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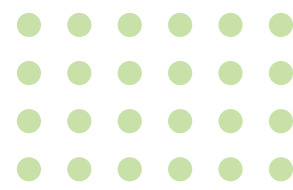
Getting Started with Member Engagement Scoring

A guide on how to successfully track and score member engagement.

About this guide

Research shows that a majority of associations are now investing in strategic initiatives to grow member engagement. But how exactly does engagement impact key business outcomes, like revenue, retention, or member satisfaction?

Engagement scoring is an effective way to evaluate your members by assigning points based on meaningful interactions. It gives you an objective way to compare highly engaged members against less engaged members. By diving deeper into engagement metrics, you can **understand which programs are successful and better assess true ROI.**

In this guide, we'll give you a high-level overview on how to successfully track and score member engagement with five important stages to consider.

1 **Clearly define all your data sources**

2 **Organize your data**

3 **Create a meaningful engagement score**

4 **Understand how engagement impacts outcomes**

5 **Share your progress by communicating results**

01 Define All Your Data Sources

When starting out with engagement data, it's important to list out your data sources and document them with your team. While it may feel intimidating to get started, it's easier than you might think. You can start by holding a brainstorming session with different members of your organization to determine all of the systems that capture the many ways your members engage with your association. This should be a cross-functional initiative in case there are places data is captured that aren't on your radar. Include people from membership, marketing, communications, learning, events, government affairs and IT at a minimum. The goal is to build consensus on which engagement sources matter so you ensure you capture all of the relevant data to build your score.
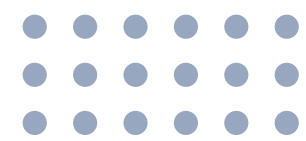
Example Data Sources

- Website
- AMS
- LMS
- Social Media
- Community
- Email
- Newsletter
- Research/Survey
- Events
- CE credits
- Advertising

02 Organize Your Data

After you have defined your data sources, the logical next step is to figure out how you can get this data centralized and optimized for analysis.

Aberdeen research found that 85% of organizations struggle because data is captured and stored in disparate disconnected systems. Go back to your list of data sources and determine if your organization has an integrated technology stack that allows you to easily report on engagement across systems and platforms.

If you don't have a solution for this, it's important to build a central repository for capturing data. This will help you develop a standard way of tracking engagement, not just with data from one source system, but from any channel you use to engage with members. With disconnected channels for engagement, you need a central location for all your data. This can be a basic pivot table within a spreadsheet or a more advanced approach that includes a data warehouse.

The key takeaway is to remember that you will need data that's centralized and optimized for analysis in order to see the full impact of member engagement.

PRO TIP

Organizing your data in a data warehouse, data lake, or a combination (for both your structured and unstructured data) enables you to most easily access your data for dashboards, visualizations and analysis.

03 Create a Meaningful Score

Engagements scores should start with a model using these 3 easy steps:

1. Choose Activities
2. Assign Weights
3. Calculate Scores

Start with Model Building

A model is what you are going to count (activities) and how much you are going to count (weights). Start with a Modeling Workshop and invite subject matter experts from your organization who interact with your members (e.g. membership, philanthropy, finance, marketing, events)

- Brainstorm a list of activities you want to include

- Once you have a complete list, prioritize them based on your business goals

- If you end up with a very long list of activities, you should combine them into broader buckets with similar activities to get to a manageable number

- Negotiate either by consensus or management direction to decide what activities to include

Once you implement your engagement score model, be flexible and test things! If the scores don't reflect engagement the way you expect, try including a replacement engagement activity or perhaps adjust the weighting.

Steps to Creating a Meaningful Score

1 **Choose Activities**

You want no less than 5 and no more than 10 activities included in your model so the number is manageable. Think back to your business goals and consider activities that drive:

- **Operational outcomes** – directly impact revenue like renewals, purchases, meeting attendance, and course registration.

- **Customer experience** – things that show you are providing a great member experience and improving your relationship with members (Examples: survey responses, community engagement).

- **Strategic objectives** – these can be harder to measure. For example, if one goal is "to be a thought leader in your sector" you could look at content downloads, CE credits, and traffic to the resources on your website.

2 **Assign Weights**

You'll want to normalize your score with weights and use 100 as a perfect score. Weight is the maximum score for each activity. For example, if you weight event attendance at 30, someone who attends all events gets a 30 and someone who attends some events might only get a 15.

- **Your overall model must total 100**. Since members who achieve all points are pretty rare, you'll want to determine what a "good" score is.

- **Engagement points for each section are relative to what everyone else has done** - look at broad activities applicable to all members like event registrations, email clicks, and community activity.

3 **Calculate Scores**

As you start scoring, you should include data that is easily accessible like the number of members, amount of donations and course registrations.

- **Don't assign scores, calculate them with data**. Instead of making up numbers, decide how important the activity is relative to everything else on a 100 point scale and then let the model calculate the points.

- **Use three years of data for relevancy.** Using one year won't give you enough information and ten years is too much.

- **Keep decay in mind.** Certain activities are less important over time (expample: if someone donated in 2020 and hasn't since, that donation has decayed in importance).

Our success is your success! That's why we created this engagement scoring worksheet to help you get started!

DOWNLOAD NOW

Avoid only including data from your AMS

Building a 360-degree view of member engagement is critical. The first mistake many organizations make is to include data only from their AMS. This includes mostly transactional data, and it's missing the valuable engagement data that lives outside an AMS. Don't forget that there is a wealth of unstructured data in social channels, member feedback and surveys, or in channels like online communities where data is captured as text.

Engagement scoring with only your AMS can also be challenging because AMS systems are not designed for analytics. Even if you were to build standalone integrations into your systems that include other member engagement data, and then bring that data into your AMS (a challenge in and of itself), it will be difficult to create a flexible engagement scoring model that is inclusive of all of your data sources.
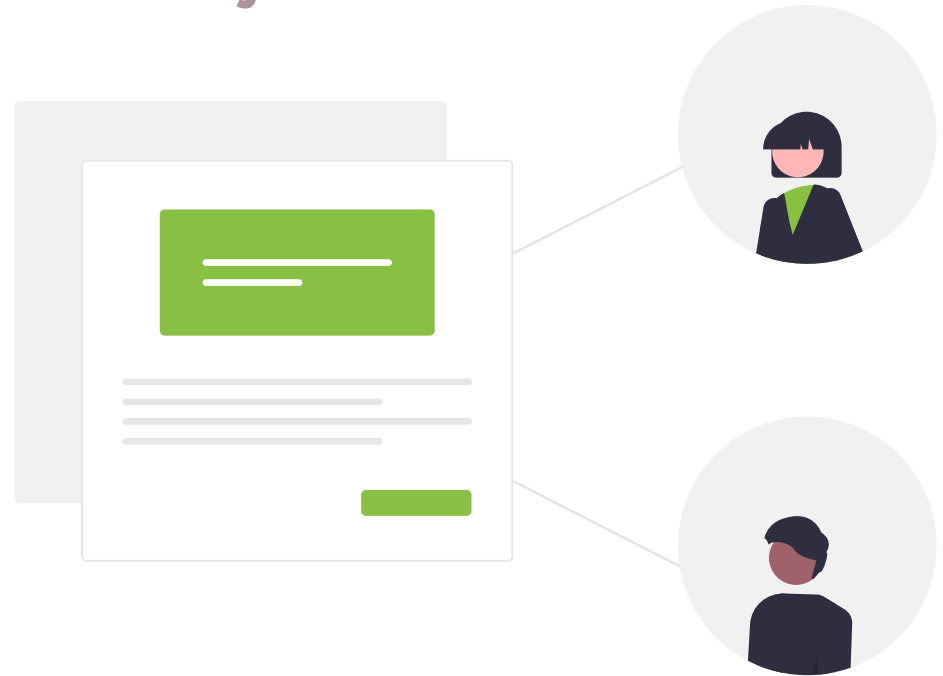
Don't forget sources for unstructured data

- Online communities
- Social channels
- Member feedback, including survey responses

04 Understand Impact to Outcomes

Once you have determined an engagement model that makes sense for your organization, you will want to establish a baseline of data so you can dive deeper into understanding how engagement correlates to business outcomes. You may want to see how higher levels of engagement correlate to financial outcomes like:

- Additional revenue or purchases

- Member satisfaction and retention

- Increased event attendance

Ranked deciles (breaking a group into 10 equally-sized sections) is a good way to compare highly engaged members with less engaged members. This is valuable because it allows you to target and segment the less engaged members and focus your efforts on getting these members more engaged.

Start to effectively set goals and develop a roadmap for the next 6 to 12 months. Use the data to inform your decision-making, determining which engagement programs might need more investment, less investment and even some that might be ready to retire. Execute on your strategies and remember that this process should be iterative – regularly monitor your progress and take the insights gained to feed the strategy.

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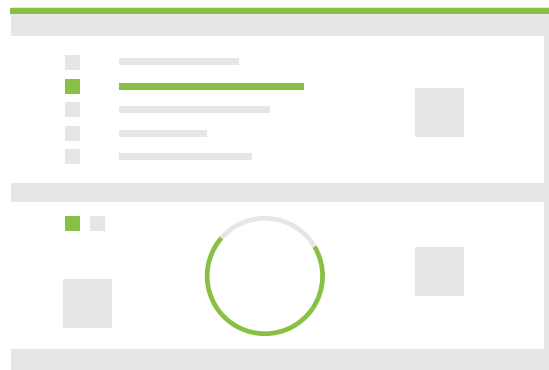
05 Share Your Progress

Make your engagement scoring accessible to all team members throughout your association. Help different teams think about ways they can put engagement data to work for them. The most highly engaged members can be great potential speakers, donors, committee members or even new board members. The least engaged might be ripe for retention interventions or personalized outreach to help them better understand the resources and programs available to them.

Engagement scoring is a journey. Be sure to communicate and share your progress over time. Report on it regularly and put those engagement scores to use!

ASSOCIATION ANALYTICS®

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