



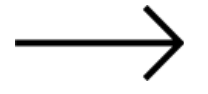
CAUSEIS PRESENTS

Digital Academy for Associations

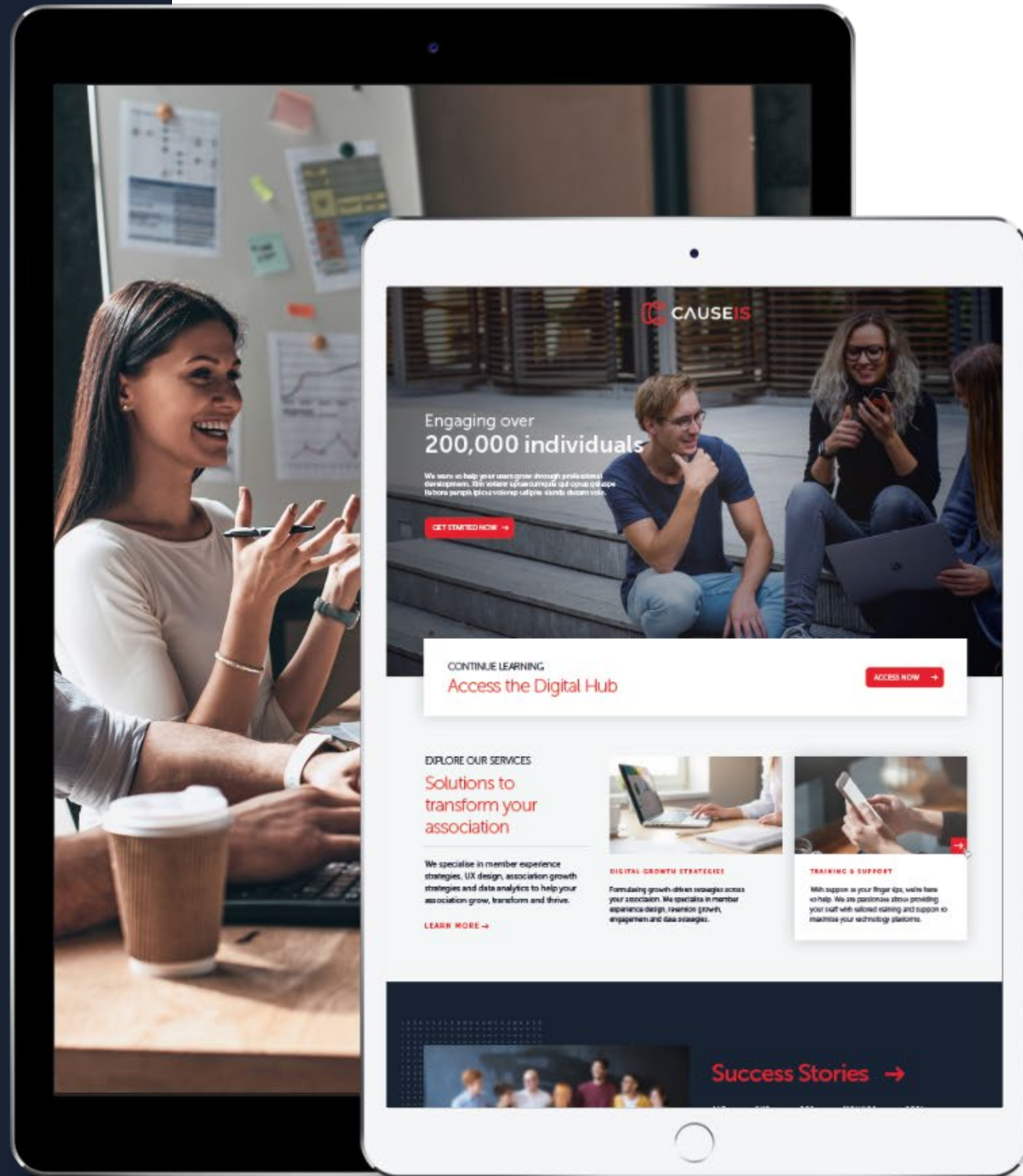
→ Course: Data Management for Associations



Digital Academy



Welcome to the Digital Academy



- Time to focus on your Association Strategy
- Learn from other associations and your peers
- Use Member Experience techniques to shift your strategies
- Consider new culture, innovation and ideas
- Tools and frameworks to help you



About Causeis

Causeis exists to support associations.

Causeis is the complete Digital Partner for your association, and we bring a shared vision for your success.

With unmatched experience in association strategy and technology to draw on, every aspect of our service is centered around the member experience.

Partnered with global best-in-class technology, we ensure you have all bases covered with Causeis.

Recently named by ASI as the Global iMIS Partner of the Year.



Supported by AuSAE

The home for association professionals.

A place where you belong, connect with others, advance your career and be inspired.

www.ausae.org.au



Maximise your Workshop Experience



Mute as required

To allow for clear audio please mute yourself when presentation sessions are in session. At times we may mute your line if you may have forgotten.

Session recording

Today's presentations are being recorded however to maximise you're sharing and networking the breakout rooms will not.

Presentation Slides

Presentation slides and recording will be distributed on course completion.

Chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat. Share ideas, successes and learnings.

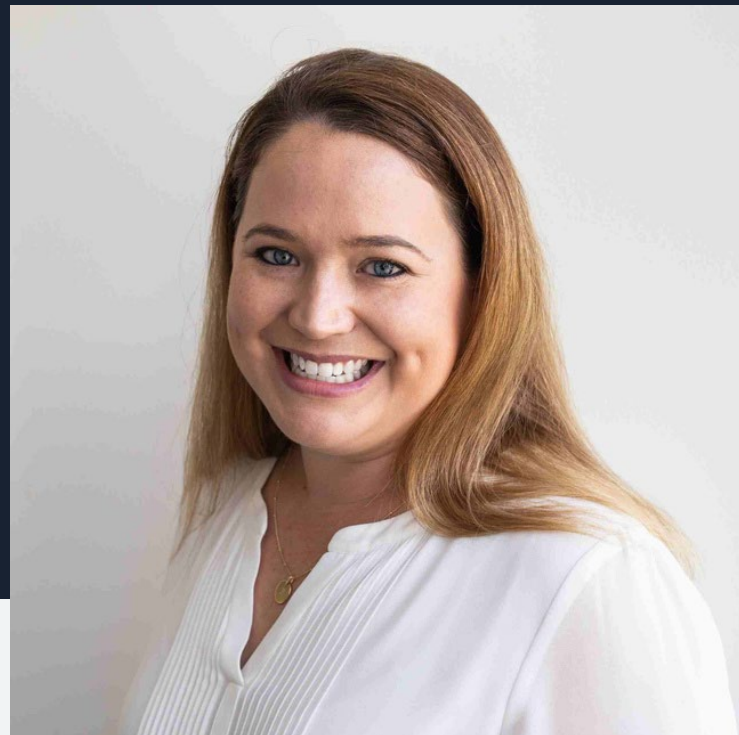
Use your camera

Especially in the breakout rooms, please don't be shy and turn on your camera to increase your engagement.

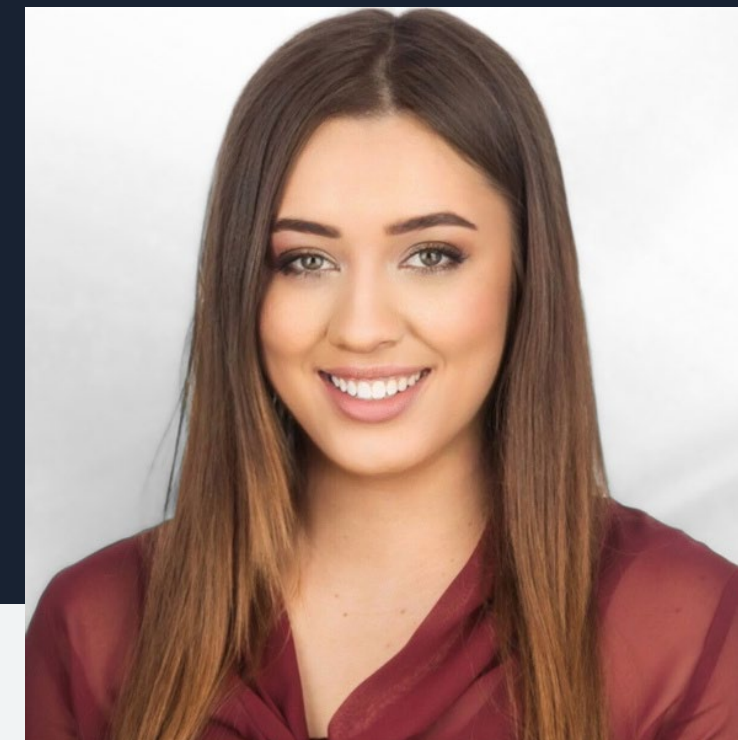
Update your Name

So that we know who you are, and to let everyone know where you are from – lets rename ourselves to show our full name & acronym

Presenters & Facilitators



Michelle Lelempsis
Managing Director
Causeis



Cassandra Vasovic
Customer Success Manager
Causeis

Thursday 14th September

Day 2: Agenda

- Your review of your associations data
- Data Management Framework
- Planning for Integration
- Data Integrity
- Formulaes
- Excel Cheat Tips: Pivot, Vlookup, & Filtering

Breakout Rooms

Day 2: Learning & Networking

- Assessing your associations data
- Data management goals

Digital Academy: Data Management for Associations

Let's Recap

**Data
Assessment**

Data Assessment

Assessment: Current and Future State

Current State

List what your current state of data is, pain points, frustrations, success.



Future State

List what your future state of data will look like including goals, success, resources, needs.

Data Assessment

Data Assessment

Software

CRM / AMS

Website

Email Marketing

Survey Tool

Event Management

Purpose

Tracking of membership data

User accounts and online information

Subscriber and preferences

Responses (anonymous and personal)

Registrations and CPD tracking

Data Collected

Name, Industry profile, Membership data, contact information

Logged in history

Email marketing history, preference management

Satisfaction, feedback, complaints

CPD, attendance,

Gaps

Reporting easy for users to Access
Gaps from other systems

Not integrated
Limited to one staff member

Limited to one team
Not used across full reporting

Anonymous data

Membership data not linked

Strategies for Data Management and Unified System



Minimum Data Set

Minimum Data Set

What is the critical minimum data set?

Definitions are critical

Definitions are critical



What are your key association definitions?

Review your member data

Review your member data



Review your member data – what did you see?

Breakout Room



15 minutes and you will receive a 60 second warning when ending



Introduce yourself, association



Data Assessment: Findings, the Good, the Bad and the Ugly



Your Minimum Data Set



Data Management Strategies

Data Management Goals

Productivity

Good data management strategies will ensure your members, staff and association are more productive. Data is easier to access.

Cost savings

Reduce duplications, focus your association efforts, increase revenue

Agility

Data Management will allow your association to be more agile and respond as your member needs change.

Drive Security Improvements

Holistic data management strategies will include a focus on data security and safe guarding the use and transmission of data.

Data protection

Back-up practices, internal ownership and knowledge.

Accurate Decision Making

Data management will help ensure your association staff are accessing and analyzing the same data. In turn enabling improved decision making.

A framework for data management.





Identify Gaps and Improvements: Planning for Integration



Planning for integration



What are the integration goals?



What is the purpose of the integration?



What integration technology is required?



What scenarios exist for testing?



How to measure the success?



What are the integration goals and purpose?

- Not to integrate for the sake of integrating!
- Ideal goals:
 - Allow your CRM (like iMIS) to be the source of truth
 - Capture Engagement data
 - Allow ease of use by members (SSO)
 - Data integration via an API
 - Use proven – off the shelf bridges and integrations
- A major purpose should be to have a complete picture of all members and their interactions with your various systems



What about testing?

- Does the 3rd party vendor allow a test environment?
- Do you have a test environment?
- Have you planned your project effectively?



Custom vs Standard Integrations

Can your CRM do it out of the box? →

Lowest Cost, Lowest Risk

No need to write any custom code.

Is there a third party integration already built? →

Medium Cost, Low Risk

Bridge handles all versions of CRM and you are not responsible for changes to either the CRM or Vendor API

Custom Build →

Highest Cost, Highest Risk

You are responsible for learning and using the iMIS API's and the Vendor API's. You will need to address all breaking changes to iMIS API's or Vendor API's.



Considerations

- An integration should be invisible to your users
- Make sure you are clear on the "Source of Truth" for data
- Be clear on where all of your member data is located
- Let the third party system do what it does best and let iMIS do what it does best
- Understand what historical data you will have if you change vendors (e.g., LMS vendors)



When not to integrate

Nobody remembers the purpose. →

Don't over integrate so nobody can remember the rules, reason and why! What is the purpose and goal.

Over engineered →

Over engineered integrations, will cost your association over time. Due to lack of business rules, complex needs and lost opportunities.

Process is too complex →

If your process is overly complex and you can't easily document then integration may not be suitable.



How to measure success?

- Provides the data to improve your decision making
- Ease of use by your members
- Ease of support by your staff
- Provides enhanced data about members
- Links to other services such as CPD recording

Let's take a 5-minute break

Grab a refreshment

Please feel free to mute and turn off your camera

Don't close the Zoom session

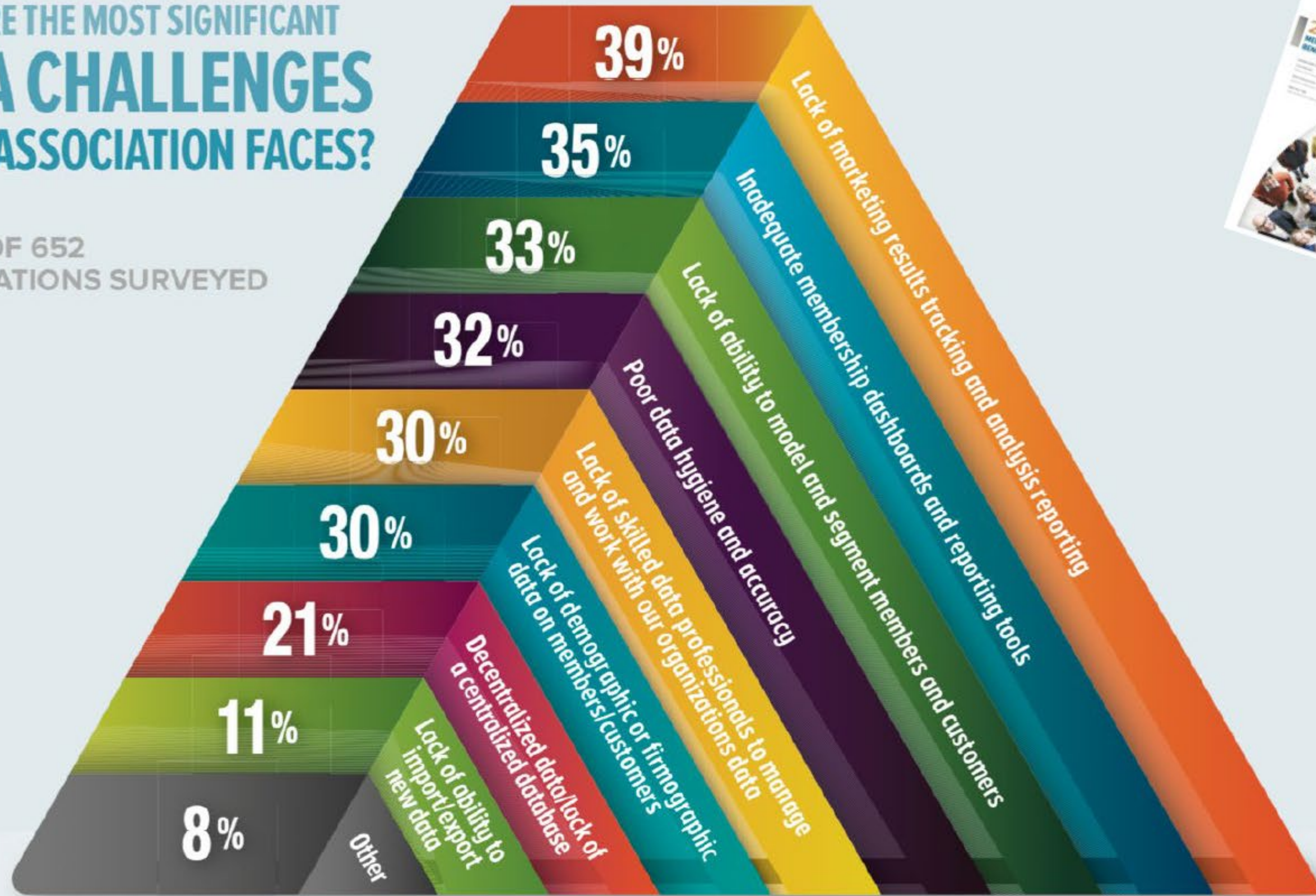


Data Integrity



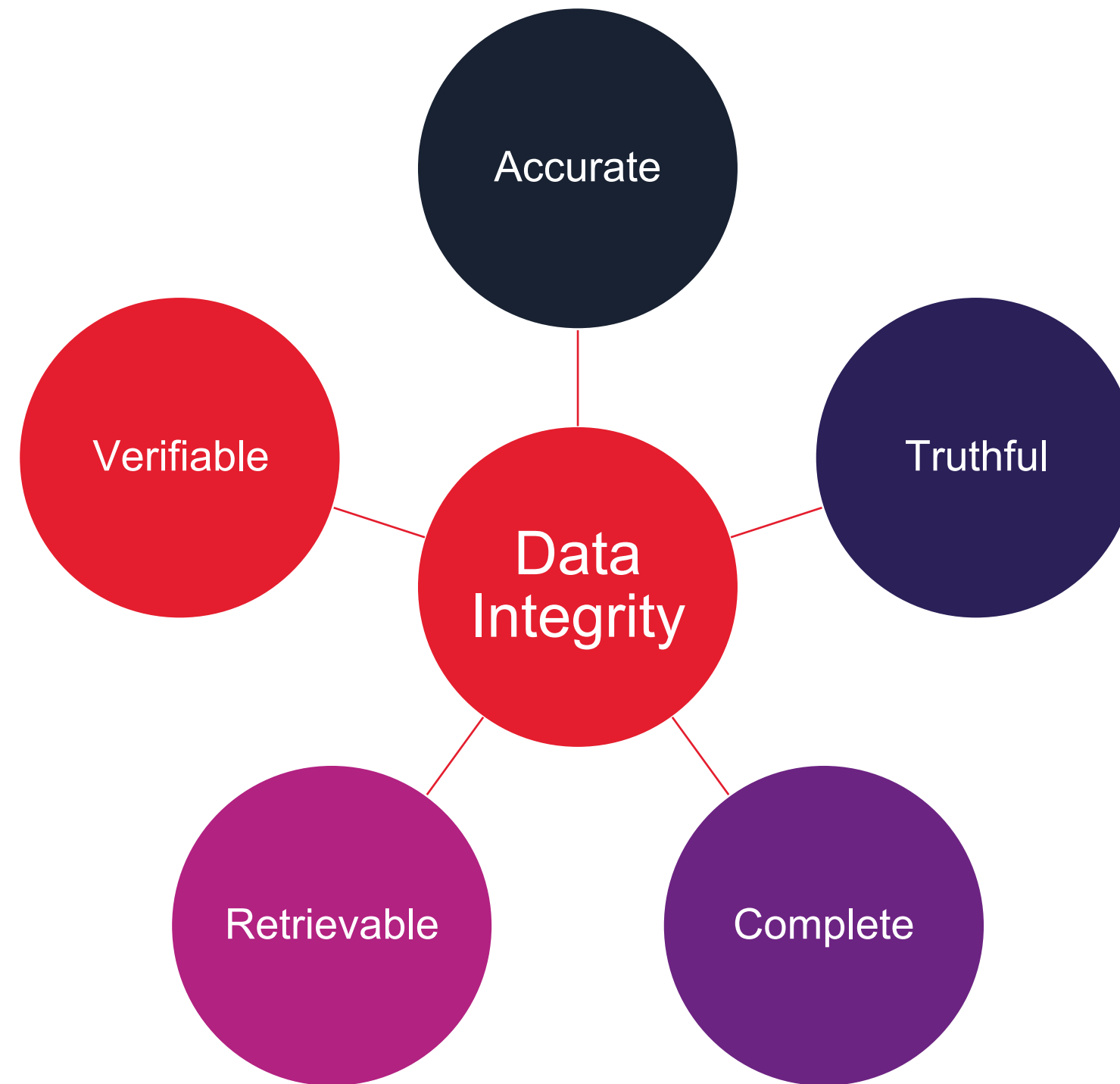
WHAT ARE THE MOST SIGNIFICANT DATA CHALLENGES YOUR ASSOCIATION FACES?

TOTAL OF 652 ASSOCIATIONS SURVEYED





Data Integrity





Data Integrity

- Did you know that a member without a valid email is 5% less likely to renew their membership?
- What about members that don't have a valid login to your portal?
- How can you change how you proactively contact your members?



Data Integrity

- Use Excel if you can't develop reports
- Export your key member data to identify gaps
- Start with the minimum data set
- Encourage pro-active or automation to connect with members



Data Integrity

- Data integrity should be completed across all data;
 - Financial
 - Member
 - Engagement
 - Website
 - CPD



Data Integrity: Automation Ideas

- Gamification: Show your members what percentage of their profile is completed and incentivize 100%.
- Nudge them to login if they haven't accessed the portal in 3 months.
- Notify staff of updates completed by the member via the portal. E.g Updates to address or company.



Data Integrity: Automation Ideas

- Internal notifications to staff about gaps in set-up, financial transactions or important data reviews.
- End of month reporting to finance or membership on statistics
- Dashboard driven data integrity to identify gaps or problems.



Data Integrity: Automation Ideas

Missing Birth Date 605	Missing Category 605	Missing Chapter 605	Missing Company ID 3
Missing Company Name 2	Missing Email 7	Missing Functional Title 605	Missing Gender 604
Missing Job Title 311	Missing Join Date 605	Missing Mobile 467	Missing Mobile (Toll Free) 482
Missing Paid Thru Date 605	Missing Postcode 25	Missing Prefix 604	
		Company Name but no Parent Company 1	Web Login Locked 0



Data Integrity: Automation Ideas

My tasks Top committees Top participants Top orgs **Data integrity**

Select a query

- Data integrity
 - ✓ Contact erasure request
 - Individuals missing primary email
 - Individuals with no link to company
 - Locked out users

Export ▾

ID	CONTACT NAME	STATUS	NOTE	CREATED BY
18933	Dr Benjamin Arthur Willis	Marked for erasure		Mrs Madison V Chabot
19844	Mr Robert V Baez	Marked for erasure		Mrs Madison V Chabot
21434	Ms Karam Gabhal	Request for erasure		Kallie Donovan
20661	Mr Stephen M Walton	Request for erasure		Kallie Donovan

Email



Tips for Maintaining Data Integrity

- Validate input: Use the right data type to collect the data
- Validate data: Update any data that is incorrect
- Remove duplicates: Duplicates are costly to associations.
- Back-up data and validate recovery process
- Access controls: CRUD (Create, Read, Update and Delete)
- Audit trail: Financial and contact data



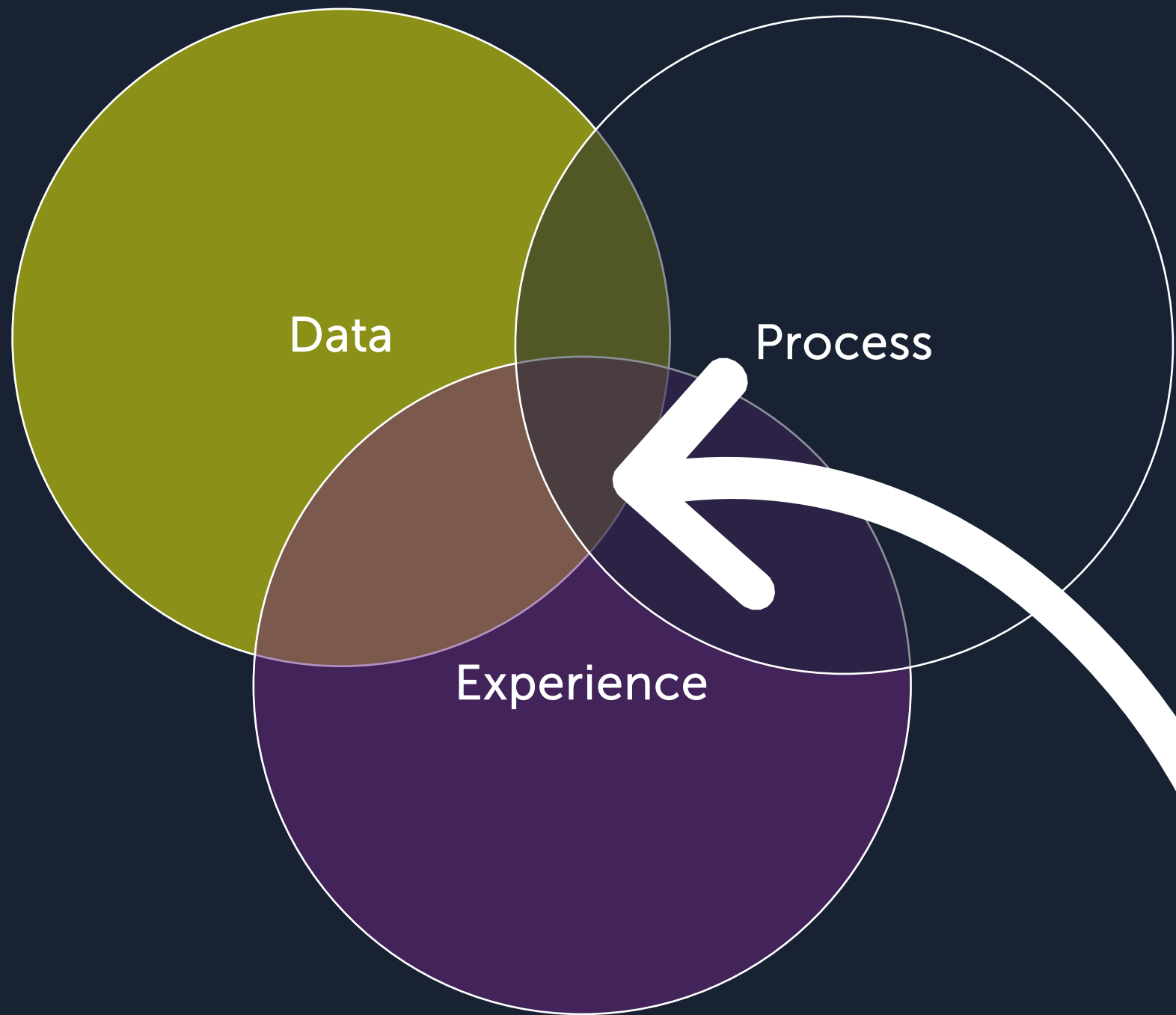
What metrics can you **access** today?



Data Driven Associations.



- ✓ Ability to talk with metrics and performance KPIs.
- ✓ Measure past success to enable future decision-making.
- ✓ Collect the right data for reporting.
- ✓ Eradicate data-silos.
- ✓ Data managed, secure and maintained.
- ✓ Ability to access real-time metrics (retention, conversion, engagement, performance).



Digital Success

Data. Process. Experience.



- ✓ Ability to talk with metrics and performance KPIs.
- ✓ Measure past success to enable future decision-making.
- ✓ Collect the right data for reporting.
- ✓ Eradicate data-silos.
- ✓ Data managed, secure and maintained.
- ✓ Ability to access real-time metrics (retention, conversion, engagement, performance).

Data. Process. Experience.



Digital Success	Project Phase	Post 1-Month Live	Post 6-Month Live
DATA			
Is the right data being captured?			
Do you have the right data?			
Can you report on the data?			
Where is the data stored?			
Will the data need maintenance and management?			
Can real-time reports be developed to measure performance?			

A laptop is shown from a low angle, open. The screen displays a rocket launch with a bright orange and white rocket ascending into a blue sky. The base of the rocket is surrounded by a low-poly, geometric data visualization in shades of white and grey. The laptop keyboard is visible in the foreground. The overall scene is set against a dark, muted blue background.

What are data driven
associations measuring?



Data Driven Associations.

Retention Rate

Dive into retention across categories, segments, and member stage. Comparing year on year and impacts.

Membership Churn or Tenure

Defines how long members stay with your association. Average retention is 84% then the tenure is 6.25

Marketing Effectiveness

Beyond the individual email campaign, but driving readership, behaviour and outcomes through learning your marketing impact across communication medium, readership, action.

Online Behaviour

Tracking how members are accessing your secured, gated content or benefits. What number of members are logging into your website? How many haven't accessed the site in a few months?



Engagement Scoring

Measure of participation and the ability to rank members behavior. To identify the utilization of members accessing your benefits and services. 20% of members access CPD in a year, 4% use advisory line.

Data Driven Associations.

Retention Rate

Dive into retention across categories, segments, and member stage. Comparing year on year and impacts.



Retention Formulae



Data Driven Associations.



Retention Rate by Excel

Two files:

- All members that were offered to renew
- All members today

Explore: Deduping, Vlookup and Pivot

Data Driven Associations.

Retention Rate

Dive into retention across categories, segments, and member stage. Comparing year on year and impacts.

Membership Churn or Tenure

Defines how long members stay with your association. Average retention is 84% then the tenure is 6.25

Marketing Effectiveness

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Data Driven Associations.

Membership Churn or Tenure

Defines how long members stay with your association on average.
Average retention is 84% then the tenure is 6.25

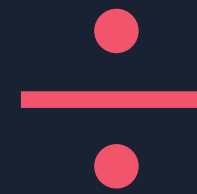


Tenure Formulae

LAPSE RATE =

1 - Renewal Rate

1



LAPSE RATE
Expressed as a decimal

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Marketing Effectiveness Statistics

- Member Segments that are opening your emails
- Behavior from the marketing effort
- Percentage of members that open and click *any* email in the month or year
- Number of members you reach via social media (LinkedIn or Twitter)
- Number of communications sent to each member per week, month or year

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Online Behaviour Statistics

- What percentage of members log into your website per week, month or year?
- Which segments are accessing secured content?
- Which members are participating in online community content?
- What is the most valuable gated content in your portal?
- What is the most popular public content?

A laptop is shown from a low angle, with its screen displaying a rocket launch. The rocket is white with a red nose cone and is launching upwards, leaving a trail of white smoke. The background of the screen is a dark blue sky. In the foreground, several low-poly, faceted spheres in shades of white and light blue are scattered across the laptop's keyboard and base. The overall scene is set against a dark, muted blue background.

Member Engagement Scoring: Ultimate goal for data management



Data Driven Associations.

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Dive into retention across categories, segments, and member stage. Comparing year on year and impacts.

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Engagement Scoring

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Engagement Scoring Statistics

- Who are the most engaged members?
- Who are the least engaged members?
- What is the most accessed benefit or service?
- What is the least access benefit or service?
- What segments are not accessing services or benefits? Is this a gap in your value proposition?

A laptop is shown from a low angle, open. The screen displays a rocket launch with a bright orange and white rocket ascending from a base of low-poly, faceted spheres. The background is a dark, muted blue-grey. The text 'The best of the best' is centered over the screen area.

The best of the best



A person with their back to the camera, looking at a world map. The person has short brown hair and is wearing a plaid shirt. The map is a world map with various colors for continents and oceans. The text "Start today to shift to a data driven association" is overlaid in white on the map.

Start today to shift to a
data driven association





Other Aspects of Data Management



Other considerations

- Educate your team – Data security, transmission, breach of data
- Move to cloud infrastructure or managed services
- Learn the law – What legislation should you be familiar with?

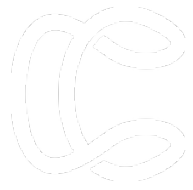


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A framework for data management.





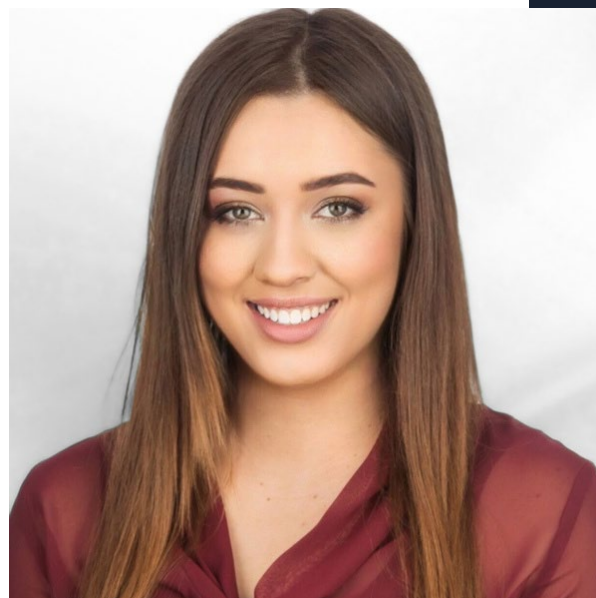
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