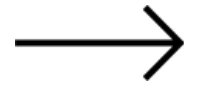CAUSEIS

CAUSEIS PRESENTS

Digital Academy for Associations
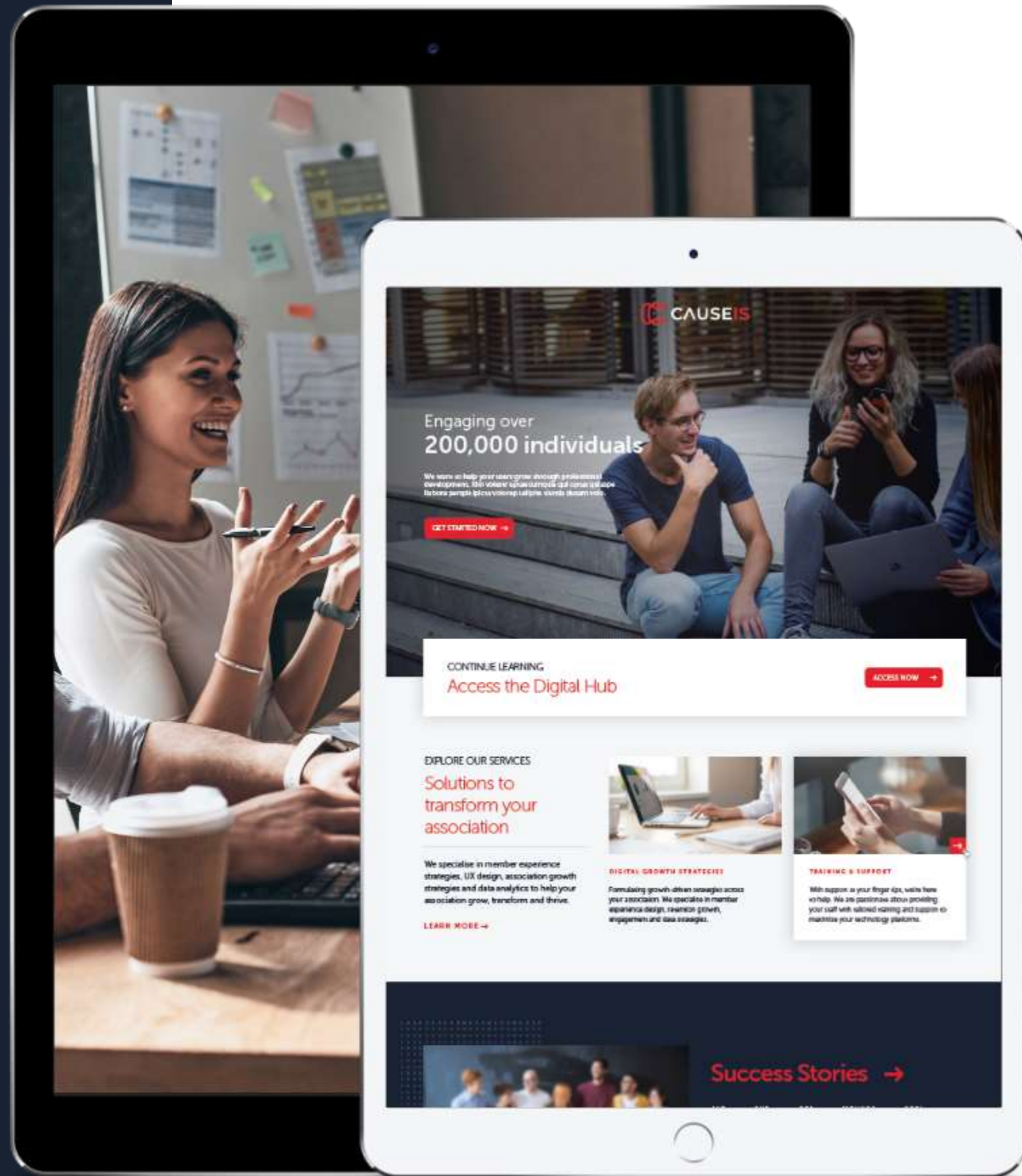
→ Course: Data Management for Associations

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

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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.

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DIGITAL ACADEMY SUMMIT 2022

October 12-13 | Melbourne

The first dedicated digital transformation conference for innovative associations proudly presented by Causeis.

Explore now →

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Thought-Leader Organisations

Keynote: The Loyalty Loop

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A place where you belong, connect with others, advance your
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AuSAE
The Australasian Society of Association Executives

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.
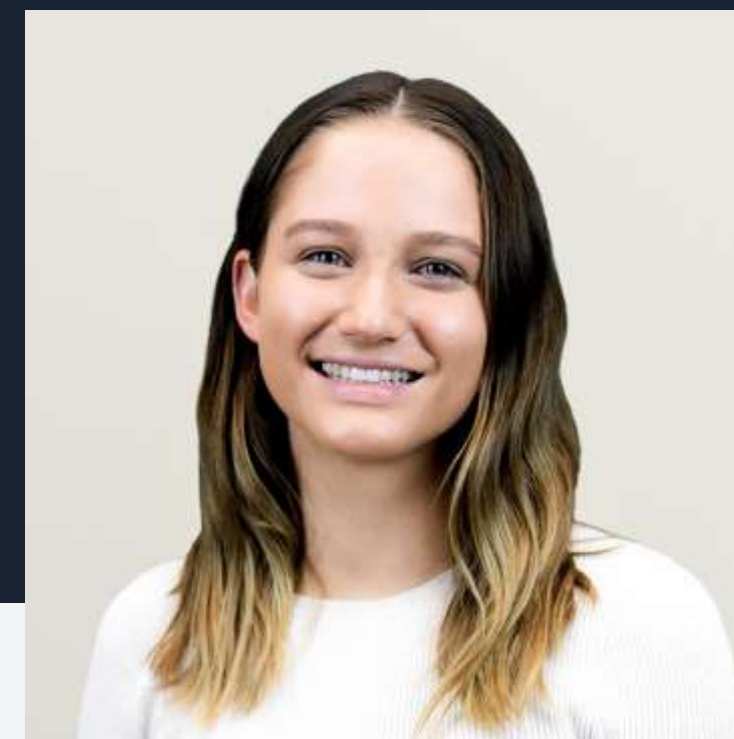
Update your Name

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

Yolande Smith

Digital Marketing Specialist

Causeis

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Tuesday 30th August

Day 1: Agenda

- Why does data matter?
- Role of data in your association
- Framework for Data Management
- Excel Cheat Tips: Pivot, Vlookup, & Filtering

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Breakout Rooms

Day 1: Learning & Networking

- What data gaps does your association have?

- Assessing your associations data

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Digital Academy: Data Management for Associations

Let's Get Started

Why does data matter?

What is the role of data?

What is data literacy vs data management?

Why does data matter to your association?

Getting buy-in from your management

Why is data so important?

Data: Why is it so important?

Performance Driven Culture

Data underpins your association's ability to become performance driven. Data is the fundamental requirement for creating reports and dashboards.

Effective Member Communication

Without accurate contact information about your members then your communications efforts are redundant. Accurate data allows your association to ensure you are maximizing your reach.

Transactional and Engagement Behaviour

Best practice associations track and maintain all transactional and engagement data to ensure you provide relevant and competitive services to the industry.

Growth

Ultimately data allows associations to grow. Through insights, communications, benefits and service optimization it all stems from good data.

Quickly access your association vitals.

Improve Performance

Data creates information - Dashboards can be used to drive your internal operations and performance by visually seeing opportunities

Change your culture.

Improve Accuracy

By removing reliance on staff or manual processes your reports are likely to be more accurate and consistent.

What data does your association have?

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What types of data exists?

01

Single Source

Profile data

Contact data

Workplace data

Classification data

02

Transactional

Financial

Event or registration

CPD

Committee

Engagement

03

Static versus Live Data

Static data is not changing – usually transactional data

Live data is constantly changing – usually single source data

How does data relate?

01

One to One

Contact Record

Communications Preference

02

One to Many

Membership Payments

CPD

Email Communications Sent

03

One to Nothing

Why would data not exist?

Data Matters

01

Data Types

Character

Date

Time

Money

Notes

Number

02

Validation

Data integrity reports or dashboards

Member self-service

External sources

03

Use it

Dashboards

Engagement Scoring

Operational Reporting

Let's measure your data maturity

1. Reviewing the data that you collect

2. **Data Integrity is someone's responsibility**

3. Process for identifying and merging duplicate records

4. Proactively ask members to validate their data

5. Measure member engagement

6. Know your vitals – retention, churn, tenure, growth, engagement

7. Access real-time reports on your associations performance

What is holding you back?

Data according to Lego.

What is holding you back?

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What is holding you back?

- ✓ Data isn't accessible
- ✓ Data is siloed
- ✓ Data doesn't exist
- ✓ Skills internally to report on it
- ✓ Relies on a staff member to run the report
- ✓ Data can't be trusted

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What is **holding** your association back?

Disparate Systems

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

Limited Skills and Knowledge

Reporting knowledge, data skills, technology gaps, management knowledge.

Trust

Staff and association does not trust the data or the systems.

Time and Resources

Simply don't have the time or internal resources to use the data effectively.

Unsure where to start

Where should you even start? It all seems too much to have a plan or goals.

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.

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Breakout Room

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

✓ Introduce yourself, association

✓ What is holding your association back?

✓ What makes up good data management practices?

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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

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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.

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A **framework** for data management.

Assessment

Culture, Training and Knowledge

Measure Quality

Data Management

Define key Terms

Data Integrity

Identify gaps and improvements

Report and Dashboard data

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Assessment

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.

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Assessment:
Ask these simple data questions

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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?

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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	Satisifcation, 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

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The data that matters

Minimum Data Set

✓ Identify your associations minimum data set

✓ This is the absolute critical data that your association needs to collect and maintain for all members.

✓ This should be no more than 10 data points including;
  - ❑ Join Date
  - ❑ Financial Paid Thru Dates
  - ❑ Date of birth or year of birth
  - ❑ Location (Post code, state)
  - ❑ Industry relevant info (such as specialty)

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Minimum Data Set

What is the critical minimum data set?

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Definitions are critical

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Association Definitions

✓ Ask your association to define key terms

✓ What is a member?

✓ What is a student?

✓ Grace periods

✓ What else must be defined?

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Definitions are critical

→

What are your key association definitions?

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Review your member data

Review your member data

✓ Export your core member data

✓ Include your minimum data set

✓ Save into Excel in a secure location

✓ Filtering and sorting to easily identify issues

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Review your member data

Review your member data – what did you see?

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In preparation for Thursday …

- Worksheet: Identify your current and future data state

- Worksheet: Identify your minimum data set

- Practice: Export your core member data and review for completeness

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Wrapping up Day 1...

What is data?

Framework for Data Management

Data Assessment

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Thursday 1st September

Day 2: Agenda

- Data Management Framework

- Tips and tricks: Excel Part

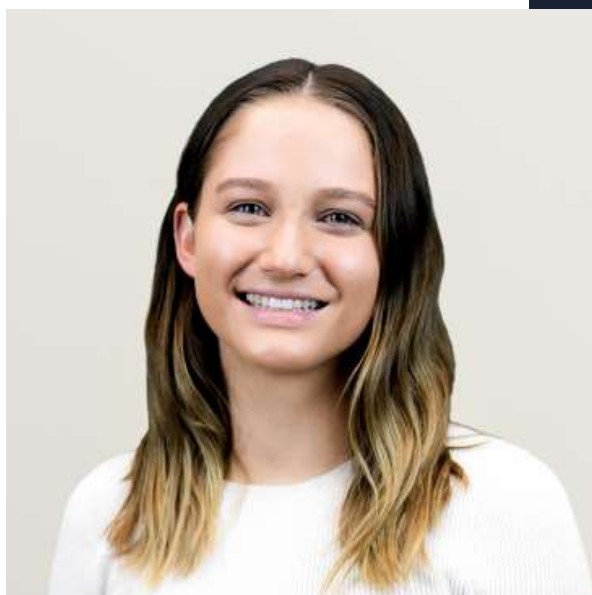- Formulas for reporting

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Michelle Lelempsis
Managing Director, Causeis

📞 0404 092 105

✉️ michelle@causeis.com.au

Yolande Smith
Digital Marketing Specialist, Causeis

📞 0434 788 214

✉️ yolande@causeis.com.au

9:41

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