



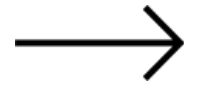
CAUSEIS PRESENTS

Digital Academy for Associations

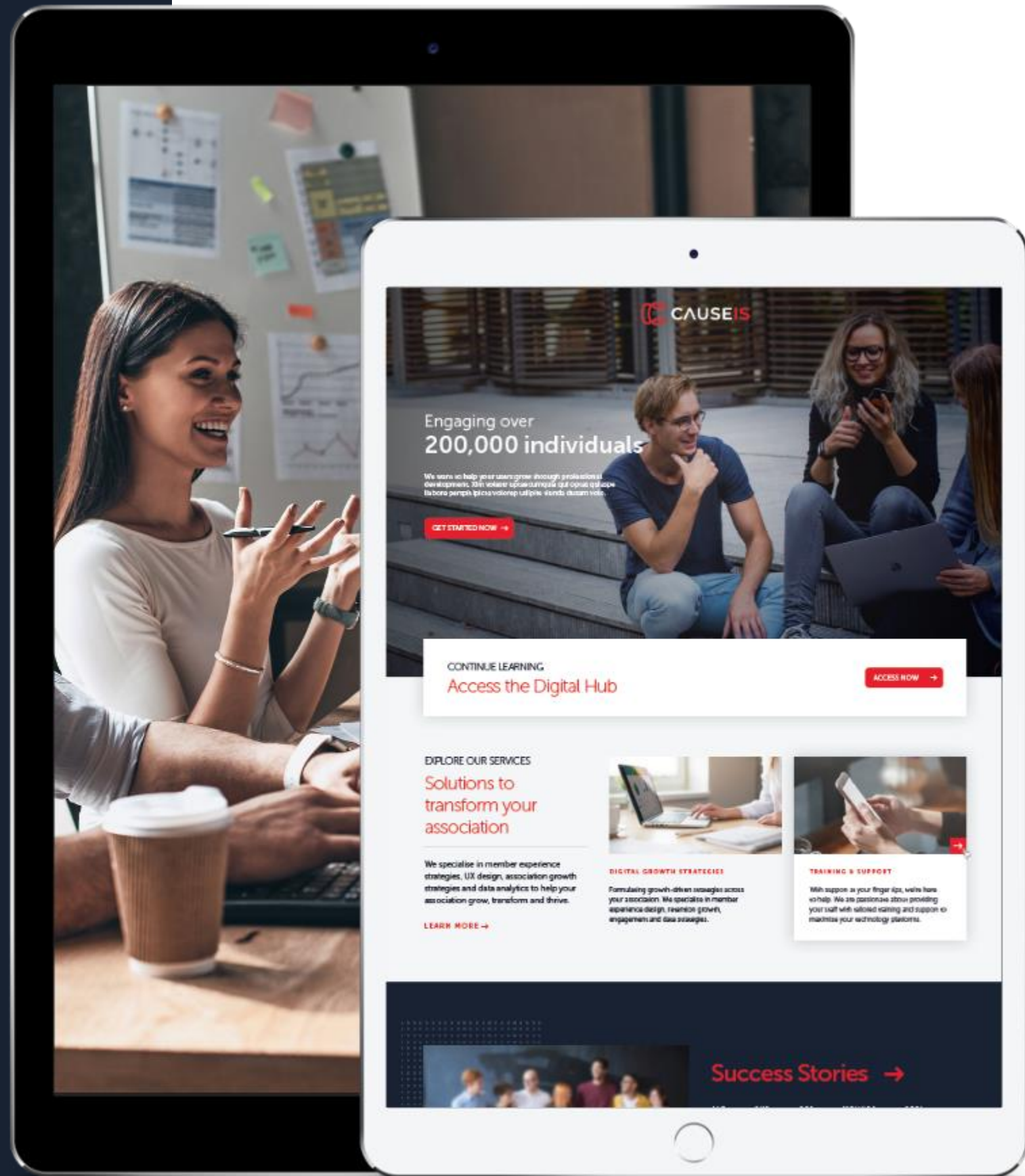
→ Course: Engagement Scoring for Growth and
Continuous Performance Improvement



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.

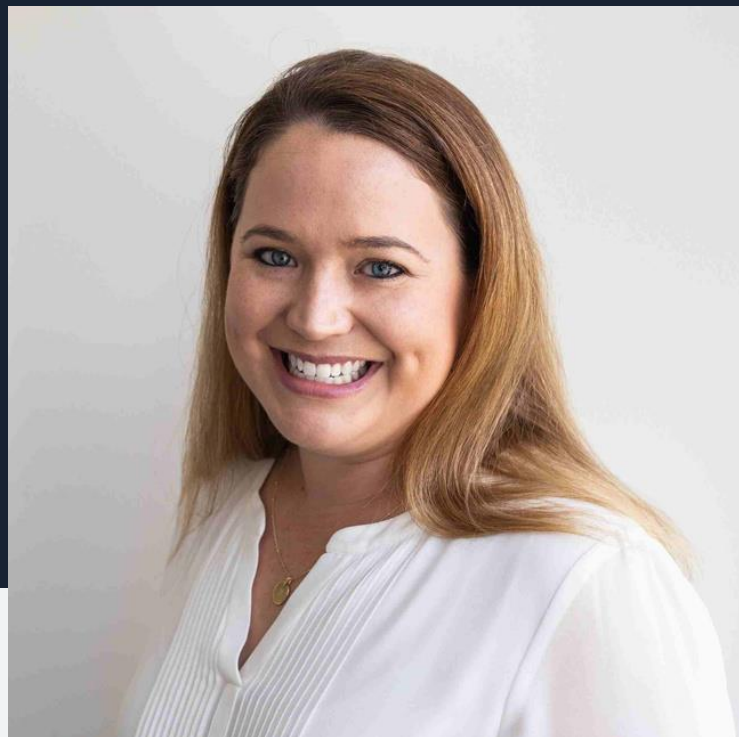
Use your camera

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



Ash Hunt
Senior Solutions Consultant
Causeis



Robin Shepard
Head of Operations & Member
Services
RCSA



Thursday 9th December

Day 1: Agenda

- Engagement Scoring: The RCSA Story
- Engagement Scoring: Framework and Development
- Engagement Scoring: The REINSW Story
- Strategies of Engagement

Breakout Rooms

Day 1: Learning & Networking

- Stock Take – What have you found?
- Engagement Strategies

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.



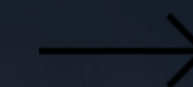



Causeis framework for Engagement Scoring

Goal and Purpose

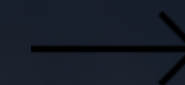


Member Benefits: Stock Take



Engagement Scoring: Stock Take Member Benefits and Services			
Instructions: List ALL member benefit, services, touchpoints and any form of engagement opportunities.			
Engagement: Benefit, Service, Touchpoint	Is the data reportable? If Yes, where?	Frequency available in 12 months	Considerations or Notes
Logging into the website for access to self-service profile management	Yes, stored on the profile	Unlimited	Only measure login in the last three-months
Accessing the Advisory line	No, service doesn't track. Can be easily resolved by tracking touchpoint in CRM.	Up to 5 calls	
Registering to attend a live CPD event	Yes, stored as registration in CRM	50 events offered in 2021	Attendance not tracked
Accessing a video of a past CPD event	Yes, stored as CPD of access to recording	Up to 100 videos accessible	
etc			

Member Benefits: Stock Take



Engagement Scoring: Stock Take Member Benefits and Services

Instructions: From the earlier worksheet, use this matrix to identify if all engagement is accessible to all membership categories.



Engagement: Benefit, Service, Touchpoint	Membership Category: E.g Student	Membership Category: E.g Associate	Membership Category: E.g Fellow
Logging into the website for access to self-service profile management	Yes	Yes	Yes
Accessing the Advisory line	No not available	Yes	Yes
Registering to attend a live CPD event	Yes	Yes	Yes
Accessing a video of a past CPD event	No not available	Yes	Yes
etc			
0			
0			
0			
0			



Member Benefits: Stock Take



Engagement Scoring: Stock Take Member Benefits and Services

Instructions: From the earlier worksheet, use this matrix to identify how the engagement is delivered.



Engagement: Benefit, Service, Touchpoint	Traditional Delivery (Face to face, Email, Phone)	Hybrid	Digital and Ondemand
Logging into the website for access to self-service profile management	No	No	Yes
Accessing the Advisory line	Yes	No	No
Registering to attend a live CPD event	Yes	Yes	Yes
Accessing a video of a past CPD event	No	No	Yes
etc			
0			



Breakout Room



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



Did you complete the stock take?



What did you find?



How did you identify the frequency, recency and reportable data?

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

A group of people, mostly women, are shown from the chest up, with their hands raised in a meeting or workshop setting. The background is blurred, focusing attention on the hands and the text overlay. The text is white and centered on the image.

Association Leader:
Member Engagement and Scoring
Robin Shepard, RCOSA

Three darts are shown in a blurred, grayscale background, pointing towards the top right. The darts are positioned behind the main text.

Causeis framework for Engagement Scoring

Goal and Purpose

Scoring Method



Step 4: Scoring

- ✓ Basic Engagement Score – This is where you need to start!
- ✓ Total Frequency Score
- ✓ Weighted Total Frequency Score

Scoring Method: Basic Score



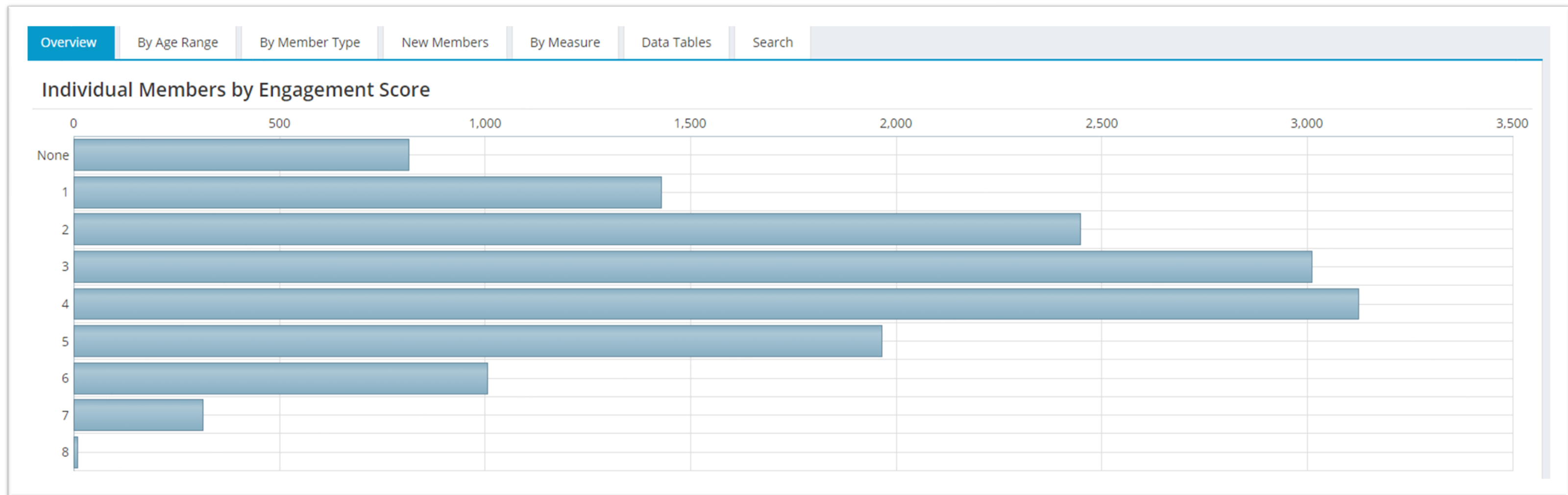
Step 4: Scoring

- ✓ Every engagement measure is weighted equally
- ✓ Total score is out of maximum measures
- ✓ If you have 10 measures then the minimum engagement score is 0 and maximum is 10.

Scoring Method: Basic Score



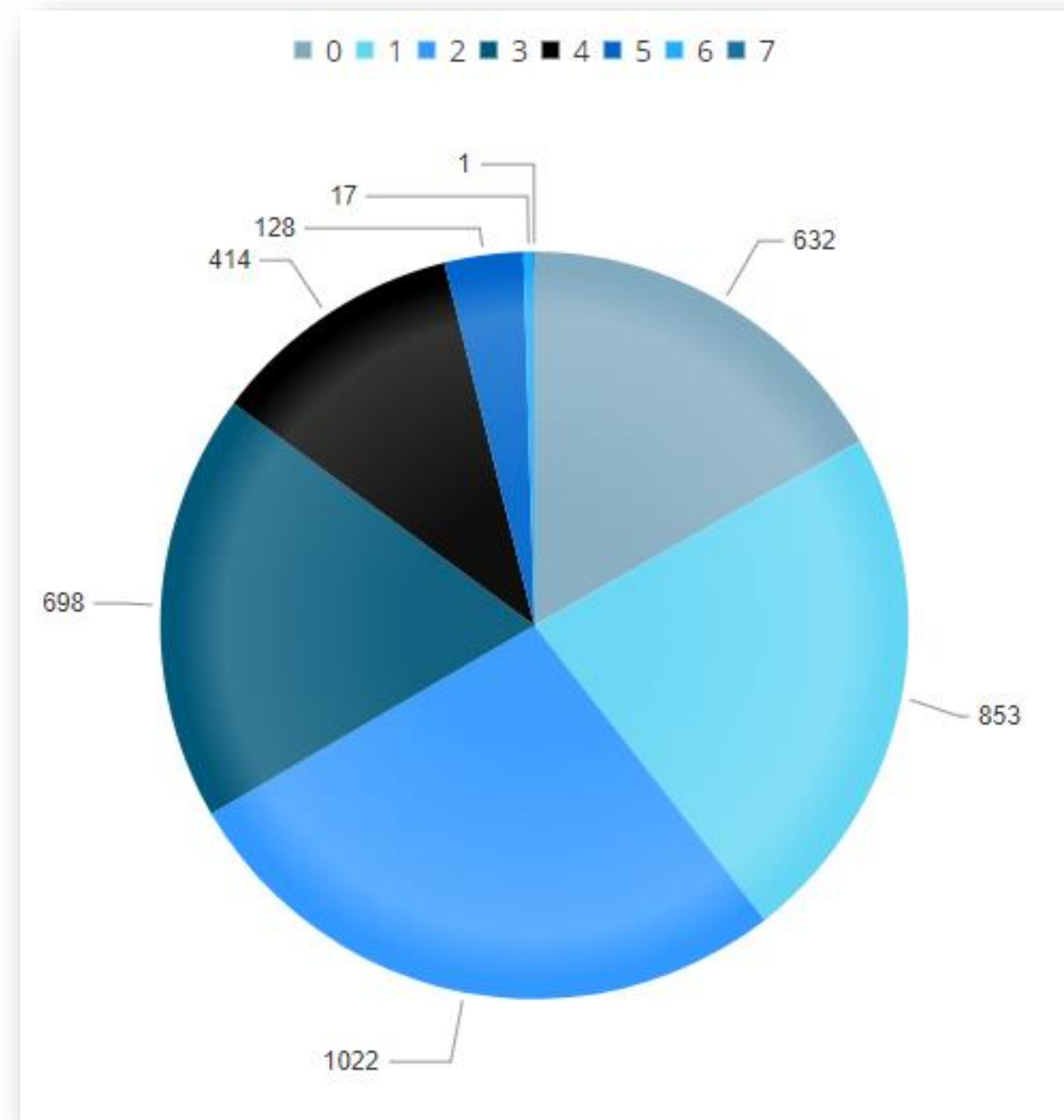
Step 4: Scoring



Scoring Method: Basic Score



Step 4: Scoring



Scoring Method: Basic Score



Step 4: Scoring

What are the advantages and disadvantages of a basic score?

Scoring Method: Total Frequency



Step 4: Scoring


- ✓ Every engagement measure is weighted equally
- ✓ Total score is out of maximum total of measures available
- ✓ If you have 10 measures with varying frequency then the minimum engagement score is 0 and maximum is total frequency.

Measure	Total Frequency	Member Example
Emails (Open and Click)	20	15
Events	40	5
Logging into Website	1	1
etc	61	21

Scoring Method: Total Frequency



Step 4: Scoring



Alex Morgan
President
Versaton US
(310) 388-5000
alexmorgan@mailinator.com

ID 23095 | Member since 1/07/1997 | Type Regular Member | Status Active | Paid through 31/05/2018

PARTICIPATION

ABOUT

MEMBERSHIP

TRANSACTIONS

GIVING

VOLUNTEERING

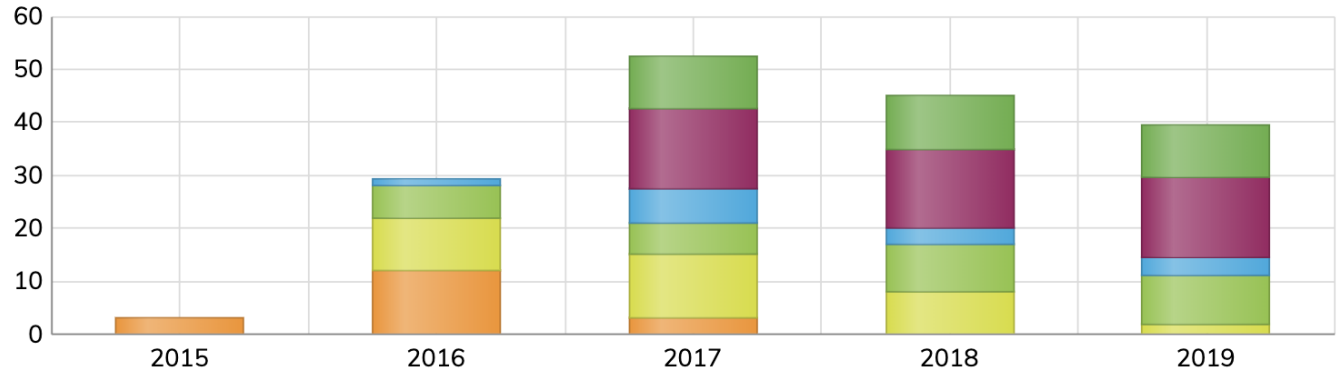
PREFERENCES

ALERTS

Tasks

DATE	ASSIGNED TO	ACTION(S)	FOLLOW UP DATE
20/03/2019 12:00 AM	JULIAG		23/04/2019 12:00 AM
28/02/2019 1:00 PM	CARLYK		28/03/2019 12:00 AM
15/02/2019 3:00 PM	BRIANM		15/03/2019 12:00 AM

Engagement history



2015 2016 2017 2018 2019

Event registrations Number of donations Purchases Volunteer attendance Committee memberships Community subscriptions

99

Leader

Renew Now

Cancel Renewal

Follow up on 15/03/2019:
CALL - Please send 10 packets to distribute at next chapter meeting

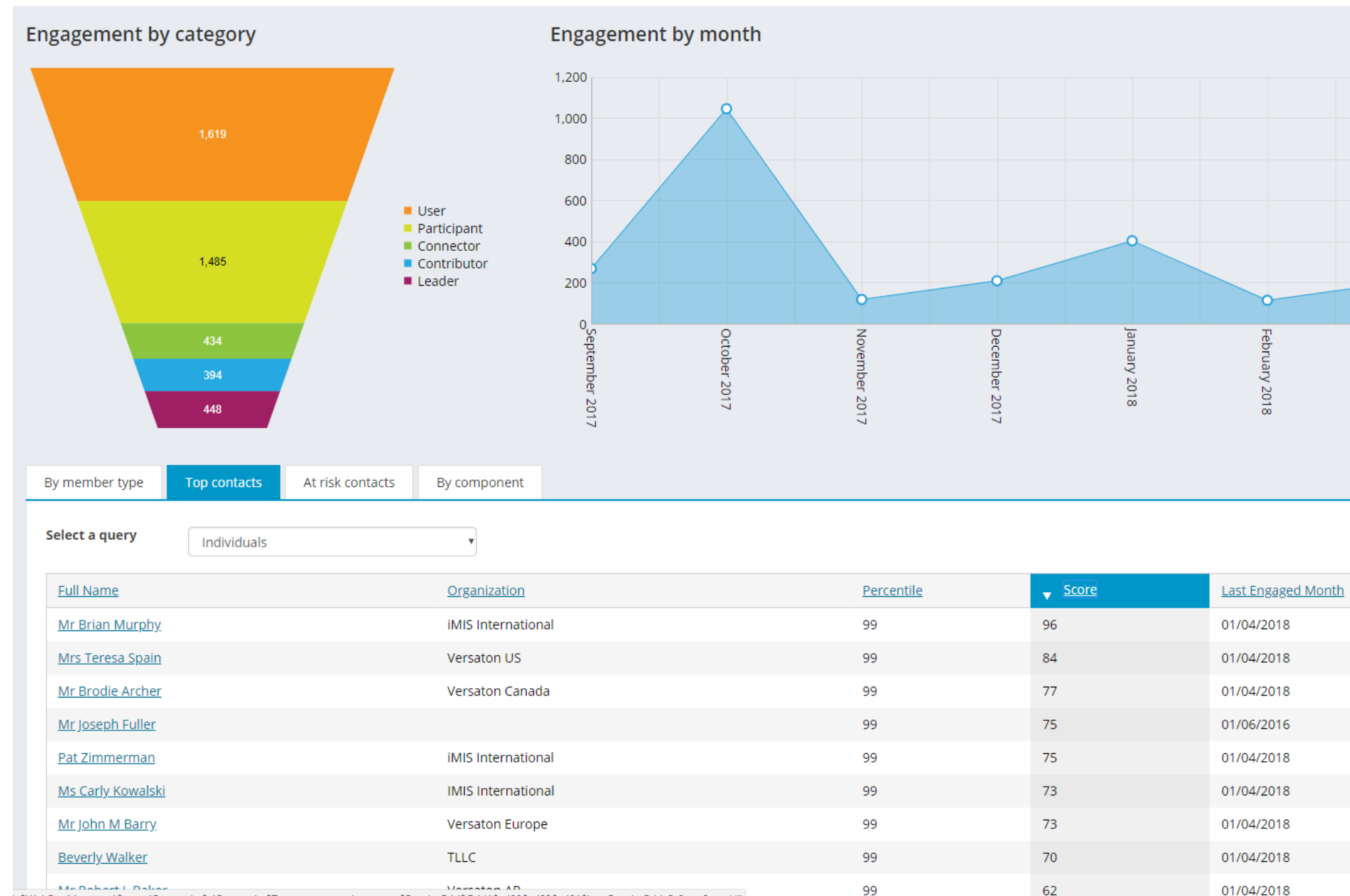
Membership expired on 31 May

Available credit: 448.49

Scoring Method: Total Frequency



Step 4: Scoring



Scoring Method: Total Frequency and Weighted →

Step 4: Scoring

- ✓ Every engagement measure is weighted
- ✓ Total score is out of maximum total of measures available
- ✓ If you have 10 measures with varying frequency then the minimum engagement score is 0 and maximum is total frequency.

Measure	Total Frequency x Weight	Member Example
Emails (Open and Click)	20 x 0.25	5
Events	40 x 2	80
Logging into Website	1 x 10	10
etc	60 x 0.25	15

Scoring Method: Total Frequency and Weighted →

Step 4: Scoring

The screenshot displays the iMIS system interface. On the left is a dark sidebar with the iMIS logo and a navigation menu including: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Continuum, RISE, Dashboard, Site Builder, Page Builder, Theme Builder, Tagging, Maintenance, Style Guide, Intelligent Query Architect, Business Object Designer, Panel Designer, Standalone Panels, and Process automation. The main content area is titled 'Score components' and contains two tables. The first table, 'Score components', lists various metrics with their IQA queries, score calculations, and multipliers. The second table, 'Categories', lists categories with their criteria and relative percentile scores. At the bottom right of the main area are 'Save', 'Save As', and 'Cancel' buttons. The footer includes 'Documentation', 'Support', 'iMIS Demonstration', and a language dropdown set to 'English'.

NAME	IQA QUERY	SCORE CALCULATION	MULTIPLIER
Committee memberships	\$/Common/Engagement/Queries/CommitteeMemberships	Count	5
Community subscriptions	\$/Common/Engagement/Queries/CommunitySubscriptions	Count	1
Event registrations	\$/Common/Engagement/Queries/EventRegistrations	Count	3
Number of donations	\$/Common/Engagement/Queries/Donations	Count	2
Number of posts	\$/Common/Engagement/Queries/NumberOfPosts	Count	0.75
Purchases	\$/Common/Engagement/Queries/Purchases	Count	3
Recently logged in	\$/Common/Engagement/Queries/RecentlyLoggedIn	Count	1
Volunteer attendance	\$/Common/Engagement/Queries/Volunteer attendance	Sum - Hours	0.25

ENABLED	CATEGORY NAME	CRITERIA
✓	Leader	Relative percentile score > 85.0 Event registrations > 6.0
✓	Contributor	Relative percentile score > 80.0
✓	Connector	Relative percentile score > 60.0
✓	Participant	Relative percentile score > 20.0
✓	User	Relative percentile score > -1.0

Scoring Method: Total Frequency and Weighted →

Step 4: Scoring

- ✓ CRM: Does your CRM have this functionality?
- ✓ Excel: Can be used to create scores, but are static and not real-time
- ✓ What else?

Measure	Total Frequency x Weight	Member Example
Emails (Open and Click)	20 x 0.25	5
Events	40 x 2	80
Logging into Website	1 x 10	10
etc	60 x 0.25	15

Develop



Step 5: Develop

The screenshot displays the iMIS software interface. On the left is a dark sidebar with the iMIS logo and a menu of navigation items including Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Continuum, and RISE. The RISE section is expanded to show tools like Dashboard, Site Builder, Page Builder, Theme Builder, Tagging, Maintenance, Style Guide, Intelligent Query Architect, Business Object Designer, Panel Designer, Standalone Panels, and Process automation. The main content area is titled 'Score components' and contains a table with columns for NAME, IQA QUERY, SCORE CALCULATION, and MULTIPLIER. Below this is a 'Categories' section with a table for ENABLED, CATEGORY NAME, and CRITERIA. At the bottom right of the main area are 'Save', 'Save As', and 'Cancel' buttons. The footer includes links for Documentation, Support, and iMIS Demonstration, along with a language dropdown set to English.

NAME	IQA QUERY	SCORE CALCULATION	MULTIPLIER
Committee memberships	\$/Common/Engagement/Queries/CommitteeMemberships	Count	5
Community subscriptions	\$/Common/Engagement/Queries/CommunitySubscriptions	Count	1
Event registrations	\$/Common/Engagement/Queries/EventRegistrations	Count	3
Number of donations	\$/Common/Engagement/Queries/Donations	Count	2
Number of posts	\$/Common/Engagement/Queries/NumberOfPosts	Count	0.75
Purchases	\$/Common/Engagement/Queries/Purchases	Count	3
Recently logged in	\$/Common/Engagement/Queries/RecentlyLoggedIn	Count	1
Volunteer attendance	\$/Common/Engagement/Queries/Volunteer attendance	Sum - Hours	0.25

ENABLED	CATEGORY NAME	CRITERIA
✓	Leader	Relative percentile score > 85.0 Event registrations > 6.0
✓	Contributor	Relative percentile score > 80.0
✓	Connector	Relative percentile score > 60.0
✓	Participant	Relative percentile score > 20.0
✓	User	Relative percentile score > -1.0



Develop



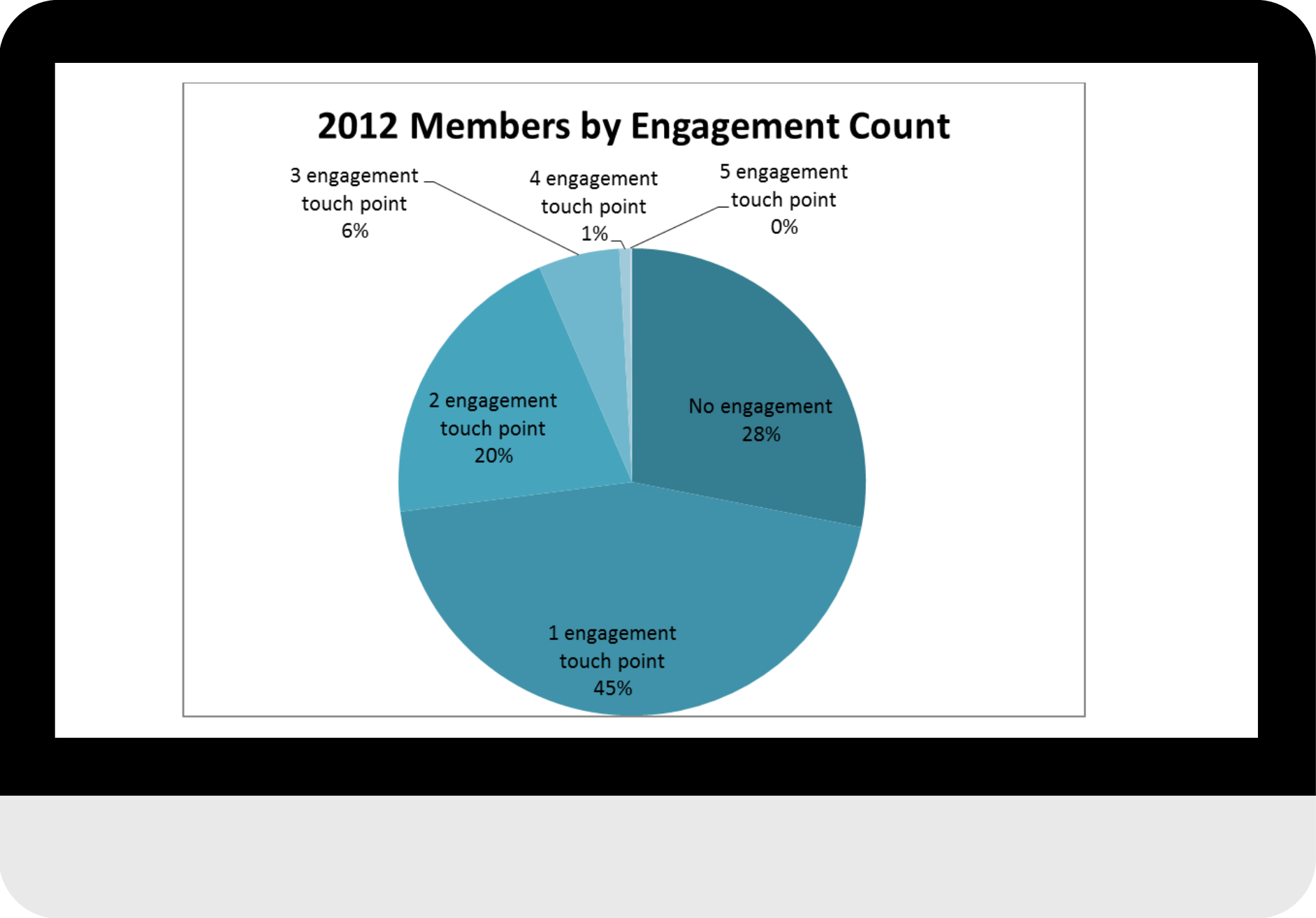
Step 5: Develop



Member Engagement Strategy



Step 6: Strategy and Outcomes



Back in 2012

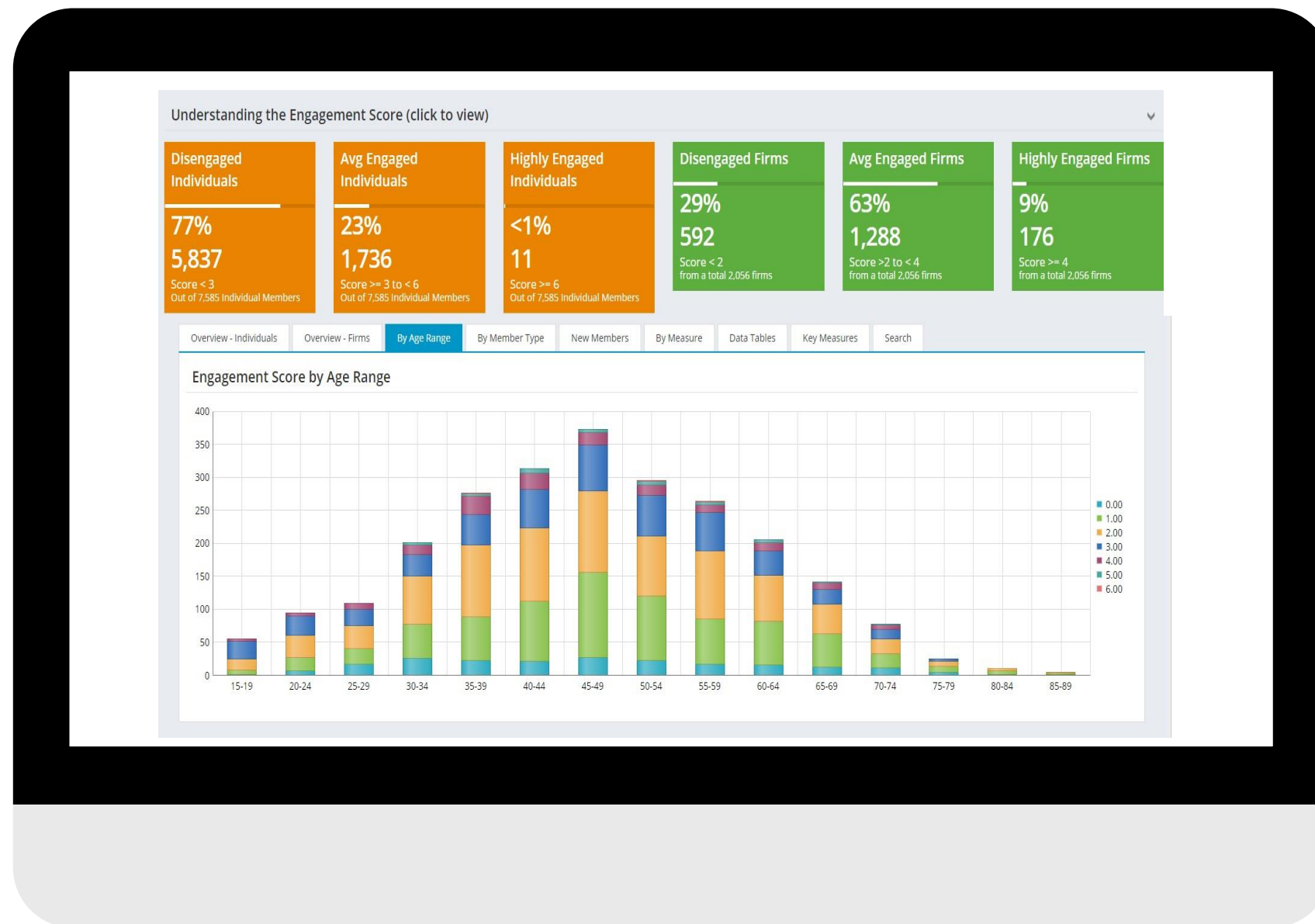
- Attended an event
- Clicked on an email link
- Contact from membership
- Accessed Industrial service
- Accessed Medico Legal service



Member Engagement Strategy



Step 6: Strategy and Outcomes



A simple engagement score can be against every other field!

- New Members
- Age
- Category
- Renewal Retention...



Member Engagement Strategy



Step 6: Strategy and Outcomes

- ✓ Deploy it and use it to implement operational outcomes
- ✓ Shifting a strategy for a benefit or service
- ✓ Omni-channel communications
- ✓ Engagement of new members in the first 12 months

Member Engagement Strategy



Step 6: Strategy and Outcomes



Monitor and Measure Success

Measure success of the objectives over time

This could be monthly, quarterly or annually

Continually improve and revise your engagement strategies

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

A group of people, mostly women, are shown from the chest up, with their hands raised in a meeting or workshop setting. The background is slightly blurred, focusing attention on the hands and the text overlay. The text is white and centered on the image.

Association Leader:
Member Engagement and Scoring
Jess Donati, REINSW

Real Estate Institute of New South Wales

- ✓ Digital Transformation – 18+ months
- ✓ Journey of Transformation led by data.
- ✓ Focused on Engagement and Member Behaviour.
- ✓ New Digital Member Value Proposition.
- ✓ Created new revenue stream.

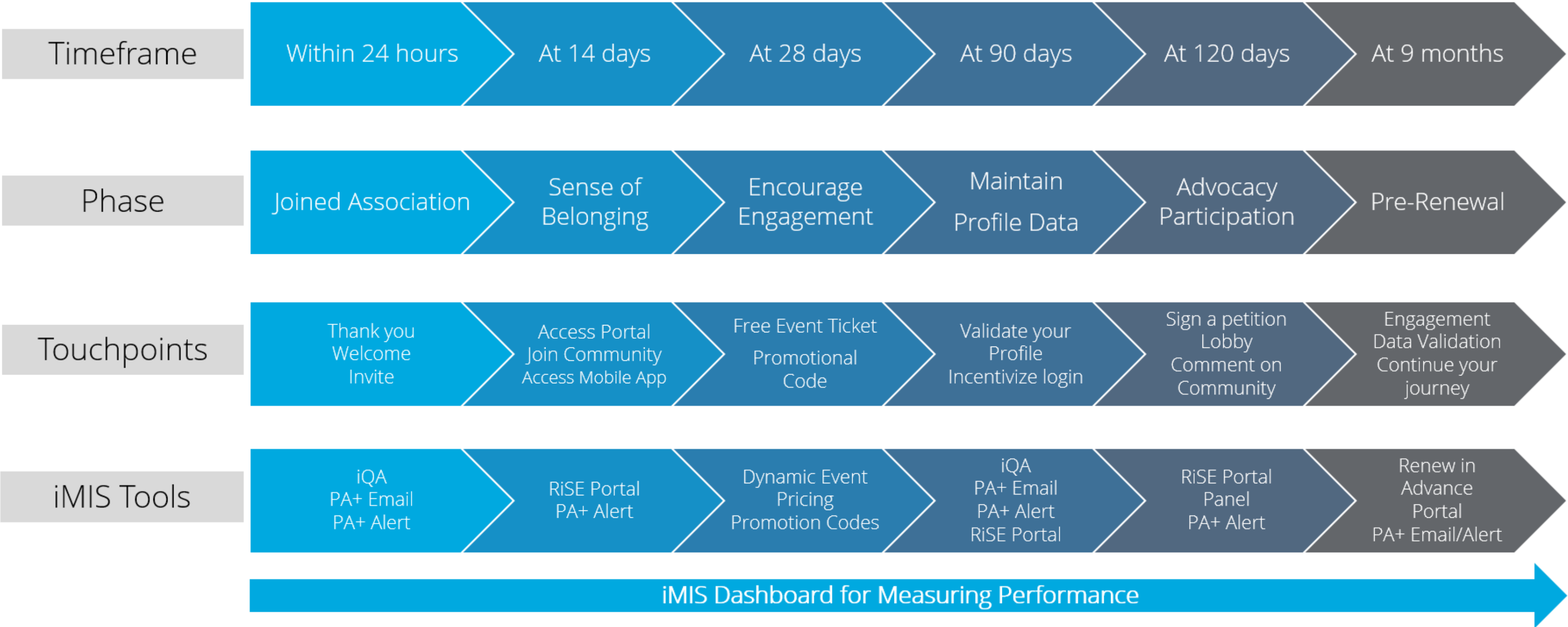


Engagement Strategies and Journeys

New Member Engagement Strategy



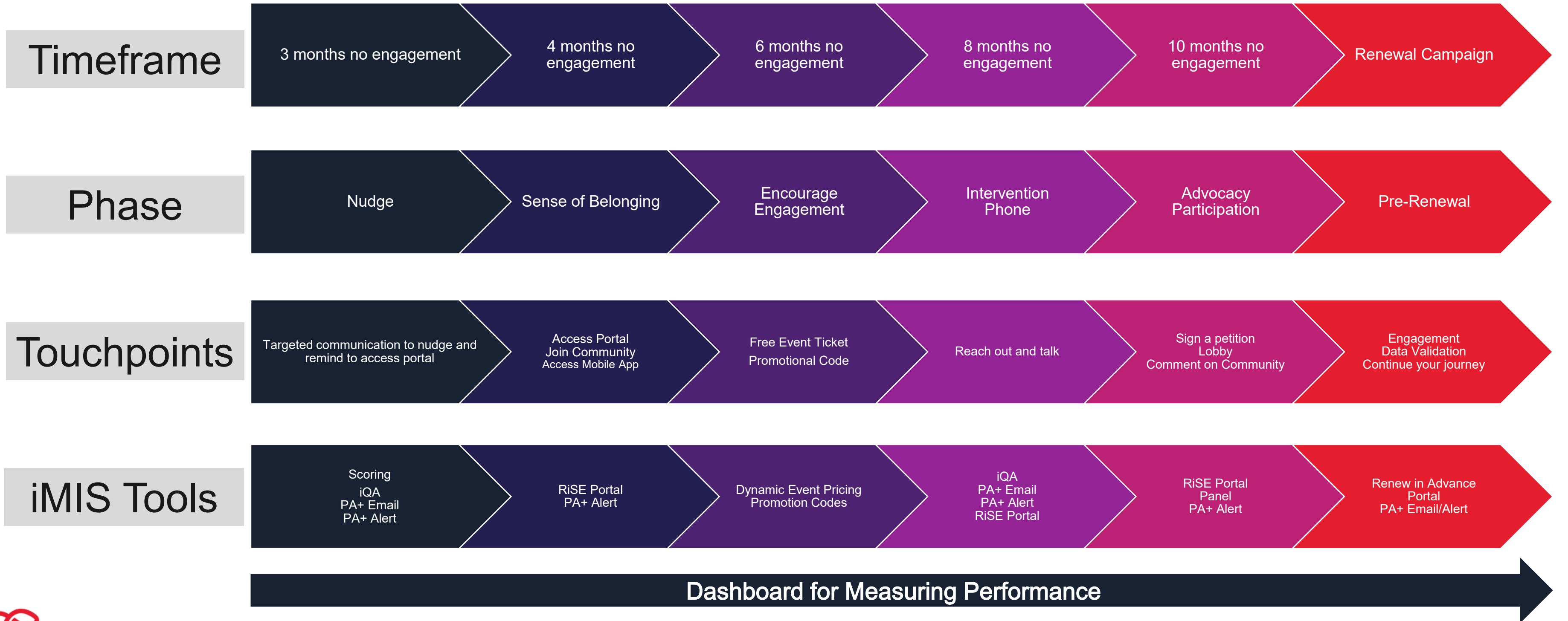
Step 6: Strategy and Outcomes



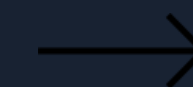
Member Engagement Strategy



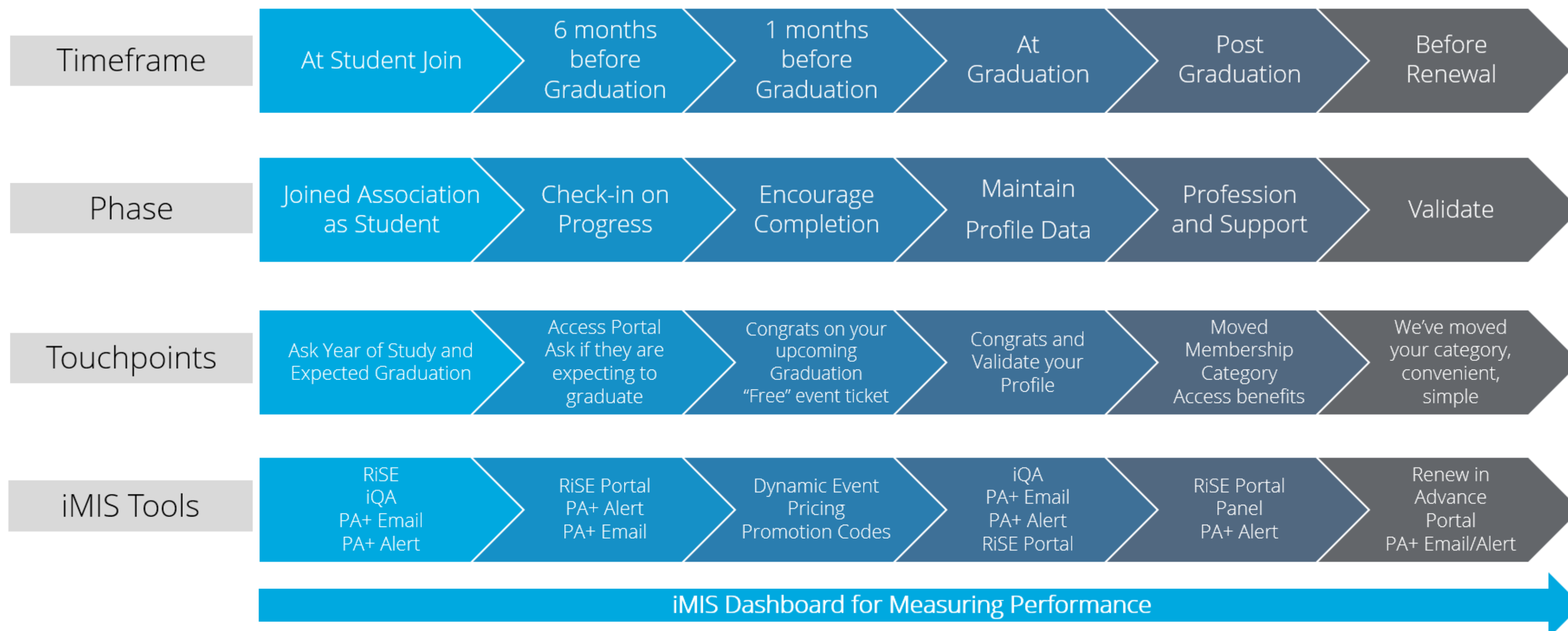
Step 6: Strategy and Outcomes



Member Engagement Strategy



Step 6: Strategy and Outcomes



Other Engagement Strategies



Teach your Members

Do they know how to access your benefits and services?

Complimentary Registrations

Can you provide any comp tickets to encourage participation?

Member Stories

Share stories about how your member benefits have impacted and improved your members? Especially to the target segment.

Human Touch

Don't disregard the human and personal touch, direct email or phone call.

Reward Engagement

Can you offer additional discounts or benefits if members reach specific engagement levels?

Ask Stakeholders

Ask your members in the joining process, renewal process – Why are you joining? What do you want to use this year with your membership?



Full Breakout Room



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



What Engagement Strategies or new Journeys could you consider?



How will you measure its' success?

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.



Engagement Scoring and Strategy Summary

- Just start!
- Understand and map your Member Lifecycle
- Track all benefits and services within your Membership database
- Implement data management ideas to validate and maintain the data
- Learn your Membership database reporting tools
- Define your member engagement goal
- Develop and define your Engagement Score
- Identify segments and markets to implement tangible outcomes and objectives
- Measure and review its success

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20 Digital Academy Courses – Double the hours available! New Strategy Courses including;

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- Digital Marketing for Associations
- Acquisition and Onboarding Strategies

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