

Effective Boards Must Survey their Members Regularly

Outstanding service leads not only to excellent member retention but also to significant growth in membership and revenues. Significant growth results because members who experience outstanding service become advocates in selling the benefits of membership. The challenge for boards is to ensure that their associations provide outstanding service by demonstrating a clear understanding of their members' needs.

Why Boards must survey their memberships

Only about 20 percent of the membership stands to serve on association boards, so boards usually do not reflect the demographic profile of their membership. Also, many board members see themselves as owners whereas most members view themselves as customers. Owners and customers demonstrate different expectations in a host of areas, including the kinds of services they want, the service levels they expect and the patience they exhibit for results.

Boards exist to see that members' needs are met. Because of these significant differences between boards and the members they serve, boards need to implement a member survey process to ensure that they are effectively meeting members' needs.

How client surveys complement financial audits

Sound financial resources remain the lifeblood for successful associations. This explains why most boards implement regular audits to ensure that their associations are on a solid financial footing.

An effective client survey process complements financial audits because it provides insights into how satisfied members are with the operations of their associations. Satisfied members are more likely to remain as members. Also, effective surveys highlight where members feel associations' operations need to be improved. Metaphorically, financial statements and audits provide your association with a score while client surveys provide with you with insights into why your score is where it is.

These insights also give you a perspective into where and how you can make changes to affect this score positively. For example, if your surveys show that your members are not satisfied with the educational opportunities provided, then you can use the survey results to begin to make the changes members want. Since the educational opportunities that associations provide are often a key member benefit, then improving the quality of this service ensures greater member satisfaction and therefore retention. Retention means more revenues and therefore better financial health.

Why independence is critical for both financial and survey processes

Financial audits are performed by outside financial experts to ensure the integrity of financial information. By the same measure, client surveys must be administered by outside experts to guarantee the integrity of the survey results.

If you are going to implement operational changes based on survey results, then the accuracy of the results becomes paramount. Working with reliable financial and client survey data helps ensure not only the financial health of your association but also that the operational improvements you are planning are meaningful and relevant to your membership.

Why it is vital to keep survey processes as simple as possible

Client surveys need to be kept as simple as possible. Long surveys and convoluted questions are a sure way to make the survey process more difficult to analyze and more difficult to accurately determine what changes are needed to improve services.

Client surveys are often made more complex than they need to be. It is futile to try and create an all-inclusive survey that will address everything at once. The power of surveys rests in implementing a regular survey process to make continual incremental improvements.

Summary

Boards need client surveys to help them meet their members' needs. A client survey process complements financial audits not only because it provides insights into the status of the financial results but also, more importantly, because it provides a perspective for how to improve financial status.