

The Chicago School

Member Engagement & Loyalty

ADLER
PLANETARIUM

The Field
Museum

Shedd
AQUARIUM

Good afternoon, everyone. Thank you for attending our session, The Chicago School: Member Engagement & Loyalty. I'm Pablo Anaya, Membership and Individual Giving Coordinator at the Adler Planetarium.

Today's Session

- Chicago's Museum Campus
- Member Lifecycle Planning
- Strategy, Success, and Struggles



Today's session is designed to be informational for those newer to the membership sphere and also to build on the inaugural sessions from yesterday: Membership 101 and Acquisition 101 aiming to demonstrate some of the finer points of lifecycle planning in practice (vs the more conceptual, best practice level at which they were introduced). We hope to provide an in depth look at member lifecycle planning, strategies, successes, and struggles of institutions on Chicago's Museum Campus through our conversation.

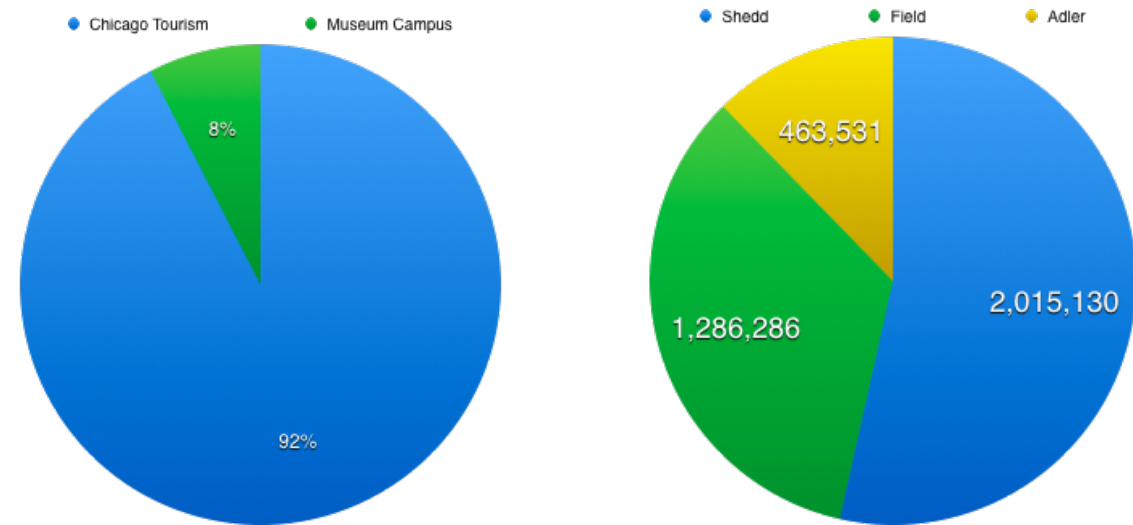
Chicago Museum Campus



Joining me for the session are: Angela Perillo, from the Field Museum; Kristall Laursen from the Shedd Aquarium, and Shannon Sudberry from the Adler Planetarium. Thank you each for joining me in this panel.

Just to give some quick background on the Chicago Museum Campus: the campus is an interesting outpost of the city, serving as a hub of sorts for three major Chicago museums. The campus is located just south of downtown Chicago. The museum campus consists of the Field Museum, The Shedd Aquarium, and the Adler Planetarium. Just out of view, but situated directly across the field museum is Soldier Field, home to Chicago Bears.

Chicago Tourism Data



But why the museum campus as a case study?

In 2013 the city of Chicago welcomed approximately 46 million visitors. Of that 46 million, the museum campus welcomed nearly 8% percent or 3.76 million visitors. Needless to say, the Museum Campus is one of the city's premiere tourist destinations and these three tourist hot spots are in constant competition for visitors and to build their respective membership base.

But how do they stay competitive and what accounts for each remaining a destination despite some of the cultural shifts that we saw in this morning's keynote as we look towards a future of museums with increased variability towards museum visitation, patron spending, and membership trends?

Field Museum



This morning, our keynote addressed and touched on this aura of uncertainty with respect to museums. As we look towards a future of moderate uncertainty with regards to the direction of museums, I'd like to present the museum campus as a case study of best practice, in practice.

Each panelist brings a their own flavor and expertise to member lifecycle planning ranging from event planning, to communications strategies, to member outreach that I hope will resonate on some level.

Angela Perillo is the Benefits Manager at the Field Museum. Each year Angela welcomes thousands of members and their guests to the Field's annual Members' Night event. Members' Nights at the Field invite members and guests to explore the Field's vast collections, interact with curators and witness behind-the-scenes work.

Shedd Aquarium



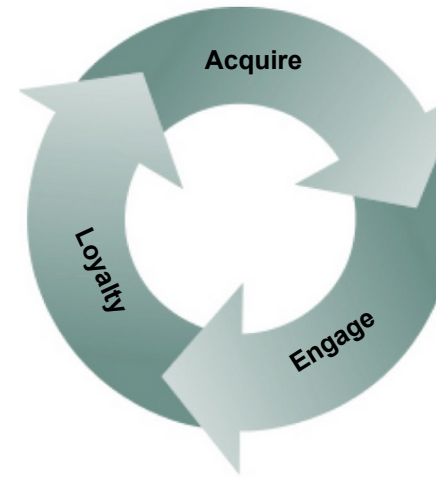
From Shedd Aquarium is the Manager of Member Relations, Kristall Laursen. At the Shedd, Kristall has worked with the Marketing team to build the Shedd's First Look Series, inviting members to go behind the scenes and receive exclusive access.

Adler Planetarium



And from the Adler Planetarium is Shannon Sudberry, Manager of Membership and Annual Fund. In the past year, Shannon has led our team to overhaul the member benefits program and member communications, including launching an inaugural member magazine, the AdlerStar.

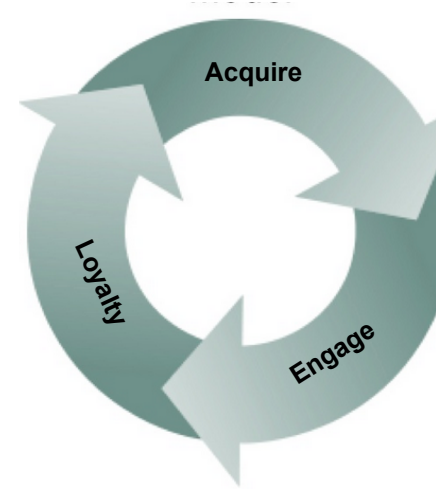
Lifecycle Planning



So what do we mean by lifecycle planning? I think many of us would agree that membership programs are most successful when we think of them holistically – from the point of sale through the dedicated 25 year member. Each stage requires different strategies, but each stage builds on the previous and ultimately the relationship is cyclical. More engaged visitors are more likely to join as members and make a return visit, just as more engaged members are more likely to renew.

Lifecycle Planning

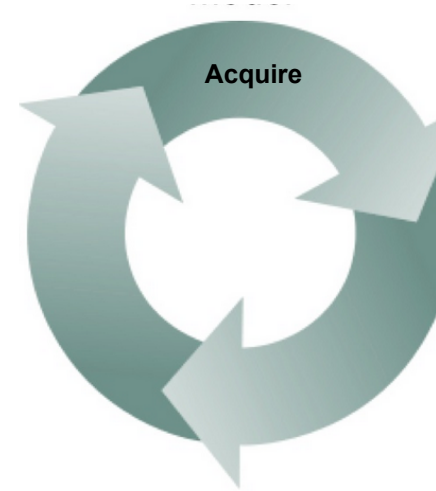
- Acquire
 - Onsite sales
 - Conversion
- Engage
 - Member events
 - Communications
- Loyalty
 - Types of loyalty programs
 - Loyalty events



Let's build on the member lifecycle as defined by these three broad strokes categories: acquire, engage, and loyalty. In our conversations we will focus subsets/ strategies within each touching on the following:

Acquire

- Onsite sales
 - Drivers
- Conversion
 - Tactics



As I'm sure we've all experienced, membership sales more frequently occur onsite than anywhere else. Generally there are fewer barriers of entry, including a minimal cost of conversion at point of sale, we have the ability to onboard new members quickly, and we can more easily activate new members to their benefits – all onsite. While We all love direct mail and shiny digital acquisitions, nothing comes close to the sales we see from onsite guests. Visitation really remains the primary driver for generating onsite acquisition and renewal revenue.

Acquire: Onsite Sales



To the group i'd like to pose a couple of questions:

What are your tactics for converting visitors, especially increasingly tourist audiences into members?

What are you leveraging for guests to become members? (shorter line?/ unique access?/ value?)

What are challenges in converting visitors? what barriers of entry are there that are difficult to navigate in creating an onsite sales team? (systems?/ too many tourists?)

Acquire: Conversion



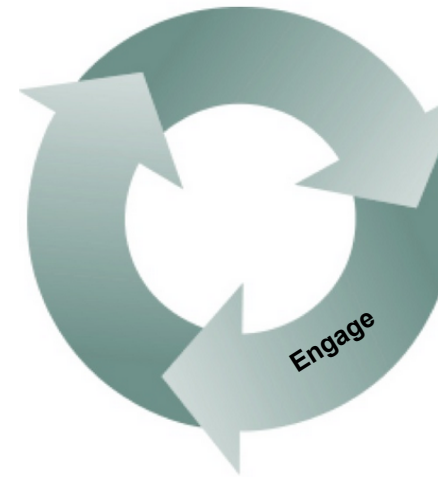
Here's another question, thinking about on-site sales from another vantage point:

So you've got them in the building or out of line? What's next?

What are the types of systems you're using to sign up guests? (on site sales team?/ dedicated member desk?)

Engage

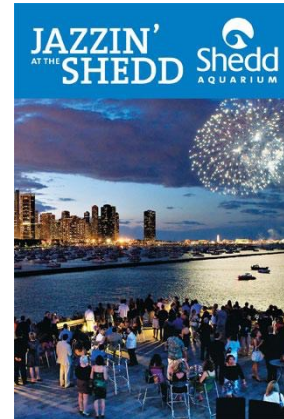
- Events
 - Behind the scenes
 - Members' Nights
 - Members' Previews
- Communications
 - Emails
 - Magazines



Now that you've acquired your members, what's next? How do we keep them engaged with your institution and really feed into building lifetime value among the plethora of other tasks we're charged with including: repeat visits, upgrading, renewing?

What are the types of events that support the mission of your institution and keep members engaged? How do we keep in contact with members to make them feel informed and part of the institution?

Engage: Events



What is your strategy behind member events: timing/ goals (is it around a specific opening/ event)?

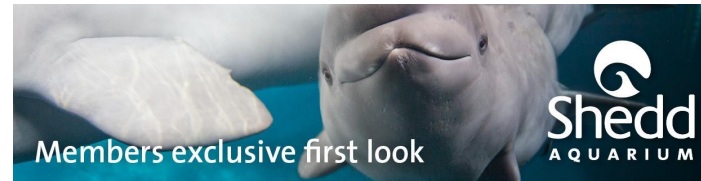
How do you track member attendance at events? Is this used in any way to build loyalty?

How do your member events compare to public programs? What are the difficulties in keeping member events distinct from public offerings?

What are the goals of your member events? Are they about building membership, revenue, or attendance during slow periods?

What are some of the challenges you've found in your own member events?

Engage: Communications

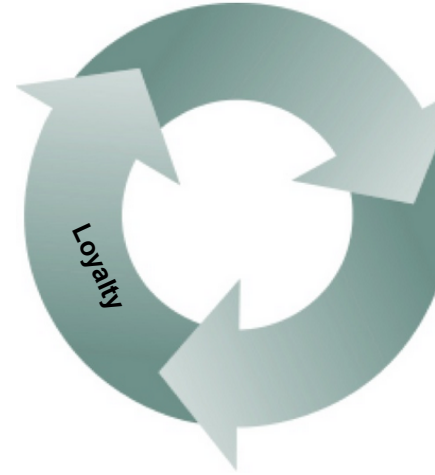


How do you engage with members after sign up to build loyalty?

What are the types of communication that your members receive?/ how are they notified of their benefits?/ how is benefit usage tracked?

Member Loyalty

- Types of loyalty programs
 - Onboarding
 - Goals
- Loyalty events



Let's say you're in the best possible situation, you have an amazing onsite sales team, your members want to participate, but what are they aspiring to? Often as membership professionals we're charged with cultivating members and stewarding them into donors, but what happens when members remain at the same level for years (because of financial barriers or their satisfaction participating at a base member level)? What are these members aspiring to? That's really what I want to touch on with regards to member loyalty. How are we rewarding members for their years of dedicated support? What are some types of loyalty programs, the goals associated with them, and what types of events or ways are we engaging with this distinctively dedicated audience?

Loyalty: Programs



What are the qualifiers of your member loyalty programs? (consecutive years/ engagement/ giving history?)
How are members notified that they are part of said loyalty program?
What are the longterm goals of your loyalty program? Is it to create prospects for planned giving?
Challenges in managing program? (data management?/ communications?)

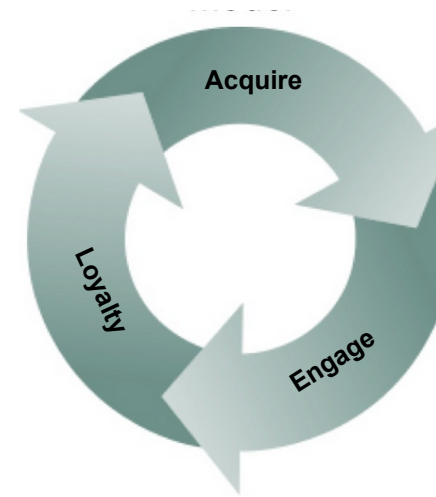
Loyalty: Events



Is there an induction event? What types of loyalty events do you hold?
What types of added benefits do these members receive?

Lifecycle Planning

- Acquire
 - Onsite sales
 - Conversion
- Engage
 - Member events
 - Communications
- Loyalty
 - Types of loyalty programs
 - Loyalty events



To quickly recap the key elements of our lifecycle planning session:

Successful membership programs stem from a holistic approach. As you examine the areas in your member lifecycle (either an expanded or broad strokes one such as this) really begin to think about the strategies that support each area of the lifecycle. Within each of those strategies, it is also helpful to think about the goals of your program to make these strategies relevant.

A look to the Future

- Campus expansion
 - Lucas Museum
- Challenges
- What's next?



Further building on some of the ideas from this morning's keynote, I'd like to turn to the panel and quickly ask them to look to the future: very recently, the city of Chicago announced that it will be home to the George Lucas museum of narrative art.

What do you feel is in store for the campus with the coming Lucas museum.

What do you think might be some challenges as you begin lifecycle planning with increased competition?

What's next for each of your programs? (Give a quick thought on upcoming event, project, etc?)

Q & A



We turn now to you for any questions/

I appreciate all of your time and wouldn't want to hold up anyone trying to get to lunch. We'll stick around for a few minutes for anyone looking to touch base and ask us any questions.

Contact Us

Pablo Anaya

Membership and Individual Giving Coordinator
Adler Planetarium
312.322.0526
panaya@adlerplanetarium.org

Angela Perillo

Member Benefits Manager
The Field Museum
312.665.7836
aperillo@thefieldmuseum.org

Kristall Laursen

Manager of Member and Donor Relations
John G. Shedd Aquarium
312.692.3153
klaursen@sheddaquarium.org

Shannon Sudberry

Manager of Membership and Annual Fund
Adler Planetarium
312.322.0521
ssudberry@adlerplanetarium.org

Also, please feel free to contact us if you have any questions or would like to discuss a strategy/ idea in more detail.

Thank You!

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Thank you again for attending!