



# PLANNING OUR FIRST CONFERENCE

BEHIND THE SCENES OF

**RETAIN**

[THEMEMBERSHIPGUYS.COM/185](http://THEMEMBERSHIPGUYS.COM/185)



Mike Morrison: Also, everyone went into sort of 185 of the membership guys podcast. I'm your host, Mike Morrison. Thank you so much for joining me this week. I'm actually doing something a little bit different for this week's episode of the podcast. I'm going to give you a bit of an insight into the behind the scenes of possibly the biggest and most exciting thing that we're doing here at The Membership Guys in 2019, and that is running our very first live event. So we're putting it on a two day conference in September 2019 and it's called Retain live.

Mike Morrison: So this is a huge, huge deal for us and I know that a lot of you guys listening are either thinking about running events for your own memberships or maybe that's something that you'd love to do long-term. And actually I know quite a few people in our audience already run live events of various different sizes.

Mike Morrison: So I thought it'd be interesting, I thought you guys would at the very least maybe be a little bit entertained or have your curiosity satisfied by hearing some of the gory details about our journey in making Retain 2019 happen. So the event itself is happening in about nine months' time, so we are still in the midst of that whole journey, we're still bringing everything together. So this is kind of the story so far. Hopefully, you'll pick up either some pointers if you're looking at running live events yourself or as I said, maybe you're all just satisfy the curiosity out there about what actually goes in to running a live event.

Mike Morrison: Okay, so if you happen to have been living under a rock and you haven't actually heard us talking about our conference, then head on over to [retainlive.com](http://retainlive.com), that's R-E-T-A-I-N L-I-V-E dot com, for those of you who can't quite decipher my accent head over at [retainlive.com](http://retainlive.com), that'll give you a bit of info about it. Essentially, it's a two day conference that we're running here in the UK on the 11th till the 12th of September, 2019. And the conference is entirely focused around membership growth. So it's aimed at people who have an existing membership site and they want to grow it.

Mike Morrison: Whether that growth means attracting new members, whether it means improving retention, increasing the member lifetime value in the lifetime spend, whether it means expanding their business into bringing other products and offerings, whether it's physical products, offline stuff like doing your own event or merchandise equipment, that sort of stuff, or maybe growth just means getting better organised, getting your processes in place, expanding your team, that sort of stuff. Retain Live is entirely focused on people in that growth stage, and it's something we're extremely excited about without question is the biggest and most daunting thing that we'd done.

Mike Morrison: So if you don't know anything about the event, this is the first time you're hearing about it. Hit pause on your podcast player, head over to [retainlive.com](http://retainlive.com), and then come back here once you've got the full scoop on what the event is all about. Okay, so let's start right at the beginning. Why are we running a conference? Where did the idea come from and why now?

Mike Morrison: Well, we've known since day one of our business that we wanted to run a big event, but we knew that we'd need to have patience, we knew since day one, but we knew we





couldn't do it on day one, or we couldn't start that process from day one. The reason for that is that the academy, Member Site Academy has always been our number one priority and we had some lofty plans for the academy that we knew would take time and we knew would take precedence in our business for a number of years as our vision for the academy was fleshed out.

**Mike Morrison:** So we've been doing a lot of product development over the last few years, a lot of brand building, a lot of refinement of our customer experience and our offering and all of that sort of stuff. And that has really been top of our list in terms of what we'd been working on since we opened the doors of the academy back in 2015. But as we were mapping out our 2018 plans, we knew that we were close to that perfect vision of our membership being fully realised. So we didn't have to think too much longer about any major product development, there's no more new big features to be built.

**Mike Morrison:** All of the pieces of the puzzle were in place for Member Site Academy, and we'd achieved a level of consistent exponential growth with our membership. So we were on very, very solid ground and in thinking about what our plans from there we're going to be, we knew that the time was right to take things to that next level, and for us running our own conference was top of the list of things to do at that next level.

**Mike Morrison:** However, just because you've had success with one thing in our case Member Site Academy doesn't guarantee success with another. So we knew that we had to test the water. Now, we've been chatting about this. We'd brought it up to a few people and we'd had a great response about the event from everyone we've mentioned it to in passing, but we really knew we had to gauge our community's reaction.

**Mike Morrison:** We had to validate this idea of not just run into it blindly. So first of all, we set up a small survey that we took to our members and we just outright ask them, is this something that you'd be interested in? If we run a conference for membership site owners, will you come? Now, we anticipate that there'll be a positive response and we've got a positive response, a unanimously positive response. Everybody said, "Yes, put on an event for membership site owners and we will come."

**Mike Morrison:** And so the next step was to essentially get those people to put their money where their mouth is. You know, it's very easy to click yes on a survey when someone says, "Would you come to a membership conference if we ran one?" It's very easy to say nice things when somebody tells you about the idea they have for the event, but there's no real commitment being made in providing that feedback.

**Mike Morrison:** So we had to do something to gauge the likelihood, the probability that people would actually buy tickets if we went ahead and booked a venue and actually started moving forward with our plans for this event. We open up an initial sale of tickets for the event just to our members kind of, I wouldn't say under the radar, but we didn't make any noise about it, we didn't talk about it publicly, we just went to our members and did this limited time pre-sale and Callie and myself decided that if we hit a target of just 25 tickets sales, then that would be our green light.





- Mike Morrison: If we couldn't sell 25 tickets, then there was no way that this was an idea worth pursuing. We'd already determined that we'd be aiming for a roundabout 150 attendees for this conference. So for us, 25 sales of a conference - sight unseen - which means there was no sales page, no specifics given, no noise made about it. It was a year in advance. If we could sell 25 tickets on that basis, sight unseen, that was a good indicator for us that we could sell this conference out once we actually took a really fully fleshed out offering to the market.
- Mike Morrison: Now, when planning a conference like this for the first time, you find yourself in a little bit of a catch 22 situation, without any specific details to speak of like a confirmed date and location, or some information about your speaker lineup and so on. Without those specifics, it's going to be hard to convince people to buy your ticket right? Because they have no idea what they're buying, but you can't confirm a date until you book a venue and doing that involves, in most cases, paying a sizable deposit, which you obviously don't want to do because you could end up out of pocket.
- Mike Morrison: You could end up paying thousands to book a conference room and then find out that no one has any interest in your event idea, and you don't want to mess potential speakers around either, you don't want to go and get people booked up and get commitments from them when you don't have a date or if that date is likely to change or get moved around, or if you're going to end up having to cancel it. And you don't want to mess your potential speakers around either.
- Mike Morrison: So in most cases, you can't just go to them with a half-baked idea and expect to get their commitment. So it's a catch 22. It's hard to sell tickets without some specifics of the event, but you can't get those specifics locked down without making a commitment and it's risky to make those commitments without selling tickets.
- Mike Morrison: However, this is where having a membership is extremely useful because you've got that deeper relationship and that deeper connection and rapport and understanding of your user base. And because of that we felt and we were confident that we knew our member base well enough to have that confidence that this is something that they would go for.
- Mike Morrison: When we talk about people putting their money where their mouth is, we had a lot more confidence than we would do if we were dealing with a cold audience and trying to guess what they might want. These guys are all people, right? They're all members. So that gave us more confidence than you might have in another situation. And having the membership also meant that they had that trust in us, which makes it far easier to do the type of presale that we did. Because when I say site unseen for our presale, I really mean it.
- Mike Morrison: We went to our community and we ask them to buy tickets for an event that had no name, no specific date, no set location, no speakers announced or even hinted at, other than myself and Callie, which were new for some people would be a big draw, but we knew that isn't the only thing they would come to the event for.





Mike Morrison: We didn't even have a specific theme, so I talked at the beginning of the episode about the fact that retain is very much focused on membership growth. We hadn't even locked that in at this point. So we were gone with no details whatsoever and we asked people to buy tickets for that.

Mike Morrison: Now, we did give some maybes, we give some probably's, we taught people that would probably be in September that it was almost certainly going to be in the UK and that it was most likely going to be a Newcastle, but you know, that was open for change. But we really made sure that we didn't lock ourselves into anything that we then need to change later on either because we decided it was the wrong way to go, or, you know, it might turn out that we couldn't find any venues in Newcastle that were available in September, so we'd either have to change the month though, we'd have to change the location, or whatever.

Mike Morrison: So we were very noncommittal when asking other people to make a commitment in buying a ticket. We did have some conditions in place that helped minimise the risk with people purchasing a ticket. We had a very generous refund period and refund condition I suppose, are basically said that once we do come out and confirm the specifics. So once we confirm the dates and the speakers and the theme and the location, if someone had bought tickets but then decided that they didn't want to come, either because the event is what they were expecting or they realised that they couldn't make it, maybe there was something else in the diary, then they could get a full refund and the period that we give people to take advantage of that again was very generous.

Mike Morrison: I think we said within 60 days of us confirming these details, you can come to us for any reason and get your money back. So not really eliminated a lot of the risk for people and made it easier for them to take a chance because that's essentially what we were asking people to do. We were asking them to take a punt, to take a chance, and a trust in us to deliver an event that they would be very happy that they'd bought ticket for in advance.

Mike Morrison: Now in the end, only one person asked for a refund and it was purely because there was a conflict in his schedule, but funnily enough, a couple of months later he came back to us and he repurchased his ticket after he'd been able to move some stuff around. And because this guy is long term member and because he had originally had that faith in us to purchase a presale ticket, we allowed him to buy his ticket back at that original presale price as well.

Mike Morrison: So ultimately, everyone who bought a presale ticket is coming to the event. So as I mentioned, we had said that if we hit our target of 25 sales, then it would be a green light on running our conference and if we miss that target, we'd refund everybody and we'd put the whole idea of an event to bed. And honestly, we would have been fine with either outcome, we wouldn't have wanted to push forward on an idea that we'd essentially proven had no legs, but being able to actually confidently say, "You know what, I took this idea of testing the water. This isn't going to work. Now with complete confidence, I can decide not to do this."





Mike Morrison: That would have been a positive for us as well because you always have those little things in the back of your head, wouldn't it be great if we did this? I wonder whether people will be interested in this. The ability to actually cross something off your list and to retire an idea is just as valuable as actually being able to pursue it because it frees up your mental bandwidth and it allows you to better focus on the stuff that is working.

Mike Morrison: So honestly, we would have been happy enough if things had gone in either direction, that's why we were being very pragmatic about that decision. As it turned out, we smashed our target and so it was all systems go. From there, we started fleshing things out. We decided on the theme of the event, focusing specifically on membership growth rather than the more beginner level stuff. We reached out with some initial speakers and we got their commitment, we start researching every companies planning our sponsorship packages and so on, and of course we started looking at venues.

Mike Morrison: And this is when we hit our first big hurdle. We'd identify the clear favourite venue to hold the event, it ticked so many of our boxes, it was close to transport links, it had ample parking, it had a room with lots of character, it was kind of a signature room that people would be talking about and taking pictures of and stuff like that. It had a great space for socialising close to restaurants, bars, all of that sort of stuff. Lots of boxes ticked off the list and it was in budget, which was great because again, when you're starting this stuff out, you don't necessarily know when you're planning your budget, what's realistic unless you have an exact replica style of event to compare to and in Newcastle we didn't.

Mike Morrison: So at the time this was definitely a clear favourite venue according to our wishlist of everything that we needed, according to our objective to have about 150 people in the room. This did tick so many boxes and it was the first venue that we actually visited. So we went to see the venue, great. We had our meeting with the events team and we came away from that feeling pretty elated, pretty excited. I mean, wow. This event, Milwaukee's pretty easy, right?

Mike Morrison: We picked a venue, visited it, booked the venue, all in the space of 48 hours. When people tell you that this stuff is difficult, what the hell are they talking about? Me and Callie have never organised an event of this scale before and in two days we've gone from looking at this massive list of potential places to having a venue locked down and it's perfect. We are rocking this.

Mike Morrison: And then we've got the email, extra costs, extra conditions, ludicrous changes to what we discussed. Stuff that just made no sense, they actually wanted us as an example to pack up all of our staging and all of our stuff at the end of day one, put it somewhere. No idea where so that there could have another event running on that nighttime when we weren't using the room and then we'd have to come back in after those guys were done and set up our staging again. And you know, setting up event staging is no small task, setting up the audio, visual, all that sort of stuff.

Mike Morrison: We need to get whoever's helping us with the AP to come in, in the wee hours of the morning, set everything up again on the morning of day two, and as soon as it hit 5:00





PM at the end of day two, we need to pull everything down, it needs to look like we weren't there because again, they want to have a different event use that room on the nighttime.

Mike Morrison: Oh, and by the way, we could no longer have use of the room the day before, which we'd asked to have in order to obviously set something up and all of that and they said, "Sure, we'll charge you maybe an extra 400 or 500," but because there's no care to ring and all of that, obviously it won't cost as much as the other days, but you can have it all day nice and convenient. That was no longer the case unless we paid them an extra 3000.

Mike Morrison: And the reason for this, the reason they're basically gave us all of these extra costs and conditions is that having us book the room, means that other people can't book the room and so they'll lose money. You're not miss hearing this. The fact that we booked the room meant that other people couldn't book the room so they want to charge us more because of the fact that what they couldn't double book, made no sense to us. I'm sure it makes no sense to you.

Mike Morrison: It was just bizarre and the emails kept coming. This was just the tip of the iceberg. Those emails kept coming. Those changes, those extra costs, each one more ridiculous than the last. It very quickly became clear that not only to this venue, not really grasped the concept of the type of event that we were doing and the notion that when we want to book a room for two days, it was on the understanding that it would be from the start with day one to the end of day two and that sort of stuff.

Mike Morrison: But there were also just on another planet on the commercial front too, this all came within hours of the initial agreement and the hold on the room being signed. And then right as we were reeling from the realisation that everything was falling apart with our venue, that's when we hit hurdle number two.

Mike Morrison: So we actually decided on a name for this event fairly early on and it was not Retain. It was a different name, I'm not going to say what it is for reasons that will become apparent, but it was a good name, it was catchy, we liked it, it was phone. We'd already started to have some ideas of how we could incorporate the name into a theme and do lots of funky stuff with it.

Mike Morrison: Now, while we hadn't announced that name or used it publicly, we were referring to the event by this name when we were talking about it. That is what it was called. Our project board in a sauna was called this word. When we were booking the venue, we booked it in this name, so as long as we were concerned it was set in stone. That was going to be the name, it wasn't going to change.

Mike Morrison: And of course because it was set in stone and we were happy with that decision, we'd gone ahead and we've registered a whole bunch of domain names for this event to event live, event conference, event 2019, all of that sort of stuff. And then one night, as we were trying to cheer ourselves up in the midst of all these issues that we were having with the venue, we got talking about our long-term plan.





- Mike Morrison: So we decided, let's focus on the positives, let's think long term, let's start to really envisage what this could become. And so you know, we both agreed that we wanted this conference, it wasn't Retain at the time, we want this conference to be something that was long-term. It was something we wanted to do year after year and that we want to build upon and built upon.
- Mike Morrison: So, to kind of cement that commitment, I went off as most of you probably done before as soon as you make this kind of decision or you decide on a direction for your business, you go to GoDaddy or you go to whatever business you use, whatever site you used to register your domains. So almost my kind of flag in the sand. Yet, this is going to be a long-term thing and as such I'm going to go away and register domain names for the following years.
- Mike Morrison: So we already had event name 2019. Okay, I'm going to go on and get event name 2020, I'm going to go event name 2021, and all that to cement our commitment to this as a long-term plan. But something odd happened. My search for event name 2020, it was gone, it was taken. Why would someone register the 2020 version of this demand without registering 2019? Ben and mine, this was still kind of August, September 2018. So there was still time presumably to do a conference in 2019.
- Mike Morrison: So then I looked for the 2021 version and that was taken as well, as was the 2022, as was the 2023. Now initially when I saw the 2021 was taken, I wondered whether someone was just kind of doing a play on the whole 2020 vision, maybe that was something in the theme around clarity or something but it was real loud, that event name 2020, 2021, 2022, 2023 was taken.
- Mike Morrison: So I did some digging and it turned out that they were predictably all registered by the same company. When we saw who that company was, it was like someone kicked me in the stomach. This was a multi-billion with a B dollar multi-national brand, a big, big name, a big brand, a big player in the online space. That had over the last six months or so that started making some noises, some moves into being a little more membership site centric.
- Mike Morrison: Now, not membership sites necessarily in the same category of the total memberships we deal with, but the start using the word membership to describe some of the aspects of what they had started offering on their platform. So there were very much kind of edging a little into a related space. Now, we're not just talking about an online entrepreneur here, we're not talking about a small business, we are talking about a massive, massive brand. Not quite as massive as Facebook, Twitter and all that, but talked about on this almost in the same-ish breath, maybe. I don't know.
- Mike Morrison: Yeah, so I'm not going to say who it is because that could land us in some trouble possibly. But needless to say, that was pretty much the end of that name for us, because even know if we pushed ahead and we'd use that name for the conference, we'd be able to demonstrate fair use. And it was totally fair use as well, you know, we hadn't discovered prior to that point that they had domain names for that.





- Mike Morrison: So without being a legal expert, I am confident that we would have been totally within our rights to use this name. They didn't have a trademark registered, they didn't have any copyright, they didn't have a single use of this term anywhere, anywhere at all previously. And they weren't using those domain names that registered either, they were just parked. And actually those domain names were purchased after we purchased ours but it didn't matter.
- Mike Morrison: They were such a big company that the best case scenario is that if we'd gone ahead and use this name, people would assume we'd copied from those guys. Worst case scenario, this was the type of company that would have the resources to make a pretty painful for us if we did use the brand, regardless of us being in the right legally, they could essentially make it so that that just didn't matter. So we had to decide whether this was a hill worth dying on.
- Mike Morrison: Make no mistake. If this was just another online entrepreneur, if this was someone who is kind of a peer or something like that in our industry, then we would have gone ahead and we were perfectly right to do so, but this was an entirely different animal. And honestly this really was a good punch in the space of just two days, two or three days, we'd gone from having our first choice venue that we were excited about, a brand that we really liked that we'd start thinking of some fun themes around, we'd gone from that to having an event that had no venue that had no name and because there was no venue, we had no date.
- Mike Morrison: And so we're just taking steps back and steps back and steps back, all that stuff I said at the beginning about how important it is to be able to actually get the venue so you could lock down the dates and then you'd lock down the dates so you can lock down the speakers and you have to do all that to sell tickets. That was just coming on done.
- Mike Morrison: I won't lie to you. We thought about giving up at that point, we honestly thought that there was just no point doing it. The first two big things, the first two things we did in making our vision, a reality had already blown up on us in a matter of days. We hadn't dropped the ball, but someone had just come along and whacked it out of our hand, and then stamped on it and burst it and made the ball unusable.
- Mike Morrison: Why were we doing this? Was it worth it? Was it just going to be setback after setback? Was this a sign of things to come? You know, we weren't making, we weren't running this event as a major profit generator. It's not something we needed to do to grow our business to make more money, but something we wanted to do for our audience, for ourselves, for our brand, but if we weren't doing it, it wouldn't hurt us and we were so early on in the process that we wouldn't really lose merchant terms of brand equity in terms of having to give them money back to be able to bought the presale tickets.
- Mike Morrison: We'd put that money aside because of the fact we'd given quite a generous refund, a condition at the beginning anyway when we did the presale. So we wouldn't lose anything, we wouldn't even lose face realistically because we'd only talked about it to our members, we hadn't made any noise publicly. But we were falling on our faces, this early in the process. Was it a mistake to move forward?





Mike Morrison: Honestly, we have not felt like that for a hell of a long time in business and it did not feel good. Failure never does and make no mistake, we will failing, this was a failure to start. But, we discussed it, we resolved, we knuckled down, we decided we were going to push through and that we would do whatever we need to do to get this back on track. Starting with the brand, so we had to go back to the drawing board when it came to the event name and the brand.

Mike Morrison: However, it actually turned out to be a blessing in disguise. After throwing around a bunch of ideas, the word Retain just emerged as such a total no brainer, like why the heck didn't we think of that before? It's so obvious. It's such a strong brand. It's such a strong word. It perfectly encapsulates what the event help what the membership industry as a whole is all about.

Mike Morrison: How come we didn't think of using that word as the brand for this event, especially when the event is actually all about growth and retention. Memberships are all about retention. That is what makes memberships different from one off purchases and one of product. It's the fact you need to retain those customer relationships.

Mike Morrison: The original brand we'd had, yeah, it was fun and we'd got a little bit carried away and thinking about how we could play with the theme that came with that brand, but Retain was another level. We fell in love with that brand even more so after our extremely talented designer Col Grey from Pixels Ink, created the logo and the brand identity and took that word Retain and turned it into something pretty special, Col, absolutely smashed that.

Mike Morrison: And that actually was quite humbling for me. You know, I've got a design background in running our digital marketing agency, so it takes every ounce of willpower for me to not just try and do everything on the design front, on the website front when it comes to our business. This has been a mammoth task and a mammoth undertaking for me over the past few years to let go of this stuff.

Mike Morrison: In particular with Retain, I was so excited about that brand that all I want to do is jump in and just create the logo and do all the design stuff myself. But thankfully Callie ever the voice of reason stopped me from doing that and reminded me that it's not what I should be doing now in my role in this business. And of course, she was right, it paid off because Col our designer, he created something way better than what I had in mind.

Mike Morrison: Like I was pretty crystal clear on what I want Col to create for the brand and he created that, because I said go in and plead. Just do it like this. And if you've got any other ideas, you know, obviously put those together. Col created what I wanted to create to a T, but then the other concept that he came up with was just so much better than mine.

Mike Morrison: So yeah, it really paid off to actually let go of that, especially it just makes sense in all areas of business you've got to let go of some things even if it's stuff you enjoy doing or excited about doing, often things like that on the best use of your time.

Mike Morrison: So it really was a blessing in disguise, we ended up with a stronger brand, a stronger name overall than what we originally had. And it's interesting though, come 2020, if this





other organisation who had registered those domain names, if they do go ahead and run that event because there is no indication that they actually are going to do this to this day, there still isn't any mention or any use of this brand. But if they do it in 2020, or even in 2021, I'd be very curious as to whether I get any messages from listeners saying, "Hey, are those the guys you were talking about?"

Mike Morrison: For now though, I'm not going to name names or even see what the original brand was because that could cause issues down the road. However, Retain is honestly so much better than that original name. So we saw another brand, we've moved past that punch in the gut that almost made us quit. Next we need to sort things out with the venue. So this time we were more thorough, we broaden our horizons, we're a little more pragmatic, we did more research, we put a lot more thought into things.

Mike Morrison: And actually that more detailed, that more involved process led us to becoming more ambitious with our goals for the event that we had been. So we'd had this limit of 150 attendees in mind, we'd like that number because it was small and intimate enough for real connections to be made in the room without the room feeling empty.

Mike Morrison: However, the more we talked, the more venues we've visited, then all we started really picturing what this event would look like, the bolder we became with the goal. And the more we realised that we could still have an intimate event with 200 or even 250 attendees, and in fact aiming that little bit higher meant that we'd have a wider array of different industries, different personalities, different success levels, all of that sort of stuff that makes it even better connections and even better networking opportunities.

Mike Morrison: So we'd actually written off and taken some options off the table in terms of our venue choice because of that 150 delegate limit. So now we'd raised that target, some of those options we're back on the table. And top of that list was the Hilton Hotel in Newcastle. I loved that venue, it was one of the first that I considered all the way back when we were first thinking about different venues. But again, we've taken that off the table because we felt that it was maybe just a little too big for 150 delegates.

Mike Morrison: We'd actually talked about it in terms of maybe this year they will go for 150, then we'll go with that original venue that will not be named because there were a shambles, but then maybe year two, year three, as the event grows, then we can move it to the Hilton. So we were already talking about it as the ideal location for our conference. The location's great, the venues, great. It's a big hotel, it's fantastic conference facilities.

Mike Morrison: It takes all of the boxes, but we'd been in that situation before. Our first venue tick a hell of a lot of our boxes, so as we booked our appointment with the event team to take a look at the venue, we made sure that we kept a level head, we weren't getting our hopes up, we weren't getting too excited because we had been in that situation before with the first venue.

Mike Morrison: Now, our meeting with the event team couldn't have been any more different to the first venue that we visited. They were just so on it, they're totally got what we were doing. That first venue we went to, we were thinking so much more about the room. We





were looking and concentrating almost entirely on the room itself and we were asking a lot of the questions that we almost overlooked.

**Mike Morrison:** The fact that they didn't say much at all, they didn't really engage much. We were just so lost in looking around at this room, but with the Hilton, not only were we totally taken by the room itself and by the space, but actually we were really taken by the event team as well. They're totally got what we were doing, they're totally got what we needed, they answered every question that we had and a few that we hadn't even thought of and they just instilled so much confidence in us through how well organised they were, how enthusiastic they were as well.

**Mike Morrison:** Because again, that first venue, I'm not sure we ever actually felt that they were even at excited or that bothered about the fact that we wanted to have our event there. It wasn't the case with the Hilton. We were really, really blown away. They were so great to deal with. So we locked in the date that day. Now, I will admit there was that little voice in the head thinking, "Oh, but what happens?" We're going to get an email tonight saying, "Oh, there's another charge. Oh, there's a new condition." Much like it happened with our first venue. But those emails never came.

**Mike Morrison:** Everything was squared away, everything was signed, sealed, and all moving ahead professionally and positively. So name sorted, theme sorted, date confirmed, venue booked, brand design done. Making progress. We'd also already confirmed about half of our speaker lineup, so it was just a case of then whipping up a landing page and getting all the texts have in place to take payments, take bookings so we could actually announce the event to the world and start selling tickets.

**Mike Morrison:** At this point, we were still almost a year away from the conference, so we knew that there wasn't a huge degree of urgency from a timeline perspective. Because of that, we decided we were going offer a super early bird promotion on tickets for our launch. So we priced the tickets accordingly to reflect just how far out we work because we knew that this was really going to be something at this stage that was all about our power members, power users, our super fans of course.

**Mike Morrison:** We gave our academy members an additional discount on their ticket too. So Retain isn't a member only event, it's open to the public. You don't need to be an academy member, but our academy members do get their ticket \$100 cheaper than non-members. Now this obviously led to some membership signups as well because if you're thinking about signing up for the Academy, then you might as well sign up now and get your ticket. It just makes sense. All right, so we launched the website, we announce the event officially after teasing it a bit for a week on social media and in our communities.

**Mike Morrison:** We've made a lot of noise on social emails, through our list, through our members and so on. And for that first 24 hours after the announcement, man was a tense. I think we checked our phones, both Callie and I every 30 seconds waiting for a ticket sale. We went to bed that night having not sold a single ticket. That sounds like a disaster, right? But we expected that to happen.





Mike Morrison: This wasn't a digital product launch, there wasn't an immediate deadline. The event was still a year away, so we knew that it wouldn't be a case of opening the doors and then sales would come floating in instantly. But I'll be honest, part of you kind of hopes that that's what will happen. Right? We knew that it wouldn't because it caused it didn't, because we're saying, "Hey, we were announced this and you know you've got to yet or buy your ticket, and we've got this great deal on for super early birds, but there's deals going to be available for like a couple of months."

Mike Morrison: So of course no one's going to rush to buy their ticket in their first five or 10 minutes. We knew that, but we did kind of still, you know, hope we'd be getting like sales every 20 seconds or something. So we were still a little bit bummed that we didn't sell tickets right away, but you just have to have a word with yourself and realign your expectations.

Mike Morrison: But then the next day, we did wake up to a bunch of sales in the next morning and then a few more came in over the weekend and then a few more that week. And as you move closer to the deadline for the super early bird promo, we made more and more noise above the event. We announced a few more speakers than of course those sales kept picking up as well, and this spiked when that super early bird price promotion ended too. Things were still a little nervy up until around the point at which we hit that half-way point towards our overall goal for attendees.

Mike Morrison: Once we got past that point, we certainly started feeling much, much better. And as I said, we announced more speakers during that time too. Honestly, with the exception of those two big setbacks that I talked about, selecting speakers has maybe been the biggest challenge that we've had. You know, because this event is so laser-focused on membership growth, it does definitely make it a little more challenging to get the right speakers.

Mike Morrison: So our speakers not only need to have expertise that they can share on strategies and tactics that are useful in membership site owners and are going to help memberships grow knowing to the need the expertise. They also need to understand memberships themselves. It's so, so important to us that everyone on stage either has a successful membership or is involved in a key role with a major membership. So it's not enough to just be a great speaker, it's not enough to just be an expert on something. You need to be able to talk about their expertise and share that expertise and teach people in the context of a membership site. We don't want generic stuff.

Mike Morrison: Now, I've spoken at a lot of events around the world and I've attended even more than that. So over the years I built great relationships with a lot of fantastic speakers. Plus, we have some pretty amazing people in our membership too, so there's a big pool of talent to draw from if you're looking for speakers in general.

Mike Morrison: But that range of availability, that range of people to choose from get smaller and smaller and smaller, once you start to actually look at just how specific our needs were for speakers. And even when you find the right people, then they also have to have the availability and the willingness to take part. We had a few people that we would have





loved to have had on stage this year and that we'd been talking to, but we just couldn't make it happen for various reasons.

**Mike Morrison:** Good thing with that is, that the seeds are planted for next year's lineup or the year after. So again, it's not all doom and gloom if there's been someone who we were trying to get this year and we can't get this year, maybe next year, who knows? Honestly, the biggest challenge with all that, it's just that there's some amazing speakers and some fantastic people who I would love to have on our stage, but there just aren't the right fit for this specific event this year.

**Mike Morrison:** Either they don't have a membership or they do, but their expertise isn't related to it or maybe you know they are experts at a particular tactic or strategy, but they've never applied it to the membership world, or maybe they do have a membership but are still really early on in its infancy or it's actually not very successful or they had a membership and they're closing it down and all that sort of stuff.

**Mike Morrison:** The parameters for the speakers that we want and the speakers that we feel we need in order to do this event justice are just so tight and it is so hard to say no. Some of these people I talked about people who are amazing speakers, they've got great knowledge, that would be fantastic for a broader, more general event.

**Mike Morrison:** Some of them actually approached me and pitched because we have relationships, we have friendships and it was so, so hard to say no. You're always worried about offending people and when you say the reasons for it, it always kind of feels like an excuse. So that's definitely been something that honestly has been a hard,, not hard to appoint that it stops us in our tracks, but it's certainly an unpleasant thing that I hadn't necessarily anticipated.

**Mike Morrison:** As we were putting all the different pieces of the puzzle in place for the event during that time, I also attended a couple of other events in the UK and actually I went to those with the main purpose of scouting, speaking talent and establishing relationships with some people who I thought might be a good fit for our event. And that really paid off because from doing that I locked down a couple of great speakers who I hadn't previously seen speaking, but I'd heard a lot of good stuff about. I knew that they had memberships. I knew that there is subject matter expertise aligned with our events and what our attendees would be interested in.

**Mike Morrison:** So actually going to those events, I think it's real important if you're running an event of your own to go to other events. Either to scout speaking talent or just to pay attention and look at how they run. You'll find yourself looking at things, thinking about things, paying attention to stuff and noticing things that you otherwise wouldn't. And if you have the chance to pick the brains of the actual team involved in organising the event, then that's a great bonus too.

**Mike Morrison:** So I would definitely recommend that we're thinking about doing an event of your own. Get out there and go to other events much in the same way that we recommend people running a membership, joining other memberships. You learn so much more from observing what other people are doing if you're planning to do something similar.





Mike Morrison:

So this all pretty much brings us close to where we are today. That's the story so far. The super early bird promotion on ticket sales ended, the prices have gone up, we've done a couple of flash promotions during December as part of our Advent calendar campaign. Those generated some additional sales and we also just introduced an instalment option for people to be able to actually split the payments for their tickets across two instalments as well. And that again has brought in some additional sales.

Mike Morrison:

Now, we eased off on promotion of the event during the holiday period, but now that we're in early January, we're about to start a big push. We've got the next four months of promotion mapped out, we haven't planned any further ahead of that, so that will bring us to around about April, May time. We didn't want to plant any further than that because of course we sell our tickets by March, but we planned out a detailed promotion plans that was September then you know we've got no tickets left. Then half of that plan or two-thirds of our plan becomes redundant. So we've mapped out the next three or four months and then we'll be able to see where we are at, at the end of that period and look at what sort of stuff we need to do moving forward too.

Mike Morrison:

We've also locked down some great sponsors, we're going to be announcing those in the coming weeks. Again, these are larger companies that we had some sort of pre-established relationship with that we built over the years of running the membership guys, and we've got a list of others where we don't actually necessarily have an established relationship, but we're going to approach them and that's obviously going to have a different tact than the sponsors that we've lined up so far.

Mike Morrison:

Deciding what's actually offer sponsors on the subject of sponsorship, that was a lengthy conversation. We thought about a pick and mix approach where we just presented people with a list of 20 or 30 different things they could potentially pop their logo on, and they just pick and choose what they want to sponsor. But instead we opted to keep it simple, we created a package that included things like having your logo on signage, swag and the swag bags profile on the website, all that sort of stuff.

Mike Morrison:

So we created that as a single package, there's no picking and choosing, and we offered out eight main sponsor slots. Every sponsor gets the same stuff. So that's kept things simple. It's made it a lot easier to go out to sponsors and get them on board.

Mike Morrison:

Now, funny thing is we had a few people asking whether or not if they sponsored the event, if they can come onto the podcast or if they can speak on stage. We actually had quite a few people saying, "If I pay the sponsor, does that also give me the ability to come on stage and deliver a presentation?" As far as we're concerned neither those are an option, we'd decided that early on. The integrity of this event is not for sale. Same goes for my podcast. The integrity, the event is a must and I just don't feel comfortable with that sort of pay to play.

Mike Morrison:

I know there are events where essentially you pay the organiser and they put you on stage, but they're terrible, they're terrible because people aren't getting put on stage on the basis of them being the right person for that event. That being put on stage on the basis of them having enough money in their wallet and being willing to pay it. And we're adamant that this is a no sales pitch event.





- Mike Morrison: I'll speak as won't be selling from the stage that you're not going to get ushered to the back of the room to buy some expensive programme like to do it some other events. This isn't something that we're doing as stage one of a sales funnel where we're going to try and upsell you to some sort of expensive mastermind group. That is not what we're about, this event has a lot of integrity.
- Mike Morrison: And I don't know, letting sponsors by a speaking slot. When you think about the fact, you know, we're not letting speakers sell from the stage, it's a zero pitch event. Selling a speaking slot almost kind of feels like, almost underhanded workaround to that promise that we're making to our attendees. And yeah, the same goes for our podcast, you can't just buy your way onto our podcast.
- Mike Morrison: In all fairness, this isn't disparaging the people who asked this because it's worryingly common in the event space that this is something that is offered, and we got absolutely no kickback and no negative feedback whatsoever from the people who had approached us and asked about that stuff when we told them it was a no go.
- Mike Morrison: It is a double edged sword though, because there are actually a couple of speakers who have companies that would make for good sponsors and there's a couple of sponsors where I had actually considered asking them to speak before they asked us if they could sponsor.
- Mike Morrison: So definitely makes things tricky because if I went to some of the speakers whose companies I think are a great fit and offered them our sponsorship package, people are probably going to think when they see them on stage that they all there because they sponsored and vice versa.
- Mike Morrison: If I go to some of our sponsors and say, "Actually, you know what? We'd love to have you do 30 minutes on this topic." Again, people are going to assume that they're onstage because they paid. It's not a major thing, it's just one of those things, but it's interesting little things like this you don't necessarily think of in advance. But anyway, just one of those things we've now locked down our speaker lists, so that is done, it's confirmed. And after much hand wringing, we've finalised the agenda, which we're going to be adding onto the website soon.
- Mike Morrison: In fact, it may already be live by the time this episode has gotten out, so you can go over [retainlive.com](http://retainlive.com) and see if that is the case. Just a couple of other random notes, random tidbits you guys might be interested in before we wrap this up. So I mentioned that we have a discounted ticket price for our members. So we have two prices listed on our site, one is a non-member price, one is a member price. That's preferential rate for our members, that's true of absolutely everything that we do.
- Mike Morrison: Members will always get first dibs on everything we do and they'll always get the best price on everything we do. However, this isn't a member only event, we have a lot of nonmembers buying tickets. So, it's one of those things, again, you don't necessarily think about in advance, but we considered whether or not we should create a private section in our member forum for the members who were going, and whether that





would mean are nonmembers are almost excluded whether it was too punitive for nonmembers, whether we somehow get on nonmembers into our forum, whatever.

**Mike Morrison:** As much as I'm not a big fan of Facebook groups for paid membership communities. In the end, we made a decision to create a Facebook group, so Facebook group for all the attendees of the event because that's real important for our start attendees, had the opportunity to mix and to chat with each other before, during, and after the event. It gives us a real easy way of being able to communicate with those guys and get them up to date on what's happening as well.

**Mike Morrison:** So the Facebook group made sense. I think it is good if you can foster conversations and connections before your event happens, it's very much worth doing. As I said earlier, we knew that opening up sales for the event and announcing it so early, so a year before the conference, we knew that, that would take some of the urgency out of things, which is why we run that super early bird promos. So we'd have that kind of incremental deadline to have the super early bird, the early burden and then the regular over the space of the year.

**Mike Morrison:** What we actually found was that a lot of the people who bought those super early bird tickets are people from outside of the UK. We've got loads of people coming from the USA, we've got attendees from or Australia, New Zealand, South Africa, Russia, the United Arab Emirates, and of course we've got attendees from all over Europe too, and we do our people coming from the UK, but currently there are more people coming from outside of it.

**Mike Morrison:** When you think about it makes sense because for those guys, for people who don't live in the UK, it's beneficial to book tickets early and to make your plans early because it's cheaper to get your flight early, you'll want to make sure you've got your hotel reservations and stuff like that. There's a lot more to take care of if you're travelling overseas for an event. Whereas people in the UK, they've got less to sort out. So that was definitely a big upside to opening up the sale so earlier, just made it easier and more feasible for people who are overseas to actually attend.

**Mike Morrison:** And speaking of the location, we did wonder about the location. We wondered whether it been in the UK would make it less likely that overseas members would come. This was a particular consideration because most of our audience, most of our members are from outside of the UK and about 60% of our academy members are from the USA and so you know, we wondered are we do ourselves a disservice running this event in the UK?

**Mike Morrison:** Now running it anywhere other than the UK was never really a serious option. There's a lot of complicated implications as UK residents going over to another country and putting on an event and these weren't complications we want to deal with. Tax, Visa, not to mention, liaising with the people you need to liaise with going and visiting some venues in Newcastle is so much easier than jumping on a plane and going to visit some venues in San Diego.





Mike Morrison: So we were never really going to do it outside of the UK, but we did wonder whether that was really going to stymie the scope of how many people would even think about coming. And then, we also had that little bit of a crisis of confidence about holding it in Newcastle. There's this strange outdated notion in the UK that if you're doing a UK event it needs to be in London because otherwise people won't travel to it.

Mike Morrison: London's our capital, people expect events to be there, and people from London will not go to other parts of the country for events. Now, that's ludicrous, it's ridiculous, we kind of knew that it was, but it did give us pause for thought and we did wonder for this first one, should we play safe and do it in London initially? But Newcastle, it's our hometown. I was born and bred here, myself and Callie had been living here together for the better part of a decade, so it had to be in Newcastle.

Mike Morrison: We're not just doing it here because it's where we're from. Newcastle is an amazing, amazing city and for people who are accustomed to going to an event in London, Newcastle is also a hell of a lot easier on the wallet as well. So it's a cheaper city to visit for conferences. So yeah, now maybe this will be something that moves location every year. Maybe it'll stay in the northeast, who knows? We'll see.

Mike Morrison: Anyway, so that's the journey so far. There are still around nine months to go at the time of recording, so there's still plenty to do. I was literally just in a meeting with an AB company this morning discussing stage designs, production requirements and all that stuff, we'll be getting all that locked down this month. Well, liaising with speakers on the final details of their sessions and we're gonna be adding profiles and so on to our website, as well as looking at ideas for working with them on an individual basis to promote their involvement. So well that's still going on.

Mike Morrison: The website, we'll be getting fleshed out over the coming weeks with more information, local stuff like recommended pubs, restaurants or the hotels, attractions, travel directions, all of that, we're going to be building that out and of course we've got a big push for ticket sales happening in the next few months too. You'll see us talking about Retain live a lot more in terms of the specific sessions, profiling the speakers and really getting the message out there about why this is a total no brainer event to attend for anyone running a membership.

Mike Morrison: So a lot happening, all very exciting and September 2019 we'll be here before we know it. You can of course keep up with all the developments at [retainlive.com](http://retainlive.com) and obviously we would love to see you there if you haven't already bought your ticket. It really is a must attend event for anyone wanting to grow their membership business. So do head over to the website, grab your ticket while you still can.

Mike Morrison: And hopefully you enjoyed this episode. I know it's a bit of a change of pace, a change of style, and maybe slightly different in terms of its content compared to usual episodes, but hopefully that's a good thing. Hopefully you've enjoyed it.

Mike Morrison: And also about audience have spoken about the idea of running an event for their members or running an event to grow their brand or their audience and many of you





listening will have already done so running events of different scales. So, I figured it was definitely worth sharing the behind the scenes of our journey so far to running Retain Live 2019.

Mike Morrison: As always, I'd love to hear from you if you found this useful. Have you enjoyed it? Would you like us to do another little update close at the time to let you know on the progress made between now and then? Let me know. Hit me on social @membershipguys, that's me on Twitter or let me know inside our free Facebook group, you can search for "membership mastermind" on Facebook or type in talkmemberships.com to your browser, that will redirect you to our group and you can let me know your thoughts in there.

Mike Morrison: And of course if you have any questions about the conference or about anything we talked about today, then you can reach me on those channels as well. That's it for me for this week. Again, I hope you have enjoyed today's episode. Hope you found something useful or at the very least you found it entertaining or interesting.

Mike Morrison: I'll be back again next week with another instalment of The Membership Guys podcast.

