

Public policy dialogue & advocacy



Members & member services

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This workbook has been written by Bernard Chege and edited by David Irwin

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Members & member services

1. Introduction

Business member organisations (BMO) engage in private public dialogue and to advocate an improved business environment. A business member organisation brings together business organisations in a given sector and, inter alia, advocates their common interests. For example, the Kenya Association of Manufacturers comprises businesses working in the manufacturing sector while the Kenya Association of Tour Operators draws its members from businesses in the tourism sector. A BMO's activities are geared towards the provision or enhancement of public goods in the specific sector from which the members are drawn.

For BMOs to be able to influence public policy, they need to demonstrate to government that they genuinely represent their defined constituency. Indeed, the greater the proportion of the constituency that they represent, the greater their credibility with government. Generally, this means that they need members but there is a challenge for business associations in that businesses will reap the benefits of policy reforms irrespective of whether they join an association, since policy reform is a public good.

A public good is a product or service that can be enjoyed without reducing its availability to others. Examples include changed regulation, improved street lighting, a better police service and roads without potholes. Since all businesses benefit from public goods, there is no incentive for businesses to join the BMO to secure the benefit. BMOs that seek to generate public goods will only survive if they can additionally offer selective benefits – that is benefits available only to members – because rational individuals will not join if they can receive the benefits without paying the costs of membership.

Attracting new members, retaining existing members and keeping members' active is a constant challenge faced by BMOs. This handbook aims to introduce ways to attract and retain members and additionally to suggest other ways in which BMOs can generate revenue.

By the end of the handbook you will:

- Understand a range of methods to recruit members;
- Recognise various approaches to retain members;
- Identify how to encourage members to pay their prescriptions;
- Appreciate a range of income generating services.

2. Importance of members

Members are the lifeblood of any organisation. By definition, a BMO is a business member organisation and hence cannot exist without members.

The bigger and more committed membership that a BMO has, the stronger it is able to champion its members' common interests. The organisation is more effective if it can show that it represents a large percentage of the sector. In addition, members pay fees that provide revenue to finance the BMO's activities. Further, the members' representatives in the BMO bring in ideas and leadership that help the organisation to play its advocacy role effectively.

Recruiting and retaining members are key challenges that confront BMOs. BMOs also face the challenge of coming up with unique services that keep the members committed to the organisation.

3. Recruitment

Businesses join an association because they value something that the association is offering. If there is nothing businesses value in the BMO, they are unlikely to join – and they will certainly not renew.

Before engaging in recruitment, it is advisable to have a clear understanding of the following:

- a) **What would interest businesses into joining** – it is helpful to understand what is happening in the BMO's business sector(s). What are the emerging trends? What are the threats and opportunities now and in future which would impact on the sector?
- b) **The real value of membership** – when inviting a potential business member to join the association you need to sell value that the member will derive from the membership. This may be accreditation, professional status, networking opportunities, or even capacity building.
- c) **Best way to approach the potential member** – businesses receive numerous recruitment messages in any given year. The potential member will take notice of the messages that will help to solve a problem or a need that has already been identified. This is why researching in a) and b) above is important as it takes the BMO to businesses that are on the lookout for the solutions offered.
- d) **Recruitment process** – What does the process look like from the potential member's view? How long and what kind of questions are asked in each stage? The shorter the process the better.

The mnemonic AIDA – Attention, Interest, Desire and Action summarises the above checklist and helps the BMO to understand the recruitment process from the potential business member's point of view.

As BMOs look to grow their membership, there are many strategies and tactics that they can use to attract new members. The following are some of the most effective ways to recruit new members:

3.1 Establish the BMO's range of services

BMOs need to be clear about the activities in which they will engage to serve and support their members. It is important to offer a range of benefits and services to members – so that they will be willing to pay, and to continue to pay, their annual subscription – but not all members will be attracted by the same services.

A range of possible services is outlined in Section 7 below. The services that a BMO chooses to offer will need to meet the needs of the existing members and the potential members. The BMO will need to decide whether the members will receive these services as part of the membership or they will pay extra. In the latter case, the BMO will also need to consider whether the members could find them more cheaply outside the organisation.

One key service of any BMO is representation. Members will have issues with the business environment they operate in. They will look to their BMO to take up these issues on their behalf by advocating appropriate reforms. This service is always provided as part of the membership package.

Understanding the issues affecting the sector also helps the BMO to:

Identify availability of potential members

As a BMO is identifying this pool, it should also look for businesses that are not obviously in the sector but also those who have any interest in the sector. A BMO serving construction companies may also include suppliers to the construction industry like hardware and earthmoving equipment dealers etc. A BMO with many members has several advantages including a strong revenue base, a blend of leadership skills to borrow from, and a strong voice when advocating for members' interests.

Ascertain how potential members can be reached

A member organisation must reach out to potential members to interest them in joining. It is therefore important to establish how to reach them. Publications, invitations to highly publicised events, advertisements in the media, and member referrals are some of the ways of reaching out to potential members.

3.2 Hold a membership drive

Membership drives are useful tools to expand a BMO or enhance its name recognition. Conducting an annual membership drive will keep the BMO foremost in the minds of existing and potential members. It will also raise the BMO's profile in the public arena.

The following tips will help the BMO to conduct a successful membership drive:

Use existing members

Using the existing members is by far the best and most cost-effective method of recruiting new members. Existing members sell the BMO to potential members by

underscoring their experience as members. This makes them more believable than any other form of recruitment.

Giving incentives to existing members by rewarding those who generate the highest number of new members would be a great motivator.

Offer incentives

Offering incentives motivates businesses to join the BMO. The incentives may include:

- Discounts – potential business member can be offered a discount by joining within a given period;
- New membership levels – this helps to widen the target market and to add variety to the group;
- Business offers – e.g. advertising opportunities during events, on website, and in BMO publications.

3.3 Engage new members

Once you have signed up a new member, you need to work hard immediately to engage with that member. Interaction does not have to be complicated. It could be:

- Welcoming new members with a membership pack and provide a membership certificate to put on the wall;
- Profiling a selection of new members in the BMO's newsletter – this gives them publicity but also ensures that they feel warm towards you;
- E-mailing new and recently joined members, reminding the member of the benefits and encouraging them to use a particular service, say the website (and providing a password if part of the website is members only);
- Printing, or at least making available on the website, a programme of meetings with dates, locations and topics for presentation or discussion;
- Getting new members involved quickly, if you can. Make them feel important. Invite them to participate in events, such as a breakfast or a lunch, or in a meeting to discuss sector needs and association responses;
- Giving vouchers offering discount on a paid-for service provided by the association.

The interaction can be as simple as a phone call.

3.4 Research members' needs

Soon after a business has joined, possibly even straight away, ask them about the most important reasons for joining. This will help you refine both the services that you offer and the messages that you use to attract new members.

A BMO needs continuously to research members' needs or risk losing them for not delivering the value they expected when they joined. Knowing this value and delivering on it is one of the most influential ways to engage the members and keep them from lapsing.

There are two suggested ways to collect this information from the members:

- Use the new member application form to ask:
 - What benefits are expected from the organisation;
 - What they are missing from other organisations;
- Regularly (at least once a year) conduct a survey of all members to get their feedback on the offerings they want. This is because, more often than not, member expectations change from year to year. The following questions may be included in the survey form:
 - What are three things that the organisation should continue doing?
 - What are three things that the organisation should stop doing?
 - Which benefits does the member take the most advantage of?
 - Would the member recommend the organisation to a friend? And why?

Armed with this and other information from the research, the BMO can restructure the benefits and the way it avails them, to the satisfaction of the members. The satisfied members will then be only too happy to refer new members to the BMO.

3.5 Promote membership through social media

The BMO can use a well-presented website to showcase to potential members the benefits of being a part of the organisation.

Existing members can also be encouraged to refer potential members to the website know what the organization stands for, benefits of being a member, who are the members and how to apply for membership.

The website would be used to also publish the calendar of planned events.

3.6 Host a networking event

A networking event for existing members can be used for recruitment by encouraging them to bring along guests who represent potential business members. This event is then used to promote membership packages and give potential members insight into the mission and goals of the group. The existing members work as ambassadors by promoting the BMO through sharing of their experiences with potential members.

The BMOs achievements would be outlined in such an event and trophies, certificates and awards displayed as indicators of the milestones attained.

Below are suggested strategies that can be used to convert non-members attendees into members:

- a) **Offer price incentive** – the incentives could be in the form of introductory discounts;
- b) **Develop relevant programs** – if non-members are not converting to member after an event, it could mean that they do not find the event relevant to their needs;
- c) **Market the association** – spread the word how the association can help businesses who join the membership by outlining the key services and successes.

3.7 Avoid a complex joining process

The membership joining process should be as simple as possible. Completing pages and pages of forms, demanding lump sum payment of annual fees, asking for introducers, etc can make the process tedious and unnecessarily long. For some well-established BMOs, stringent measures may be a necessity. On the other hand, new or less established ones may require a relaxed joining process.

3.8 Sensitise staff on everything related to the organisation

The staff need to know and understand the purpose and goals of the organisation. They also need to know the need and process of conducting the membership drive. The goal here is to ensure that each staff member can answer any organisation-related question and be confident in the process of recruiting new members. A reference to the Frequently Asked Questions would be a good starting point for the staff members in preparing for answers to questions from potential members in a recruitment drive.

3.9 Display BMO colours and logo

The colours and logo help others identify the BMO. All staff members and others engaged in the drive should wear uniform or other clear symbol that clearly indicates they are part of the organization.

Banners may also be placed strategically where they will be easily seen by the target members. Displaying the banners at the entrances where the drives are held ensures early visibility as the potential members access the in the premises.

3.10 Advertise in the print and electronic media

This is an expensive way of getting members but has a wide reach. It includes running adverts on tv and radio. A BMO will therefore need carefully to select the stations and prime time when the target audience is watching tv or listening to the radio. Carrying adverts in newspapers or putting inserts in magazines which are read by the target audience is another method. For example, advertising in business oriented newspapers will reach business executives who make decisions on which member organisation their business should join.

4. Retaining members

In common with all businesses, it is far easier to retain a member than it is to recruit a new member.

ASAE, the Centre for Association Leadership (formerly known as the American Society of Association Executives), reports that the mean renewal rate for a trade association is 91 per cent. They do note, however, that associations with a rapidly growing membership tend to have lower renewal rates than associations with a steady or declining membership. This is because associations which are growing quickly have a higher proportion of first year members and first year members typically renew at a lower rate than long term members.

Incentives may therefore assist in persuading businesses to join an association, but generally the stronger the incentive, the lower the renewal rate compared to members who joined with no incentive.

Ways of motivating the members include:

a) Hosting professional events

BMOs should regularly hold events which may include an annual expo, a quarterly lunch, or training. These events bring the member organizations together to exchange ideas and give them opportunities to market their businesses. Offering fresh speakers and sought-after topics in each event gives the members a sense of belonging and pride in their organization.

b) Getting feedback from existing members

Regular members' feedback helps the BMO to continuously improve its service to the members.

Once a new member has joined and, perhaps, had time to experience some of the different services provided by the association, it is sensible to ask the member for their views about what they value most.

Undertake surveys of the membership periodically to understand which benefits and services are most valued. An annual member survey should be conducted and where a change in member benefits has been effected as a result of the survey, the change should be broadcast to the existing members. They will not only be impressed that their concerns have been addressed, but they will likely spread the word to non-members.

By asking the existing members for their opinions, the BMO is able to improve the benefits to appeal to the general membership.

c) Regularly communicate with members

Put in place a communications plan so that you can keep members up to date with the benefits and services that are of most interest to them – as well as providing general intelligence about the business environment, the economy etc – and ask members for feedback.

Think carefully about the opportunities to engage with members and evaluate the outcomes.

If you already have a website, you may want to think about using social tools (such as Facebook or LinkedIn) to encourage more networking; consider creating a wiki within the members' area of your website to encourage peer group support. Think about ways in which you can use your website to offer additional content to members. Many people join associations for the networking opportunities – so ensure that you provide the means for networking and encourage members to exploit the opportunities.

Also regularly communicate values that members have gained in the course of the year. It may be a training that impacted certain skills, a networking trip or a lobbying initiative.

A BMO should therefore take advantage of every opportunity to communicate to its members. Events and functions, direct mail or social media should be used continuously in availing information to members.

Regularly communicating with the members keeps them abreast of their organization, makes them feel valued and enhances their sense of belonging.

d) Provide membership cards

Members feel like they are part of something special when they are issued with membership cards or other kits. In addition to the card allowing free or discounted access to the BMO's services, the BMO can negotiate with key associate organisations to allow the card holders free or discounted access to their services. E.g. a membership card can provide access to libraries, events, information or other partner benefits.

e) Think ahead

Associations need to lead – rather than to follow – their members, not least because one of the benefits from association membership is that associations can be drawing members' attention to what is happening in the environment. Consider how your members' expectations might change – and think about possible future competition.

Undertake research formally when necessary but never forget to gather information and market intelligence informally from a range of sources. And use that to keep your members up to date.

f) Leverage on 'Brand' advocates

A number of members are passionate about their association and take every opportunity to talk about it to other members. Identify these brand advocates and build a relationship with them with the aim of using their passion to drive membership loyalty.

Remember that every interaction with a member is important. If handled well, it will make them feel warm about the association but, if handled badly, it will be more likely to encourage them to leave, or not to renew their membership.

Some associations may be large enough to have a membership officer, or even a membership department, whose role is to attract new members. But the BMO should feel responsible for engaging with, and thus retaining, members.

g) Others

- Benchmark with other BMOs;
- Create intra-business opportunities;
- Create affiliation/corroboration with other BMOs locally and abroad;
- Identify sub-groups where BMO is made up of different subsectors or professionals.

5. Membership plans

None of the above will succeed without a plan. BMOs should therefore prepare a written plan for attracting and retaining members, probably as part of their overall business plan. A typical plan might include the following elements:

- Background: membership trends over the last couple of years, membership potential (size of sector by number of businesses and contribution to GDP), competition etc;
- Assumptions: it may be necessary to make assumptions about the state of the economy, availability of resources etc and the effect that these might have on the successful implementation of the plan;
- Targets: the association's strategy will set out objectives for membership (and these should be summarised in the membership plan if it is a separate document) with targets for number of new members recruited during the period and number of existing members who are retained;
- Recruitment: this section describes the activities that will be undertaken to recruit new members including, inter alia, visiting prospective member businesses, telephone calls to prospective members, marketing via a third party, e-mailing prospective members, advertising in the press, seeking press coverage in the newspapers (advocacy success often leads to the recruitment of new members) etc. The section also describes how businesses will be targeted including lapsed members;
- Retention: describe the activities that will be undertaken to ensure that the association continues to offer a range of benefits and services that are valued by the members; this includes communications, surveys etc;
- Budget: this section outlines how much money will be required for the plan;
- Timetable: not everything can be done at once, so there needs to be a schedule of implementation of the plan;
- Evaluation: as with all other activities undertaken by the association, there should be recognition of the need to evaluate the plan; describe how results will be tracked and analysed. Assess the cost and the benefits, build up the services that work and ditch those that do not.

6. Encouraging members to pay subscriptions

Most BMOs have multiple sources of income and do not expect membership fees to cover all their costs. Indeed, there is merit in diversifying the sources of income, which will make the BMO more resilient to economic shocks.

The Professional Associations' Network in UK reported that 44% of 2015 revenue for associations in that country came from members' dues. The American Society of Association Executives stated that 46% of revenue for trade organisations in USA came from membership dues in 2016 while professional organisations had 30%. An article by Amanda Howe for Scribble Solutions, Inc, in 2018, indicated that an average of only 39% of BMOs' revenue came from membership dues.

In their 2016 financial statements, the Kenya Association of Manufacturers raised 51% of their income from members' dues up from 41% in 2015. Amongst

professional organisations, the Law Society of Kenya relies on members for about 19% of its income.

Members' dues, nonetheless, are the primary source of income for most BMOs. It is an important indicator of members' commitment to their organisation. And unlike most other income, it can be used by the BMO in whatever way the BMO deems fit. Selling training requires that you deliver training; selling certificates of origin requires that you deliver certificates of origin; selling participation in trade delegations requires that you manage trade delegations. You may make a small contribution on these, or may see them as a loss leader. But the subscription income can be used to cover the costs of representation and advocacy, to prepare and distribute a newsletter, to set up and maintain a website, etc.

Outlined below are some of the ways that members can be encouraged to pay their subscriptions:

Begin the renewal process early.

Starting the renewal process early helps to prepare members well in advance. This removes the pressure, sense of urgency and ambush that members feel when they have just a few days to pay the subscription. In addition, member organization are factor in the dues to the BMO in their budget.

Some members do not renew because they simply forget. It is therefore important to remind members early (and often) to renew their memberships. In the correspondence, the BMO should remind the members of all the great benefits that they receive by being members.

Offer incentives

Incentives help to motivate members to pay up their dues. Incentives for early payment may include a discount on the dues, and a reminder that they can only access the services if they are current – that is, they have paid their fees – members.

Be transparent

Encourage members to look at the budget which shows how their dues are used. Let them know what they are paying for. If members know where their dues are going, they will be less reluctant to pay especially when they see that they may forsake some of the benefits if they do not pay up.

Post those who have not paid

A post in the notice board or in a reminder mail which lists those that have paid or not helps to exert peer pressure to get the late members to pay their dues.

Suspension

Any member who has not paid the dues can be suspended from enjoying the benefits of the BMO. Allowing such a member to attend all events and enjoy member benefit creates animosity in the membership.

Make it easy to pay

A tedious process of payment of subscriptions and other dues is likely to lead to default. Payment can be made easy by:

- Use of online process;
- Offering payment in instalments.

Send statements

Statements act as reminders to the members for them to meet their obligation to their organization. The statement should explain how much is due and how to pay. Issuing of regular statements also portrays professionalism in managing a member's account in the BMO.

7. Member services

BMOs exist to provide services to their members. Often, they start because businesses have a grievance about a public policy. But to take on a life of their own, they need to do more than simply representing and advocating for their members. If they do not, the danger is that members will not keep paying their subscriptions. So BMOs need to provide a range of services which not only benefit their members but also are sufficiently attractive that members want to remain members.

The officials therefore need to be proactive and innovative in developing benefits that members will be willing to participate in.

BMOs need to think carefully about the services that they may be able to provide. They need to consider:

- Which services might be provided at no cost (other than the cost of membership);
- Which services might incur an extra charge;
- For those extra, paid-for, services, BMOs need additionally to consider whether they should only be available to members or whether they would also provide them to non-members, albeit at a higher cost.

Some of these services include:

Representation

One of the key benefits of joining a trade association is the ability to support the organization in influencing legislation that affects the industry. The combined resources of the members of an association can be used to lobby key stakeholders more positively towards the goals of the association. With the increased level of government regulation in many industries, this is an absolute necessity for the survival of all businesses in the field.

This service is realised by:

- Identifying issues of concern;
- Lobbying for changes in public policy affecting all members;
- Supporting individual members on specific cases.

Networking

Networking forums are opportunities for business members to do business with each other or collaborate to the mutual benefit of the different businesses.

Networking fora can be organized through:

- Regular business meetings;
- Industry clubs and committees;
- Internet-based business contacts;
- Newsletters and publications;
- Membership directory and database.

Training

Training and education programs are member benefits that are offered by BMOs. These programs enable the business members to enhance the skills in their organizations and also be updated in their professional fields. Some training may be full certification while others are short term seminars and workshops. Members also have constant opportunities for peer-to-peer learning and mentorship where they share experience and knowledge. Training can be achieved through:

- Management training
- Technical and vocational training
- Development of training manuals
- Development of training curricula and standards

Certification and licensing

In addition to the usual training and education organised by BMOs, many BMOs provide certification and licensing programs that are not available to non-members. This certification enhances professionalism in the industry. In other cases, the certification is a necessity for a member to practise or to be competitive in the field. Certification and licences provide a level of prestige and reliability in the minds of clients who seek the services of any member.

Trade and market development

This service helps the business member organisations to expand their market and sources of inputs. The following activities help the BMO in offering this service:

- Organising exhibitions and trade fairs;
- Facilitating market research;
- Providing information on export markets;
- Bringing together buyers and sellers;
- Organising trade delegations;
- Facilitating group marketing (possibly allied with standards);
- Enabling group procurement;
- Developing codes of conduct.

Advice and consultancy

Businesses are always keen to remain competitive through improved operational processes and to be aware of statutory requirements. BMOs offer this service to their members through:

- Best practice benchmarking among members;
- Business counselling and mentoring;
- Information on regulatory requirements;
- Legal services;
- Financial and taxation advice;
- Accountancy and bookkeeping services;
- Quality standards, ISO 9000;
- Environment standards, ISO14000;
- Hygiene standards, HACCP and ISO22000.

Office facilities and infrastructure services

- Secretarial services;
- Computer services;
- Telecommunications;
- Internet access;
- Providing arbitration services.

Delegated government functions

- Business registration
- Issuing certificates of origin
- Registration of samples
- Develop and supervise industry standards

As mentioned earlier, a BMO needs to consider carefully which services to provide and whether these are expected by members as part of their subscription or whether an extra charge could be levied for them. The BMO will require to decide whether:

- To charge a low subscription – and then rely on additional charges for services;
- To charge a high subscription – and give members a wide range of service in return;
- The services make a sufficient 'offer' to attract members because they perceive the benefits are worth more to them than the cost of membership.

It is not enough simply to offer a range of services and hope for the best. The BMO needs to ensure that the service offered is second to none. That way, members will continue to use the service – and will recommend that other businesses join as well. The BMO will also need to ensure that all of the services confer benefits for the members.

8. Benefits for members

There are many benefits associated with membership organisations including:

- Forming a cohort of businesses who can engage in dialogue with regional, national and local government on policy issues of collective interest;
- Forming a body for official contact, consultation and contracting with local and national government or foreign organisations wishing to deal collectively with businesses;
- Contributing to building a comprehensive database – including evidence of practices and lessons from other countries – enabling the association to understand other stakeholders' viewpoints on public issues and to advocate more effectively on behalf of its members;
- Uniting like-minded businesses towards common goals by the creation of a forum for exchange of ideas;
- Creating a body for which can empower and build capacity of members;
- Enhancing the capability to implement larger scale activities than any one member could undertake on its own;
- Enabling small businesses to increase their bargaining power in regional, national and local affairs of mutual interest;
- Promoting the integrity, public accountability and professionalism of all the members.

9. Conclusion

The survival of a BMO hinges on its membership. Without sufficient members, the BMO is limited in pushing its advocacy, meeting its financial obligations and offering services to members. BMOs must therefore be innovative in recruiting members and entrepreneurial in their services so as to retain and increase their membership.

Further reading and further information



- 8 Ways to Increase Association Membership, Marisa Cogan
- 12 Time-tested Tips for Membership Recruitment, Scott Oser Associates, 2015
- 5 Must-have Strategies for Successful Membership Recruitment, Melissa Harrison
- How to Manage Your Membership, NCVO (The National Council for Voluntary Organisations), 7/4/17
- The Subcontractors Association of Northeast Ohio SANEO blog, 5/4/2018
- The TJB American Business Magazine 5/3/2010
- The benefits of TRADE Associations – Trade Association Forum, United Kingdom, Nov 2009
- Building the Capacity of Business Membership Organisations – World Bank 2005



This series of advocacy competence handbooks – divided into modules and units – is intended to support business member organisations (BMOs) to engage in public private dialogue and to advocate improvements to the business environment. You are free to use the units and other materials provided that the source is acknowledged.

Foundation Unit

0. Introduction to advocacy & dialogue

Module 1: The policy process

1.1 Understanding policy and regulation

1.2 Policy analysis

1.3 The process of formulating and reforming policy

Module 2: Policy positions

2.1 Identifying, understanding & framing issues

2.2 Preparing policy positions

2.3 Influence & argumentation

Module 3: Communications

3.1 Communications & public relations

3.2 Media relations & use of social media

3.3 Interview skills

Module 4: Written communications

4.1 Branding & house styles

4.2 Writing press releases

4.3 Preparing written documents

Module 5: Managing advocacy projects

5.1 Planning an advocacy project

5.2 Budgeting & financial management

5.3 Evaluation of advocacy

Module 6: Managing a BMO

6.1 Leadership, strategy & business planning

6.2 Governance and ethics

6.3 Members and member services

Module 7: Research

7. Research methods



The Business Advocacy Network is an initiative of Irwin Grayson Associates and can be found at businessadvocacy.net. IGA can be found at irwingrayson.com and contacted at david@irwin.org. You can follow David Irwin on twitter at [@drdaavidirwin](https://twitter.com/drdaavidirwin).
