# nonprofit TECH SHOP

# The Ultimate Guide to Museum Membership Renewal *Automation and Engagement*

*A Comprehensive Resource by Nonprofit Tech Shop*

# Table of *Contents*

# Introduction

Memberships are the lifeblood of most museums. They fuel operating budgets, support educational programs, and sustain the vital work of preserving culture and history.

But here's the challenge: renewals and engagement.

Getting members to stay year after year isn't just about sending an annual renewal reminder. It's about nurturing relationships, delivering value, and making the renewal process seamless. For most museums, doing that manually is overwhelming and, frankly, not scalable.

That's where HubSpot comes in. Imagine automatically recognizing a member when they make an online purchase or buy tickets through a third-party system integrated with HubSpot—and instantly applying their membership discount. This level of integration not only simplifies processes but also enhances the overall member experience, ensuring they feel valued at every interaction.

This guide is here to help you tackle membership renewal and engagement head-on. You'll discover how to leverage automation to simplify and streamline the renewal process, ensuring no member falls through the cracks. We'll also dive into proven engagement strategies designed to keep your members active, connected, and excited about their involvement year-round.

Finally, we'll explore the tools that make all of this possible—empowering you to reduce the manual workload while delivering a better experience for your members. Let's get started.

## Chapter 1:
# Transforming Membership Programs for Museums: *A Look at the Data*

Membership programs have always been essential to museums, providing financial stability and a dedicated audience. However, managing these programs is increasingly complex.

Rising member expectations, competing demands for attention, and the need for seamless digital experiences have pushed museums to rethink their approach.

Recent data highlights the critical issues museums face in retaining and engaging members:

▶ **52% of museums** reported membership retention struggles in 2023, citing inconsistent communication and outdated processes as key obstacles.

▶ Retaining an existing member is five times more cost-effective than acquiring a new one.

▶ **62% of museum members** expect personalized engagement, yet only **31% of museums** have systems to deliver tailored experiences.

▶ Museums leveraging automated renewal systems saw a **35% increase in membership** renewals compared to manual approaches.

The path forward? Modernizing membership programs—recent numbers show that when done right (with the right tech!), this offers museums tangible benefits, from improving retention to enhancing operational efficiency:

▶ **Boost renewals:** Automated processes have been shown to increase retention by **20%-30% in nonprofit organizations.**

▶ **Create loyalty:** Members who feel engaged are **50% more likely to renew their membership** year over year.

▶ **Enhance efficiency:** Digital tools can **reduce administrative costs by up to 40%,** allowing museums to allocate resources elsewhere.

**Chapter 2:**

# The Power of Automation in Renewal *Management*

Membership renewals are a recurring pain point for museums. From members forgetting deadlines to cumbersome payment processes, the manual work involved often leads to lost time and missed opportunities. In an age where efficiency and member engagement are key to sustaining growth, automation is not just a convenience—it's a game-changer for retention.

## How Automation Works: Streamlining the Renewal Process

Automating the membership renewal process enables museums to reduce the burden of manual follow-ups while delivering more personalized and timely communications to members. By integrating a powerful Customer Relationship Management (CRM) system like HubSpot, museums can ensure they're maintaining strong relationships with their members through automated workflows and targeted messaging, all while cutting down on administrative tasks.

Here's how automation helps streamline the renewal process:

### 1. Pre-Renewal Reminders: Keeping Members Engaged

Automation tools allow museums to set up automated email sequences based on membership data, so members are reminded of upcoming renewals well in advance. With CRM-powered workflows, museums can deliver personalized communications that encourage timely renewals.

▶ **90 Days Before Expiration:** An automated email introduces members to upcoming benefits, such as exclusive events or new exhibits, and reminds them of their renewal date. Using CRM's dynamic content feature, museums can personalize these messages based on the member's specific tier or interests, making the reminder feel more relevant and tailored.

▶ **30 Days Before Expiration:** A follow-up email provides a progress update on the member's benefits, such as "You've attended three events this year!" This helps reinforce the value of their membership, reminding them of the experiences they've enjoyed, and the exclusive perks they'd miss out on without renewing.

## 2. Last-Minute Incentives: Encouraging Action

Even with proactive reminders, members may need an extra nudge. Automation can trigger personalized offers to motivate members to renew before their membership lapses:

▶ **7 Days Before Expiration:** A personalized email offers incentives like discounts, exclusive digital content, or VIP access to an upcoming event. CRM tools, such as A/B testing, can optimize the timing and content of these emails, ensuring the messaging resonates and drives action.

## 3. Post-Expiration Follow-Up: Re-Engaging Lapsed Members

After a membership has expired, automation takes over again to reach out to members who have lapsed, presenting them with a last-chance renewal offer:

▶ **Immediately After Expiration:** Automated workflows can send a "last-chance" renewal email, emphasizing the missed opportunities and highlighting the benefits of rejoining. CRM tools trigger these follow-ups quickly and consistently, making it easy to reach lapsed members without additional effort.

## 4. Personalized Member Journeys: A More Tailored Experience

One of the most powerful aspects of CRM automation is its ability to create personalized member journeys that enhance engagement and loyalty:

▶ **Automated Thank-You Emails:** Upon renewal, members automatically receive a personalized thank-you message, reinforcing their decision and showing appreciation for their support.

▶ **Tier-Based Follow-Ups:** Members at different tiers receive unique perks and offers. For example, premium members may receive exclusive invitations to events or behind-the-scenes access to exhibits.

▶ **Cross-Channel Outreach:** CRMs like HubSpot allow museums to extend their reach beyond email, sending SMS reminders for time-sensitive renewals or updates on new membership benefits.

## 5. Efficiency Beyond Renewals: Optimizing Backend Processes

Automation doesn't just stop at communication—it also helps simplify critical backend processes:

▶ **Payment Automation:** Payment processing is automated, reducing the risk of errors and ensuring that renewal fees are collected on time. Members receive automated payment confirmations, and the museum staff can focus on more strategic tasks.

▶ **Data Insights:** CRM tools offer robust reporting features, providing museums with insights into renewal rates, campaign performance, and member engagement. These data-driven insights allow museums to continuously refine their strategies and better target future campaigns.

## 6. Auto-Renewals: A Win-Win

An increasingly popular feature in CRM systems is auto-renewals. This function allows members to seamlessly renew their memberships without manual intervention, reducing friction and enhancing retention:

▶ Recent research reveals that **70% of members prefer auto-renewal options,** with 63% saying it makes them more likely to stay engaged with the organization.

▶ **According to a 2023 report,** nonprofit organizations leveraging automated reminders experienced significantly improved renewal outcomes compared to those relying on manual processes.

Combining AI-driven engagement, scalable systems, and meaningful personal connections empowers museums to future-proof their membership programs. This holistic approach ensures long-term growth, enhances member loyalty, and streamlines operations for sustainable success.

# Chapter 3:
# The Essential Toolkit for Membership Success

Effective membership management requires more than just good intentions—it demands the right tools. From automating communications to providing insights into member behavior, a well-chosen toolkit can streamline operations, enhance member engagement, and ultimately increase retention.

Let's dive into some top tools that can transform membership programs for museums.

## HubSpot for Nonprofits (Top Choice!)

HubSpot is an all-in-one CRM solution known for its powerful features tailored to nonprofits, including email automation, member segmentation, and personalized workflows. It's scalable and integrates seamlessly with marketing campaigns, making it a top choice for museums looking to manage their entire membership process in one place.

### HubSpot Features Breakdown

| Feature | Details |
|---|---|
| Ticketing | Enables ticketing for events and exhibits, with the ability to apply member discounts automatically. |
| Membership Management | Advanced CRM with segmentation and detailed member profiles. |
| Email Automation | Automated email workflows for reminders, renewals, and thank-you emails. |
| Custom Workflows | Create customized, member-specific workflows for renewals and engagement. |
| Segmentation | Segment members based on behavior, engagement, and donation history. |

| Event Integration | Integrates with event management tools for member-specific invites. |
|---|---|
| Payment Integration | Integrates with Stripe, PayPal, and other platforms for automated payments. |
| Reporting & Analytics | Comprehensive data analytics to track engagement and renewal rates. |
| Ease of Use | Moderate learning curve, great for larger museums with complex needs. |
| Customer Support | Excellent, with nonprofit-specific pricing and dedicated support. |

**Pros:**

▶ Highly customizable workflows for automating renewal management.

▶ Integration with many other tools and apps, making it adaptable to your needs.

▶ Detailed reporting and analysis to improve membership retention strategies.

▶ 40% off for nonprofits

**Cons:**

▶ May take some time to fully set up and customize to your specific needs, especially for larger or more complex membership programs

▶ While the platform is user-friendly overall, some of the more advanced functionalities may require additional training or support to master

## Wild Apricot

Wild Apricot is a membership management software designed for small to mid-sized museums, offering a simple and intuitive interface that helps automate payments, renewals, and event registration. It's particularly well-suited for organizations looking for an affordable, all-in-one tool without the complexity of larger systems.

## Wild Apricot Features Breakdown

| Feature | Details |
|---------|---------|
| Membership Management | Simple member database, with tools for tracking memberships and renewals. |
| Event Registration | Built-in event registration system for workshops, exhibits, and more. |
| Online Payments | Secure payment processing and renewal reminders. |
| Email Templates | Pre-built templates for newsletters, event invitations, and renewal notices. |
| Website Integration | Easy integration with your museum's website for member login and payments. |
| Mobile App | Mobile app for managing memberships and events on the go. |
| Reporting | Basic reporting on membership growth, renewals, and event registrations. |
| Ease of Use | Very user-friendly with a low learning curve for small to mid-sized museums. |
| Customer Support | Good, but can be slower during peak times. |

### Pros:

▶ Simple, affordable, and user-friendly, ideal for small to medium-sized museums.

▶ Built-in event registration and online payment processing.

▶ Easy to set up and doesn't require technical expertise.

### Cons:

▶ Limited customization for complex needs.

▶ Reporting features are basic and may not provide all the insights needed for larger museums.

▶ Lacks advanced features compared to HubSpot or **MUSEUMS+.**

## MUSEUMS+

MUSEUMS+ is a specialized tool for museums, offering a comprehensive suite of features that go beyond membership management to include event coordination, analytics, and more. It's ideal for museums that want a platform specifically designed to cater to their sector's needs.

### MUSEUMS+ Features Breakdown

| Feature | Details |
|---------|---------|
| Membership Management | Specialized features for tracking membership tiers, renewals, and benefits. |
| Event Coordination | Manage exhibitions, workshops, and special events with integrated tools. |
| Analytics & Reporting | Advanced reporting tools to track member behavior, event attendance, and more. |
| Donor & Sponsorship Tracking | Track donations, sponsorships, and related member benefits. |
| Member Communications | Automate email communications for renewals, thank-yous, and event invitations. |
| Mobile Accessibility | Full mobile access for both members and staff. |
| Payment Integration | Secure, integrated payment options for memberships and donations. |
| Ease of Use | User-friendly, but tailored more to museums with specific needs. |
| Customer Support | Good, with a focus on museum-specific issues. |

### Pros:

▶ Designed specifically for museums, so it addresses sector-specific needs.

▶ Strong event management tools and integration with membership management.

▶ Advanced analytics to help museums understand their member base.

## Cons:

▶ Higher cost compared to general CRM systems like HubSpot or Wild Apricot.

▶ Limited integrations with tools outside of the museum sector.

▶ Not as flexible as more general CRM solutions for unique operational needs.

## Tix

Tix combines membership management with ticketing features, offering a unique solution for museums that are heavily dependent on ticket sales and event revenue. It simplifies membership management while streamlining ticketing for exhibitions and events.

### Tix Features Breakdown

| Feature | Details |
|---|---|
| Membership & Ticketing | Integrated system for managing both memberships and event tickets. |
| Ticket Sales | Real-time sales tracking and online ticketing. |
| Event Registration | Manage event registrations along with membership renewals. |
| Payment Integration | Secure, automated payment processing for both tickets and memberships. |
| Real-Time Analytics | Reports on ticket sales, attendance, and member activity. |
| Donor & Sponsorship Tracking | Manage donations and sponsorships alongside memberships. |
| Ease of Use | Simple to use but focused more on ticketing than membership management. |
| Customer Support | Reliable support with a focus on ticketing-related issues. |

**Pros:**

▶ Perfect for museums that rely heavily on ticket sales and events.

▶ Real-time data for ticket sales, member renewals, and event registrations.

▶ Integrates membership management with ticketing for a more streamlined operation.

**Cons:**

▶ Focus is on ticketing, so the membership management features are not as advanced as those in specialized tools like HubSpot.

▶ Limited customization and reporting for non-ticketing-related features.

▶ Best suited for larger institutions with a high volume of ticketed events.

## Tessitura

Tessitura is a robust enterprise-level CRM and ticketing platform widely used by arts and cultural organizations, including museums. Known for its powerful integration of ticketing, memberships, and donations, Tessitura offers extensive customization options for complex membership programs.

**Tessitura Features Breakdown**

| Feature | Details |
|---|---|
| Membership Management | Advanced membership tracking and segmentation with customizable member profiles. |
| Ticketing Integration | Robust ticketing features integrated directly with member benefits. |
| Donor Management | Comprehensive donor management features, ideal for museums with large donor bases. |
| Event Management | Integrated event scheduling and registration features for members and non-members. |
| Reporting & Analytics | Advanced data analytics and reporting to track membership engagement and donor performance. |

| | |
|---|---|
| Customization | Highly customizable to meet complex and specific organizational needs. |
| Integration | Strong integration with financial systems and external databases. |
| Ease of Use | Steeper learning curve, designed for larger organizations with dedicated IT resources. |
| Customer Support | Excellent support but can be more expensive due to enterprise-level pricing. |

**Pros:**

▶ Comprehensive, all-in-one solution for membership, ticketing, and donation management.

▶ Highly customizable and scalable for larger museums or institutions.

▶ Strong reporting and analytics tools for measuring engagement.

**Cons:**

▶ Steep learning curve and higher cost make it more suitable for larger museums with advanced needs.

▶ Implementation can be time-consuming and may require dedicated IT support.

**Pro Tip:** Choose tools that integrate with each other to avoid creating silos of data. Integration ensures smoother operations and a unified view of member engagement.

## Nonprofit Tech Shop Case Study

The Minnesota Historical Society (MNHS) successfully transitioned from Tessitura to HubSpot and saw a 25% increase in donor engagement. This migration allowed MNHS to leverage HubSpot's robust CRM capabilities, streamlining their membership renewal process and enhancing overall member experiences.

The switch to HubSpot proved to be a game-changer, simplifying workflows and improving data visibility across departments.

**READ THE CASE STUDY**

nonprcfit
Driving Donor
Engagement: How MNHS
Achieved a 25% Boost with
*HubSpot Migration*

# Chapter 4:
# Building Lasting Engagement and *Measuring Success*

Now that we've explored the tools and technologies that can streamline your membership processes, it's time to focus on how to leverage these resources to build long-term relationships with your members.

Successful membership programs thrive on two key pillars: engagement and continuous improvement. While automation tools help ensure efficiency and consistency, it's the ongoing value you provide to your members—and your ability to track and adapt—that drives loyalty and renewals.

Delivering personalized experiences year-round and using data to inform your strategies strengthens your membership base and positions your museum for long-term success.

## Delivering Value Year-Round

Engagement is the heartbeat of a successful membership program. Without regular touchpoints and exclusive benefits, renewal automation can only go so far. The key is to provide members with ongoing value that strengthens their connection to your museum.

Here are a few proven tactics for keeping members engaged:

▶ **Exclusive Benefits:** Offer behind-the-scenes tours, member-only webinars, and sneak peeks of upcoming exhibits. These personalized experiences create a sense of belonging and exclusivity. For example, the Smithsonian Institution reported a 30% increase in engagement rates in 2023 after launching a members-only online archive.

▶ **Targeted Email Campaigns:** Segment members based on their interests or demographics and send updates tailored to their preferences. This ensures your communications are relevant, increasing engagement and renewals.

▶ **Social Media Groups:** Private groups on platforms like Facebook or Instagram allow members to interact with each other and with the museum, fostering a sense of community. Sharing member highlights or behind-the-scenes content can deepen their connection to your mission.

▶ **Event Engagement:** Exclusive member events—like previews or virtual Q&A sessions with curators—create valuable touchpoints that encourage deeper loyalty and emotional investment in your museum.

## 1. The Role of Feedback

To ensure your engagement strategies resonate, regular feedback is crucial. Send surveys to members after events or interactions, asking questions like, "What did you love? What can we improve?" This not only shows members that their input is valued, but it also gives you actionable insights that can guide future programming.

## 2.Tracking Metrics That Matter

You've likely heard the saying, "What gets measured gets improved," but there's a reason it's stuck around—it's a powerful principle for driving success. Engagement strategies are only effective if you track and analyze the right metrics.

Combining automation, engagement strategies, and data-driven insights enables museums to revolutionize their membership programs, freeing up time, strengthening member relationships, and ensuring long-term financial stability.

Here are some key metrics to track:

▶ **Renewal Rate:** This indicates the percentage of members who renew each cycle. A renewal rate above 80% is typically considered a strong benchmark, though it may vary depending on your membership base and goals.

▶ **Engagement Metrics:** These include email open rates, event attendance, social media interactions, and website visits. These metrics give you a snapshot of how engaged your members are with your content and offerings.

▶ **Lifetime Value (LTV):** This metric calculates the total revenue generated by a member over the entire duration of their membership. It's an essential indicator of long-term member retention and financial health.

## 3.How Analytics Drive Strategy

Leveraging analytics tools like HubSpot's dashboards allows museums to visualize trends, pinpoint areas for improvement, and adjust strategies in real time. For example, if event attendance drops, you can quickly determine whether it's due to poor timing, ineffective communication, or programming that doesn't align with member interests.

## Continuous Improvement

The cycle of measuring, refining, and executing is essential for ongoing success. Use insights from your analytics to:

▶ **A/B Test Campaigns:** Test different messaging, timing, and formats for your email campaigns to see what resonates best with your members.

▶ **Refine Engagement Tactics:** Based on feedback and data, introduce new tactics to keep members engaged—whether that's more personalized communication, new benefits, or unique member events.

▶ **Adjust Programming:** Use member preferences and feedback to guide future programming decisions, ensuring that you're always offering something that your members value.

Consistently iterating and refining strategies based on data allows museums to stay agile and better meet the evolving expectations of their members.

# Chapter 5:
# Future-Proofing Your Membership Program

The key to long-term success for museums lies in their ability to evolve. As the digital landscape continues to change, museums that embrace innovation and adapt to new tools are best positioned to thrive.

This final chapter will explore how integrating cutting-edge technology and forward-thinking strategies can help you prepare your membership program for the future.

## AI-Driven Membership Management

With the rise of AI, museums now have the ability to offer deeply personalized experiences for their members. For instance, **HubSpot's AI-powered tools** can analyze member engagement data and automatically craft tailored renewal messages based on past behavior.

Such technology makes it easier to understand member needs and anticipate their desires, improving both retention and satisfaction.

## Scalable Systems: The Power of Flexibility

Museum CRM systems are increasingly leveraging artificial intelligence to streamline membership management and personalize communication. For example, the Metropolitan Museum of Art in New York City adopted SMS-iT's CRM system to enhance member engagement. The museum implemented targeted campaigns based on detailed visitor data, offering personalized benefits and creating exclusive experiences. As a result, membership grew by 20% in just one year, while satisfaction scores saw significant improvement

This approach illustrates how a tailored CRM system not only simplifies management but also drives meaningful growth.

## Focus on Relationships: The Human Touch in a Digital World

Even in an increasingly digital environment, personal touches remain essential. While technology can automate routine tasks, it also enhances personalization. For example, HubSpot can help craft digital notes that feel thoughtful and tailored to individual members. For more traditional gestures, like handwritten thank-you notes or personal phone calls, automations and tools in HubSpot can be set up to ensure tracking and standardization—making sure no supporter is overlooked in your personalized approach. These small but impactful gestures reinforce that members are valued as individuals, not just as data points.

## Embrace Innovation, Ensure Sustainability

Combining AI-driven engagement, scalable systems, and meaningful personal connections enables museums to future-proof their membership programs. This holistic approach ensures long-term growth, enhances member loyalty, and streamlines operations for sustainable success.

With the right tools, your museum can continue to provide exceptional experiences for your members while adapting to future challenges.

# The Final *Word*

*Museum membership management is crucial for fostering long-term relationships with your audience, driving member loyalty, and creating impactful experiences that resonate with your community. A well-managed membership program goes beyond renewals; it's about building a sustainable, engaged community that supports your museum's mission and goals.*

Whether you're a small museum looking to strengthen member engagement or a larger institution aiming to streamline operations, effective membership management should be at the heart of your strategy.

This ebook has explored the essential elements of a successful membership program, from automating renewal processes to personalizing member experiences. We've highlighted the importance of leveraging data insights and technology to ensure that your membership program remains agile, effective, and scalable.

Now, it's time to put these insights into practice. Assess your museum's membership needs, explore the strategies we've outlined, and take actionable steps toward building a robust, member-centric program that aligns with your museum's vision.

Curious about how HubSpot can transform your museum's operations? Contact Nonprofit Tech Shop to learn more about tailored CRM solutions
*for your institution!*

LET'S TALK