

MEMBER ENGAGEMENT SCORING FOR EXECUTIVE LEADERSHIP

EXECUTIVE BRIEF SERIES

THE 4TH IN A 4-PART SERIES

ENGAGEMENT SCORING FOR CEOS & EXECUTIVE DIRECTORS

Member Engagement Scoring is an approach for better understanding members, membership segments, and your membership/constituency overall.

It assigns values to actions taken by individuals and generates an overall score - meant to reflect their interest in certain areas and their general engagement. Scores can be rolled up for organizational engagement scoring. Among other things, it is very good at identifying both member retention challenges and membership acquisition targets.

- “What gets measured gets improved.”
- Peter Drucker, “The Founder of Modern Management”

WHAT BENEFITS SHOULD ENGAGEMENT SCORING PROVIDE MY ORGANIZATION?

ENGAGEMENT TRENDING

Engagement scoring is ideal for monitoring the overall engagement of your membership - or that of a segment of your members (i.e. new members with tenure less than 5 years), and whether the engagement trend is improving or regressing. This trend provides insight into whether your messaging and interactions are generally resonating with your intended audience.

You can establish a baseline and subsequent trend by aggregating the engagement scores of all the activity of all your members, non-members, and other stakeholders. You also have the option to create an unlimited number of distinct engagement metrics by calculating engagement for a membership type, certification participants, sponsors, and non-members.

ENGAGEMENT LEVELS

Once you have calculated engagement scores for your members, you can group them into categories such as high, medium, low, etc. The benefit of categorizing them is two-fold. First, you can interact with each group differently knowing full well that your most engaged members will be your best advocates and most willing to provide volunteer services. Equally valuable is knowing your members who are less engaged, but which are trending positively. Those individuals or organizations might be ideal candidates to push for greater involvement in your organization.

A second benefit of grouping members by engagement levels is that the categories themselves can be used as filters to inspect other data. For example, you can compare the email or web page readership between the most-engaged members with the less engaged segment. This may provide some key insight into what resonates most with the laggard group and help you improve your messaging and reach.

YOUR NEXT VOLUNTEER

A key by-product of implementing engagement scoring is identifying your most engaged members. Your most engaged members are your obvious targets for advocacy initiatives, board and committee appointments, and fundraising for your political action committee (PAC). They are the individuals or organizations that you can depend on to help you drive the organizational mission.

A complementary metric to the engagement score is the engagement score *trend*. Knowing that a key member has a high score does not tell the entire story; but knowing whether their score is increasing or declining clarifies your understanding of their current involvement. Identifying an important but disgruntled member quickly, before their relationship with the organization becomes irreparable, can have an immensely positive impact on the organization, or you as an executive with the organization.

HIGHER RENEWAL RATES

Member retention rates strongly impact the long-term viability of most associations. Wouldn't it be useful to know 5-6 months in advance of renewals, which members are at risk of not renewing? Engagement scoring provides this on an ongoing basis. Instead of relying only on one or two key indicators, member engagement scoring provides more comprehensive understanding – and given that low levels of activity often indicate that a member might not perceive that they are receiving a great deal of value from their membership, it is tremendously helpful for your teams to receive this information before it's too late.

Identify at-risk members months before their renewal dates – when there is still time to engage them

IDENTIFICATION OF FUTURE MEMBERS

Engagement scoring is also invaluable for identifying and encouraging new individuals or companies to join. By scoring the activities of non-members, the engagement engine identifies the top acquisition targets. Additionally, the individual activities that comprise a prospect's score (i.e. webinar registration, on-line community participation, etc.) can be used to articulate the benefits of joining the organization (and from which the prospect is already benefiting). In some cases, you may find that the prospect would save money by joining, which can make the convincing easier. Establishing a prospect list of equal quality without engagement scoring would be challenging, if not impossible.

AUTOMATED ACTIVITY

Engagement scores can facilitate next steps – triggering outbound marketing campaigns, alerts to staff, and much more. For example, highly engaged non-members could be sent a special membership offer when they reach a certain score. Alternatively, a coupon code (or other incentive, whatever you choose) could be sent to moderately-engaged members identified as potential retention challenges. Automating activity can ensure that each person receives the appropriate communication for their journey with your organization.



GAMIFY SCORING TO DRIVE ENGAGEMENT

It is not uncommon for members to take pride in the volunteer support they provide their association. You may find that you can capitalize on this human nature by creating a healthy competition between them. By offering incentives such as free conference registration, you may find that your members will work to drive up their scores whereby providing even more support to your important organizational initiatives.

With a modern data analytics tool like Nucleus, you can take this one step further by embedding a member's score, side-by-side with the top five scores, in your website and mobile apps to facilitate this gamification.

HOW DOES ENGAGEMENT SCORING WORK?

FIRST, AGGREGATE ACTIVITY FROM ALL YOUR KEY SYSTEMS

A common misunderstanding at many associations is that all important membership transactions and activity are being tracking and managed in their association management system (AMS). In fact, our research has shown that at a typical association today, less than 20% of the membership data is captured in the AMS - and that percentage is falling over time.

Why? Because other tools, such as email marketing, web tracking, and on-line community tools (to name just a few) are generating substantially more data than the AMS. This is vital information about the activities, behaviors, and trends of your membership. Therefore, it is critical that your engagement scoring engine is pulling and aggregating activity from these other systems as well as your AMS.



NEXT, ESTABLISH A SCORING METHODOLOGY

Once you have decided which information sources to include in your data analytics initiative and the integration and data blending is complete, you can focus on constructing a scoring methodology. The idea is to assign points to every activity in which your members (and non-members) participate. For example, you may provide 1-2 points for an individual opening or clicking on an email, 5-6 points for an individual posting or responding in your on-line community, 50 points for registering for a webinar, 100 points for serving on a committee, etc.

It often requires departmental input, and sometime some negotiation, to determine the scores assigned to each activity. Generally, we recommend that opening an email has the lowest score and that your most important activity, such as calling a member of Congress, should have the highest score. All the other activities should be ordered and assigned a value between these two.

AGGREGATE SCORING FROM INDIVIDUALS TO ORGANIZATIONS

Many associations have organizations as members (and/or sponsors) and would like to aggregate the scores from related individuals up to the organization level. This has proven to be an appropriate use-case for engagement scoring, as it provides the same valuable information about organizational members and stakeholders. Some associations even have multiple levels or organizational membership and the same principle can be applied. In this case, you can

aggregate the scores from the individual to the organization, and then from the related organization to the parent organization.

*Monitor organizational engagement
by aggregating individual scores at the
organizational level*

Organizations can also earn points themselves if you deem that certain activities are truly an organization function and should not be attributed to individuals.

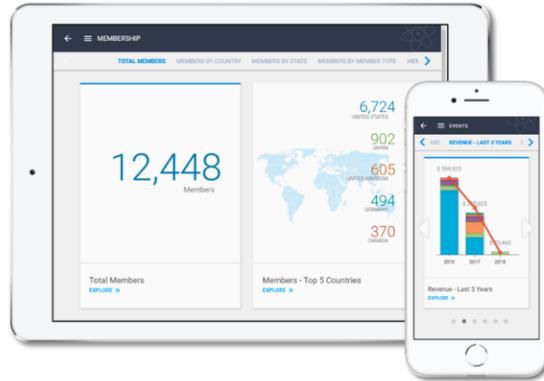
Two examples of this are contributions beyond membership dues payments that are given by the organizations, and supporting material produced by the organization that highlights the value of the association.

SCORING LIMIT PER ACTIVITY

An element of engagement scoring that can skew your results is if one member performs one activity frequently. This most commonly happens when you have a member who is very active in your on-line community or list serve. We generally recommend that you limit the total points any one activity can contribute to the overall score, rather than allowing the score to balloon and skew the results.

SCORING DECAY

An element of engagement scoring that should be considered is scoring decay. This is the concept that points should lose value (and become irrelevant) over time. For example, you likely do not care if a member opened an email 6 or 12 months ago. The value assigned to most activities should deteriorate with the passage of time, as it becomes less and less relevant as an indicator of the member's current level of engagement.



CONCLUSION

Engagement scoring can be an important tool to measure the level of commitment and involvement you are achieving from your members. It enables you to have a comprehensive understanding of the activity that is being collected across all your systems. It can help you pinpoint growing or waning interest and empower your organization to seize opportunities to influence your members at precisely the right time.

“Most of the world will make decisions by either guessing or using their gut. They will be either lucky or wrong.” – Suhail Doshi, chief executive officer, Mixpanel

CHECKLIST FOR EXECUTIVES CONSIDERING ENGAGEMENT SCORING

- The solution includes pre-built integrations and blends all your data from all your systems.
- The solution incorporates an innovative engagement model and comes with a built-in array of dashboards and data visualizations which highlights engagement activity.
- The solution allows your staff to create new visualizations to explore even more engagement activity through simple self-service.
- The solution includes a data glossary where all the terms, rules, and definitions of the engagement engine can be stored and made available to everyone.
- There is no additional cost to making the system available to all your stakeholders including all staff, the board, and even your members.