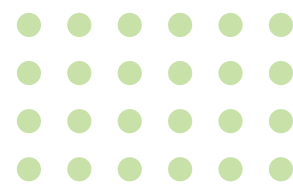


Getting Started with Member Engagement Scoring

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 to see how engagement relates to financial outcomes. 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** Invest in technology to capture the 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

Have you planned for data governance within your organization? Governance provides a framework for organizations to standardize how data is managed, setting policies around who creates, approves, enforces, and monitors data. Implementing a data governance program will drive growth and help improve the member experience by encouraging the use of consistent, accurate, and reliable analytics to inform decision making.

Having a basic foundation for data governance will help bring standards and processes to managing data, with clearly defined roles and ownership. When starting out with engagement data, it's important to list out your data sources and document them with your team, which could happen as part of a larger data governance initiative. While it may feel intimidating to get started, it's easier than you might think and there are resources out there to help you get started.

At a minimum, you can start by holding a brainstorming session with different members of your staff to determine which engagement sources are aligned with your mission and strategy. The goal is to build consensus on which data sources matter, so you can develop solutions to capture the data.



Example Data Sources

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

Learn More About Data Governance

[READ OUR ULTIMATE GUIDE](#)

02 Invest in Tech to Capture 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.

Luckily, there are numerous technology solutions that can help you out and we encourage you to start researching vendors to help you create a true 360-degree view of member engagement.

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



PRO TIP

Our data analytics platform, Acumen, was built specifically for associations to help them centralize their data and includes hundreds of pre-built integrations into the most commonly used association tech systems. If you'd like to learn more, you can [schedule a consultation](#) with one of our data-loving experts.



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 something doesn't work, switch gears to another activity or business question to answer.



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 gets 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 (example: 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!

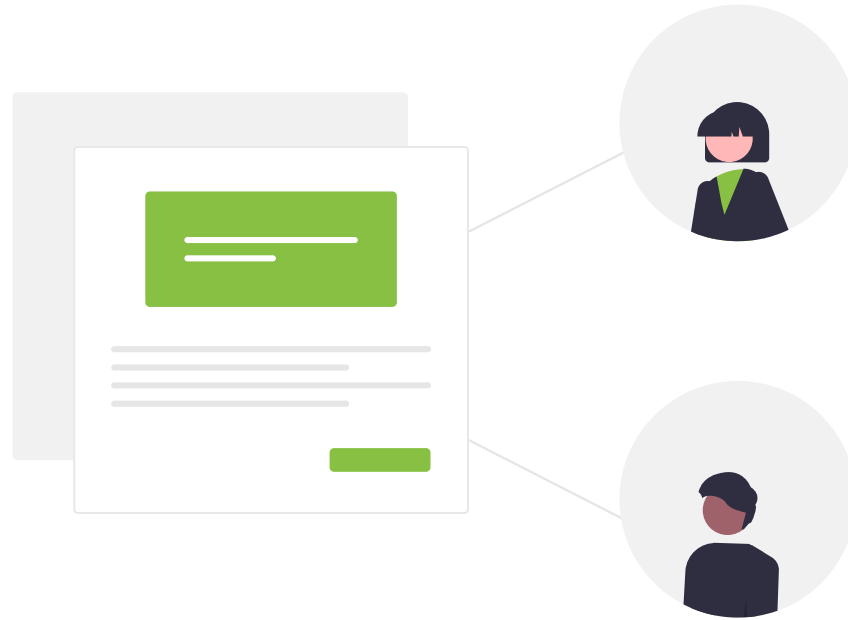
[DOWNLOAD NOW](#)



Avoid only including data for 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 channels like online communities where data is captured as text.

An advanced analytics solution will allow you to bring together all data, including unstructured data that can be incredibly useful for discovering trends. 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

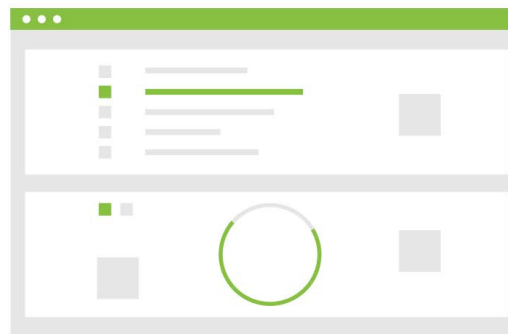
Once you have determined an engagement model that makes sense for your organization, you will want to establish a baseline of data so you can dive deeper into understanding how engagement correlates to business outcomes. You may want to see how higher levels of engagement correlate to financial outcomes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

- Additional revenue or purchases
- Member satisfaction and retention
- Increased event attendance

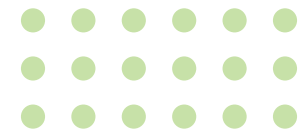
If you decide to use ranked deciles to score engagement, you now have a granular way of comparing highly engaged members with less engaged members. This is valuable because it allows you to target and segment the less engaged members and focus your efforts on getting these members more engaged.

You can start to effectively set goals and develop a roadmap for the next 6 to 12 months. Start to use the data to inform your decision-making, determining which engagement programs to sunset and where to invest more. 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



The final point to make on engagement scoring is to communicate and share your progress over time. This is where having analytics technology in place becomes incredibly useful, with proper engagement visualizations that can be shared easily with other stakeholders in your organization.

A business intelligence and data analytics solution will change how your team operates, giving you more time to measure your results and develop data-informed strategies. It will allow you to become agile, regularly monitoring engagement and continuously improving strategies to drive more revenue, grow retention, and improve the member experience. All of this will lead to greater profit for your business, providing you with important business intelligence that can help to adapt as markets change and member sentiments shift.

Beyond just the visualizations, an investment in analytics solutions will help give you create standard reports with consistent and accurate data. All of this should be self-service, allowing anyone to access the data in real-time and helping to eliminate manual work spent building ad-hoc reports.



Association Analytics is a team of passionate people who love helping associations discover insights and take action on their data. That's what drove us to create Acumen, our data analytics platform built exclusively for associations that comes with pre-built integrations into today's most popular software platforms.

We bring all of your data together in one place for to visualize, analyze and take action. Helping you grow.



Discover insights at AssociationAnalytics.com.

Learn how to grow your association with Acumen by speaking to one of our data-loving experts.

TALK TO AN EXPERT

A pair of hands is shown from the bottom, with fingers interlaced to form a heart shape. The hands are set against a dark blue background.

FOR THE *Love*
OF DATA