driving transactions.

And there is one more especially important reason. This change is worthwhile because the only way to coordinate, capture, analyze, and make decisions based on the full picture of member engagement is to be systematic in our approach to the processes and technology we use to accomplish our social media work.

WHO OWNS SOCIAL CRM?

Social CRM demands the participation of staff from nearly every department. In fact, this inclusive, holistic approach is a defining characteristic of the Social CRM philosophy. With that in mind, each department should take responsibility for the slice of the pie that suits their skill set. Consider how associations might map the work of the four basic areas of a social CRM practice. (See page 7.)

1. **Social media monitoring and responding**
   Communications department monitors and assigns the appropriate people to respond in public social spaces. They even train responders how to do their job. **Publications** and **education** will build and curate content around trending topics.

2. **Social profile mapping**
   Membership works to gather data, pull in additional profile information, and analyze connectedness against renewal rates. **Marketing** takes the lead on growing outposts, identifying influencers, and developing word-of-mouth marketing programs.

3. **Outreach and lead generation**
   Membership and marketing collaborate to build lists and design member recruitment campaigns. **Marketing** designs campaigns for products, services, and events. **Communications coordinates with government relations, publications, and other departments** to coordinate participation in public conversations on blogs and Twitter.

4. **Community management**
   Component relations, customer service, the executive team, and many other staff people should be involved. Many associations will choose to hire a **community manager** to lead the charge. Depending on the association's structure, the community manager could sit in many different departments, especially **membership, communications, or government relations.** Some associations might choose to have multiple community managers in different departments who collaborate.

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BASICS OF A SOCIAL CRM PRACTICE

Now that we've defined Social CRM, let's tie all of this back to actual work. For the purposes of this white paper, let's look at four areas:

1. Social media monitoring and responding
2. Social profile mapping
3. Outreach and lead generation
4. Community management

In this section, we'll imagine a number of daily processes and projects that will contribute to a Social CRM practice. Hopefully you're already trying to do some of this. Eventually, the goal will be to streamline these tasks with the help of good work habits and great technology.

Social media monitoring and responding

The work of monitoring and responding is the most basic social media work. Many associations have someone doing this work using a variety of tools and independent processes. The work looks a little different when it's integrated into an organization's Social CRM practice. Here's what we mean:

- Record and track social media interactions alongside email and member service interactions.

- Triage inquiries, assign the appropriate person in the organization to respond, and enable them to respond directly through social media channels. For example answer a Twitter inquiry with an @reply or a direct message from the main association Twitter account.

- Analyze trending topics, filtered by groups you are tracking in your database. For example, you could have trending topics for members-only, or trending topics for member prospects. Build content around trending topics.

- Track the association brand and industry keywords across the web, and respond when appropriate.

- Track important industry websites, and less prominent sites that mention the organization frequently.

- Create curated monitoring reports to share with key leaders in the organization, so that everyone shares a level of awareness about conversations happening in social spaces.

Social profile mapping

Social profile mapping is the process of recording a contact's social media data— Twitter account, blog feed, Facebook profile, LinkedIn account, Flickr account, or some combination of any of these and other social sites. Taking this a step further, some social sites (like Twitter) allow you to map the relationships between members. So you would be able to record that Lindy is following Maddie and Elizabeth, and Maddie is following Lindy and Elizabeth, but Elizabeth is following Maddie and not Lindy. Social profile mapping is a big job, and it creates some interesting possibilities.

BASICS OF A SOCIAL CRM PRACTICE

Here's what the work might look like:

- Record a member's social media data in the database. This can be requested on the membership form, entered manually over time, or added using a social discovery service. (See Social Discovery on page 11.) This work is vital if you hope to integrate monitoring filtered by your database.

- Grow your official outposts—the pages, groups, or accounts that your organization owns on public social networking sites like Facebook, LinkedIn, Twitter, and others. Track members in your database who are on Facebook, but haven't connected with your Page, who are on LinkedIn but haven't joined your Group, and who are on Twitter, but haven't followed the association. Then get them to connect to you.

- Build a better member profile. Fill in key demographic data points from public information available on member's public social profiles. Again, a social discovery service can help accomplish this.

- Map each member's social connections. Analyze member connectedness against renewal rates to see if there is a predictable correlation.

- Identify members with large networks and influence within your membership. Design word-of-mouth marketing programs that involve your influencers in a mutually beneficial relationship.

❝Remember, you don't have to do it all. Instead, you'll want to gradually introduce this work over time ❞

Outreach and lead generation

A big part of Social CRM is identifying potential new members and customers. When you're engaging members in public spaces, there are a lot of opportunities to identify people who are not yet a part of the association, but should be. Here's what we mean:

- Build a list of people following your social media sites who are not members. Design a member recruitment process for them.

- Build a list of people who are influential in the industry, but who are not members. Find ways to involve them in the association, maybe as authors or speakers.

- Build a list of people who are connected to many of your members in public social spaces, like Twitter, but are not members. Design a member recruitment process for them.

- Participate in public conversations. For example, comment on prominent blogs, participate in industry Twitter chats, accept invitations into member-created social sites. Think of this as an extension of your member relations, public relations, or government relations, depending on the topic of the conversation.

BASICS OF A SOCIAL CRM PRACTICE

- Design campaigns for membership, events, and other association offerings that are appropriate for your social media audiences. Track the results.

> 66 *Association executives who are adopting Social CRM practices should focus 80% of their efforts on changing work habits, and 20% of their efforts on changing technology and tools.* 99

Community management

When we refer to community management in this context, we are talking about deepening relationships with members. This is the work of actually engaging members, making them feel like they are a part of the organization, and motivating them to take action. This work can happen both on your own website or community platform, or on public social networking platforms. Here's how that work fits into a Social CRM practice.

- Empower more staff to connect with members through social media channels, and record those interactions so there is continuity for the member, should the staff person leave.

- Build a list of at-risk members based on the map of social connections you've made. (Those who are not connected to other members are the ones at-risk.) Reach out to them to see if there is some way they'd like to get more engaged.

- Facilitate and nurture member interactions. Many associations will make the member-only section of their website a social work space. Ideally, interactions in that space will also be a part of the Social CRM practice.

- Involve members in decision-making in new ways. Associations will learn to use their Social CRM practice to solicit ideas and build consensus at all levels of the membership. You'll be gathering and analyzing feedback from many more voices. MyStarbucksIdea[1] is an example website designed to enable this type of work in a corporate environment.

Now that you've come this far, you can probably brainstorm many more ways to take advantage of this marriage between process and people, data and technology. Remember, you don't have to do it all. Instead, you'll want to gradually introduce this work over time—beginning with the work that can have the biggest impact with the least pain for the people trying to do the work.

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1. My Starbucks Idea, *http://mystarbucksidea.force.com*

6 KEY SOCIAL CRM TECHNOLOGIES

Technology can also play a big part in easing the pain of adopting Social CRM practices. You'll still need to do the work to imagine and build good work habits, but many parts of the work can be automated and streamlined to some degree.

There are thousands of tools out there that label themselves as Social CRM. It seems no two tools do the same thing, and they fall into a number of categories. For simplicity—because this stuff is anything BUT simple—we've narrowed the list of technologies that contribute to Social CRM down to 6 that we feel are most applicable to associations right now. We've even named a few companies you may have heard about that fall under each category. Many of these companies work across several categories. We did the best we could, keeping in mind that our goal was to simplify. Here goes:

1. Social Media Monitoring
2. Social Media Management/ Marketing Systems (SMMS)
3. Social Discovery
4. Email Systems
5. Communities
6. Association Management Systems

Social Media Monitoring

Tools in this category are designed to filter the web. Depending on the tool, you can filter by brand mentions, keywords, specific websites, and even sentiment in some cases. The more sophisticated tools also make it easy to track mentions over time, and curate a report for your executives. Social media monitoring should be integrated with your AMS system. On the corporate side, Saleforce, a leading CRM system, is now integrating with Radian6. In a perfect world, we'd like to see social media monitoring that recognizes members, and can filter by member mentions only. We haven't seen it yet.

Social Media Monitoring Tools
- Google Reader and Google Analytics
- Lithium Social Media Monitoring
- Radian6

Social Media Management Systems (SMMS)

Sometimes referred to as social media marketing tools, or campaign management tools, social media management systems are designed to streamline the process of posting and responding through social media channels. These tools often have monitoring capabilities as well. But the real value of an SMMS is the ability to enable multiple users for official association accounts, assign follow up duties, manage posting work flows and schedule posts according to an editorial calendar.

Social Media Management Systems (SMMS)
- Hootsuite
- Objective Marketer
- Spredfast

6 KEY SOCIAL CRM TECHNOLOGIES

Social Discovery

Tools in this category make it easy to find members' social media profiles and map relationships between members. Most of these services take the email address in your database and compare it against public social media profile data associated with that email address. Social discovery has been causing controversy in the news—the amount of information you can uncover is astounding, and the privacy issues that brings up are serious. But used responsibly, social discovery can give you a much more holistic view of your members, and help you serve them better.

Social Discovery Services
- Fliptop
- JitterJam
- Small Act

Email Marketing Services

Email is such an important part of CRM, that we couldn't leave it out of this discussion of Social CRM. Tools in this category help you connect with members and customers through email. This category could be broken into two pieces—email marketing services, and enterprise email add-ons (meaning extensions to your staff's work email). On the email marketing side, our wish would be to make it easy for your marketing team to segment lists based on social discovery data. On the enterprise email side, we'd like all staff to be able to see social discovery data in context as they send an email. For example, if someone from the publications staff is emailing an author, they can see that author's latest blog post. They might realize that points from the post would make a good addition to the article and mention it, earning important social brownie points at the same time.

Email Marketing Services
- Constant Contact
- Exact Target
- Mailchimp
- Marketo

Email Add-ons
- Xobni
- Rapportive

> **"** *Social CRM refers both to a business strategy for managing customer relationships in the age of social media and the evolving technology that helps organizations do this.* **"**

Communities

Tools in this category help create social connections on your website. This category could actually be broken into three parts: Content Management Systems (CMS), Community Platforms, and Social Sign On services.

Content Management Systems often have a member-only section that gives you a lot of information about your members and their browsing habits. More and more, these member-only sections are adding social features. Some CMSs have robust, customizable community features that

often come with additional licensing or development fees.

Community Platforms offer an alternative to the typical member-only section. These platforms are developed to enable peer-to-peer communication, group forming, document sharing and more. Community platforms have been very popular in the association market, and there are many players in the space. For the purposes of this Social CRM white paper, we'll narrow the list to market leaders with AMS integrations.

Social Sign On is a technology that enables a website to connect to social platforms like Facebook, Twitter, Google, or LinkedIn among others. The idea is that when a member (or potential member) comes to your site, they use their login from one of these other platforms, and authorize an exchange of information. In that way you can automate some level of social discovery for that person. You can also show them members in your database that they are already connected to through their social graph. For example, I go to your site for the first time. Realizing that your association is right up my alley, I create a web profile. I choose to connect to your website using my LinkedIn credentials. You preload my member profile and show me that 15 of my LinkedIn connections are also members of your association. Feeling good about my decision, I give you my credit card information and become a member on the spot. Sounds pretty good, right?

Communities (CMS)
• Drupal
• Ektron
• Sharepoint
• Wordpress

Communities (White label platforms with AMS integrations)
• Higher Logic
• MemberFuse
• Socious
• ThePort

Please see our white paper on community platforms for more.
http://www.socialfish.org/whitepaper

Communities (Social Sign On)
• Gigya
• Janrain

Association Management Systems

This is a familiar category to many association executives. The AMS is a powerful member database tool that tracks transactions and more. It's similar to CRM tools like Salesforce or Microsoft Dynamics CRM, with a membership management twist. We'd like to see the AMS market take a leadership role in developing Social CRM solutions for associations. Just like the associations they serve, the AMS needs to evolve, or be left behind. These systems must capture and account for social media interactions—and then make sense of the avalanche of data those interactions provide. As the central repository of membership data, we see the AMS as a critical foundation for the work of a Social CRM practice.

6 KEY SOCIAL CRM TECHNOLOGIES

AMS (Market Leaders)
- Avectra
- Aptify
- TMA Resources
- iMIS
- MemberClicks
- NimbleUser (built on Salesforce platform)
- ProTech (built on Microsoft Dynamics CRM platform)

Please see this list maintained by our friend and colleague Wes Trochlil. *http://www.effectivedatabase.com/AMSVendors.shtml*

What about our other technology systems?

When you consider all of the other systems that we left out of this list—learning management, event registration, expo management, job boards, accounting and ecommerce, help desk systems, business intelligence dashboards—you can imagine how complex this stuff can get. But again, if you look at your organization's work habits first, you can find places where it makes sense to streamline, and make your technology decisions accordingly.

AVECTRA SOCIAL CRM FOR ASSOCIATIONS

Avectra (who helped pay for this paper) is working to build all **6 Key Social Media Technologies** into netFORUM. Meanwhile, we're working with them on an ambitious project to explore the implications of Social CRM for associations. We've been consulting with them on Social CRM trends and applications, and we're inviting you to participate in our conversations around this subject. We are doing a blog series on the Avectra blog, where we encourage you to join us in debating these ideas: we're hosting some in-person discussions (please contact us if you are interested in participating!) and we'll be presenting a session at ASAE's Annual Meeting in August of 2011. This white paper is the first in a series of papers we've planned to map how associations can adopt a more holistic Social CRM model.

That's the theory part. The technology part of social media seems very complicated right now, but eventually, it should become the easy part. In March of 2011, Avectra took the first step toward their version of a Social CRM for Associations. At this point, they've added monitoring, reply capabilities, social discovery, and community management capabilities. They are also working on deep reporting and lead scoring. We expect other AMS companies will be fast followers. We believe this is what our market needs, especially as associations become more certain of their social media objectives and the role social media plays in their membership initiatives. As these capabilities begin to be added into the tools associations are already using, association executives will be in a better position to focus on the process changes we all need to make.

CONCLUSION AND NEXT STEPS

Even though we are all cautious in the face of change, and we all have internal and external hurdles to overcome, associations have a major advantage over corporate Social CRM practitioners. Most big consumer brands are not used to having real relationships with customers. But associations are. It could be argued that all association work is meant to engage members and deepen their relationship with the organization. The work of Social CRM feels different, but the mindset is a natural extension of the mission.

Associations are still doing a lot of experimenting with social media, and it's no surprise that few association professionals have been able to focus sufficiently on deeper social media work—deciding what information to capture and how to analyze it and apply it to business decisions. What concerns all of us, especially in these early days, is finding the time to give this work the attention it requires. Not to mention building (or hiring) the social media expertise to work through the process changes and technology implementation.

Associations are changing, and so is the technology that supports us. As you begin adopting Social CRM strategies, apply the business maxim, "go slow to go fast." Taking the time now to rethink the way you work will take a lot of patience and persistence. But eventually, you'll have an infrastructure in place that will enable you to focus on *what* you want to do with social media and less on *how* you're going to do it.

SOCIALFISH

http://www.socialfish.org
202-713-5343

Lindy Dreyer
lindy@socialfish.org
http://twitter.com/lindydreyer

Maddie Grant, CAE
maddie@socialfish.org
http://twitter.com/maddiegrant

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AVECTRA

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