



# TOOLS

WE USE FOR OUR  
MEMBERSHIP

2019 EDITION

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Mike Morrison:

Welcome to episode 204 of the Membership Guys podcast. I'm Mike Morrison your host for the show, you have found the number one resource for everything you need to know to build, launch, and grow a successful membership website.

Okay, so something that we're always getting asked about is what tools we're using ourselves within our own business, both from membership and for our main content website, themembershipguys.com. Now, we've actually talked about this before on the podcast and on the blog, and even though not a great deal has changed in terms of the tech we're using, there are some things that we've stopped using, some new tools that we've brought into the mix. And also our thinking and our reasoning behind some of the stuff we're doing has changed as well.

So, I want to do a quick 2019 update on the tools that we're using for our membership. Starting out with the content management system that we use, is WordPress. If you've been listening to this podcast for a while, or if you've been reading our content, you'll know that we're big fans of using WordPress as the basis for a membership website. Essentially when it comes to setting up a membership, your choice is pretty much between creating your own membership on your own website that you control, versus using a hosted platform like Kajabi, Thinkific, Simplero, and so on.

Now, there's pros and cons to each, which we've talked about before on the show. I'm not going to dive into those too much. But we are very much fans of building on your own turf. And that means having a membership site that's on a hosting account that you control, that's using software that you control and you can access and edit the files and all that sort of stuff. And when it comes to building your own content driven site, the number one content management system out there is WordPress.

And so it stands to reason that's what we're using for our own membership. At no point have we given any consideration even back in the early days, at no point did we consider going down any other route for running our membership site. There are other self-hosted options out there, but honestly in terms of the flexibility, the amount of choice there is for membership plugins and other plugins and tools, nothing comes close to touching WordPress.

Number one tool, the foundation of what we use for our membership site, and for our main content site, themembershipguys.com, is WordPress. In terms of our membership plugin, we're big fans of Member Press. Now, we've used that since day one, although we came very close to using a completely different plugin. We very nearly went with Member Mouse rather than Member Press, and that was almost entirely just down to integrations.

So, when we were building out our membership site, Member Press did not integrate with ActiveCampaign, which is the platform we use for our email marketing. Member Mouse did. But at the 11th hour, Member Press came out with an add on that connected it to ActiveCampaign, and that was enough to say us back in their direction, and we've been using that plugin ever since.





Now, in our opinion Member Press is perhaps the best all round membership plugin. It does everything we need it to do. It has reporting built in, it has a few cool little features that we really like. This is not to say it's the best membership plugin for every single situation. Again, as with anything to do with building your membership, it really comes down to the features that you need. However, our needs are fairly basic. We don't need an all singing, all dancing membership plugin. So, in that sense, Member Press fits the bill. Sure, there are plugins out there that have some real, real cool features that are going to be game changers for certain types of membership models. But for us, we like keeping things simple, Member Press does the trick. We have a good relationship with their development team, and so it's not something we see ourselves moving away from any time soon.

That's our membership plugin, we use Member Press. Now, the one question we are constantly asked about when it comes to our membership is the design, the theme. People want to know what WordPress theme we're using, or how we built it using something like Divi, or something like that. Bad news is both of our websites, both [themembershipguys.com](http://themembershipguys.com) and [membersiteacademy.com](http://membersiteacademy.com) are both completely custom designed. And they were custom designed and built by us. So, there's not even agencies out there that we use that we can recommend you to.

And there's a lot of real advanced stuff that we built that you simply cannot replicate using plugins, or anything else off the shelf. You have to keep in mind however that the look, the feel, the functionality of our membership needs to be of a much higher standard than the average membership site. We are the experts in memberships, and when you're the experts in memberships, the bar is pretty high for the standards that your own membership needs to hit.

So, you shouldn't necessarily be looking to replicate what our membership does, because you don't have the same standards that you need to reach as we do. We kind of need to blow people's socks off, right? You can't be the membership experts and have a substandard membership. So, you can't just buy \$100 theme and have your site looking exactly the way that ours does. But at the same time, you shouldn't be trying to do that anyway. And remember, our website didn't look anything like it does now when we very first started out. We've built, and we've added, and we've adapted over time.

Now, if you are a member of [membersiteacademy.com](http://membersiteacademy.com), we do offer a free WordPress theme that is designed specifically for membership sites. And some parts of that theme are inspired by our own website. So, for example, the way in which we structure and layout courses in the member only theme is very similar to how we do it in Member Site Academy. Now, the majority of what you see on the academy is totally custom, but the member only theme is going to give you a site that looks great, that has some real cool features too. So, definitely check that out if you're a fan of our overall aesthetic.

Next up, the community element of our membership. We use Envision Community Suite, otherwise known as IP Board. In our opinion, this is the best in class when it comes to forum software. Again, we talked at length about why we use forum software versus using a Facebook group, and why we feel that forums in most cases are a better option for membership sites than a private Facebook group. Again, we're not going





to dive too much into that, but check out the show notes, we've got links to episodes where we go deep into that topic.

So, we're very much fans of having an on-site forum, and when it comes to on-site forums, the best software, in our view, in terms of look, feel, functionality, is IP Board. So, something we've used since the beginning. Something we used a lot with previous clients. We remain huge fans of it. And they keep adding awesome new features. So, we're very, very happy with IP Board for our community.

Now, I mentioned before the email marketing that we use is ActiveCampaign. Honestly, recently we've been toying with looking at other options. Now, when we very first started using ActiveCampaign, it was a little bit of a game changer, because it has really powerful automation tools, and lots of real amazing stuff that you can do with tagging and all that sort of stuff, that previously had not been available at the sort of price point that ActiveCampaign was selling for. And over time, they have added some new, cool features, but it kind of seems like other players in the market have progressed a lot more than ActiveCampaign has.

And there's increasingly more and more frustrations that we're experience. For a start, you simply cannot use their website on mobile devices. In 2019, their website is not mobile friendly. Heck, sometimes it's not even desktop friendly. Their user interface is just terrible. And we're not talking about things like their automation builder, anyone who uses ActiveCampaign will know they have a drag and drop automation building tool. I wouldn't expect to be able to use that on my mobile device, but I'd expect to be able to just look up a contact's details on my phone, without having issues. You simply can't do it, their website is so, so bad on mobile. And as best as I know, they don't have a mobile App.

There's also been some sporadic issues around deliverability. Their actual email design tool pretty much sucks. So, we have been toying with other options. We probably won't change any time soon, because the automation side of things to help automate the funnel and do clever stuff with tagging and all of that, that's still pretty killer. But, other solutions in the market are catching up and exceeding ActiveCampaign. And so it may well be for the chop, unless some of those problems and some of those little niggles that we're having are addressed.

Another tool we've used right from the beginning that we're big fans of is Intercom. So, we use Intercom for in App messaging. This basically enables us to send little messages, little popups to our members that they'll see when they're on our website, so we can give them notifications about new content. We can show little messages the first time someone visits a page. That gives them little pointers, maybe shows them a little tutorial video. Just overall helps make the user experience more interactive.

It also acts as a messenger. So, if a little message pops up and tells someone about a new piece of content, and someone wants to ask us a question, or they're having problems accessing that content, they can just hit reply and they can message us directly. So, it's a really cool way of interacting with members and of taking your user experience to that





next level.

Now, we have wavered a little bit on Intercom, for a short period of time we switched over to using Drift, which is a very, very similar tool. However we found, whether it's just the aesthetic, whether there was issues somewhere else, we just found that the messages we were sending through drift weren't getting opened anywhere near as much as the messages we were sending through Intercom. So, we switched back, and we stuck with it ever since.

Intercom, really cool tool for being able to let members know about new content, for being able to add interactive tips and little pointers throughout the website. And also being able to enable members to get in touch with us as well.

The next tool in the list is Vimeo. We use vimeo.com for hosting our videos. The main reason we use Vimeo is that you have the ability to set privacy settings, so you can make it so those videos can only be embedded on your own website. That's a feature that's pretty much essential for membership site owners to stop your videos from being shared outside of your membership.

We've been using Vimeo for a long time, and around six months ago we also started using their livestreaming features too for doing our member Q&A calls. Previously we were doing these using Google Hangouts, which has since been rebranded at YouTube Live. We would previously do our Q&A calls, and we'd basically just throw up a Power-Point. So, you'd have just a single screen on the video, and you'd hear our voice answering questions. But, around six months ago, we decided we wanted to switch it up, we wanted to get on camera. And for those purposes, YouTube Live was simply too low quality. No matter what we did, the picture was always blurry, it just wasn't up to the standard that we need it to be for us actually appearing on camera.

So, we switched to Vimeo Live. So far we are loving it. We love the fact that it automatically saves the recording into our Vimeo account. That makes it a lot quicker and more efficient for us then to be able to put that recording into an archive on our site. Before-hand we used to have to download it from YouTube, upload it to Vimeo, then delete it from YouTube so it was hidden from the public.

Again, it's just a little bit more of a hassle in addition to the quality issues. But yeah, so far Vimeo Live is working out great. The quality is so much better, and that just adds all round to the overall standard of our live Q&A calls. We embed those live stream videos from Vimeo onto a page on our website, so that our members can just go to the URL whenever we're on live, and they don't need to download anything. They can just see us on screen there and then. That makes it easier for people to attend the live sessions than if we were to make them download something like go to webinar, or Zoom, or something like that.

We also use chatroll.com to embed a chat room next to the live video. So, as the live session is going on, members can ask questions in that chat box in real time. And then





when we're on the call both Cali and members of our team can keep an eye on that chat box, they can pull out questions that members are asking, and we can ensure that they get answered on the call. That's chatroll.com. It's got a great little integration with WordPress as well, which means that it uses the WordPress account and pulls in your member's name. So, again, people aren't having to sign into anything. They're not having to download anything. There's zero friction, zero barriers to them being able to attend and participate in our live calls. And that's very, very important for us.

Something else we do at membersiteacademy.com is we send personal videos to individual members. Sometimes these are welcome videos saying hello to people, welcoming them to the community. Sometimes there's a little message to congratulate someone when they've launched their site. Occasionally we'll send videos to people on the renewal of their annual membership. It's a real great way of adding a personal touch to the member experience.

Now, we use bombbomb.com. So that's bomb as in exploding bomb, bombbomb.com, to send these personal welcome video. We did switch to bonjoro.com for a while, but when we did that, the open rates of those videos tanked.

Now, that might have had something to do with the fact that when tried Bonjoro, they didn't have much in terms of options or flexibility for changing the titles of the videos that you were sending out, where as Bomb Bomb does. I believe Bonjoro have changed that since then, but again, but we tried to switch and then we've had to switch back, changes are we're not going to switch again. So, that's bombbomb.com for those personal welcome videos.

We also run an affiliate program, for that we use a plugin called Affiliate Royale. Previously we did use one called Affiliate WP, but it had a big, big issue with Member Press when it came to deleting subscriptions or users. So, if we had to delete a subscription where for example had got halfway through the signup process and they didn't complete the transaction for whatever reason, and then we'd obviously want to delete that person, delete that subscription from the system. If we did that, for some reason that would mess with the recurring subscriptions. It would just totally throw the affiliate WP plugin out of whack.

So, we switched to Affiliate Royale, it was built by the same people who built Member Press. There's some features that it doesn't have. Affiliate WP is a great plugin, it's got some real cool features. But that was a game changing bug, I mean that literally made so many problems for us when we realized that that was going on. So, Affiliate Royale has been the plugin we've been with for a year or two now, and we've never had any issues with that.

Another plugin we're big fans of, and that we use in a variety of different places in our site is Grouty Forms. This is a plugin that enables you to create contact forms on your site. We use Grouty Forms for our contact form for member support and stuff like that, but we also use it to create a new member questionnaire. And we do some funky stuff where we can send people off to different pages, or show people different messages according to the answers that they select.





We also use it for our cancellation survey. We use it to enable people to submit questions in advance for our live Q&A's. It's an awesome, awesome plugin. There's all sorts of great add ons, some of which we use. When we're selling tickets for the Retain Conference for example, the checkout forms for that is using Grouty Forms with a PayPal add on. So, there's so much you can do with Grouty Forms, especially when it comes to that conditional messaging stuff, where you can send people to different sections on your website according to the answers that they give on your form. That's really good for being able to send people off to recommended content based on their needs, based on where they are in their journey, and so on. So, we're big, big fans of Grouty Forms.

If you're a member of [membersiteacademy.com](http://membersiteacademy.com), we actually have a whole course dedicated to Grouty Forms, and some of the real cool ways that you can use it. Those are the main tools that we use, I'm just going to run through a few other things that we have in the business. We use Help Scout for customer service tickets. So, any emails we get, any messages we get through our customer support forms, they go into Help Scout, and that enables us to be able to allocate them to people on our team, to keep notes on actually dealing with the customers, or issues if there's any problems. To use pre-formatted templated answers to some of our most common questions. Help Scout, really, really good customer support desk.

We use [asana.com](http://asana.com) for project management. Big, big fan of Asana, mainly because you can set up templates of tasks that you can just reproduce and replicate over and over again. That is crucial for things like podcast episodes, for things like publishing member content, and so on. Big fan of Asana, it's an awesome project management tool.

We also use something called Core Schedule for automating elements of our social media activity. However, we're possibly going to move away from that, as we seek to reduce the amount of automation that we've got going on on social media. For hosting files like WordBooks, audio downloads, PDFs, and stuff like that, we used Amazon S3. Very low cost, very reliable. A little bit of a learning curve to use it, but it does the trick.

And finally we also use something called Mini Chat for Facebook Messenger. So, we don't use Facebook Messenger too much, however we've utilized it for sending out notifications to members about new content. We've used it as a chat bot on the sales page for [retainlive.com](http://retainlive.com). And we've found that Mini Chat is really easy to use and gives you some pretty cool features for handling the Facebook Messenger chat bot as well.

There we go, they are the main tools, or some of the main tools, that's not every plugin we use, it's not every piece of software we use. But these are the ones we essentially rely upon within our own business, both for [membersiteacademy.com](http://membersiteacademy.com), and for [themembershipguys.com](http://themembershipguys.com). Now, it's so important to remember that just because we use something doesn't mean that you should. I've tried my best to give a bit of an explanation as to why this is our particular choice, without making it sound like if you're not using this, then your business is going to fail. That's absolutely not the case. Every business has different requirements, different circumstances, different features they may need. And that is what will inform the technology that you choose. Don't just use stuff just because we're using stuff.





If you've got questions on what the best membership plugin, what the best video host, best payment providers, anything like that, any of those questions, do ask us inside the membership if you are a member, or inside our free membership group at [talkmemberships.com](http://talkmemberships.com). Or you can search membership mastermind in your Facebook App, and you'll find that group in there. Any tech questions, if you're struggling to find the right tool to use, go ahead and ask, and you'll be sure to get pointed in the right direction.

Okay, I hope you've enjoyed today's episode, if you've found that useful. As always I'd love to hear from you guys on what has been your biggest takeaway from today's episode? Hit me up on Twitter @MembershipGuys, or let me know inside our free Facebook group. If you head over to [talkmemberships.com](http://talkmemberships.com), or just type in membership mastermind in your Facebook App, you will find the group. There's around 12,000 membership site owners in there, and I would love for you to join them and let me know what you thought about today's episode. I'll be back again next week, thanks for listening, see you then.

