

The Expert's Membership Site Checklist

19 Tactics For Maximum
Engagement and
Retention



The Expert's Membership Site Checklist

Introduction

Membership sites are all the rage these days. But, unfortunately, many don't survive, don't make the business much money, and end up costing the business a lot of time, energy, and stress.

But membership sites done right become a business's most profitable source of stable, consistent revenue.

At Box Out Marketing, we've helped build well over 100 membership sites. In doing so, we've created this membership site checklist to help you increase the chances for success with your membership.

Your membership site's primary purpose is to provide value in exchange for memberships fees. Beyond that, there are 3 other purposes you should focus on. We've organized the checklist according to those 3 purposes: Increasing Retention, Scaling Customer Service, and Creating A Community.

This checklist assumes you are offering access to a subscription-based membership site. If so, enjoy!



Increasing Retention

No matter how good your content is, or what your content is, if you're growing your membership base, eventually retention of members will become one of your primary concerns.

This section of the checklist is dedicated to showing you a few strategies for increasing retention of your members.



Increasing Retention

✓ Onboarding

This is one of the most critical parts of an online membership. The very first time new members login, walk them through an onboarding experience that gets them excited about the membership, facilitates their learning, and helps them connect with the community.

A standard onboarding experience might: force them to set their password instead of relying on an automated password, invite them to join the Facebook group or forum, instruct them on where to find resources, ask them a few survey questions so you can customize content, and more.

On those onboarding pages, be sure to strip out standard navigation and other distractions. Ensure they go through each step of the onboarding process in a way where you completely control the experience so you can ensure that experience is great. First impressions are important and you want yours to be awesome.





Increasing Retention

Activity History

One thing that's frustrating for members of online memberships is when they go through some training and then come back later and can't remember which parts of the training they've completed and which parts they haven't completed.

Be sure and set up your core content in a way that tracks completion so that members can easily know which parts they've completed and which parts they still have left.

This is a simple thing that may seem unimportant but it really facilitates the experiences and helps members come back over and over to continue in their training.

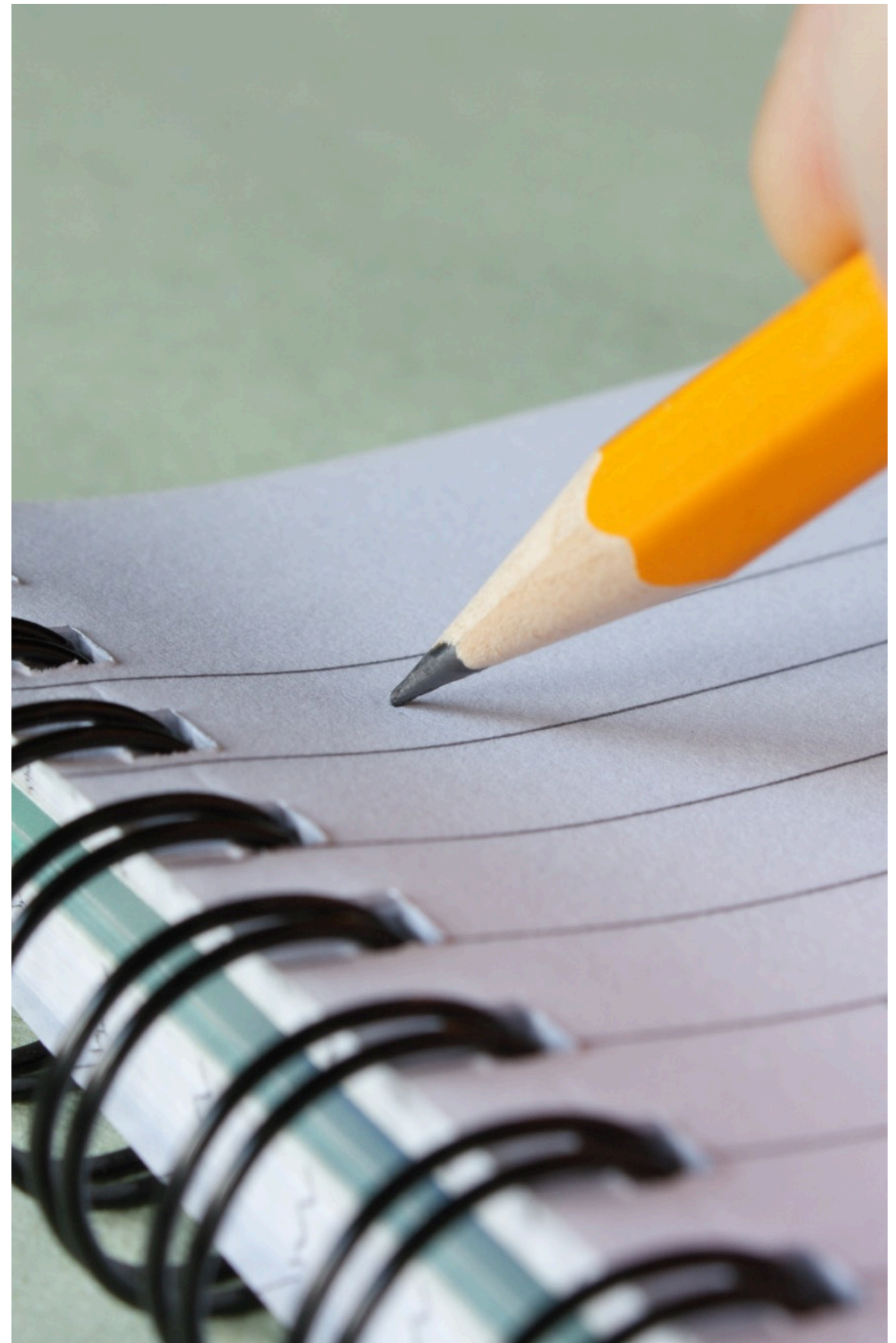
Increasing Retention

✓ Notes

When members go through online training they often take notes on what they're learning. One key way to increase retention and improve the value of your membership and the experiences of being a member, is to offer a way for members to take notes **INSIDE** your membership site.

Then, when they go to review their notes they will log into your membership site and associate value there.

Be sure and allow them to easily print well-formatted notes from your site in case they want to take their notes offline.





Increasing Retention

✓ Exams & Certificates

The more your members learn, the more they'll associate value with your membership. One way to facilitate that learning is to have exams at the end of courses and offer certificates for passing the exams.

This creates a sense of accomplishment and pride for members. They may even share their accomplishments online and help you spread the word about your content.

Increasing Retention

✓ Unlock Content Based On Activity

One way to keep members excited and engaged is to unlock additional content once they have completed a certain activity.

If they can see that there is more content that can be accessed after they complete a course or two, their likelihood of completing those courses increases.

Human nature is such that we don't like leaving things undone, and we don't like knowing we're missing out on stuff. This strategy taps into both of those feelings when you have visible content that can only be accessed after an accomplishment.





Increasing Retention

✓ Unlock Content Based On Time

Another variation of this is tied directly to retention. Let's suppose you've determined that on average your members cancel during their 6th month of membership.

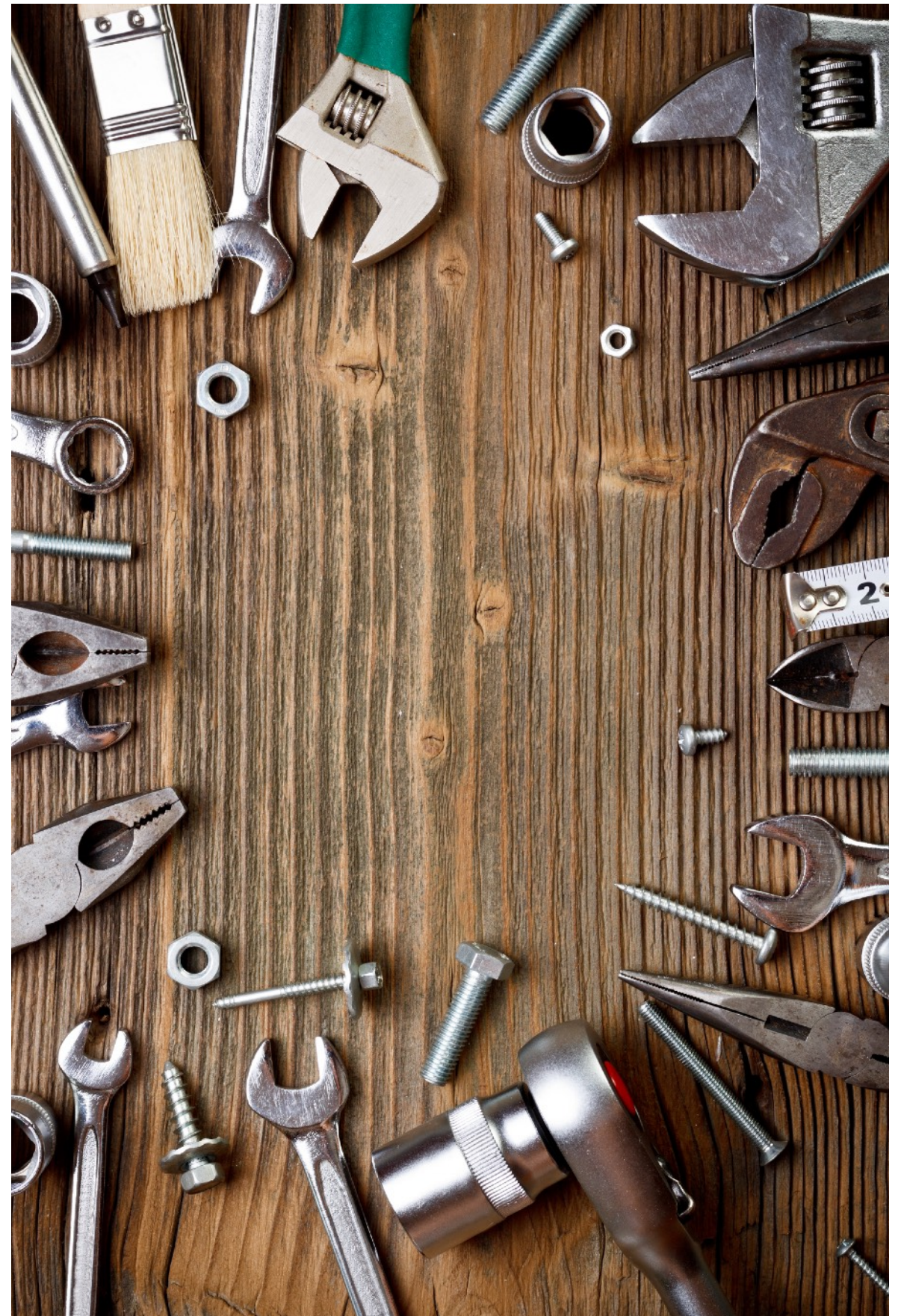
You may consider having new content only available starting on month 7. Be sure to communicate to your members that your special content will be available after month 7. That way, those that may have considered cancelling, may stick around to get access to that new content.

Increasing Retention

✓ Tools

Offering online software tools available in your membership site, and not anywhere else, is another way to increase the value of your membership and therefore increase retention.

If members have to continue their membership in order to continue utilizing a tool you offer, they're more likely to continue being members.





Increasing Retention

✓ Bonus Content

Studies have shown that the randomness of gambling is what creates addiction. If you won money every time you pulled the slot machine lever, it wouldn't be nearly as exciting. It would be predictable, but not exciting.

You can make your membership more exciting, and more “sticky” by randomly offering bonuses (typically content) to your members at unexpected times.

This creates a feeling of loyalty from members towards you and your membership site, which in turn, increases retention.

Increasing Retention

✓ Live Interaction & Training

Another very effective way to keep members engaged, provide real value, and increase retention is to offer a way for your members to interact and learn directly from you or your team in a live format on a regular basis.

A common example of this is to offer weekly “open office hours” times. This is basically an open format webinar where members can connect to ask questions, get help, and feel a deeper connection with you.

Live, in-person, events are often harder to pull-off logistically, but can have an even greater impact.

If members know they can get live help from you when they need it, they’ll be likely to stick around in order to keep access to that help.



Scaling Customer Service

One of the main purposes of launching a membership site should be to scale your customer service. By creating a “self-serve” portal, you allow your members to manage most customer service needs on their own instead of requiring you or your team.

This portion of the checklist is dedicated to helping you know how you can scale your customer service efforts through your membership site.





Scaling Customer Service

✓ Forgot Password

One of the most common customer service requests is “I can’t login”. Usually, that’s a result of them forgetting their password.

Your login page must have a “Forgot Password” link so that members can gain access on their own, without contacting customer service.

Depending on your configuration, your “Forgot Password” link may send members their existing password, send them a link to reset their password, or send them a new, randomized password and require a reset.

We recommend sending a reset link or a new randomized password and require a reset. Sending existing passwords isn’t secure and it makes some members question the security of their data.

Scaling Customer Service

✓ Profile Page

In 2007, the US Census Bureau determined that the average American will move close to 12 times in their lifetime, and that number seems to be increasing. That means if people live an average of 75 years, they'll move every 6 years or so.

What does that have to do with your membership site?

It means that every year, about 17% of your members are going to move - which means their address will change. Billing addresses change. Phone numbers change, etc.

A profile page where members can keep their address and phone number updated is essential to you keeping your list up-to-date and clean. It also ensures you can continue communicating with your members.

We also recommend a campaign that asks your members to update their contact information occasionally.



Scaling Customer Service

Update Email Page

17% of Americans create a new email address every 6 months.

If you don't have a way for members to update their email address inside your membership site, then in 3 years you would have no email contact with your current members.

Be sure to include a page in your membership site where members can update their email address so you can stay in communication with them.

Source: <https://www.convinceandconvert.com/convince-convert/15-email-statistics-that-are-shaping-the-future/>



Scaling Customer Service

✓ Update Password Page

Another necessary page for your members is a page where they can update their password.

Whether another account of theirs has been compromised, they forgot their password, or they just feel like changing it, they need to be able to update their password on their own without contacting your customer service team.



Scaling Customer Support

✓ Bill Payment Page

Occasionally people's credit cards get declined. It might be because their card is maxed out, or because the card was cancelled, or because their bank figured it was a fraudulent charge.

This creates a customer service issue for you and your team. As your membership grows, more and more of these will come up and they become a time suck.

Offering a page where members can update their credit card and pay their overdue bills is great for them and for you.

Be sure and set up your systems so that the member is automatically notified when payment fails and follow up continues until payment is made or their membership is automatically cancelled.



Scaling Customer Support

✓ Payment History & Invoices

Many people want or need a copy of their invoices, especially if the membership service you offer is business-related.

Be sure to create a page where they can see their payment history as well as open each invoice individually to see the detail and print invoices.

Having to generate PDFs of invoices and email them to members is a waste of resources when you can provide a self-serve option inside the membership site.



Creating A Community

If you can create a community where the members get more value from the other members than from you, then your members will be VERY reluctant to cancel.

Bringing people together as a community is also one of the most valuable things you can do for your members. The value of your membership is multiplied by the connectivity and connection in your community.

This section of the checklist is dedicated to helping you create a strong community.



Creating A Community

✓ Forums & Facebook Groups

The easiest way to build and strengthen your community is to allow your members to communicate in an online forum. This forum could be hosted in your membership site, or it could be in a social network such as Facebook. Facebook groups and forums have their pros and cons. You will want to evaluate these before you make a decision.

If you host your community inside your membership site, you have more control over the environment (no ads, etc). The drawback is, people have to login to see the latest posts and content. You could make an argument that people also have to login to Facebook, but the difference is, people are already logged into Facebook....ALWAYS.

Another benefit of hosting a forum in your own membership site is you can customize the community to your heart's content. You won't be able to do any customization in Facebook.

Lastly, be sure you or someone on your team proactively spurs conversation in your forum.



Creating A Community

Gamification With Badges

People love games. We love competition. We love *status*.

One way to engage members at a deeper level is to gamify your membership and allow members to earn badges when they accomplish predefined items.

BadgeOS is a free Wordpress plugin that allows you to accomplish this easily.

Also, badges allow members to take pride in elevating their status and becoming resources for the community. This is good for you and for them.

Lastly, when new members can see the *status* of other members by seeing their badges, they know to whom they can turn for help. The more your community helps your members, the more valuable your membership becomes.



Creating A Community

✓ Gamification With Leaderboards

Another way to gamify your membership is to create leaderboards and therefore invite more competition amongst members.

Whether the leaderboards are for posts and replies in the forum, completing lessons, or something else you come up with, creating some competition is a good way to engage member and keep them logging into your membership site.





The Expert's Membership Site Checklist

Get Help

At Box Out Marketing, one of our specialties is building killer membership sites with Infusionsoft as the back-end automation engine.

We love helping our clients build, launch, and improve membership sites that are valuable, engaging, and profitable.

If you'd like some help getting your membership site rocking, just request a [free consult here](#).

[Click here to request membership site help from Box Out Marketing](#) or call us at 480-442-4098.

About Box Out Marketing

Box Out Marketing was established in January of 2014 by Tyler Garns, former VP of Marketing at Infusionsoft. Tyler helped lead the marketing team while Infusionsoft grew from \$4M to over \$30M in annual revenue from 2007 to 2012.

Box Out Marketing has become a leading Infusionsoft agency helping small businesses harness the power of automation while focusing on bottom-line results.

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