



How To Create Member Personas For Your Association

Use this workbook to create member personas for your member-based organization.

What are member personas?

Member personas are fictional, generalized representations of your ideal members. They help you understand your members (and prospective members) better, and make it easier for you to tailor content to the specific needs, behaviors, and concerns of different groups.

The strongest member personas are based on research as well as on insights you gather from your actual member base (through surveys, interviews, etc.). Depending on your organization, you could have as few as one or two personas, or as many as 10 or 20.

PRO TIP: If you're new to personas, start small! You can always develop more personas later if needed.

What are negative personas?

Whereas a member persona is a representation of an ideal customer, a negative -- or "exclusionary" -- persona is a representation of who you don't want as a member. This could include, for example, potential members who are just too expensive to acquire (because of low commitment, their propensity to churn, or their unlikeliness to participate in your organization.)



How can you use personas?

At the most basic level, personas allow you to personalize or target your marketing for different segments of your member base. For example, instead of sending the same member nurturing emails to everyone in your database, you can segment by member persona and tailor your messaging according to what you know about those different personas.

If you take the time to create negative personas, you'll have the added advantage of being able to segment out the "bad apples" from the rest of your members, which can help you achieve a lower cost-per-member.

PRO TIP: When combined with the member's journey (i.e. how far along someone is in your engagement funnel), member personas also allow you to map out and create highly targeted content.

How do you create member personas?

Member personas are created through research, surveys, and interviews of your target members. That includes a mix of members, prospects, and those outside of your contact database who might align with your target audience.

Here are some practical methods for gathering the information you need to develop personas:

- Interview members either in person or over the phone to discover what they like about your organization.
- Look through your member database to uncover trends about how certain members or prospects find and consume your content.
- When creating forms to use on your website, use form fields that capture important persona information. (For example, if all of your personas vary based on their preferred social media platform, you could gather information on what forms of social media your members use by asking a question about social media accounts.)
- Take into consideration your team's feedback on the members they are interacting with most. (What types of engagement funnel does your team work with? What generalizations can they make about the different types of members you serve best?)



You can use the following pages in this workbook to organize your persona data. First, we'll walk you through an example, then we'll leave you with some blank templates so you can get to it!

Client	Persona: Sample Sally
What's the persona's work life like??	• Head of human resources • Worked at the same company for 10 years; worked her way up from HR associate • Probably has an assistant screening calls • Asks to receive collateral mailed/printed
What's the persona's home & family life like?	• Married with 2 children (10 & 8) • Dual HH income: \$140,000 • Suburban
What's the persona's demographic information?	• Skews female • Age 30-45
What's the persona's personality?	• Calm demeanor
What are the persona's goals?	• Keep employees happy & turnover low • Support legal & finance teams, as well as company leadership
What are the persona's challenges?	• Get everything done with a small staff • Rolling out changes to the entire company
What are the persona's hesitations to your organization?	• "It's been difficult getting involved with professional associations in the past." • "I need access to peers that can offer me advice on difficult situations, not another association." • I don't want to add more commitments to my already busy life.
What are the persona's worries?	• I'm worried I'll just be paying for a membership and not get anything in return.
In a few words what does the persona need?	Real support for a difficult role.
What is your solution?	We give you a professional association membership that you can manage at your fingertips with a mobile app, a peer to peer matching system, a content library with advice and a job board.

Question	Persona: _____
What's the persona's work life like??	
What's the persona's home & family life like?	
What's the persona's demographic information?	
What's the persona's personality?	
What are the persona's goals?	
What are the persona's challenges?	
What are the persona's hesitations to your organization?	
What are the persona's worries?	
In a few words what does the persona need?	
What is your solution?	

Was this workbook helpful?

Talk to a growth coach about
strategic planning for your member
based organization

Let's Talk!



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