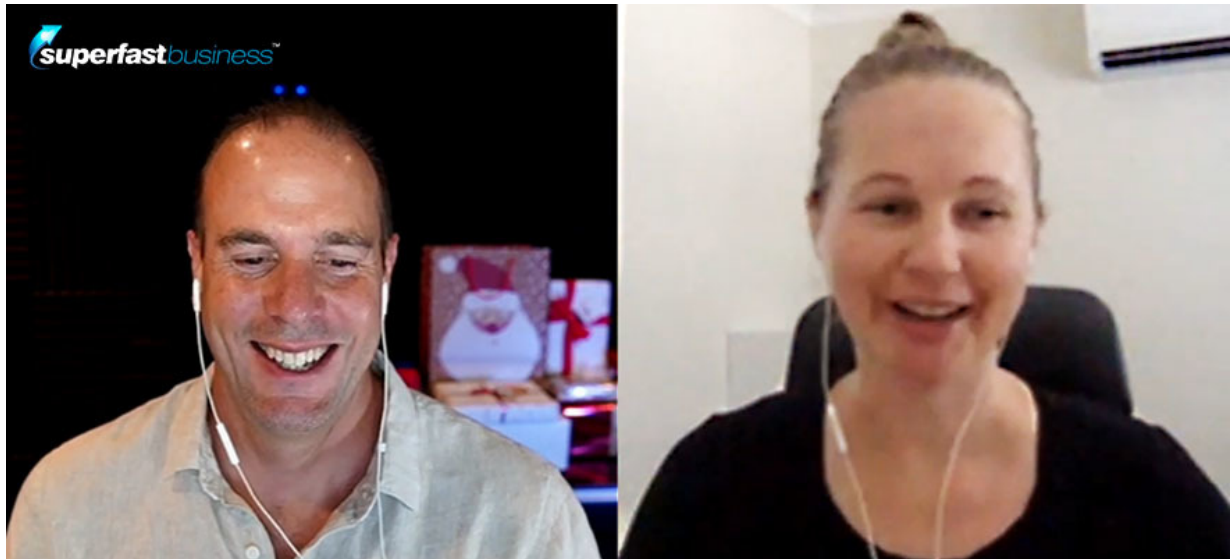




# Exploring Membership Back Office Roles



Paid membership admin tasks getting the better of you? James and Your Online Team's Kat Jarman go behind the scenes to identify what you should and shouldn't do. Help is just around the corner - tune in and find out more.



**James Schramko and Kat Jarman**

**James:** James Schramko here, welcome back to SuperFastBusiness.com. And today, we're going to go behind the scenes of a membership site, and we're going to have a look at what actually gets done in the back office. Because we're often focused on the front of house - getting customers, converting customers, even keeping customers in our membership.

We talk about our membership offer, we talk about what we're delivering for the membership. So it's all very client-focused and owner-focused or the membership expert, but there's this whole other world of running a membership, and that is admin. You know, it's kind of a boring, dry topic. However, it absolutely has to get done.

So along for the ride for this episode is my good friend, [Kat Jarman](#), welcome to the call.

**Kat:** Thank you for having me.

### **A solution for business owners levelling up**

**James:** I brought you along, Kat, because you operate a business that supplies team members, for the purposes of the exact things we're talking about today. So I thought you and I would have a fantastic chat. You've got your website over there at [YourOnlineTeam.com](#).

And I'm going to share some of the things my team does. And anything we talk about today, you could basically get done for you by Kat, in terms of just plugging in. And that's why I think it's a wonderful solution you've come up with there, because as we're building a lot more successful members in our ecosystem here at SuperFastBusiness, there will be an ongoing need for things like your offering and what my team is doing.

And of course, my team doesn't work for anyone else. They're just working on my business. So I'm not selling this as a service. I've often advocated people should build a team. I talk about it in my book, [Work Less, Make More](#). I've published training inside SuperFastBusiness on [How to Recruit Your Next Team Member](#). I'm a co-owner of a [recruitment business](#) where we help people find their team members.

But of course, a lot of that is a long-term play. And it does require some hands-on leadership from the expert/membership owner. And that's not always practical, or it's not necessarily practical right now. So why don't we just kick off there, Kat, and talk about where your service is stepping in to help people?

And then we'll talk about the kind of activities that actually need to get done from a membership so that someone listening to this can assess whether they want to, A) do it all themselves, B) go down the long-term path and hire, train and transfer their skills and build their own team, or C) immediately get help from someone else on a contractor basis to just step in and take over and do it for them, so they can get on with growing their business.

And maybe they can revisit option B later. I don't think they'll ever visit option A. Hopefully not. So why don't we talk about the types of memberships you've currently been serving to give us a feel for what's happening out there?

## **The stuff that goes on in the back**

**Kat:** Sure. So as an online business management agency, we have worked with loads of membership site owners, and it's actually one of our favorite businesses to work with, because not only are they awesome businesses, they also have very similar needs in terms of how, like, every membership needs a retention strategy, or every membership needs to either be launching or be open and closed or like, all the sales strategies are quite similar.



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"A lot of memberships need similar things in terms of the admin and the back end systems that nobody thinks about."

KAT JARMAN

And one thing that we really like as an agency who, we love the back end operations and the systems, is that a lot of memberships need similar things in terms of the admin and the back end systems that nobody thinks about or nobody wants to think about. And what we're finding lately, or all the time, really, is that a lot of membership owners, they get really excited at the start, because having a membership is great, and they can see, James, you're really good at telling them the vision of the recurring revenue and how amazing it's going to be, and it really is.

And then there's this pain that comes along, after you've done all the setup work, you've opened your membership, you've launched, and then all of a sudden you might have, I don't know, maybe like 50 or 100 members and things are going amazing, but at the same time your to-do list is just gigantic every day. And you're juggling all the things that James is telling you to do to grow your membership, but you're also juggling all of the back end administration as well.



## From admin manager to person in charge

So we've worked with some really awesome businesses lately, like the [Merrymaker sisters](#), for example. And they didn't realize that their membership is quite successful. They came in with a few hundred members when I first spoke to them, and they didn't realize that their day-to-day, it went from growth to more of an admin role. So they were both performing admin roles for their business, which is amazing, but it doesn't do anything for growth.



So they didn't realize that literally 75 percent of their day-to-day was administration. And they very quickly did after working with us for a few months, and we were able to remove 75 percent of their day-to-day. And the immediate impact that had, by removing all of that, was that their membership immediately grew by 45 percent, just by tweaking, 'Okay, let's not be admin managers here. Let's go back to being the people in charge of our business and in charge of the growth of our business.' And they're so much more the happier for it.

And we've had a lot of stories like that, over the past couple of years. And I know from when I had a membership, I think it was in 2016, and I actually closed my membership down because the day-to-day had gotten too much for me. And I think back, and I think, oh, if only I had known that you can actually make your life easier in a membership, you don't have to be all the things to all the people, but it does require you to step out of your comfort zone and actually make some changes and not just do the same thing, day in day out.

**James:** Yeah, that's such a good point you've raised, because I have to be careful not to take for granted how little admin I do. Because I've got such a good team. And all I do is make these podcasts and answer questions for my members or build the next training and run it. Like, I'm delivering my service, and I'm creating a new set of customers and keeping the ones I've got. That's my main job. What the team do is everything else, and we're going to cover what everything else looks like in just a moment.

## **Running the machine you've built**

But I love how you're now across my training, and you're aware of what I'm teaching, because you just foil in behind that. I think pretty much a huge proportion of your database is the same as my customer base. And they're coming through with good ideas. And of course, there's a huge shift going from that one-time product seller or that expert in a day job, and now suddenly having this recurring income and a couple of hundred people to look after. It's like a massive culture change.

And you're almost not prepared to have such an ongoing rolling income coming through. It's sort of, it's exciting, but also like, oh, wow, you know, like there's this responsible machine I've built. I've often equated to having a membership like raising a child. It starts off with dirty diapers, and you have to keep feeding it and it's not giving you a lot of love back in the beginning sometimes, especially if you're building it over the long term.

But as it grows up and matures, it becomes amazing. But of course, if you go back into my timeline, I was pretty early to get a help desk. Because I did not want to do, 'Hey, I need to change my credit card details.' Or, 'Hey, I'm not able to log in,' or 'The website is showing blocked for me, is it down?' Or, 'How do I change plans?' All of this stuff, it's like, as a driven entrepreneur, who's often a creative visionary type, a lot of the types of people who are setting up a membership as an expert are not the type of person to do repetitive tasks.

It could be considered boring for them. It could be almost a pain in the ass to have to do these things. Even, you know, the next set of things that I moved on were things like collating a weekly newsletter. And then of course, processing content. Imagine I do a training - after I do the training, there's no way in the world I want to go back through it and edit it, clean it up, upload it, and then publish it inside my membership, and then write an email about it and send it out to members and tell them about it. That's just a waste of my time.

### **The things that Kat's team provides**

Because you can hire a service or a person to do that for you. So why don't we break down the top tasks that your team are actually supplying? And I'll compare that to what my team is doing and see if we miss anything. And then you can tell us if things are included or not.

But you've already hinted at support. I'd love to know what that looks like, because I know in my case, when people go to my support, A) it's not me, B) it gets answered pretty quickly and responsibly, and C) it's not really involving much of my energy or effort at this point in the membership. My team know how to respond. They know what sort of questions come in. We've pretty much figured out the whole thing.

Now I imagine when you start working with someone, there's a bit of figuring out to do. And I noticed that you have a join fee, and then recurring monthly, or someone can commit to six months, and you waive the join fee. Is that what that's all about?

**Kat:** That is exactly what that's all about. So we noticed that one of the main things that people were struggling with was the communication with their members. And I think, potentially, that people don't realize that there's two types of communication that you need to provide to your members.

There's the being there for them and delivering on what you promised when you sold them the membership. But then there's all of the back end, admin, random questions from members and also non-members as well that come into your inbox, day after day after day. And many membership owners aren't keeping on top of it. They are getting stressed out by it, because that's just not what they want to be doing with their lives.

And a lot of them either are not doing anything else, because they're so stuck in answering these admin-type questions, or they're actually ignoring these admin-type questions, which is not amazing, either. So we've noticed that, and a lot of what we do in the past was helping people with their own virtual assistants, and we onboard and train and set up all the systems that you need in order to have one.

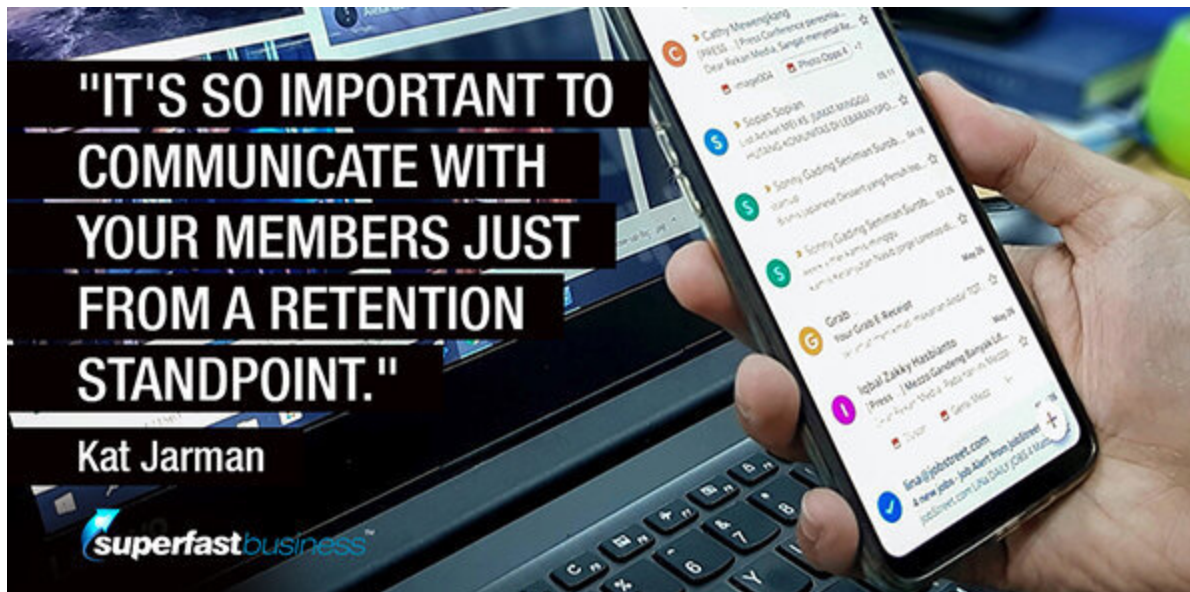
### **What would you like to hand off?**

But recently, we also realized that not everybody wants to do that. And it takes me back to my first virtual assistant. And I had no idea what to do with her. So I was paying for her to be around for, I think, it was 10 hours a week. She wasn't doing anything, because I had no idea how to set up, and how to delegate, and how to give her the proper processes that she needed.

And so, I thought, what if I could take that away from people and just immediately take over their customer support, in terms of all of that administrative, how much is your program, what do I get when I join the membership, can I change my password? All of those questions that don't need to be answered that are weighing on membership owners every single day. What if I could just immediately take that away, because I have the ability to create systems around that that make it easy for us to do?



And that was the first thought I had that kind of spawned this idea of this new service that we're offering. And it's basically just the ability to immediately hand off your customer support. And we've also given you the ability to hand off your membership newsletter as well, just because that's something that we find really easy to do. And a lot of membership owners would love to be sending a newsletter to their members every week, but it takes them four hours to write it, or they're just not doing it.



And it's so important to communicate with your members just from a retention standpoint. So we started with those two services only in this new service. And the reason that we have the join fee is what I think is our, kind of our secret sauce. So you could go and outsource this exact same thing to probably a virtual assistant agency or your own virtual assistant. But if they don't know anything about you or about your business, they're probably going to answer those questions wrong, and it's probably going to be a disaster.

## How to jive with the brand

We don't want any disasters in our business. So we spend a lot of time in the beginning, learning about your business. We create what I call a membership support manual, which is all of the things that a team member needs to know enough about your business so that they can answer your customer support queries. So it has a whole heap of things in it.

It's got something that I call a brand personality guide, which is not just, oh, this is the logo, this is your colors. It's actually, what words do we say in the business? What type of words would this business never, ever say in written communication? One thing, for example, a lot of people like to say, something is their jam. And in my business, my whole team knows that nothing will ever be my jam.

So it's little things like that, that help keep the quality high, because you know that your support team, my support team, would never respond to one of my customers and say something like that, because it just wouldn't fit with the vibe of my business. And so the membership support manual is a whole heap of little things like that.

We also create a kind of canned responses but with care. I'm thinking of calling it canned response with care, because we want to answer your customer support tickets in a way that is systematized. And that's where canned responses come in. But we also don't want to send somebody an email answering a question with a canned response that was completely inappropriate and without a context from the question.

So this is a very systematized service. We'll take your customer support from you, but we'll do it with care, because we have one of our standards in our brand is maintaining high quality.

## The efforts that make for retention

**James:** Yeah, nice. But I think canned response is such a negative connotation. But if you have a library of responses that are appropriate, then I guess there'll be some kind of a consistent response that, you know, you could uphold the brand guidelines. I know our team, we're very careful about the words we use, and that they are in keeping with my intention as a business owner, and what I would hope we can serve our clients with.

We also follow it up. We have little things like a net promoter score. So you know, we're getting judged by the customer in terms of how well we serve them. And we want to keep that standard high. Because like you mentioned with the newsletter, little things like that, it's a good reason for someone to stay or go, and when you're running a recurring subscription membership, there's really nothing more important than retention.

If you can bump the frequency of purchase from one month, to three months, to nine months, to 19 months, to 27 months, you now get 27 sales from one customer instead of one sale back in the old info product days. So everything you do relating to retention is important, and a newsletter, it's a critical one.

Now, I've also seen a scenario where a newsletter can actually prompt someone to unsubscribe. But for everyone that prompts to unsubscribe, because it reminds them about this thing they're not using, there'll be plenty of people who are also encouraged because they received that newsletter and they'll say, "Oh, yes, I really appreciate this. I'm going to go back in and use it."

We look at things like open rates on our members' newsletter. It's very high. We're getting around 70 percent open rates for our weekly newsletter, which I think is very encouraging, and a huge click-through rate. They click through and reengage with our top topics. So that is such a critical service. And I think that's missing from many memberships, some kind of ongoing resell campaign, if you like.

I would say it's a retention strategy, that newsletter. The support, of course, having a great support experience, can help you stand out from the woeful standard that's out there. There are some enterprise solutions that won't even reply to you within days, still, online, and it's just unacceptable. Certainly, a lot of the big enterprise companies, you can't even get a response by even filling out a ticket in some cases.

You've got to go to their knowledge base and fend off for yourself in the public and hope some other customer answers your question, which I'll never really understand how anyone thinks they can get away with that. So your package focuses on help desk support and newsletter service. And taking that from the owner's plate frees them up to get on with the job - going to get more customers, looking after the customers they've got but not in an admin way.

## **Maintaining a two-way relationship**

What about when it comes to things like that expert adding new things to their membership? Do you coordinate with their assistant, or it's just like nothing to do with you? Or how do they let you know to put it in the weekly newsletter?

**Kat:** So what we do is, we have day-to-day communication with our clients via, it depends what the client likes to do. It can be via email or via Asana, whatever they're using. And we ask them a handful of questions every day, such as, do you have any new content this week? Have you noticed any forum posts or anything that have been really popular this week?

We have logins for our clients' memberships as well, so we can go in and we can see what most popular posts are, what seems to be getting people excited. If you have stats in your membership, then you can supply us with those. If you've got behind-the-scenes things of which thread was most popular, because we're really good systems-based business, we have so many behind-the-scenes ways to extract the information that we need from you.



And the client still has to provide us with things. There's going to be new content such as you said, that we won't know existed if they don't let us know. There are going to be emails that we will not be able to answer for the first time without the client coming back to us with a response, which then we can add to their library afterwards. So it doesn't get you out of it altogether, which is good, because I don't ever recommend that anybody completely be out of the customer service of your business.

You still need to know what's going on on a daily basis. But we try and make it as hands off as possible for you as we can, but we still want to maintain the quality. So that makes it a two-way relationship.

**James:** Sounds a lot like how I'm operating now with my [Slack](#). We have a help channel in Slack.

**Kat:** Magic Slack.

**James:** Yeah. And there's a sister channel to our support channel. So I can see the tickets come into our business. As a business owner, I want to keep a finger on the pulse. When a podcast comes out, or when I make a post somewhere on Facebook, or someone recommends me, people come and ask questions. I see a lot of podcast pitches as well, which we delete.

So when my team asks me something, I just tell them how we answer it, and then they update the knowledge base. So that works well. The other thing is, we're keeping an eye on things like the flow of content and what else is happening in the business. And we do have a weekly meeting. So the main difference is, if I was working with you, then we'd just have a Slack channel or something like that, I imagine, where we're back-and-forth-ing about the support.

And then you're having the very close contact with the actual team. You have to hire the team, you have to train the team, you have to pay the team, you have to cover when they're having days off, or sick leave or whatever else. That's your responsibility. And now the business owner is just paying your recurring subscription, which I might add, is actually probably less than what you would pay for one full-time VA. So it's a very moderate rate at the time of publishing, maybe you'll realize that it's too low, and the prices will go up down the track, and certainly within your rights to do that.

But I think it was quite a pleasant surprise when I saw how much you charge for the service. And it doesn't take many members to have a membership where it's worth now having that help, until or unless you want to go down the path of independently building your own team. And there's pros and cons with that.

## **The other things a team can do**

So in terms of some of the other things that my team do, I did say I'd mention a couple of them. And I'd love to just get your take on things like, would you expect the business owner to take care of their own bookkeeping, for example?

**Kat:** Ooh, bookkeeping, no. In the beginning, I think so. I think it's nice in the beginning to have kind of done everything once. So you have made a sales page once, have written your own emails once, have done your own bookkeeping, so that you know what's going on. But after that, I spent way too many years doing everything myself. And so now if I can outsource that, I will.

So my bookkeeping is very easily handled by a SuperFastBusiness member, Bean Ninjas. So there's just, no, I just can't even imagine doing my own bookkeeping. Please, no.



**James:** Yeah, same. So my team does. They handle all the books, and they send me financial reporting. So you could go and do that at Bean Ninjas if you want to build up that skill.

We've talked about content. There are content suppliers out there. I think companies like [ValherMedia.com](https://www.valhermedia.com), they might organize your podcasts and videos and the sort of things that my team do there. So it can be covered that way.

I'm sure your team aren't going to be handling the customers' content editing and publishing. That's not within the scope of service or newsletters. In terms of sending out the emails, I'm sure you probably stay away from web dev and setting up email campaigns and so forth for regular funnels and so forth.

**Kat:** Definitely. At the moment, if we need to supply that kind of support to memberships, which we do, we've worked with a couple of memberships for a few years now. And one of them, we take care of every promotion that they have. So we're sometimes writing the emails, sending them out, running a Black Friday sale for one at the moment, and it's going amazingly, but that is more of our retainer package service where you would get your own dedicated high-level online business manager, and it's a service that is well worth it, but definitely a lot more than this membership support package is, and it's just for a different type of membership owner. It depends where you are at.

**James:** That's like a more grown-up, mature, you know, has a big income coming and really just doesn't want to do it. Like me. You know, but I've got this full-time team that I pay. And they've been working with me for a long time, and they're amazing. They're going to take this podcast as soon as I hang up and do everything with it, which I, you know, it makes me happy thinking about that. I sometimes forget how good it is for me. And I can just focus on having a good life, because of having that strong support in the team.

But what you're offering is a bridge to getting there immediately. You could skip the whole recruitment phase, the whole leadership phase, the whole training phase. Really, it's just, pay some money, and then do some induction and a bit of back and forth ongoing, and you'll have that load taken up for you. So that's what I love about what you've come up with. That's why I wanted you to come on and share about this.

## Wrapping up the episode

So I think we've covered the major things that happen in the back office of a membership. There's sort of web dev/support/updates. A lot of my members are now not even worrying about any of that, because they're on [10XPRO](#). So they're fully hosted, fully updated, fully secured. They don't have to worry about any of the things that I actually have to pay someone to do for some of my older sites.

We've talked about your financials and accounting and reporting. We've talked about your content wrangling and publication and syndication. They're all separate. And we've talked about support, and ongoing newsletters, which is really the core of a membership, which is what you're supplying there at [YourOnlineTeam.com](#). Have we missed anything, Kat?

**Kat:** No, I don't think so. I think that covers it pretty well. And with this service, we just wanted to make it really easy for you to get rid of too simple, but super effective things in your membership. We will probably add things to it later because we're excellent with systems. But for now, it's a cost-effective way to immediately rid yourself of, depending on your membership, it could be 50 percent of your day.

**James:** I mean that's just outrageous. That's insane. I spend maybe an hour a day on my membership/memberships. And, you know, I'm such a fan of it. I've got a whole course on it. [Profitable Membership Business](#). I'm a huge fan of this model. But I'm a big fan of Kat now, because you've been helping my customers get past the bits that they're not really well suited to. And certainly a lot of them don't like doing those things. So it's a double combo, really. Don't like it. Not good at it. Just pay someone to do it, please.

I appreciate you coming on the show, Kat. And of course we'll put a link to your site, people can check out your packages. This is Episode 793 on SuperFastBusiness.com. We'll put a full transcription for you and a little digest of what we've talked about today over there on SuperFastBusiness.com.

Kat, I hope you'll come back and share with us some of the insights you get after you get the next wave of customers and what's happening with your products and what sort of services you're offering for people who have membership sites.

**Kat:** Thank you so much for having me. And if anybody wants to chat about all the things that they've got on their membership to-do list, just come to [YourOnlineTeam.com](https://YourOnlineTeam.com).

**James:** Thank you.



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