



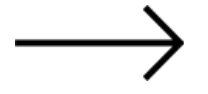
CAUSEIS PRESENTS

# Digital Academy for Associations

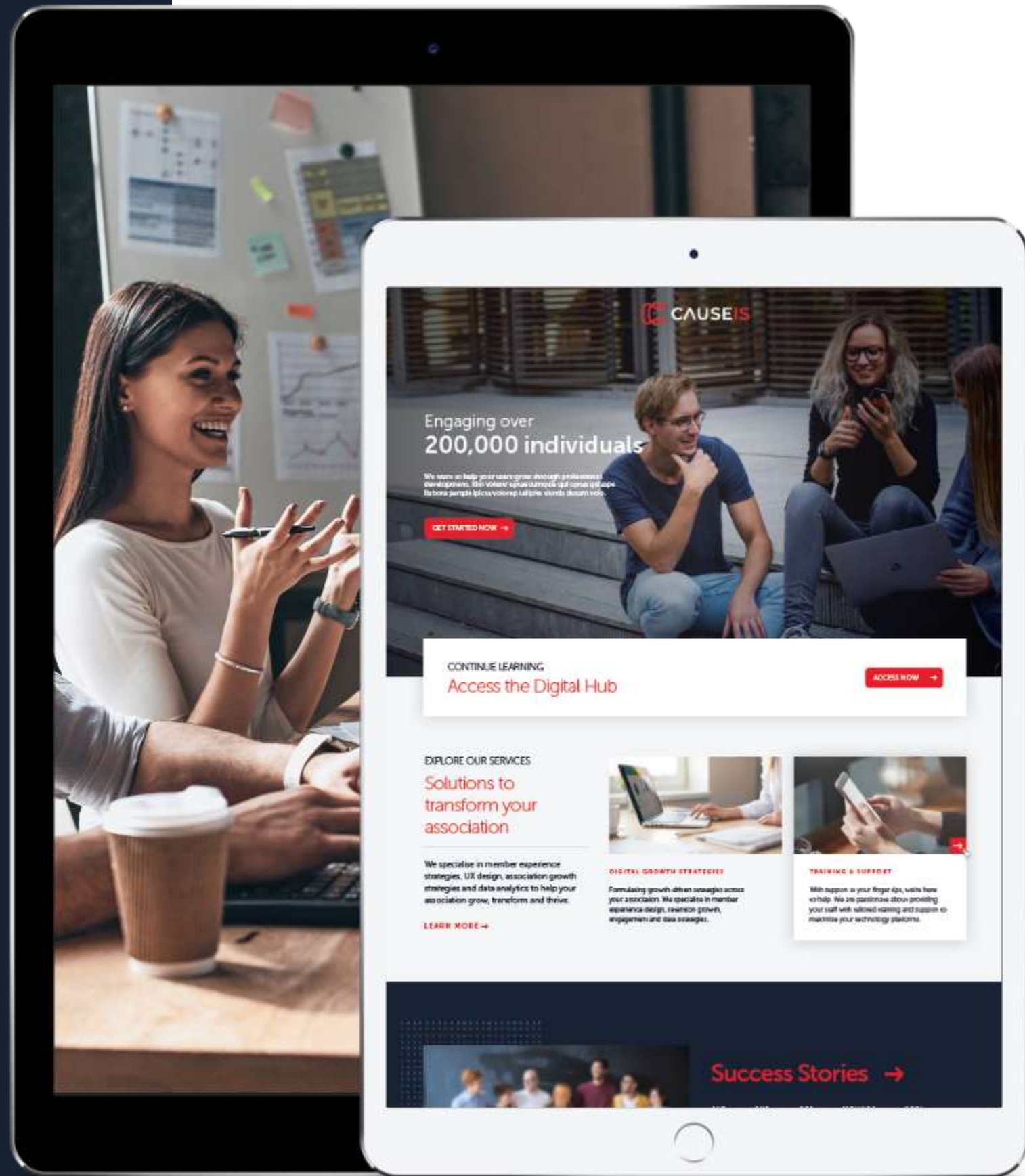
→ Course: Data Management for Associations



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](http://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.

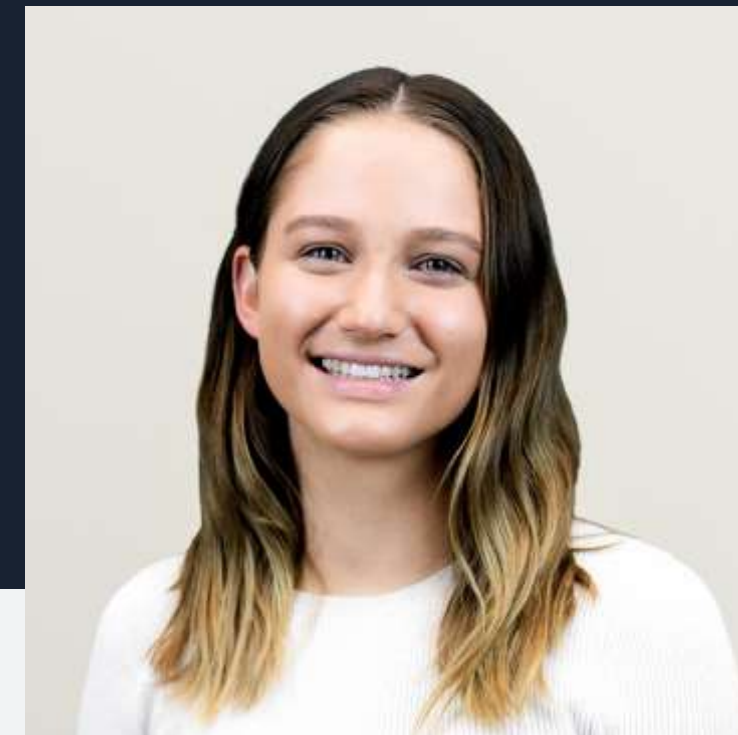
## Update your Name

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



**Yolande Smith**  
Digital Marketing Specialist  
Causeis

# Thursday 1st September

## Day 2: Agenda

- Your review of your associations data
- Data Management Framework
- Planning for Integration
- Data Integrity
- Formulaes



Digital Academy: Data Management for Associations

# Let's Recap

**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?



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, a girl in a pink mask and cape, a girl in a yellow mask and cape, a boy in a blue mask and cape, and a boy in a green mask and cape. They are holding large, colorful signs that say 'BAM!', 'POW', and 'BOOM'. The background is a bright, overcast sky.

# Data Management Strategies

# A framework for data management.



A group of five children dressed as superheroes, standing on a concrete surface. From left to right: a boy in a blue suit with a red mask and cape, pointing forward; a girl in a pink suit with a pink mask and cape, holding a red starburst sign that says 'BAM!'; a girl in a white suit with a yellow mask and cape, with her arms raised; a boy in a red suit with a blue mask and cape, holding a pink starburst sign that says 'POW'; and a boy in a green suit with a green mask and cape, holding a yellow starburst sign that says 'BOOM'.

# 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 3<sup>rd</sup> 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



# Data Integrity





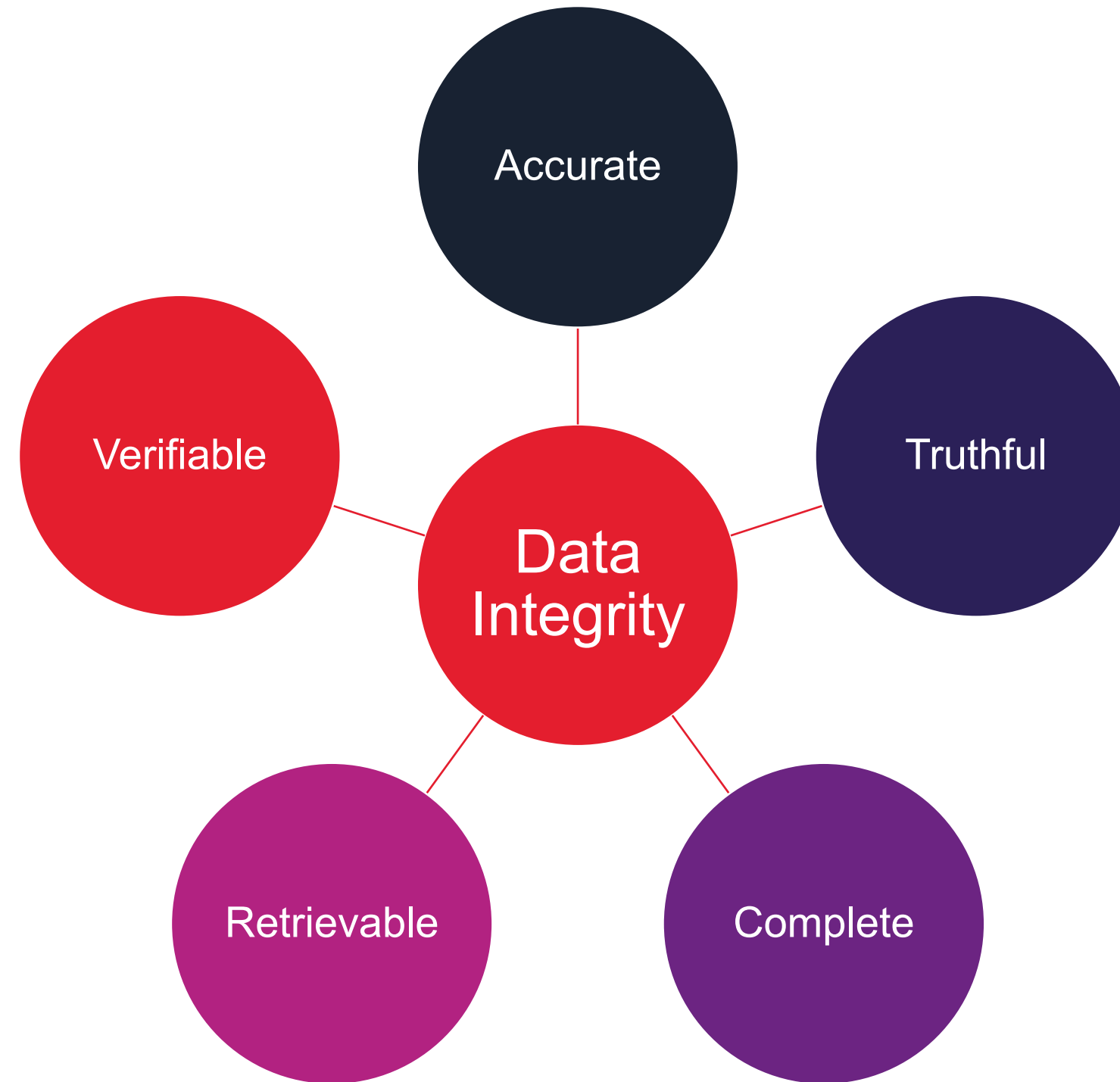
# WHAT ARE THE MOST SIGNIFICANT DATA CHALLENGES YOUR ASSOCIATION FACES?

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

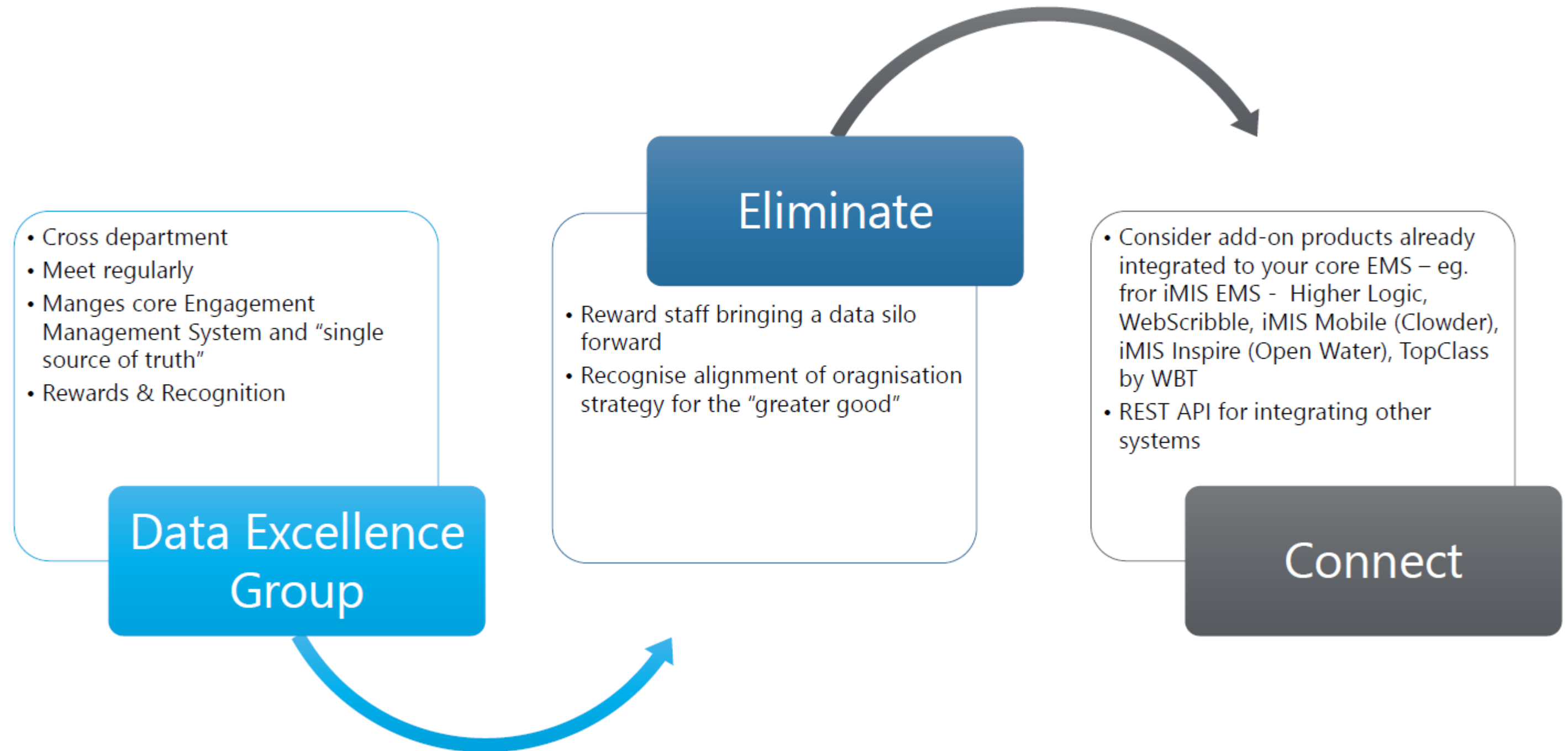
**Export** ▾

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

**Email**



# Improvement Framework





# 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





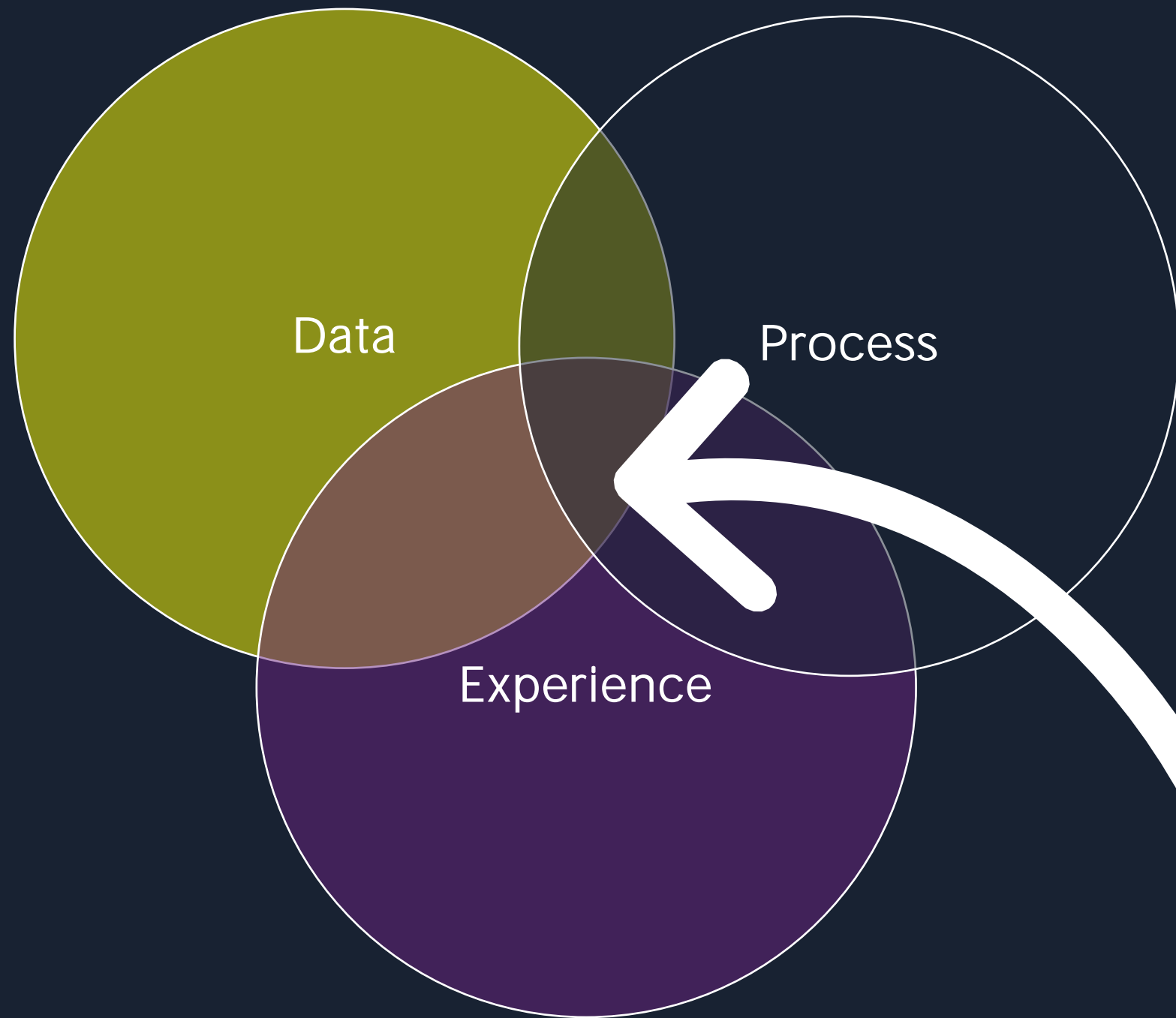
What metrics can you **access** today?



# 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).



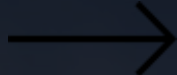
Digital Success

# Data. Process. Experience.



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# Data. Process. Experience.



Digital Success	Project Phase	Post 1-Month Live	Post 6-Month Live
<b>DATA</b>			
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, 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, there are several low-poly, geometric shapes in shades of white and light blue, resembling data points or a stylized landscape. The overall scene is set against a dark, muted 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.

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; a girl in a pink suit with a pink mask and cape; a girl in a white suit with a yellow mask and cape; a boy in a red suit with a blue mask and cape; and a boy in a green suit with a green mask and cape. They are holding large, colorful comic-style signs that say 'BOOM!', 'POW!', and 'BOOM!'. The background is a beach with waves in the distance.

# 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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- 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?

# A framework for data management.





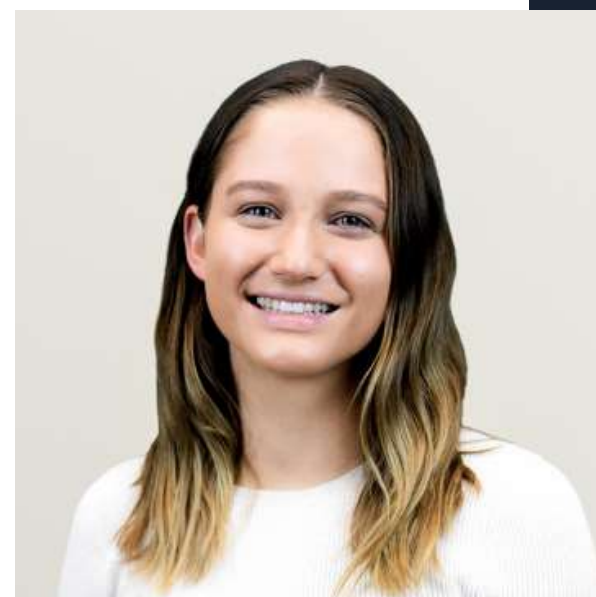
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