



CAUSEIS PRESENTS

Digital Academy for Associations

→ Course: Engagement Scoring for Growth and Continuous Performance Improvement



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



Ash Hunt
Senior Solutions Consultant
Causeis



Paul Ramsbottom
Managing Director
Advanced Solutions International

Tuesday 7th December

Day 1: Agenda

- Digital Academy Courses and Summary of Key Topics for Engagement Scoring
- Engagement Scoring: Technology Leader
- Engagement Scoring: Framework and Development

Breakout Rooms

Day 1: Learning & Networking

- Member Engagement
- Member Value Proposition and Stock Take
- Engagement Scoring Framework

Digital Academy: Data Management for Associations

Let's Get Started

Digital Academy Courses

- Courses in Review for 2022
- Everything leads to Engagement Metrics

A woman with dark hair, wearing a black sleeveless top, is standing on a glass-enclosed escalator in a busy urban setting. She is looking down at a smartphone in her hands. The background is a blurred city street with other pedestrians and buildings. The overall image has a blue-tinted overlay.

What does a future association look like?

What does a future association look like?

Leading with Innovation

Associations will be leading with innovation, agility and able to lead the market.

Personalised Experiences

Why not be an association for everyone? Targeted, relevant and personal.

Impacting Policy and Industry

Leaders in policy and industry changes that are tech-driven. Google AI Spot check.

Connecting Consumers and Members

Focused on connecting in real-time, consumers with members and new markets.

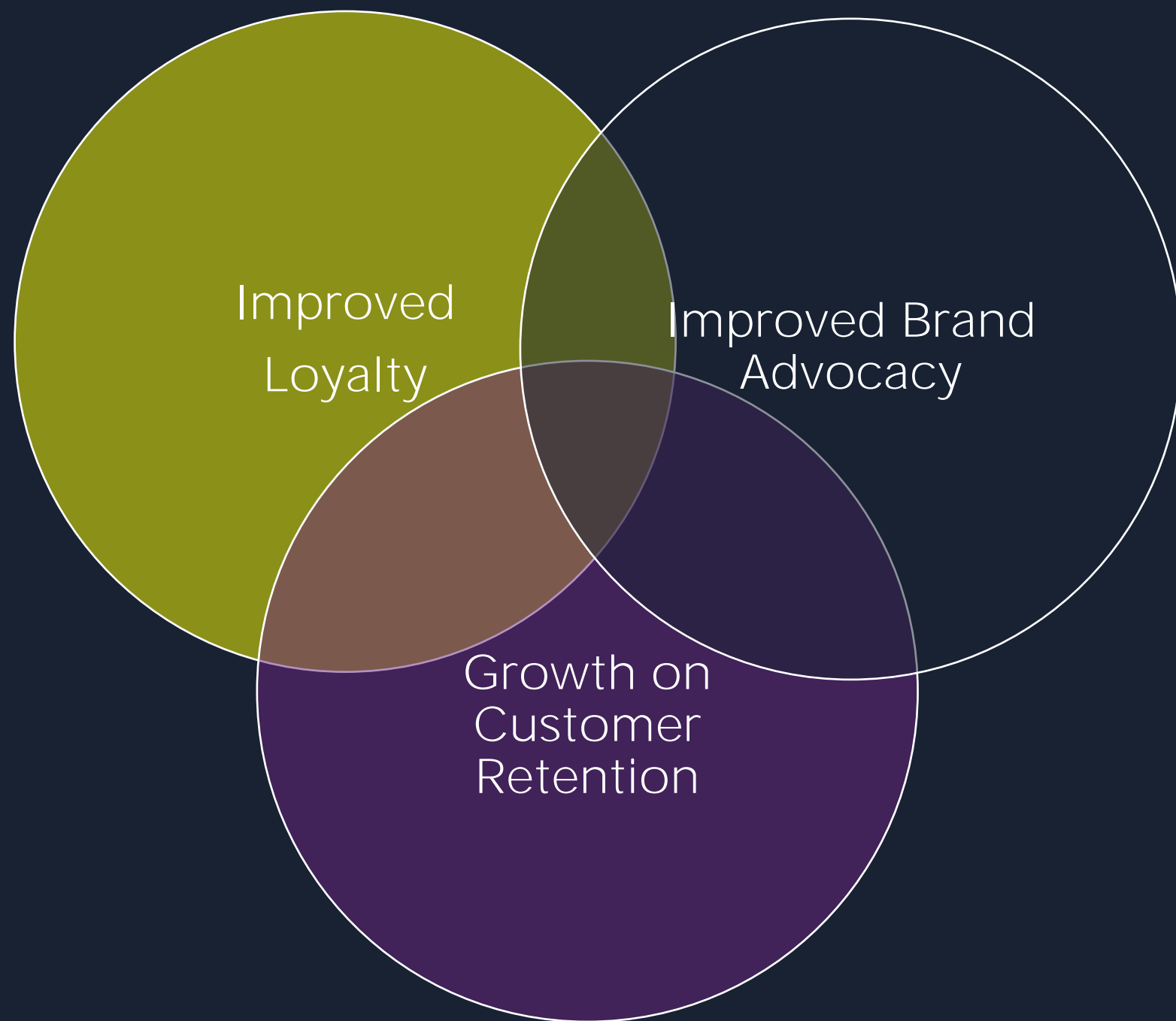
New Markets and Global Reach

Connectivity will be easier and more accessible. Global associations will influence local markets.

Content driven by AI and New Sources

AI driven content will provide new opportunities, and new sources. Member driven content will be bigger than ever before.

Member Journey Mapping



Customer Experience

What is holding your association back?

Disparate Systems

Systems that are for different purposes, duplication of process, data gaps.

Limited Skills and Knowledge

Data Manager, Business Analyst, and CX Officers are the future.

Budget

Digital, IT and Data need growth in budgets as all association services are delivered across technology.

Innovation Gaps

Create a culture of innovation will enable your future steps and ideas. Start by talking about improvements, ideas and blue-sky thinking.

Guiding Principles

Is your association perception of “agility” resulting in lost opportunities? Create a framework for your digital guiding principles.

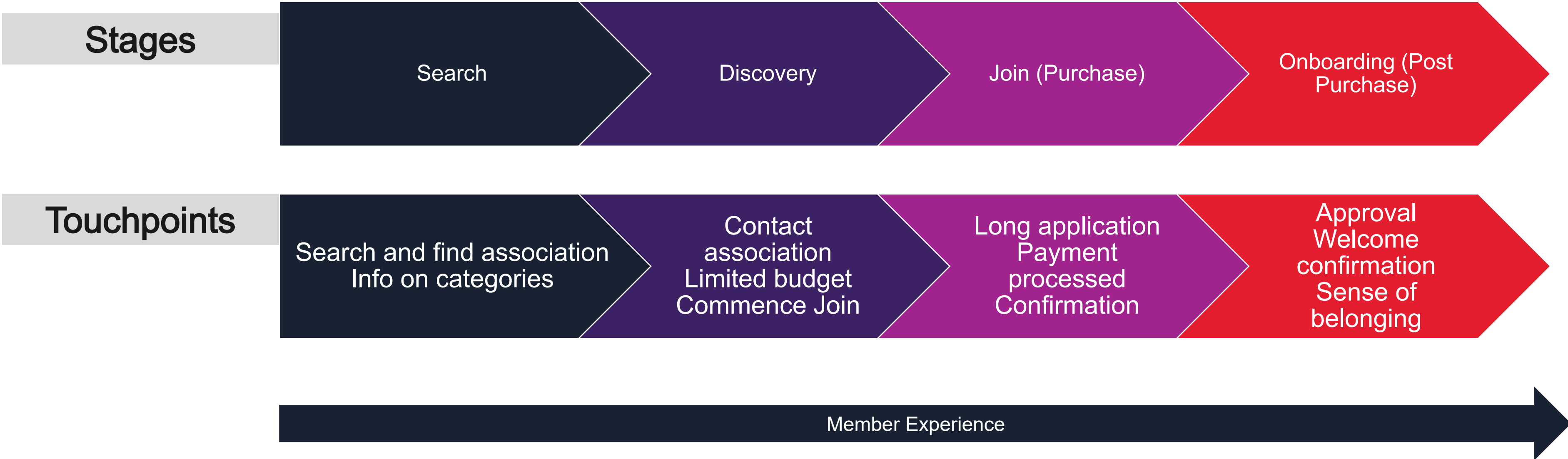
Data as Business Driver and Asset

Data is the most valuable asset your association has – how are you harnessing, managing and using to sustain your business decisions.

A framework for successful CX.



Pain and Gain Journey Mapping



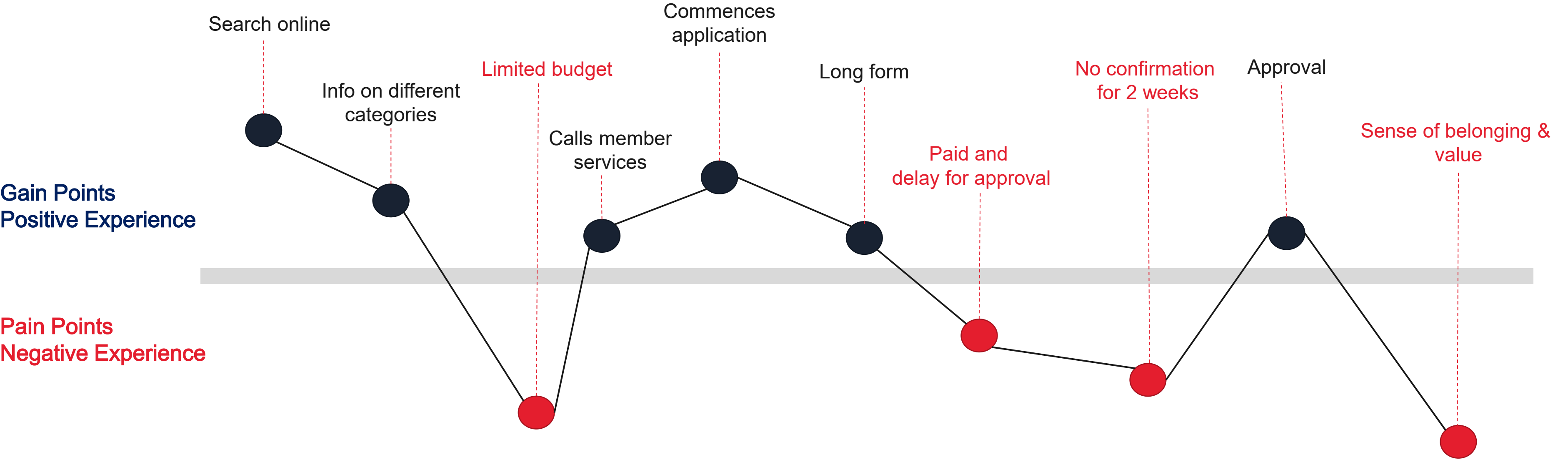
Pain and Gain Journey Mapping

Search

Discovery

Joins (Purchase)

Onboarding





Personas

If MX teaches us to focus on the Member's satisfaction, efficiency and effectiveness then a persona will help your association identify that each member is different.

Not all members are created equal.

Personas:

Jane



Sarah



Frank



Persona: Student to Full Member

Jane



Profile:

Age: 23
Occupation: Graduate Nursing
Location: Melbourne

Bio:

Recently graduated from Bachelor of Nursing. Seeking placement in a hospital. Experience in customer service from working while studying.

Goals:

- Start career in nursing
- Focused on advancing their knowledge in nursing
- To make a salary

Frustrations or Concerns:

- Impact of COVID
- New to profession
- Lack of career discipline or focus

Technology Skills:

Internet	High
Desktop/Office	Low
Social Networks	High
Mobile Apps	High
Trust in Technology	Medium

Daily Brands:



Personality:

Social Change	High
Trust	Medium
Innovative Thinking	Low
Adventurous	High

Persona: New Member

Sarah



Profile:
Age: 35
Occupation: Hospital RN
Location: Sydney

Bio:
RN in a major Sydney public hospital. 7 plus years experience. Switched hospitals to be closer to home 3 years ago.



- Goals:**
- Focused on career maintenance.
 - Advancing the industry and public health
 - Improving patient care

- Frustrations or Concerns:**
- Frontline COVID worker.
 - Time poor and works non-traditional hours
 - Mobile work, so not at

Technology Skills:

Internet	Medium
Desktop/Office	Medium
Social Networks	High
Mobile Apps	Low
Trust in Technology	Medium

Daily Brands:



Personality:

Social Change	Medium
Trust	Medium
Innovative Thinking	Medium
Adventurous	Low

Persona: Existing / Long Standing Member

Frank



Profile:

Age: 55
Occupation: Hospital RN
Location: Sydney

Bio:

RN in a Sydney private hospital. Post-operative nurse. 20 plus years experience. Switched hospitals to be dedicated to discipline.

Goals:

- Retirement consideration
- In career discipline and position
- Longer term goal to mentor and teach graduates

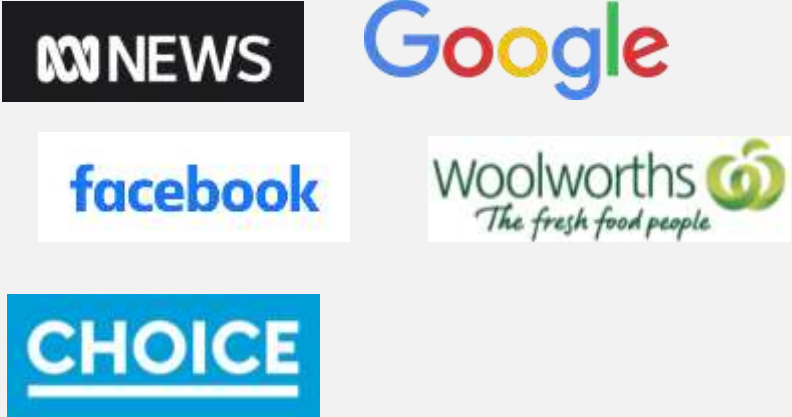
Frustrations or Concerns:

- Time poor due to family and work commitments.
- Works traditional hours

Technology Skills:

Internet	Low
Desktop/Office	Medium
Social Networks	Low
Mobile Apps	Low
Trust in Technology	Low

Daily Brands:



Personality:

Social Change	Medium
Trust	Low
Innovative Thinking	Low
Adventurous	Medium

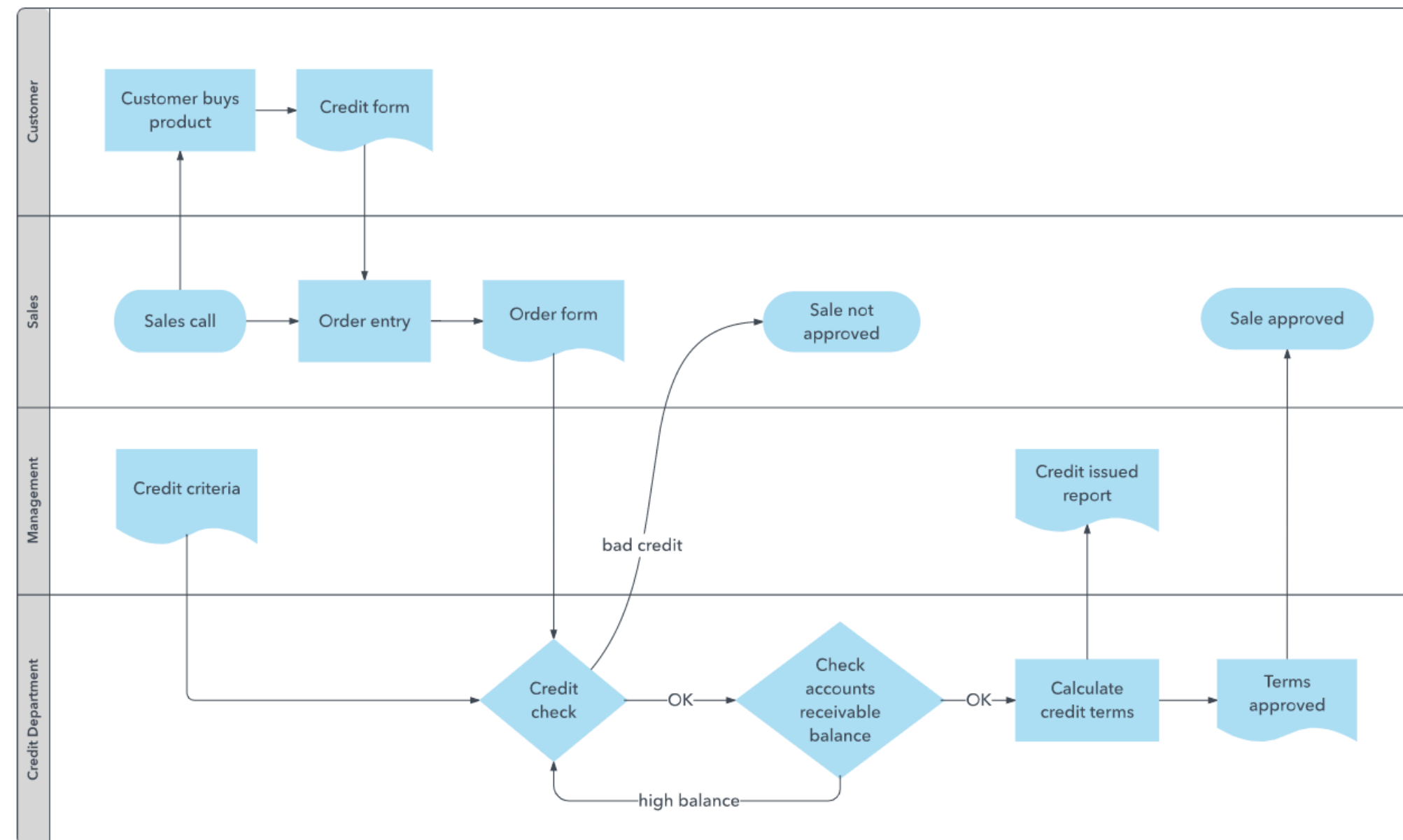


Tools to map your member journey

Swimming Lanes:

Define who / team
per lane

Process and touch-
points



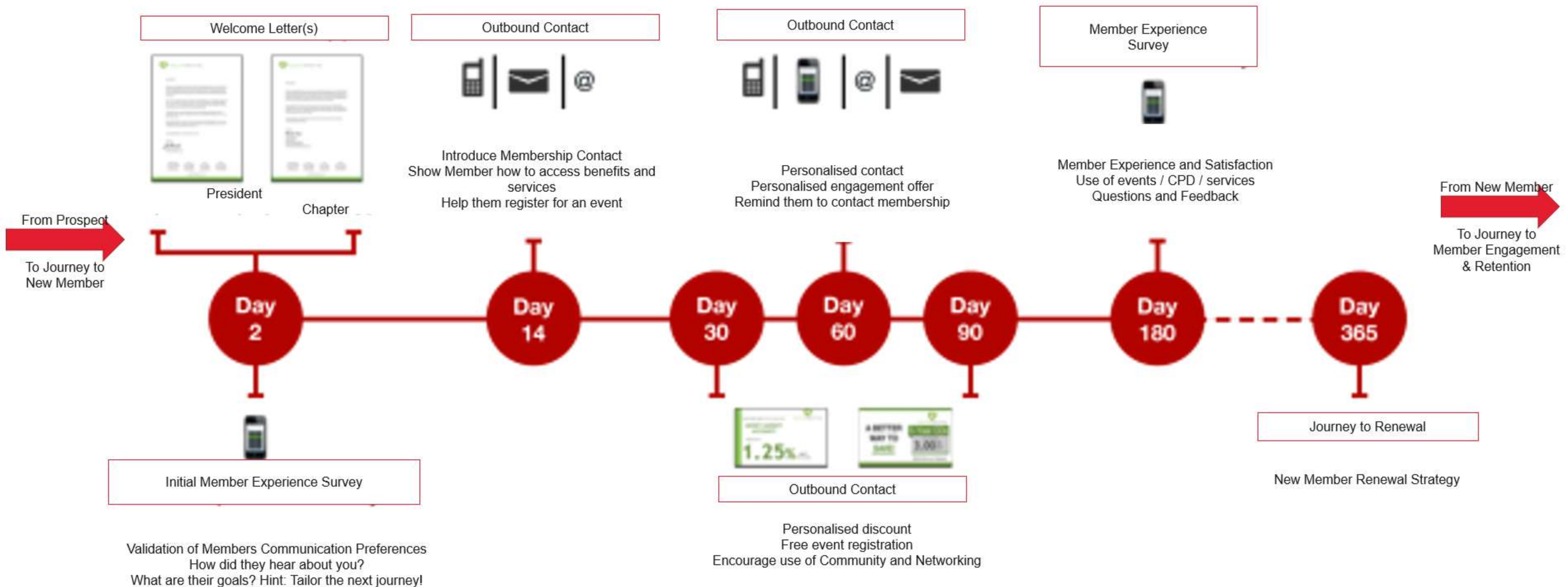


Tools to map your member journey

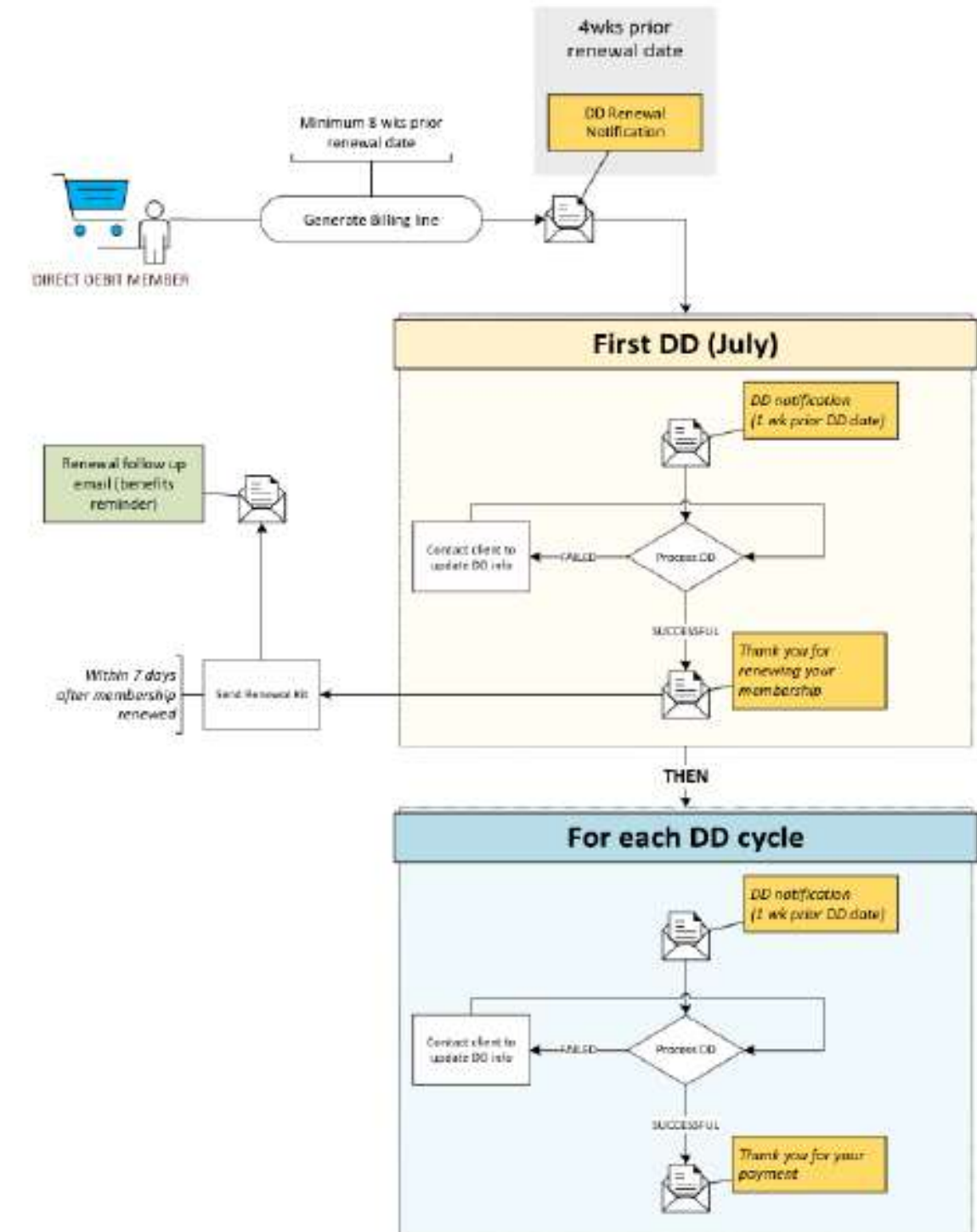
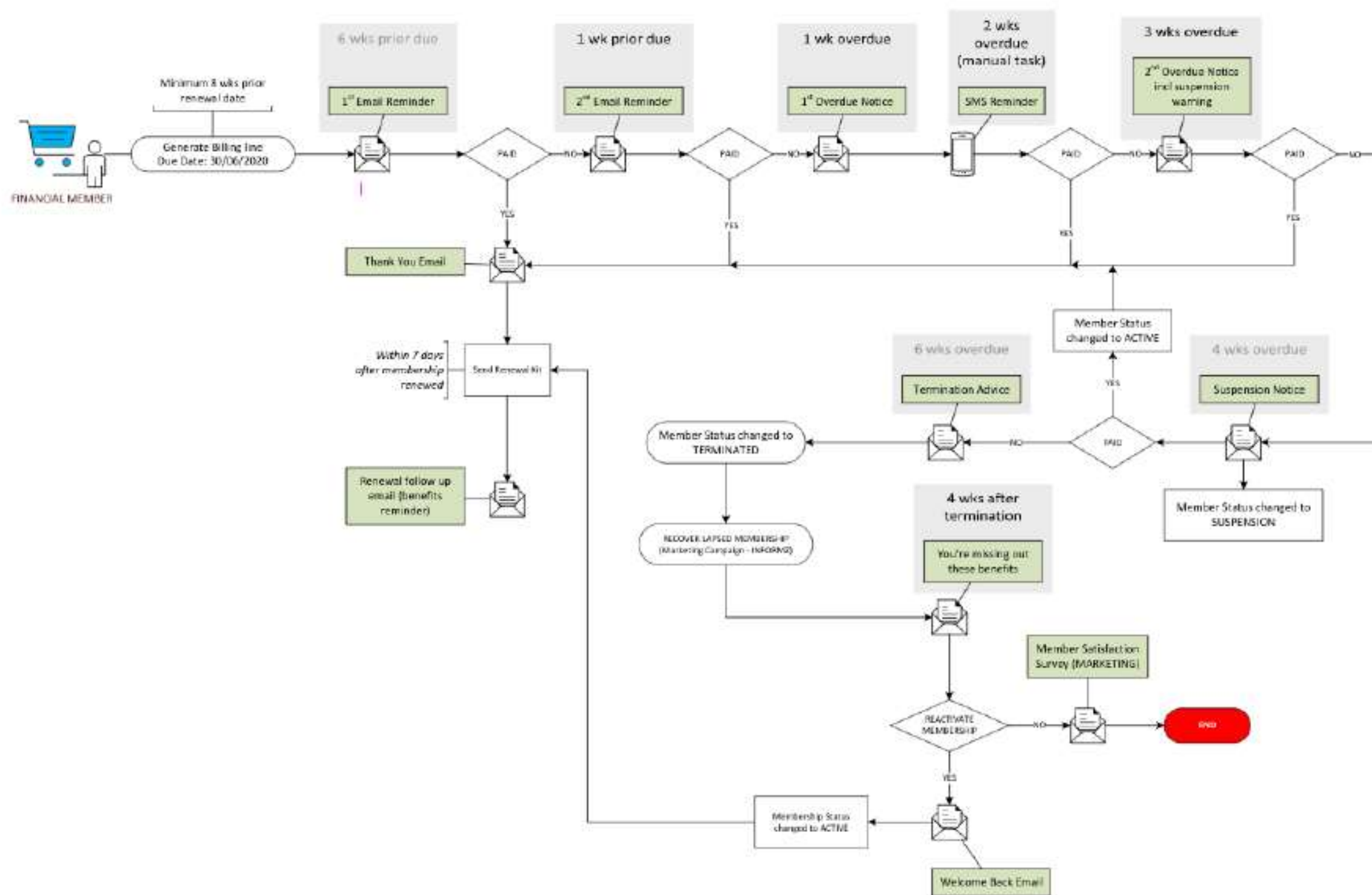
New Member Onboarding Process: The simplest journey to map

- How do they join?
- What happens immediately after?
- What happens within the first day?
- What does the Member receive?
- What does Membership Team do?
- What happens in 2-weeks?
- What happens at one-month?

New Member Onboarding Process



THE NEW RENEWAL JOURNEY



A group of five children dressed as superheroes, standing on a beach. From left to right: a boy in a blue suit with a red mask and cape pointing forward; a girl in a pink mask and cape holding a red starburst with the word 'BAM!'; a girl in a yellow mask and cape with arms raised; a boy in a blue mask and red cape holding a purple starburst with the word 'POW!'; and a boy in a green mask and cape holding a yellow starburst with the word 'BOOM!'. The background is a blurred beach scene.

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.

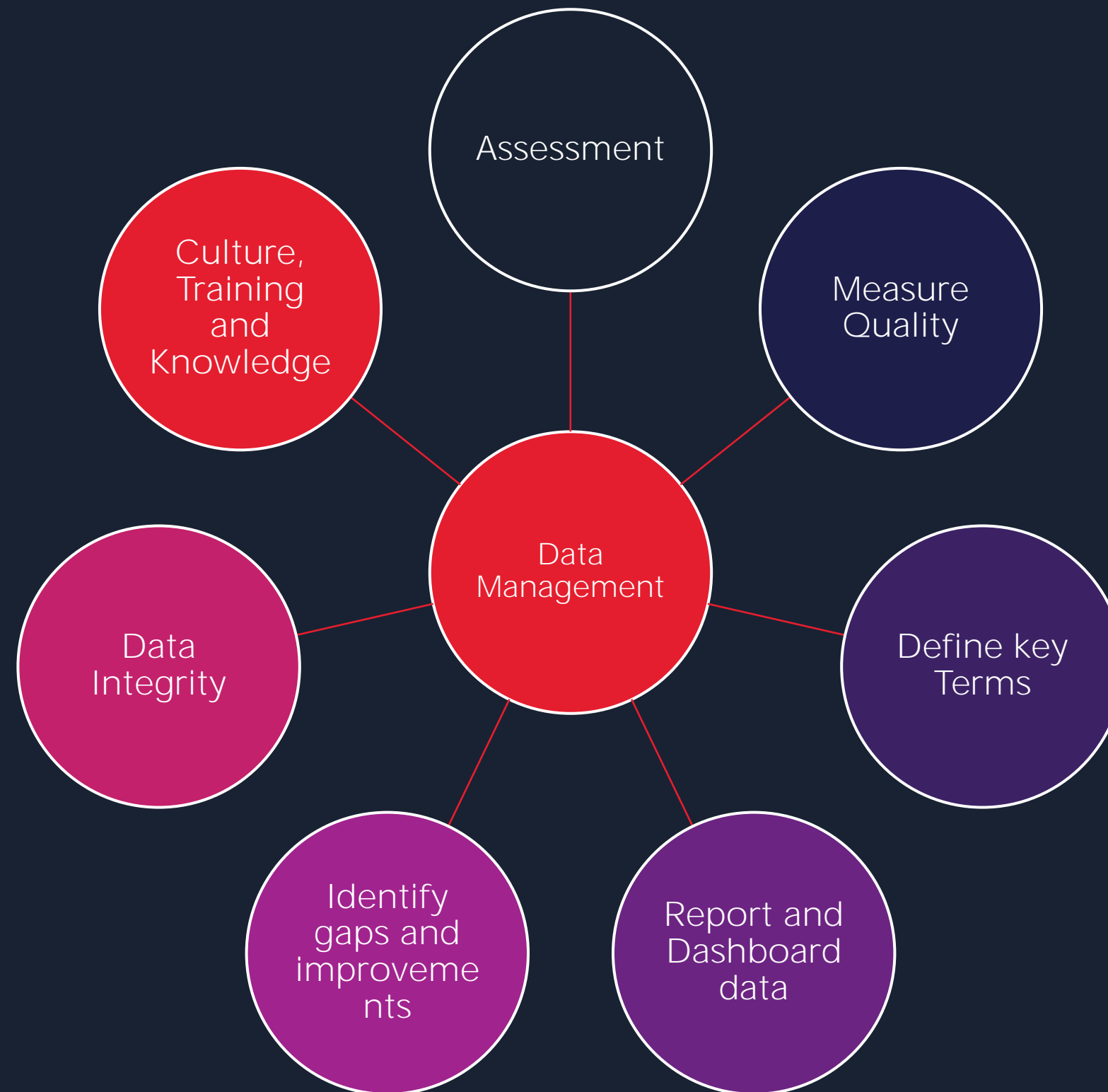
Data protection

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.



Assessment: Current and Future State

Current State

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

Future State

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

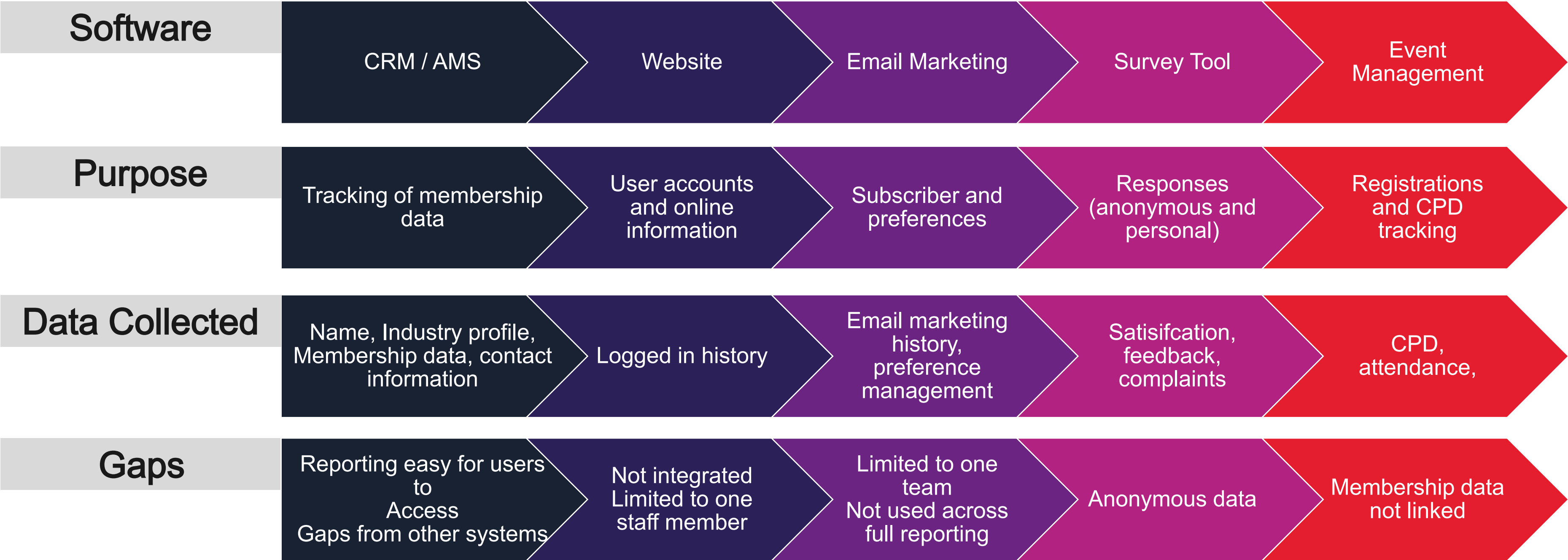


Ask these simple questions



- ✓ What systems do we have that are collecting data?
- ✓ What happens to the data?
- ✓ How are we using this data?
- ✓ Could we use this data?
- ✓ Can these be integrated?
- ✓ How could we easily report on this data via real-time dashboards?
- ✓ Are we using a spreadsheet to collect and store data?

Data Assessment





Let's take a 5-minute break

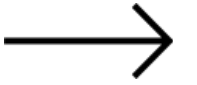
Grab a refreshment

Please feel free to mute and turn
off your camera

Don't close the Zoom
session

Tech-leader: Member Engagement and Scoring

Bios



Paul Ramsbottom

Managing Director, Advanced Solutions International

Paul is the Managing Director of ASI Asia-Pacific which has more than 600 Not-For-Profit clients across iMIS, Association Online and Donman systems



Questions

- Michelle to introduce you
- What does engagement mean to today's association?
- Why is measuring the engagement of your members important?
- What is the purpose of an engagement score?
- As a technology leader, what steps should an association consider when embarking on engagement scoring?
- Wanting you to talk to the value of single source of truth, one-system, data capture, integrity and using more than just a report on event attendance to move to viewing the full engagement metrics of members.
- Once you build an engagement scoring, what could this be used for?
- Are there any considerations you should factor in when developing an Engagement Score?
- Questions from anyone

Breakout Room



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



What does Member Engagement mean to your association?



How are you currently measuring engagement?



Have you started any Member Journey Mapping or Data Management Strategies?

Member Engagement and Scoring

What is Engagement?



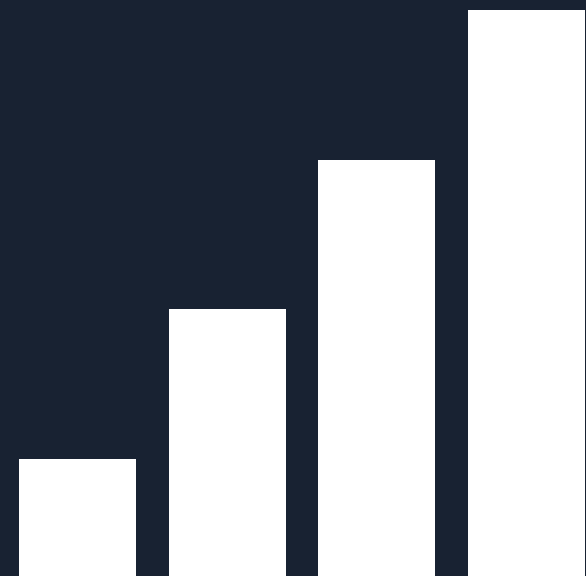
You are already engaging with
members and prospects

What is Engagement?



Engagement scoring is more than a buzz word – associations need measure in order improve performance and effectiveness to remain competitive and relevant

What is Engagement?



Engagement Score = Measure of participation and the ability to rank members behaviour

Engagement Strategy = Proactive behaviour resulting from the Engagement Score

What is Engagement?

What is engagement?

Every CEO wants to increase engagement.



A 3D bar chart with blue bars of varying heights, creating a sense of depth and growth. The bars are arranged in a grid-like pattern, with some bars being taller than others, suggesting data comparison or performance metrics.

2021 MEMBERSHIP PERFORMANCE BENCHMARK REPORT

COVID EDITION

What are your organization's **top operational goals** in the next year?

(Ranked on a scale of 1 to 5 with 5 being highest.)



Once again,
increasing
engagement
edges out
retention for
the top goal.



What is Engagement?

Loyalty and higher retention
Satisfaction
Passion for your mission
Referrals
Believes in your advocacy
Attendance
Opens and click-throughs
Volunteering
Participation

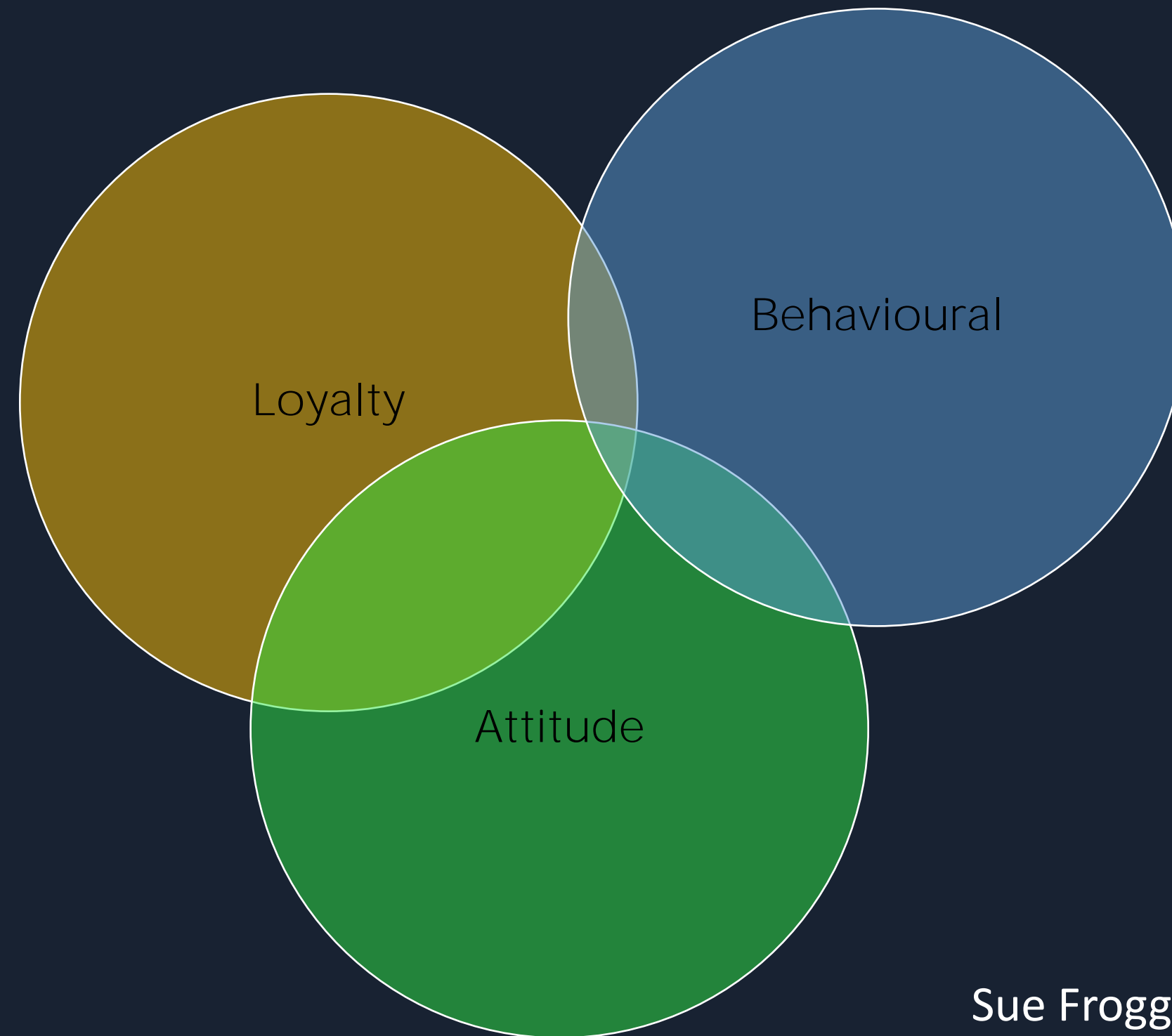
What is Engagement?

You cannot have a member engagement strategy across your entire member base - as not everyone joins or participates for the same reasons.

Why do your members join and renew?



Why do members join?



What is Engagement?

**The biggest mistake your association can make is
to not define Member Engagement
and its purpose.**

What is Engagement?

Member Engagement Goal
How do we start if we don't know why.

What is Engagement?

1. Measure your association success?
2. To be more relevant and personalized to members?
3. Improve our members satisfaction with our association?
4. Is it a retention problem?
5. Average tenure of membership is in decline?
6. Are members not satisfied?
7. Utilisation of core services is low
8. We aren't acquiring new members
9. We haven't appealed to new generations
10. No one wants to be on our board or committees?



What is Engagement?

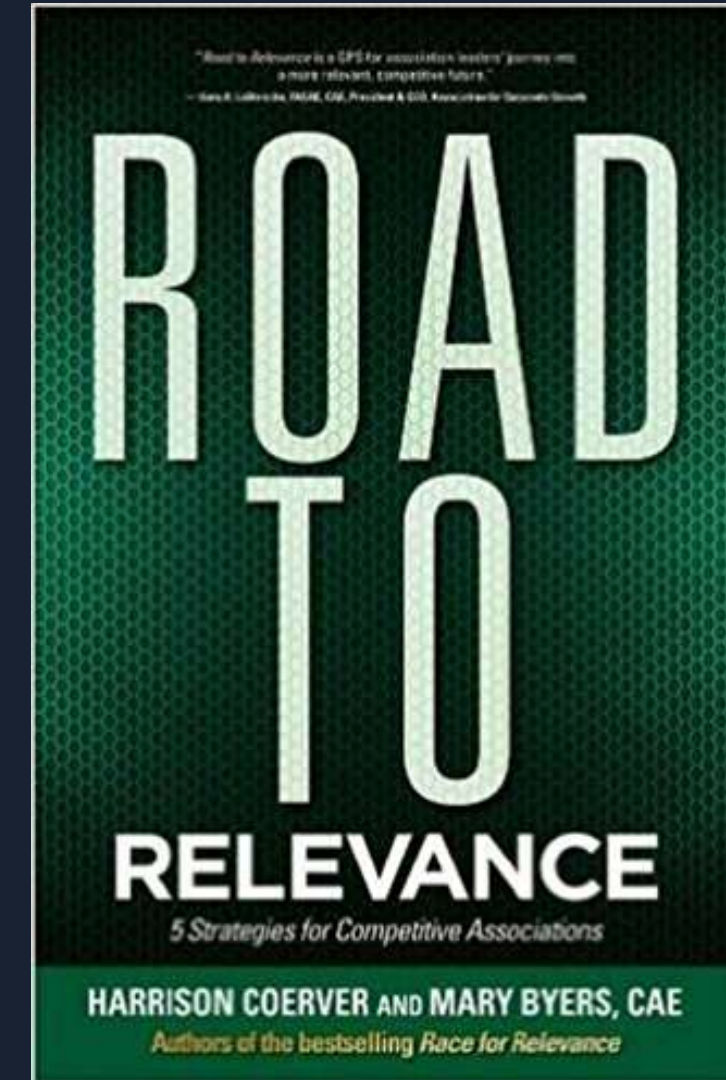
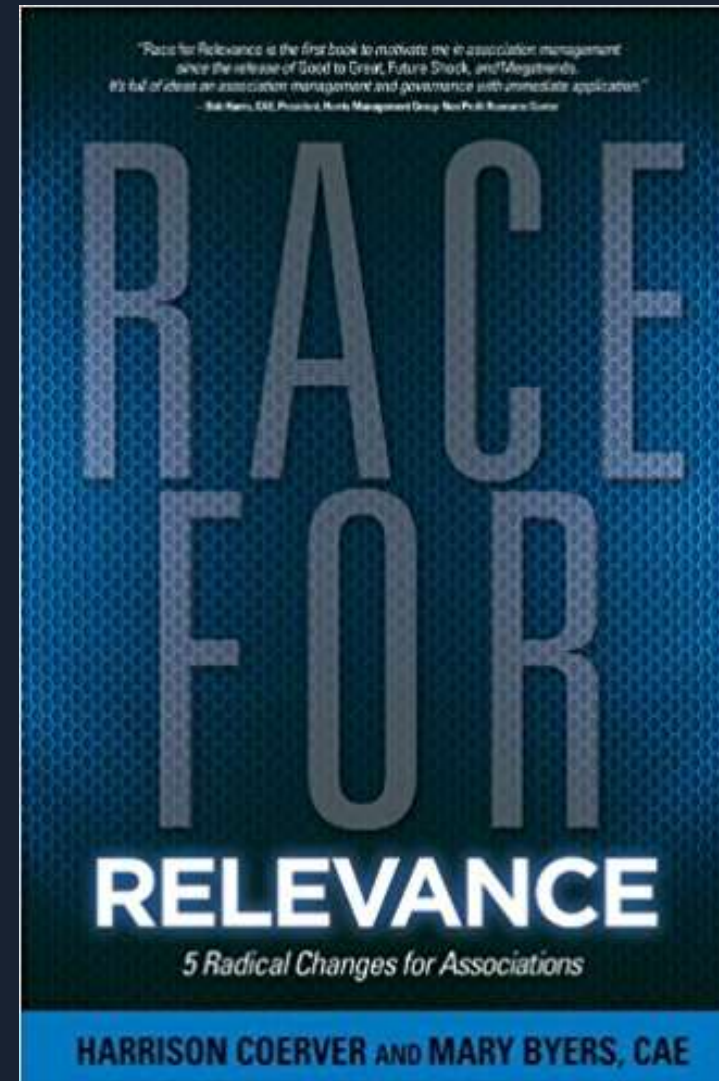
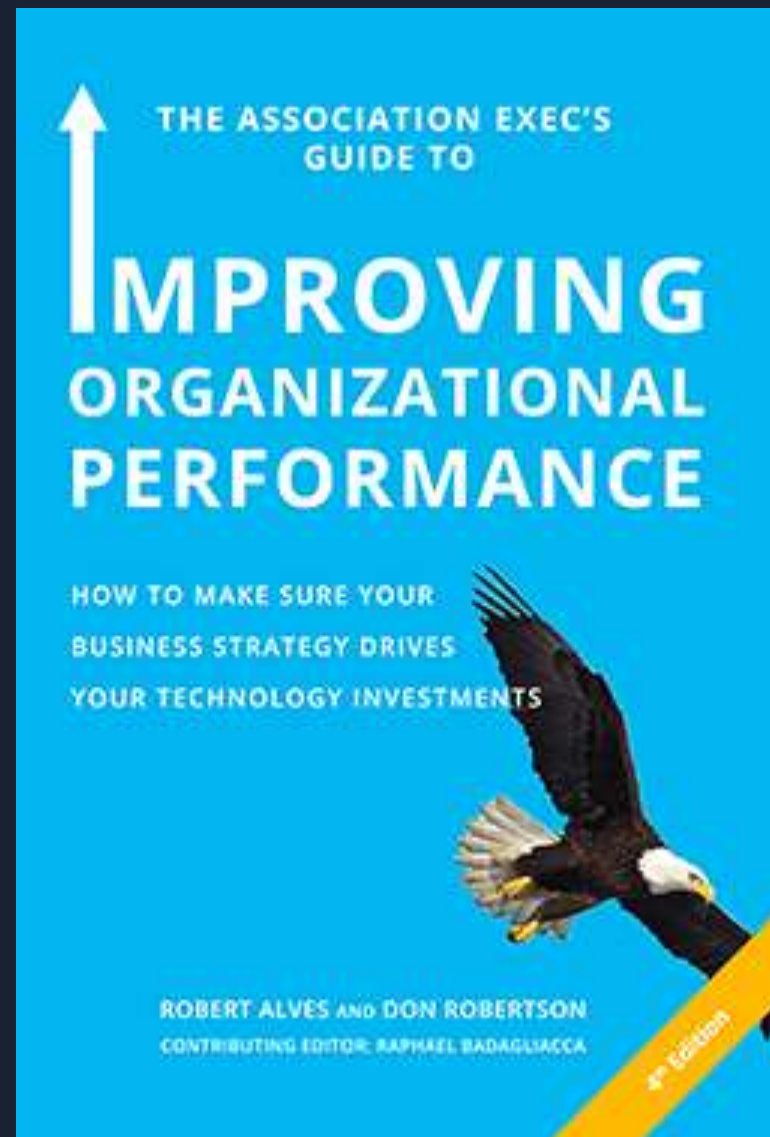
1. Which members will this be engagement be defined for?
2. New members
3. Renewing members
4. Unfinancial members
5. Members of a specific category
6. Members of a specific career stage or age
7. Members of a specific years of membership
8. Existing participators of CPD or events

The Case for Member Engagement Scoring

The need for change and even more so now.



The Case for Member Engagement Scoring



The Case for Member Engagement Scoring

Time

- People are busier than ever before
- Work/life balance is blended

Value Expectations

- Associations needed a value proposition
- What are the value benefits for members?

Market Structure

- Associations can't be everything to their industry, focus on the strength

Generational Differences

- Traditional association model seems less and less appealing and relevant to each succeeding generation of members
- Decline in engagement due to “career stage” or “generational differences”

Technology

- Slow adopters “not all of our members have email”
- Technology is also your biggest competitor

The Case for Member Engagement Scoring

- Coronavirus has changed associations as we know them.
- Accelerated digital transformation.
- Delivering new online and virtual benefits and services.
- In order to measure impact of change you must measure engagement of these new digital services.
- Associations must reinvent to remain relevant and engagement scoring will allow this.

Digital Transformation

Reimagining your association in the digital age.

Digital is the efficient and effective use of your data, technologies and online solutions to support and grow your mission.

Digital Transformation Framework

Goals & Purpose

Digital Member
Value Proposition

Digital Business
Operations

Digital Revenue
Streams

Digital
Sustainability
and Growth

Elements of Success

Culture of
Innovation and
Change

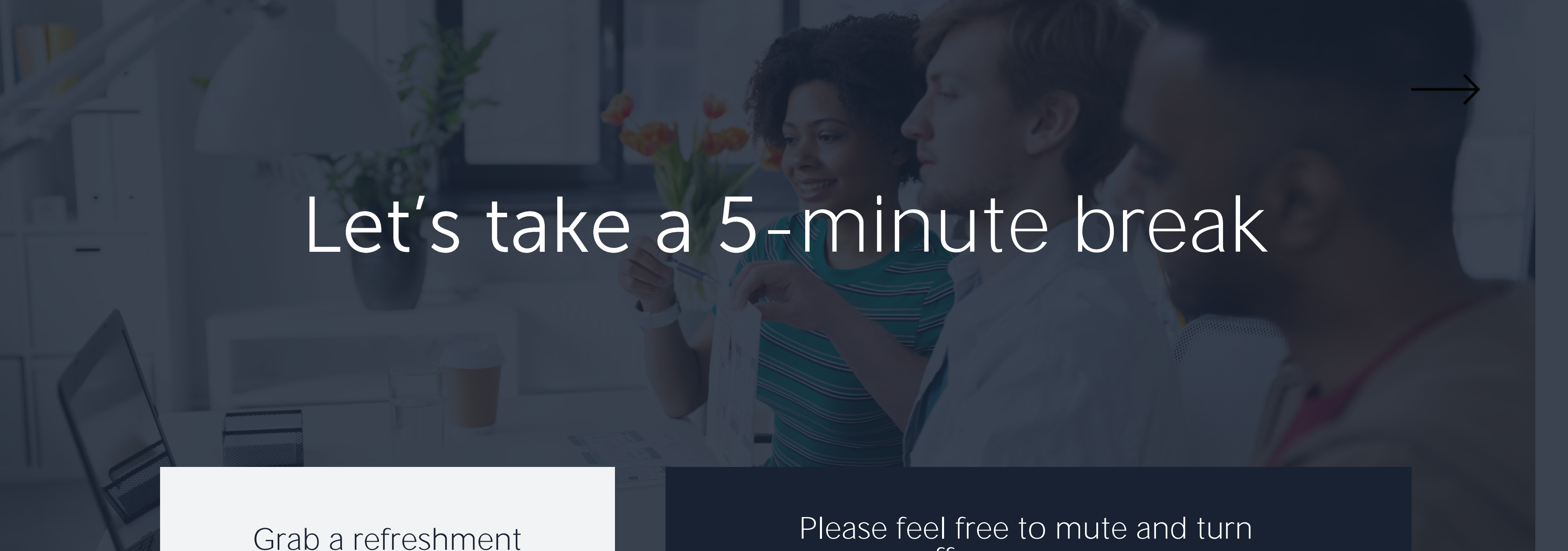
Data Centric and
Data Driven

Investment in
Cloud Technology

Digital Partner
for Acceleration

Technology & Platform

Cloud Technology



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

Causeis framework for Engagement Scoring

Getting started and getting buy in



Causeis framework for Engagement Scoring



Goal and Purpose

Why are you considering engagement scoring? What is the goal and purpose?

Intuition

What does intuition already tell you?

Stock Take

What are all of the benefits and services your association offers? Do you track the utilization of those services?

Define a Score

Choose how you want to score. Whether a simple, frequency or weighted score.

Develop

Whether in Excel or your CRM develop your score and compile the data.

Operational Strategies

Develop and implement operational strategies. Monitor and measure success.



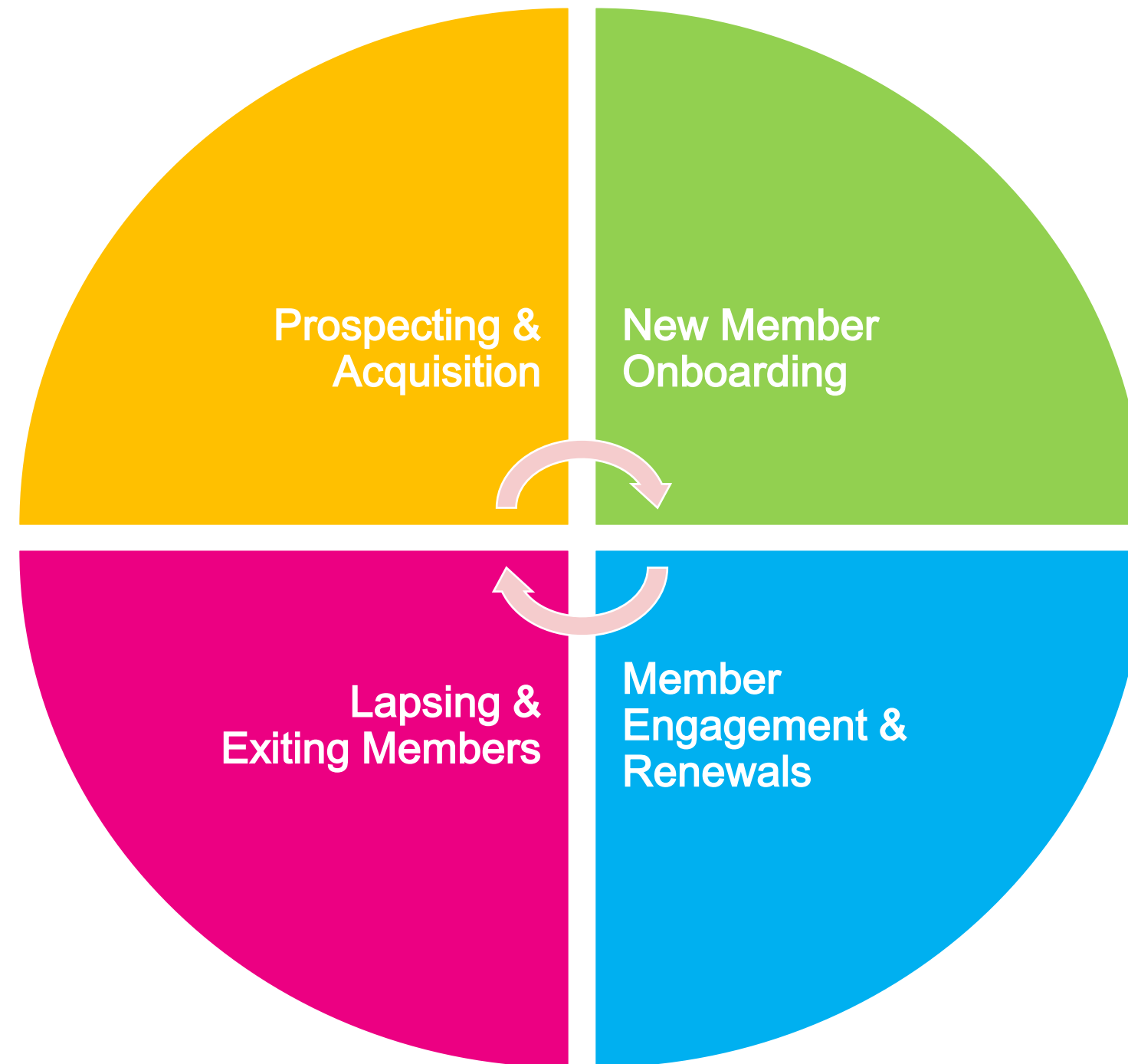
Goal for your engagement

What would your engagement goal be for your association?

Why are you doing this? What are the questions you want to solve?

Member Journey

Step 1: Goal and Purpose



Member services:

- Events
- Training and CPD
- Journals
- Web content
- Legal / Industrial Support
- Policy

External forces:

- Competing organisations
- Industrial / legislative changes
- Time

What is engagement?

Example member engagement goal:

1. To increase the retention of first year members through a planned 12-month engagement model.
2. To drive participation of services to members starting their career.
3. To increase readership of communications to younger members.

Defining an engagement score

Step 1: Goal and Purpose

The member lifecycle provides the starting point for analysing and establishing an engagement strategy.

1. Which stages have higher or lower retention? Which are more likely to lapse?
2. How do you communicate with each stage?
3. How do you know which members are in their “first year” of membership?
4. How do you measure retention of membership renewals?



Defining the Engagement Score

Step 1: Goal and Purpose

First consider what your gut tells you.

Before you sit down to develop the perfect engagement score, ask your colleagues a few basic questions;

- What does an engaged member look like?
- What does a dis-engaged member look like?
- What do you think increases someone's likelihood to renew?

Step 2: Intuition

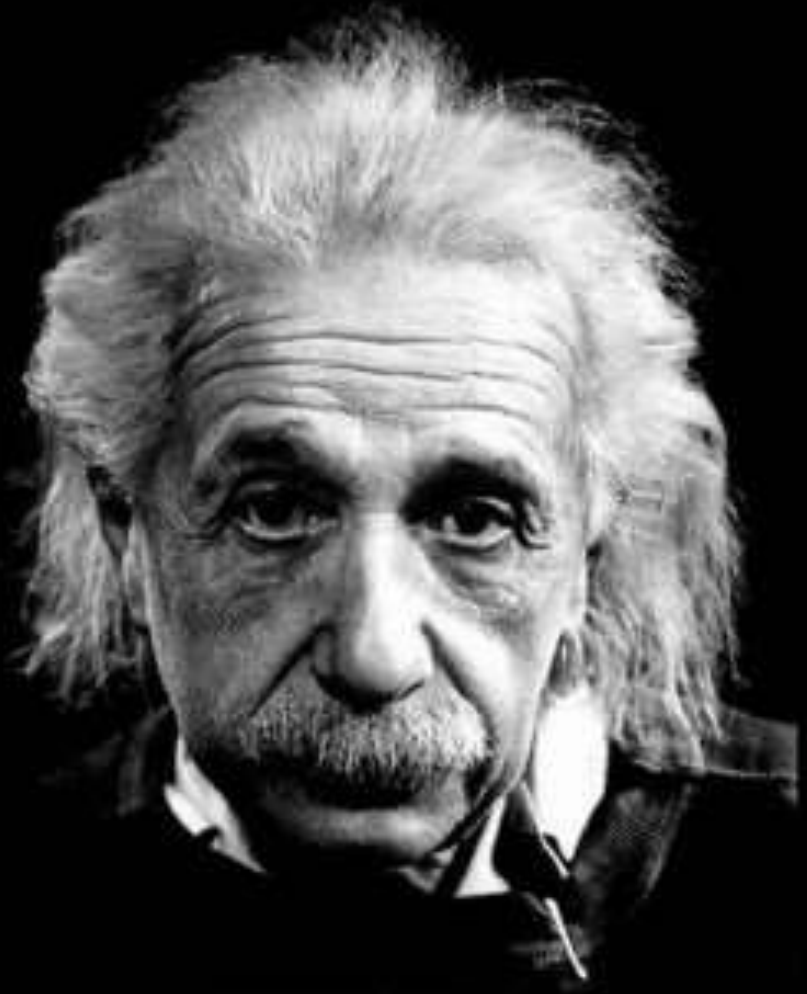
First consider what your gut tells you.

Before you sit down to develop the perfect engagement score, ask your colleagues a few basic questions;

What does an engaged member look like?

What does a dis-engaged member look like?

What do you think increases someone's likelihood to renew?



“The only
real valuable
thing is
intuition.”

-Albert Einstein

Step 3: Stock Take



Stock-take all your
benefits and services

Stock-take

- Attending an event or training
- Participating in a webinar
- Donating
- Volunteer committee member
- Subscribing to the journal
- Contributing to the journal
- Contributing to an online community
- Accessing industrial services
- Providing feedback (good or bad)
- Completing an education course as a student
- Accessing member only content
- Logging into your website
- Referring a new member
- Opening and clicking on your email

Stock Take

What about the data that isn't in iMIS?

You need to review and assess all data your association has. Identify what API integrations are available.

Or access your third-party data and import it into iMIS!

Data audit and validation is critical to your success with engagement scoring.



Stock Take

Just start somewhere so pick 5 – 7 services to get started!

1. Attending an event or training
2. Volunteer committee member
3. Contributing to an online community
4. Logging into your website
5. Opening and clicking on your email

Stock Take

Step 3: Stock Take

Does the data exist in your Membership system?

Is the data reportable?

How frequently or recently does the benefit / service occur?

Engagement measure	Reportable	Notes
Opening and clicking on your email	Yes, data is tracked for both open and click through. Measuring for specific email newsletter that is sent about industry and advocacy.	Total number of emails for industry news is 25 per year.
Logging into the website	Yes, data is tracked to display the last login date. Not all previous login dates are stored though. Measuring member accesses and utilised member portal via a login.	Use a recency measure to identify level of participation, e.g. Within 3 months logged in, Within 6 months, 9 months etc.
Event participation	All events and registrations are tracked, attendance is not maintained though. Measuring all event registrations for members.	Up to a total of 60 events in the year.
Volunteering as a committee	Committee and boards are tracked and managed.	Up to 5 committees at Example Association.
Subscribing to the journal	The Industry Journal is an optional paid resource. The subscription is managed against the members record.	Not all members subscribe to the journal.

Member Benefits: Stock Take

Member Benefits: Stock Take



- ✓ Do you have your member value proposition available?
- ✓ Have you listed all member benefits available?
- ✓ Are they available across all categories or segments?
- ✓ What about member benefits across traditional, hybrid or digital?

Member Benefits: Stock Take



Members Benefits Available

By Category

Member Benefits: Stock Take



Members Benefits Available

By Delivery Mode: Traditional, Hybrid, Digital

AuSAE Panel: Live Discussion

> Live Webinar

**Wednesday,
8 December**

11am - 12pm AEDT

Presented by

 **CAUSEIS**


The Australian Society of Association Executives

ASSOCIATION INSIDERS SERIES WEBINAR

**PANEL DISCUSSION ON ASSOCIATION
DIGITAL TRANSFORMATION**

With Special Guests



**Michelle
Lelempsis**
Causeis



**Ben
Stockwin**
Australian Institute of
Landscape Architects



**Tanya
Pampuch**
Christian Schools
Australia



**Peter
Griffin**
Real Estate Institute of
New South Wales

Register here:

[https://www.ausae.org.au/
event-4519654](https://www.ausae.org.au/event-4519654)

Select: Causeis Guest
Access code: **Causeis21**

In preparation for Thursday

- Identify the purpose and goal engagement scoring
- Which segment of membership?
- Stock Take your member benefits and services



Wrapping up Day 1...

What's data and member mapping got to do with engagement?

Assess your Member Value Proposition

Goal and Purpose of Engagement Scoring

Thursday 9th December

Day 2: Agenda

- Assessment of stock take
- RCSA: Journey of Engagement Scoring
- Definitions, Scoring and Strategies



Michelle Lelempsis
Managing Director, Causeis



0404 092 105



michelle@causeis.com.au



Ash Hunt
Senior Solutions Consultant, Causeis



0431 042 292



ash@causeis.com.au



