Manage Member Expectations: The Key to a Vibrant Association

2016 Illinois Association of REALTORS® AE Workshop

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Understanding the Hidden Challenge

1. Determining the membership status of your association today

A. What percentage of your members must your association retain each year in order to remain a viable organization? ________________
This answer defines your 'safe zone'.

B. What percentage of your members would renew their REALTOR® membership today if they were not required to do so? _______________
If 'B' is less than 'A' your association is in the 'danger zone'

2. Recognizing the difference between joining and belonging

→ ***Join*** - to become a member of something such as a club, social group, company, team

→ ***Belong*** - to be accepted or made welcome in a place or group; to affiliate and share an identity with a group.

→ REALTORS® *join* their association because they are required to do so but they are not required to *belong*.

3. Understanding the realities created by 'Required' Membership

→ Members never have the opportunity to make a '*decision to join'*.

→ The requirements that accompany REALTOR® membership may be seen as a burden rather than a benefit (dues, code of ethics etc.).

→ As a result of their involvement, volunteer leaders embrace the principals of being a REALTOR® which creates a gap between themselves and many of their members.

→ Members define their own expectations as to what they should receive from their association and this often conflicts with what they actually receive which results in a dissatisfied member.

NOTE: There is a tendency to *blame* members who don't behave the way that leaders and staff wish they would.

4. *Recognizing the challenges that are created by 'Required Membership'*

- → Your association has two groups of members:
  - ~ Those who pay their dues because they 'Have To'
  - ~ Those who pay their dues because they 'Want To'
- → Because your members never make a buying decision before joining, all of your members start out in the 'Have To' group.
- → The culture of your association must recognize the critical need to convert members from the 'Have To' group to the 'Want To' group.
- → Members will move to the 'Want To' group when they feel that the value they receive from their memberships equals or exceeds the dues they are paying.
- → Increasing the number of members in the 'Want To' group will put and keep your association in the 'safe zone'.

Making the Changes That Will Move Your Association to the Safe Zone

1. *REALTORS® in the 'Want To' group place a value on one or both of the following:*

- → **Resources** that save money and/or improve quality of life both personal and professional
  - ~ Personal service (discount programs etc.)
  - ~ Business tools and resources
- → **Relationships** with
  - ~ Staff
  - ~ Leadership
  - ~ Other agents in their market area
  - ~ Referral sources from outside of their market area

NOTE: Some members in the 'Want To' group may use many of the REALTOR® resources but never attend an event and likewise, some members may attend all the events but seldom use a resource.

2. *Transitioning members from the 'Have To' to the 'Want To' group*

- → Continuously emphasize the importance of acclimating new members and retaining existing members. *Question - How would you serve your members if they were customers who were free to choose a different service provider whenever they wanted to?*
- → Develop on-going programs that inform/remind members of the REALTOR® resources that they can access to achieve greater success.
- → Conduct programs for new members for the first year after they join that makes them aware of the opportunities they receive as REALTORS®.
- → Don't forget that you have many existing members who you also need to help transition from 'Have To' to 'Want To.'

3. *The questions that members ask themselves that determine whether they are in the 'Have To' or the 'Want To' groups:*

- → Phase #1 – Connecting the member to the association during the first year
  - ~ Why do I need to be a REALTOR®?
  - ~ Why do I need to pay dues to three different groups?
- → Phase #2 – Maintaining the member's value experience every year they are members
  - ~ Am I receiving value equal to what I am paying in dues?

4. *Prioritizing the factors that often determine what services are offered:*

- → Preferences of the leadership team
- → Tradition –'this is what we have always done'
- → Mission of the organization
- → Member feedback
- → Strategic Plan

5. *Keys to creating perceived value:*

- → Market both awareness and benefits of every event
- → Work with new members as soon as they join
- → Use testimonial marketing from your members to reinforce the perception of value
- → Continuously link members with tools and resources
- → Local associations must market all REALTOR® resources to their members

6. *Understanding the difference between a resource and a benefit*

→ A resource is something that a member has access to as a REALTOR® member.

→ A benefit is the positive result that a member receives from using a resource.

→ Your members must experience a benefit before he/she will place a value on it.

→ Continuously remind your members of the resources they have available and, when possible, help your members convert them into benefits.

7. *Delivering resources to your members*

→ Leaders at the local level should match the needs of their members with the resources available at the local, state and national level.

→ Local association will receive 100% of the credit when they connect their members to REALTOR® resources.

→ Avoid the territorial parochialism that says that local associations should only market local resources.

→ Local associations should serve as the conduit between their members and the resources available from the national, state and local associations.

Notes

Making Your Association Relevant to All Your Members Not Just Your Leaders

1. *Four Principles of 'Relevance Based Leadership'*

1. It's about the members, not the leader.
2. It's about service, not power.
3. It's about responsibility, not credit.
4. It's about listening, not speaking.

2. *Implement an interactive communication system that allows an exchange of information between leadership and membership*

~ Leaders must evaluate how members respond to the communications they receive from the association (not opening an email is a response to a communications).

~ Association marketing efforts should focus on creating a high level of awareness rather than simply 'filling the room'.

~ Use focus groups to stay in touch with your members' needs and impressions. Listening sessions provide leaders with up-to-date information they can use when making decisions.

~ Train leaders to listen without defending the association or trying to 'correct' a member.

3. *Six step process to convert goals into long term benefits*

1. Identify strategic goals/initiatives that support the association's mission statement.
2. Define the *specific benefit(s)* that members will receive from each goal.
3. Prioritize goals based on the impact they will have on the mission (*required; beneficial; nice to have*).
4. Create an action plan for each goal.
5. Manage each action plan as a separate project (*present a status update at each Board of Director's meeting*).
6. Evaluate results (*outcome achieved; not achieved due to a faulty plan; not achieved due to faulty implementation*).

4. ***Avoid the 'paradigm of parochialism' that prevents associations from maximizing the services they offer to their members***

   ~ State and local associations need to help members become aware of, and assist them in learning how to benefit from, the REALTOR® resources that are available to them.

   ~ REALTORS® will have a greater perception of value in an association that serves as a conduit linking its members to all the resources that can help them achieve their goals.

5. ***Leaders must focus on providing value to the members***

   ~ Leadership positions must be earned rather than assigned based on entitlement.

   ~ Association leadership must respect the different volunteer personalities and learn how to best work with them in making associations more successful.

   ~ When recruiting members to volunteer, leaders should explain the expectations to insure that volunteers will focus on what is best for the association.

   ~ Association leadership must address volunteers whose behavior prevents the association from maximizing its potential.

Notes

Appendix A
AE Workshop
Suggested Local Association Initiatives

1. For individuals considering entering into the real estate business, provide a thumb drive with all the necessary information for someone considering becoming a real estate agent – links to RE Commission, licensing instructors, the importance and benefits of membership in the REALTOR® organization. Theme - "Why Being a REALTOR® Can Help You Succeed as a Real Estate Agent."

2. Ideas to incorporate in new member orientation that address both resources and relationships:

   ~ A panel of seasoned REALTORS® sharing information about maximizing the resources available as a REALTOR®;

   ~ Networking lunch that allows new members to interact with staff and to identify who does what at the association; Invite affiliate members to the networking lunch. New agent meets affiliate mentor if you are using that program (see #4)

   ~ Introduce agents to the financial potential of using their REALTOR® network to generate referral revenue;

   ~ Explain to members how their association will communicate with them to keep them informed about events, educational programs, political action, etc.;

   ~ Invite DRs to join their new members in taking the REALTOR® pledge;

   ~ It is very important to insure that there is meaningful staff interaction with new members throughout the orientation event.

3. Have an 'Up and Running in 90 Days' program that new members can sign up for at orientation. This program should be designed by a team of broker/owners and provide new agents with a step by step program that identifies the things that new agents must do when starting out in the real estate business. This program should include numerous REALTOR® resources. Rather than giving a new agent the entire program at orientation and sending them on their way, the association should send a new agent a portion of the program every two weeks.

4. Offer new members a "mentor" relationship with an affiliate member. The 'mentor' will contact the new member periodically during the first 90 days of membership to insure that the new member is aware of events that are being held at the local and state level; the mentor will host the new member at local association events; and the mentor will serve as a person that the new member can call when he/she has a question about something related to the REALTOR® organization.
   NOTE: Broker/owners will be reluctant to have their agents take advantage of a 'mentor' program if the mentor is another agent or broker/owner for fear that their agent will be recruited. Using an affiliate member provides a neutral party who can help the new REALTOR® become part of their local association.

5. Member benefit brochure – available in print and on the association website. Print version can be given to new members at orientation as well as included with dues billing if done through the mail. The link can be included in the dues billing notice if done via email. The member benefit brochure should be available at every member event.

6. Provide members with information regarding the statistical data available from state and national associations – where can they find it and how can they use it.

7. Provide new members with recommended resources that will assist them in getting their business started. Ideas for this initiative include introducing agents to the field guides available on REALTOR.org, online courses available at REALTOR.org, and classroom courses offered by the local, state and national associations.

8. Ask members how they want to receive information from their local association and customize how the association provides information to its members.

9. Require all instructors who teach for the association to include at least one REALTOR® resource in their training material for every three hours of class time.

10. Develop a training program that teaches REALTORS® how to use REALTOR® technology tools to grow their real estate business. This program can include a wide range of topics : creating a CMA; using twitter to stay in touch with information from NAR; using Facebook as a source of learning; blogs from national real estate educators and motivational speakers; using online agent rating program, etc. NOTE: this program must be continuously updated to insure that it is providing up to date information.

11. Work with other local associations to cross-market training programs and special events that the associations are offering. Attending an event sponsored by another association will help your members increase their REALTOR® network that they can use to generate future referrals.

12. The association president along with one member of the board of directors and one staff member visit each office in their association with permission of the broker/owner. These visits should focus on updating agents on what the association is doing as well as answering questions from agents.

13. Create "How To" videos to help members become familiar with the tools and resources available on REALTOR.org and to include the REALTOR® virtual library and field guides.

14. "Meeting Tips" – at each membership meeting share one or two resources available on IAR or NAR website with suggestions on how members can use the resources to improve their business.

15. Survey members asking them what REALTOR® resources they find helpful in their business. When possible, ask a member to provide a testimonial that you could publish with the resource.

16. Provide a podcast on your website of the guest speaker and the "Meeting Tips" (see #14) portion of member meetings so all the members can get the information.

17. Board of directors' select one question that they all ask REALTOR® members that they meet. This question may relate to a challenge that members are facing; a service that the board of directors is considering offering to its members, etc. At the next board meeting, the directors share the information that they received from the members they met. This feedback session should be an item on the meeting agenda labeled as 'Member Feedback' with a time allocation of 10 – 15 minutes.

18. Conduct focus groups semi-annually. The topics of these focus groups can be to confirm information that the staff and leadership will use to make an upcoming decision, or to gain information regarding where the members are at on specific issues.

19. Provide training for broker/owners that deal with issues/challenges that these members face on a daily basis. These training programs can also address changes that NAR is predicting will affect real estate professionals in the future.

20. Solicit testimonials from members that convey the benefits that they have realized from their REALTOR® membership. These benefits can address resources from national, state and local membership as well as the benefits that the agent has experienced through volunteering for the association. Examples – ‘I saved $140 last year by using the NAR Sprint Discount program’; ‘I earned over $4,000.00 last year through referrals that I made with other REALTORS® that I met through my volunteer work for the association’; ‘I improved my ability to generate referrals from past clients by using the information that I received at a seminar that I attended at our state REALTOR® convention’.

21. Share testimonials with members from experienced REALTORS® who have used REALTOR® resources to improve their business skills and enhance their business. These can be posted on association website, used as place cards on tables at member events, added to mailings that go out to members, etc.

22. Collaborate with other local associations to present training programs to your members that your association would not be able to afford to provide.

23. Annually conduct an e-survey to your members asking them to identify the three challenges that they feel will affect their business in the next twelve months. Leadership and staff will then use this information to determine what classes to offer. Survey information can also be used to send members information about on-line resources that are available to them that address the challenges that members mentioned in the surveys.

24. Conduct a breakfast with the president and staff that focuses on engaging members who have not participated in association activities during the past year. Members should receive a personal invite from the president and association executive via telephone calls, if practical, or a printed invitation. The goal of this session is to get members connected to the association who didn’t have the benefit of attending the new and revised member orientation and/or were at one time active in the association but are no longer.

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Appendix B
AE Workshop
Tips for Working with Volunteers

1. Recognizing and Rewarding

→ Find reasons to say ‘thank you’
→ Thanksgiving card – ‘thank you for helping our association’
→ National Volunteer Week activities
→ Respect them; listen to them; empower them
→ Publicize their work in their local newspaper and on social media
→ Display a picture collage of volunteers in action at member events; Facebook, etc.
→ Offer them valuable training – leadership, communication, conflict resolution
→ A framed quote on volunteering for the member’s office
→ Celebrate successes
→ Invite to local/state/ national REALTOR® events
→ Posters in meeting rooms: ‘We succeed because of our volunteers’
→ Publicize the results of work accomplished by volunteers

2. Conducting Volunteer Orientation Days in your association

→ Explain what volunteering is all about to members who might be interested
→ They learn about the association and you get to learn about them
→ If they are interested in volunteering they sign a form that explains the responsibilities of being a volunteer and their areas of interest
→ When the association has a need for a volunteer it simply selects someone from the ‘volunteer pool’ who understands the commitment and has expressed an interest in volunteering

3. Avoid the things that ‘Kill’ volunteer spirit:

→ Poorly run meetings
→ Predetermined results
→ Wasting of time
→ Board of director ‘override’
→ Rejection of new ideas
→ Lack of respect from other volunteers in the group

Appendix C
AE Workshop
Selecting and Training Future Leaders

1. *Selecting and mentoring leaders must be an on-going activity*

→ Members who are currently serving as leaders in other volunteer organizations.

→ Members who served as leaders in previous employment situations

→ Assign a member of a committee / work group a task that requires him or her to display some leadership traits

→ Send potential leaders to leadership training and evaluate their performance

2. *Minimum skill sets require:*

→ Team leader:
- role of the leader
- meeting management
- conflict resolution
- team building
- consensus building

→ Board member:
- importance of being a steward leader
- strategic planning
- problem solving
- recruiting and retaining volunteers
- selecting and mentoring leaders
- communicating with members

3. *Resources*

→ NAR REALTOR® Leader Programs L200 and L300

→ NAR leadership academy

→ Joint training programs with non-profits in your area such as the home builders

→ REALTOR.org

The future success of your association
depends on training tomorrow's leaders today.

Post AE Workshop
Recommended Action Plan

1. Meet with board of directors to discuss the concept of the 'Have To' and 'Want To' membership groups.

2. Determine whether your association is at risk of not being a viable organization by surveying your members to determine what percentage of your members are in the 'Want To' group and what percentage are in the 'Have To' group.

3. Review strategic plan to determine where this project fits among your current strategic initiatives.

4. Looking at a three year period, determine what percentage of your members should be in the 'Want To' group at the end of each year:

   ~ Year 1__________

   ~ Year 2__________

   ~ Year 3__________

5. Looking at the list of Suggested Association Initiatives, identify those that you feel are realistic in scope for your association and determine which ones you will implement in each of the next three years.

6. Decide whether each of the initiatives that you have chosen will be completed by staff only or whether volunteer assistance is required. Whenever possible, keep the length of the volunteer commitment as short as possible. These should be seen as task forces and not long term work group assignments.

7. Evaluate outcomes quarterly to determine whether changes are required.

Good Luck!!!!

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