



# Optimize the Customer Journey

FOR YOUR ASSOCIATION'S SPONSORS, EXHIBITORS, AND ADVERTISERS

*Your path to non-dues revenue growth*



# Introduction

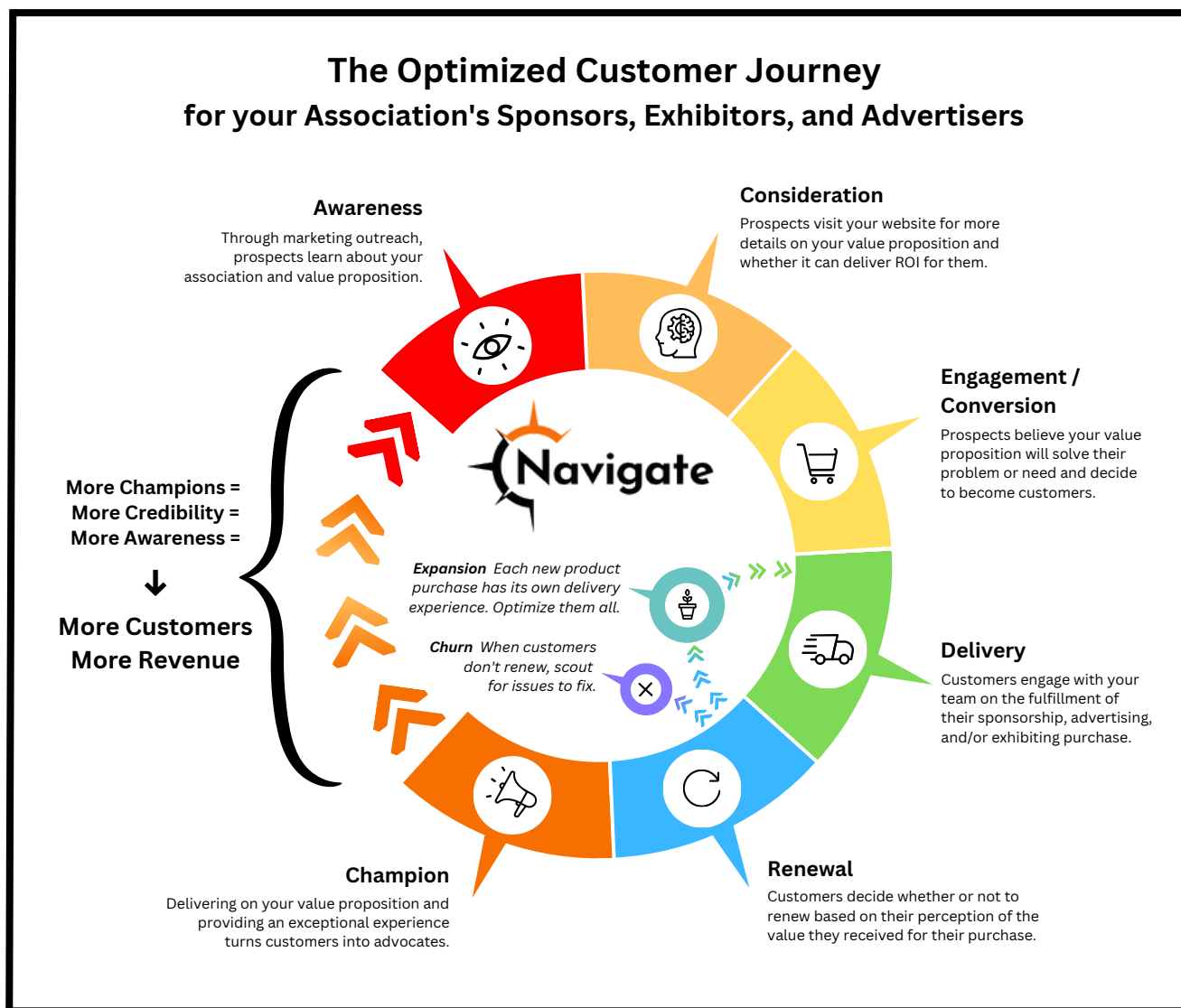
According to the Professionals for Association Revenue (PAR) *Associations Business Development Landscape Survey*, **86% of associations say they don't have a business development strategy or they need a new one.**

**If that's you, this guide can help!**

Here you'll find a clear way to create (or refresh) your approach to business development, using a customer journey model specifically for associations with sponsor, exhibitor, and advertiser (SEA) customers. As you'll see, from marketing to sales to delivery to renewal there are **simple things you can tweak to have a**

**positive impact** on your sales operations, customer satisfaction, and revenue results. **And many will cost you absolutely nothing.**

Since the majority of non-dues revenue comes from consistent renewal of relationships with existing SEA customers, **the logical first step is to retain—and upsell—these customers.** Also ensure they have an exceptional customer experience and strong results, and you'll **create champions whose success stories will make attracting new SEA customers even easier.** The optimized customer journey below will help you do this and more. **Let's go!**





# Awareness

Through marketing outreach, prospects learn about your association and value proposition. **Most people won't know your association, and if they do, they don't necessarily care about what you're selling.**



## Get their attention:

- Association markets via email/social
- Staff reaches out by phone/email
- For best results:
  - have a compelling value proposition
  - include metrics and testimonials
  - don't forget a call-to-action
  - ensure contact data is clean and complete
  - have a process to monitor results

**TIP:** Champions make this stage much easier—read on for how to develop as many as possible.

# Consideration

Prospects visit your website for more details on your value proposition and whether it can deliver ROI for them. **They're more likely to engage if you talk about *their* problems and *their* issues.**



## Create curiosity:

- Prospects shouldn't have to dig around your website
- Create an easy-to-find SEA-specific page with:
  - how you can help their business
  - member/audience demographics/buying influence
  - overview of engagement options (events, ads, etc.)
  - product stats, metrics, and testimonials
  - links to details on other internal pages

**TIP:** If products can be sold without talking, share the prices and make it easy to buy online. If it always takes a conversation (i.e., annual partnerships) give a price range vs. specifics and have them engage with a person.

# Engagement / Conversion

Prospects believe your value proposition will solve their problem or need and decide to become customers. **Remember: different customers value different things, don't assume it's always the same.**



## Instill confidence:

Provide options to achieve different objectives:

- thought leadership
- lead generation
- branding, etc.

Make sure all products have clear deliverables:

- what is included with the purchase
- what do they need to provide

**TIP: Make sure your prices are appropriate... and not too low!**



## Delivery

Customers engage with your team on the fulfillment of their sponsorship, advertising, and/or exhibiting purchase. **If you want more champions, then these next steps are as critical as your sales process and the results you deliver.**

## Validate their choice:

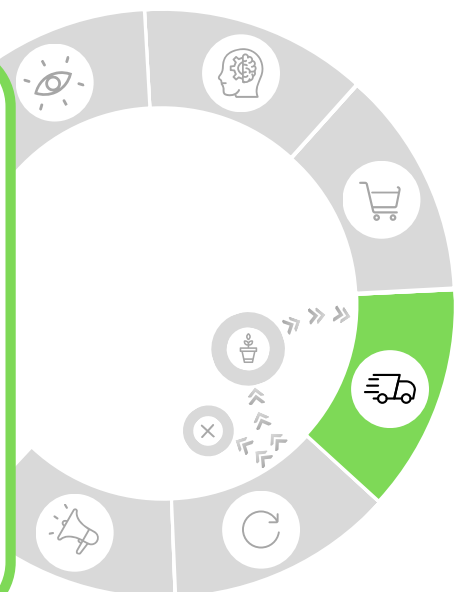
After a signed contract, quickly provide:

- an outline of the delivery/fulfillment process
- deadlines and deliverables
- appropriate contacts

During fulfillment:

- if the answer to a request is 'no' - *call them* to discuss (ideally with alternatives)
- if there's a problem - *call them* with solutions (ideally before they bring it up)

**TIP: Ensure outreach is proactive, not reactive.**



# Renewal

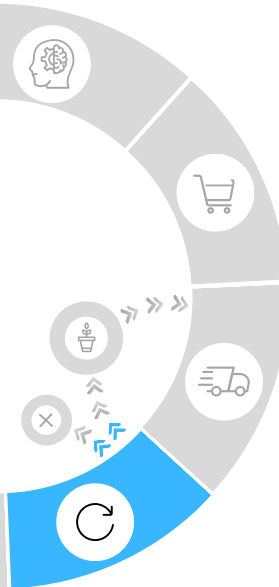
Customers decide whether or not to renew based on their perception of the value they received for their purchase. **Be proactive so you can build on the momentum of success OR quickly solve a problem to prevent churn.**



## Don't get complacent:

- Renewals are easier if you know how each customer measures success (best asked in the sales process!):
  - provide ROI info before they request it
  - include context: stats/metrics/survey results are more helpful with comparison/benchmarking
  - with context, you'll know if poor results are something you need to fix, the SEA does, or if there simply isn't a fit

**TIP:** If results are poor, proactively reach out to discuss and possibly retain them (assuming they're a fit); if results are good, scout for testimonials and referrals.



# Churn

When customers don't renew, scout for issues to fix. **Problems can't always be solved, but how you handle them is critical to your reputation and can even create a Champion.**

## Today's loss, tomorrow's win:

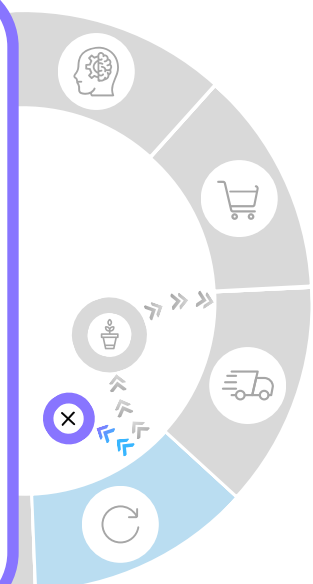
When customers don't renew it's usually because:

- something went wrong
- they didn't do their part to make it work
- they did their part, but still didn't get the expected value

Have a phone call/web conference as soon as possible:

- many problems can be fixed or make-goods offered to save a client (and possibly create a Champion!)
- embrace negative feedback; it often leads to better products and processes

**TIP:** People talk and reputations matter; ignoring a problem or handling it poorly can cost you even more business.





## Expansion

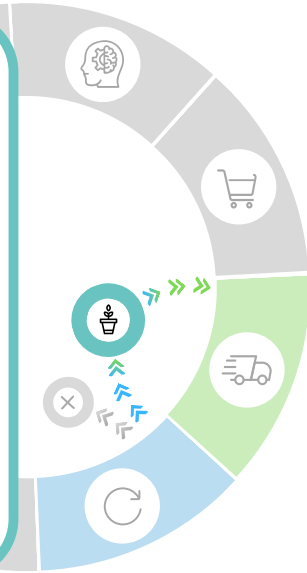
Each new product purchase has its own delivery experience. Optimize them all. **Incremental increases to existing customer spend is one of the simplest ways to increase revenue.**

### Add-on's will add up:

Even small increases can make a difference:

- if you skip the upsell, they could be upset you didn't present the opportunity
- build off what they tell you they need, not what else you want them to buy
- try this: "Do you want to include X next time to increase your Y results?"

**TIP:** If a new contact will be involved, ask your current contact to be on the first call to help transfer the credibility you've built.



## Champion

Delivering on your value proposition and providing an exceptional experience turns customers into advocates. **Champions are your best sales reps and can even be a great source for new ideas and revenue streams.**

### Where the magic happens!

Champions are **GOLD**—the more you have, the better:

- their testimonials are your best messaging in the 'Awareness' stage to attract new prospects
- their enthusiasm and relationships can lead to intros with other relevant SEA prospects
- feeling connected to your association can lead them to propose new products/value for members

**TIP:** THANK THEM. Periodically reach out to them and *don't sell anything*. Think hand-written notes or a call from executive staff or a board member.

More Champions =  
More Credibility =  
More Awareness =



More Customers  
More Revenue

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# Now it's your turn!

For your association's sponsors, exhibitors, and advertisers, what does their customer journey with you look like today?



Small changes can have a big impact and every association has one or two quick wins just waiting to be noticed!



Looking for more non-dues revenue?  
Book a discovery call today for help finding  
wins along your SEA customers' journeys.

[calendly.com/navigate-ces/30min](https://calendly.com/navigate-ces/30min)

