

# MEMBERSHIP SITES 101



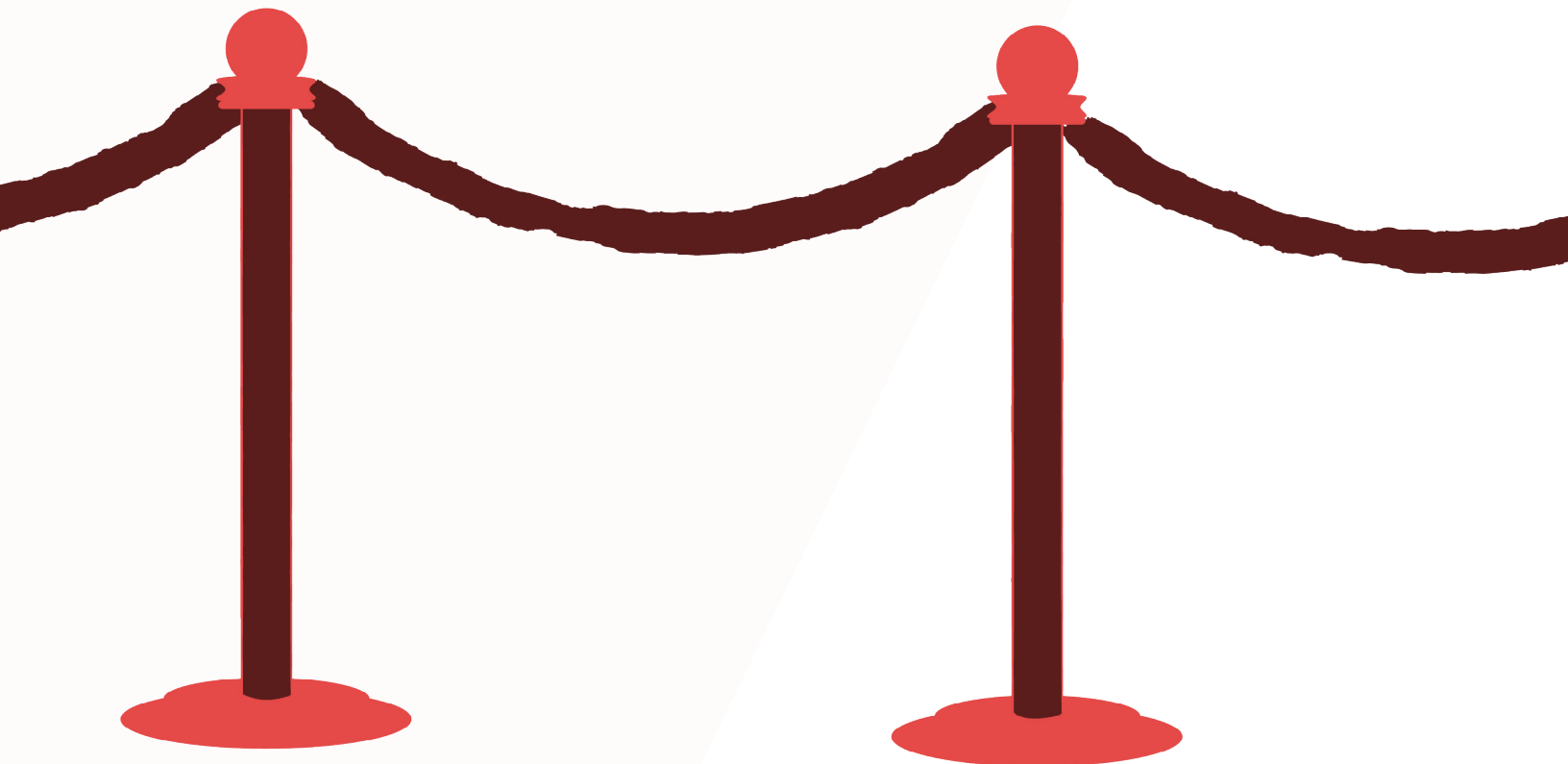
ONTRAPORT



## ABOUT THIS EBOOK

### Membership Sites 101

This ebook will walk you through the ins and outs of building and running a membership site, from idea to execution, with the goal of collecting recurring payments from customers. Membership Sites 101 will familiarize you with membership sites, help you determine if the membership product model suits your business, and show what you stand to gain from launching one. By the end, you'll be able to take an objective look at your product in a competitive marketplace and gauge whether or not you're ready for a sustainable and scalable membership site.





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## CHAPTER 1

# THE BENEFITS OF A MEMBERSHIP SITE

Many entrepreneurs dream of being able to work from a beach in Tahiti or a yurt in Big Sur at least once in awhile. But most business owners are tethered indefinitely to their office, and the idea of leaving their business and touring the world — or even taking a weeklong holiday — seems absurd.

If only there were a way to secure an automated passive income stream ...

Enter the gated membership site.

This subscription product doesn't require anyone physically at the wheel to guarantee an income, and it requires little to no daily up-keep. Successful membership sites combine the right technology with valuable content and a sales funnel that reliably converts leads into sales.

You may already have a successful web presence. Perhaps you're a blogger with a strong following, have an ecommerce site or are publishing podcasts or videos. Or maybe you just have a list of contacts receiving your monthly newsletter. Regardless, adding a membership component to your web presence can help you earn more money.

**Membership sites offer benefits including:**

- **EARN RECURRING REVENUE** Running a membership site allows you to stop trading hours for dollars and start earning a (relatively) passive, recurring cash flow.
- **A SPACE FOR USER INTERACTION** Membership sites enable members to leave comments on your pages, thus opening the floor for interactivity on your part through which you can foster customer relationships. You can even launch a full-blown forum site aimed at member interaction and open discussion.
- **THE OPPORTUNITY TO INSTANTLY UPDATE YOUR PROGRAMS** Update your site and course modules with new, relevant information on-the-fly.
- **ALL YOUR CONTENT PUBLISHED IN ONE PLACE** Quickly and easily publish your written content, audio, video and file downloads in a single, convenient place thereby giving members of your site the ability to log in and consume all your on-demand content whenever it suits them.
- **THE OPPORTUNITY TO MAKE A DIFFERENCE FOR OTHERS**  
A membership site gives you the ideal platform to help others gain something they want in life and avoid pain. If you're an expert or coach in a particular field or niche, membership sites provide a platform to share that knowledge with others without draining yourself dry.

This guide is designed to prepare you to set up a membership site. First, we'll cover what membership sites are and how they benefit businesses. The remaining bulk of this guide is meant to help you work through the thought process of planning your membership site. This involves asking the tough questions that force you to take a critical look at your product and your market to make sure that you have the right match established. You'll then have the opportunity to strategize about your membership site content and how you want to deliver it. This entails diving into questions about membership levels, pricing and access. Lastly, you'll learn how to finalize your live site and drive traffic to it.



## CHAPTER 2

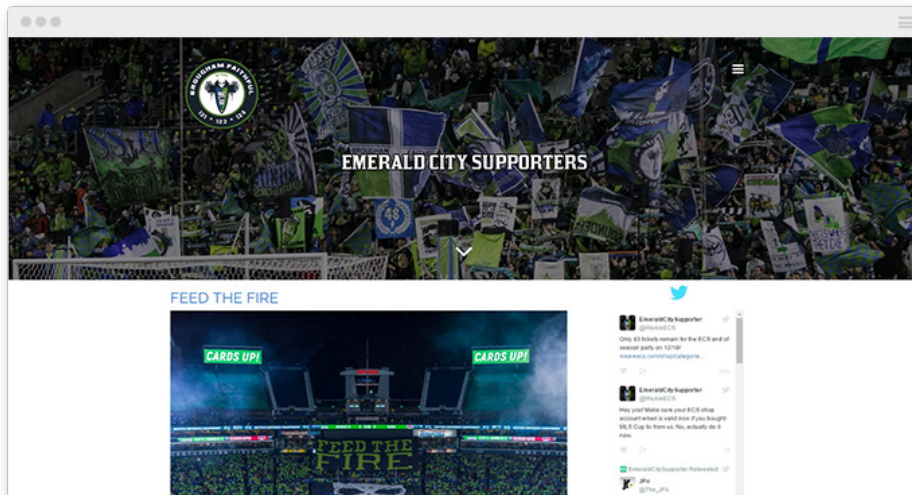
# TYPES OF MEMBERSHIP SITES

A membership site is a website that people join to gain access to exclusive, “members only” features, content or benefits. Some are free (like [Facebook](#)); some offer free services but require payment for “premium” access (like [Spotify](#)); others require payment to access anything but the most introductory content (such as [Copyblogger](#)).

**Some examples of successful membership sites include:**

- Fan sites such as [Emerald City Supporters](#) bring fans of the Seattle Sounders soccer club together through a gated site that allows them to access members-only discounts on merchandise and exclusive information about the team.
- Coaching sites such as [GuitarTricks](#) offer a free membership to teach people to play guitar from beginners to advanced using in-depth video lessons.

- Community forum sites such as [Windy City Blogger Collective](#) grant members a seat among a professional network of bloggers along with access to a multitude of exclusive content and invitations to blogging events.



- Business support sites such as [The Restaurant Expert](#) offer a vast amount of content and resources that assist members in running a successful, independent restaurant.

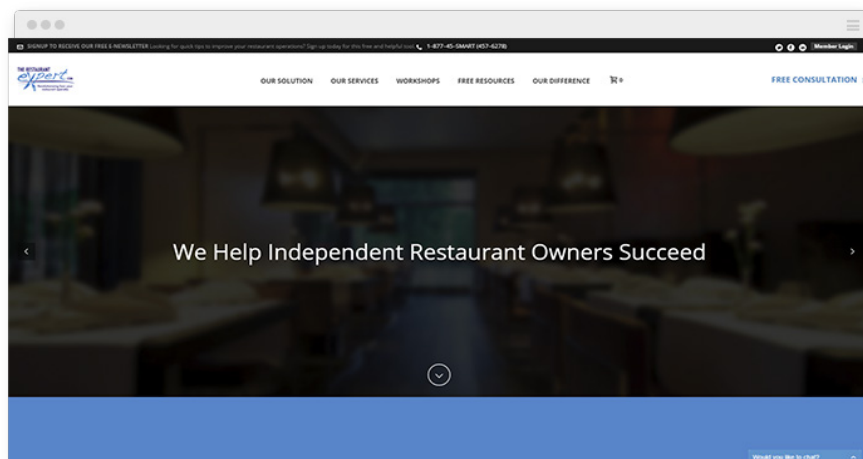




These are just a few examples of many; the idea is that people will pay you for the right to access content that you create or curate. They pay you and, in return, you send them the credentials to log in and start consuming your great content. Once your content is created, you sit back and make money. Boom!



Of course, you've got to be creating and adding great content on a regular basis to make it worth their money. The technology that makes a membership site work is, at its core, a tool that allows you to hide content from nonmembers while revealing the hidden content to members.





## CHAPTER 3

# PRELIMINARY STEPS

### IS A MEMBERSHIP SITE RIGHT FOR ME?

It's important to determine if a membership site is right for you before you invest significant time into creating and designing a site. The following questions will help you hone in on whether a membership site will benefit you and will provide you with information to guide the construction of your site. The more precise your knowledge is in each of these areas, the greater the value you'll provide to your members.

Ask Yourself The Following Questions:

**Am I genuinely an expert on this topic?**

- Do you know enough that you could offer real value to others looking to learn about this topic? Why would someone turn to you as opposed to any other knowledgeable source for this information? The stronger your answer, the more credibility you can build into your sales funnel.

- If you don't think of yourself as an expert, can you make a good argument for why people should come to your site for the content you're offering? Just because you are not the expert does not mean that you shouldn't have a membership site.
- Have a clear and concise argument for why people should trust your knowledge over others. It may be that you are really well-connected and can link like-minded people or that you have the resources to create the site where others can congregate or that you have great taste and can curate the best work by others in one place.

**Am I genuinely passionate about this subject?**

- It's not worth spending time on something that doesn't get you excited to get out of bed in the morning. Without passion as the driving force, the lack of authenticity in your products will shine through. If you don't love it, don't do it.

**What am I offering? Be specific:**

- Is it access to a collection of knowledge?
- Is it access to a community of like-minded individuals?
- Is it access to discounts?
- Is it access to a specific course?
- Is it access to you or someone else?
- Is it something else?

**Is there a market for what I am offering? Who is my target audience? Be as specific as you can.**

- What are their hopes and aspirations?
- How can what I offer help them reach these goals?
- What are their fears and frustrations?
- How can what I teach help them avoid this pain?
- What do I know about their lives?

- How old are they?
- Are they men, women or both?
- What are their occupations?
- Do they have kids?
- Is the market already being served?
- What other solutions are out there? (Hint: this is your competition.)
- Who are they?
- What do they do well?
- What do they do not-so-well?

Where is the value to the member who chooses me over my competitors?

- Why would someone give you his/her money for access?
- If there are others in the market, how do you compare/compete?

How am I going to establish credibility? (If you're already established in your space, this may be the easiest step. If not, consider the following ways to build credibility):

- Will you start a blog?
- Will you create an email campaign to build relationships?
- Will you offer education for free (like an ebook or free workbook on a membership site)?
- Will you collect testimonials from people who know and trust you?



## CHAPTER 4

# STRUCTURING YOUR MEMBERSHIP PROGRAM

### WHAT'S IN IT FOR THE MEMBER?

The preliminary steps of this process had you hovering around 30,000 feet to think broadly about what it is that you're offering and why people will pay you to access it. This next section brings you down a few thousand feet to more specifically identify what knowledge and expertise you have, how you want to present your knowledge and expertise, and how you want to structure your membership program.

Decide what type of content you want to offer the members. As noted above, what you're offering can take the form of a community, information, discounts and more. Content types can be divided into several categories.

The first category of content is interactive in nature and requires you to interact more often with your members. Within this category are:

- Q & A sessions
- Live events (e.g., podcasts, videocasts or meet-ups)
- Open discussion boards

The second category includes content that is standalone; once created, this content should require little work on your part, with the exception of keeping it up-to-date. Within this category are:

- Downloadable PDFs
- Web pages
- Workbooks
- Video
- Audio recordings
- Software

In the third category, content can be standalone or it can require interaction, depending upon how you set it up. Within this category are:

- Quizzes and surveys
- Education or training lessons

The key to a successful membership site is that there's a reason for people to continue to be members. Even free membership sites need to give people a reason to stick around. Some sites have a compelling ongoing incentive such as access to a particular community, the link to their favorite band or a chance to talk to you. Others have to build in a reason to stick around; this is one of the key reasons we suggest limiting access to all of your great content outright. If all the information is available upfront, there's less of a reason for people to return later. At the same time, offering a disparate mountain of content all at once can overwhelm users which, in turn, results in a drop-off of members.

So, we encourage you to create a membership that structures the release of content over time.

## DELIVERY MODELS

**FIXED TERM:** Member gets access to x content. The fixed term model offers a highly profitable opportunity in that you can update your content over time and add extra media or tools. That accumulation of bonus content on top of your existing content can be combined into a premium product that you sell separately at a higher price.

**TIERED:** This is the standard "pay more, get more" model. You can provide levels of access, such as Silver, Gold and Platinum; more info is given as the metals get more precious, and the price increases.

**CONTENT VERTICAL:** Each piece of content or bundle of content is unique to each level of access.

**SEQUENTIAL (DRIP):** New content every x days/weeks, each week/month/day, etc.

**COMBO:** Anything you can dream up.

There are still plenty of decisions to make about format even once you know you want to release content over time. Ask yourself following:

**How many releases will there be?**

- Will I set it up as a course with a series of lectures or as something else?
- Once they have consumed a set of content, can members select the next set of content, or is it pre-determined for them?
- How often will I release content? Daily, every other day, once a week, once a month?

**Who is responsible for creating fresh content for members?**

- What systems or practices can I put in place for generating content so that I'm sure to always have enough content to create sufficient, ongoing value for my members?
  - How will I assign homework and account for learning/retention of the material?
- Will I review/critique members' assignments?
  - If so, how, and how many of them?
- Will I give quizzes and/or tests?
  - If so, check ONTRAPORT's WordPress Survey and Quiz Tool Plugin.





## CHAPTER 5

# LEVELS OF ACCESS, PRICING & COLLECTING FUNDS

Now it's time to figure out the best pricing model for your membership site. Consider and be informed about what others are charging for similar products, but don't be bound by it. You might create a budget solution to undercut other solutions, hoping to be the "no-brainer" option for price-conscious prospects. You might create a premium solution that's far more expensive and valuable than the rest, catering to the high-end market. Either way, it's good to know what others in your niche are charging for access to their sites.

Ask yourself the following questions to determine your pricing strategy:

1. What do my competitors charge for similar products?
  - Will I charge more?
    - Why? This could be to frame yourself as a higher-end brand or because you feel your product is better. Be sure to be able to communicate the reasons you cost more to your customers.
  - Will I charge less?
    - Why? If your plan is to undercut your competitors, ensure you can still make money. If you have a less established brand, make sure you can clearly articulate why a customer should buy your product.
2. Will I charge one set price for members or create a graduated membership structure where each higher level of membership costs progressively more?
  - If I'll have multiple membership levels, how many?
  - Will there be a free level to get people "in the door"?
  - What will the membership levels be called? Bronze, silver and gold? Good, better, best?
3. Will it be a weekly, monthly or yearly recurring fee? Or will members just be charged a one-time access fee?
  - Is there a start-up or set-up fee?
    - If so, how much will it be and why?
  - Will I offer a free trial?
    - If so, how many days will the free trial last, and what will it entail?

#### 4. How am I going to get paid?

- Do you want to integrate your payment into a larger solution like a CRM (such as ONTRAPORT) or a membership site management solution (such as Kajabi)? Note: These solutions will often be able to walk you through your choices for collecting funds from your members.
- Do you want to sign up for one of the common aggregators (like Paypal, Stripe or Square)?
- Do you want to set up a payment gateway and merchant account on your own?

**Note: If you're going to ask for recurring payments, some payment solutions might not work.**

We strongly recommend that you map out the path a member will take from the time he/she is exposed to your content through his/her experience with your membership site.

#### **Other considerations:**

1. As you organize your content, think about offering materials that support one another. For example, you might consider offering:
  - An interview with a leading expert as an mp3 audio file after a blog post on a related subject matter
  - A checklist or guide as a PDF
  - A complete transcript of the video you offered in the media window
  - A PDF summary of the lesson
  - Great case studies that exemplify what you were teaching in the lesson

2. Regardless of your content and delivery format, think about including discussion forums. This allows your members to foster a sense of community of like-minded people and builds their relationship with your site, reducing the chance that you'll lose them as customers.
3. Regardless of your content type, and even if you've structured it as something you don't have to actively manage, plan occasional direct interactions with your members. This communication can be in the form of chat office hours, a live video or an audio Q & A. It will increase the value of your content and make your members more likely to stick around.
4. Think about setting up milestones or rewards for your members as they complete assignments or participate in certain ways. Everyone loves to be recognized.
5. Think about setting an end date to the membership so that people know that after a certain period of time, they should have consumed the available content. This is only one model but has garnered some strong support. After the given time period is up, you can always move them into other programs.
6. Think through what you want to have happen if individuals click on a membership level for which they don't have access. Do you want them redirected to a page that lists the benefits of that higher membership level, with an order form at the bottom for them to purchase it?



## CHAPTER 6

# DRIVING TRAFFIC TO YOUR MEMBERSHIP SITE

There's still one more piece to plan before you build your site: distribution and promotion. How are you going to let people know that your great content is waiting for them? Let's look at several ways that you can make this happen.

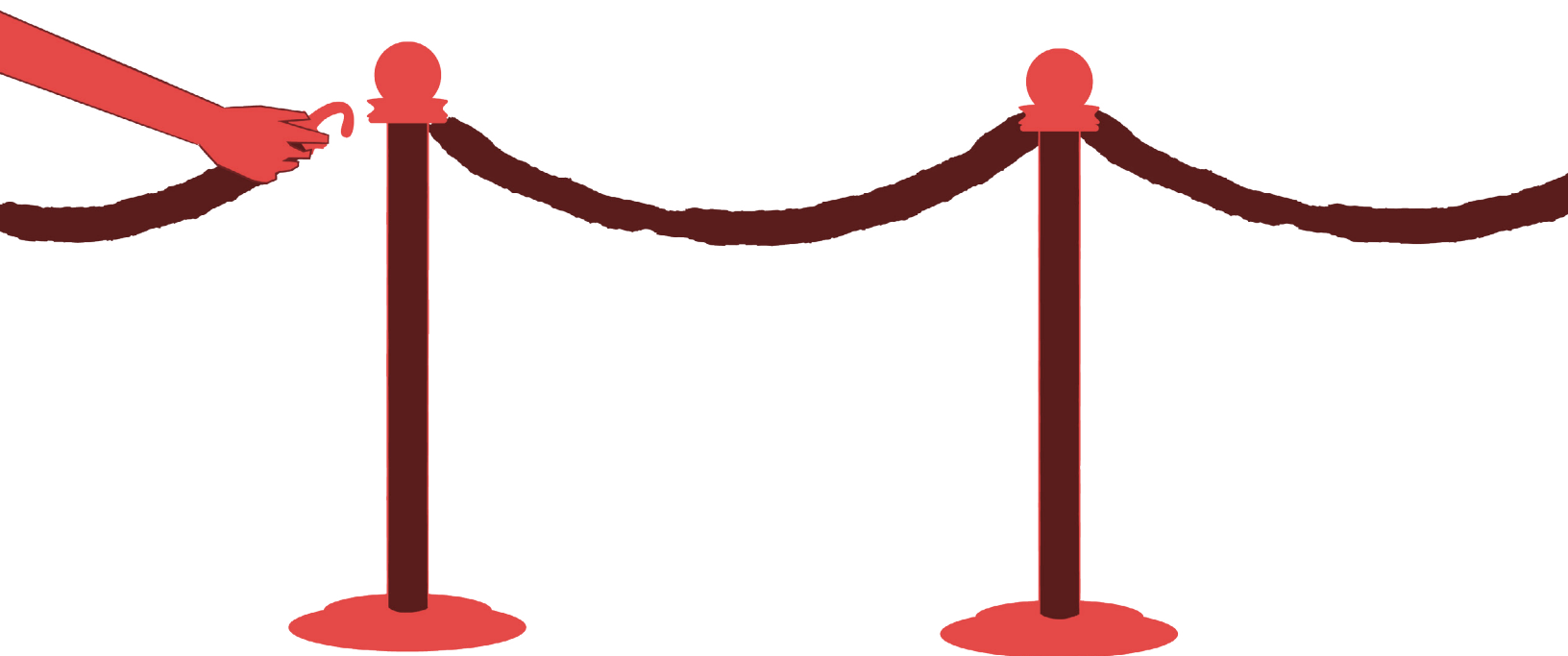
**1. SALES PAGES:** This is the most straightforward way to drive membership sales. Without a sales page, you're leaving potential sales on the table. Your sales page is where you close the sale for your membership site. The focus should be on:

- The benefits of your membership, rather than the features: Benefits tell the consumer how the features will make their life better. Concentrating on the features leaves the consumer to figure out how they would benefit.
- Responding to expected objections
- Offering several ways (buttons, links, etc.) to get to membership site order form

Other ways you interact with potential members can also direct them to this sales page. Link your sales page to your blog, your website and your email marketing, at least periodically.

**2. SALES FUNNEL:** A sales funnel approach is more broad and focused on obtaining contact information from potential customers. That contact information is used in focused marketing efforts over the course of weeks or even months to develop a relationship that moves them past objections before pitching them the sale.

**3. THE PRE-LAUNCH:** The pre-launch technique is a marketing strategy to build buzz around your membership site launch. You can do this through a blog, Facebook page, newsletter or website that already has some attention. These are your strongest marketing tools where you can offer some free content to get people excited. Use the database you already have to send a teaser free PDF download that gets people interested in your membership site. You can also pre-sell the membership so that people are waiting for it to launch.



4. **AFFILIATES/PARTNERS:** The final way to get people to your membership site is to enlist the help of affiliates/partners. The beauty of affiliates/partners is that they do the marketing for you, and you don't have to pay them until they are successful. Basically, it's marketing with no upfront costs. Affiliates are people to whom you pay a commission for driving traffic to your membership site. Commissions can go as high as 50%, but you only pay when they refer someone who actually buys.

## CHAPTER 7

# MEMBER RETENTION STRATEGIES

Without loyal members, your membership site is ill-fated to become a barren wonderland. Think abandoned carnival: The rides are left standing but there's not a soul in sight. While getting new members to join is undoubtedly a key focus, a sustainable membership model demands a low churn rate. Retaining existing members ensures recurring income.

The industry average retention period for a membership site is a dismal three months. Employ these strategies and blow that number out of the water.





1. **TEASE UPCOMING CONTENT:** To build anticipation around your soon-to-be-released content, give members a glimpse of what's coming. This not only incentivizes them to stick around but also builds organic buzz which is likely to spread to non-members.
2. **GRANT EARLY ACCESS:** You may or may not be familiar with Amazon's Lightning Deals on featured items peppered throughout the site. These are time-sensitive deals that sell out quickly. Early access to these deals is one of many reasons it pays to purchase Prime, Amazon's exclusive membership. To that end, offering early access to premium content is a great way to get people talking about your product.
3. **OFFER DISCOUNTS:** Think of your membership site as a rewards program: The longer you're a member the more perks you get. For those pursuing a paid membership model, discounts can be a great retention tool. Just be careful not to undermine the the value of your offer.
4. **GAMIFICATION:** Gamification — in all its forms — can be a turnkey solution to guarantee engagement on your membership site and turn your visitors into loyal fans. Some examples of gamification are progress tracking for online courses, badges for completing tasks or even social sharing opportunities for bragging rights. There are plenty of gamification apps and plugins that integrate with membership software. Do some Google searching and find the one that works best for you.



## CHAPTER 8

# SETTING UP YOUR MEMBERSHIP SITE

### BUILDING YOUR SITE

Now it's time to begin building your site. The full scope of this decision is beyond this workbook, but your answers to all the questions above should help you narrow down your options.

There are several overarching ways that you can get your site designed and up.

#### 1. HIRE A WEBSITE DEVELOPER TO CUSTOM-BUILD YOUR SITE:

This is not for the faint of heart or those tight in the pocketbook. There are some really great designers and developers out there who can make your website really fantastic. There are also many who will promise the ocean and deliver a puddle — a very expensive puddle. That being said, the very best websites are created by pros who aren't cheap. If you have the funds to pay someone to do this work or if you have the skills yourself, this can be a great option for a wonderful website.

**2. USE A PLUGIN FOR WORDPRESS OR SIMILAR SITE:** There are a ton of products that have pre-built memberships frameworks that work on a variety of web platforms. These frameworks allow you to plug in your content and requirements and often allow for some significant functionality for tracking and reporting. They do require you to do the design and can be time consuming to set up.

ADVANTAGES	DISADVANTAGES
User friendly - easy to operate and update	Navigational stucture determined by layout you choose
Free to use, cheap to build	Frequent software updates may lead to compatibility issues that may break or suspend plugins
SEO friendly	Need basic SEO knowledge to take advantage of SEO-friendly system
Many membership plugin options	Re-ordering pages and categories cumbersome - requires scripting knowledge
Can be used as blog, website, or membership site	Theme customization can be costly
Plugins far extend WordPress basic functionality	Vulnerable to bugs and sql injection attacks

**3. USE A SOFTWARE SOLUTION SPECIFIC TO MEMBERSHIP SITES:**

These solutions, such as Kajabi, are designed specifically for membership sites and allow for increased reporting, tracking and functionality around membership sites.

**4. USE A SOFTWARE SOLUTION TO MANAGE YOUR MEMBERSHIP SITE IN COLLABORATION WITH YOUR OTHER MARKETING EFFORTS:**

These solutions, such as ONTRAPORT, allow you to fully automate the cultivation of your sales funnel all the way from initial contact with a potential member through making them an affiliate/partner who markets for you, all in one place.



## CHAPTER 9

# FINAL THOUGHTS

Membership sites require that your work is front-loaded but then offer you a chance to sit back and get paid with minimal effort as members access your information. Once you've put in the work and planning, you'll have the luxury of extra downtime to unwind with your family or friends and take that well-deserved vacation. You don't have to slog through the constant daily business maintenance of one-to-one sales of your content. Armored with this knowledge, use a membership site to engage with as many people as you can draw into your funnel.

# ONTRAPORT

ONTRAPORT's mission is to support entrepreneurs in delivering their value to the world by removing the burden of technology. We deliver on that mission by creating software, offering services, and educating the entrepreneurial community.

For over a decade, we have made a difference for thousands of businesses, their community, and our own staff, which is why we've received countless awards for innovation, revenue growth and company culture.



Our flagship marketing automation product is a subscription software that provides our customers with all the tools they need to start and grow their businesses through the advantage of an all-in-one platform. In addition, we also offer a large collection of free resources, courses and educational products that support entrepreneurs at any stage throughout their journey.

[ONTRAPORT.COM](https://ontraport.com)