SCORING

MEMBER ENGAGEMENT

What Engagement Really Means and How to Measure It

by Amith Nagarajan

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Introduction

"Member Engagement" is certainly not a new term in Association Management. However, with the growth of new channels of communication on the Internet—specifically the upsurge in social media platforms—organizations of all types need to take a step back and rethink what engagement now means. Engagement models continually change and will likely continue to change at an even more rapid pace in the future.

"Engagement" is a perfect word to describe the relationship between an association and its members because it implies a mutual exchange of value. Effective association executives have been mastering engagement with their members since the advent of the membership model. Growth in membership, events, volunteerism, foundation support, and more are all tied to the creation of value for the member. Of course, engagement creates value for the association, as well. In many cases it also creates value for the general public through a stronger profession or trade. We see engagement as an intangible asset, much like the value of a brand. Yet, engagement has never been quantified in a consistent way in the Association

Management profession. This eBook aims to bridge that gap and provide ideas and tools to help association executives build engagement scoring models that will stay relevant as their associations evolve.

We will establish a clear and easily calculable engagement scoring method that is tailored to each association.

The primary objectives of this eBook are as follows:

▸ **First,** we will establish a clear and easily calculable engagement scoring method that is tailored to each association. We call this measurement Composite Engagement Score™ or CES™. This measurement system will be simple to understand, yet comprehensive enough to truly reflect the level of engagement an association has with its stakeholders.

▸ **Second,** we will define ways to use CES for each association, helping executives analyze engagement across new dimensions, like rate of change, segment, and more.

▸ **Lastly,** we will discuss general and segment-specific ways to raise composite engagement scores.

Ultimately, our goal in producing this eBook is the creation of a standardized vocabulary in the world of engagement management. Financial professionals have a standard set of metrics and statements they review on a recurring basis to gauge the financial health of an organization. Our belief is that CES will spur the formation

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of a similar kind of standard vocabulary for association executives to use within their organizations. This CES-based vocabulary will enable executives to refine their methods of engagement and thereby create more value for all stakeholders— including the association itself—far more effectively than those who choose to approach engagement as a fuzzy, qualitative, and therefore subjective, measure.

The Need to Measure Engagement

Unlike revenue, expenses, and member count, there is no standard, quantifiable method for measuring engagement in associations today. As a result, this critical aspect of association management is generally unmeasured, and those few who do attempt to measure engagement often rely on a multitude of inconsistently tabulated metrics.

It is our belief that the time has come for a rigorous, clearly defined method of measuring engagement for all types of organizations, particularly associations, *whose success fundamentally depends on engagement.* It is also our view that engagement measurement needs to be simplified into a small number of values, which can then be further distilled into a singular value that expresses the actual level of engagement.

The principal challenge with a qualitative metric like member engagement, compared to quantitative measures of performance like revenue or member-count, is that it necessarily varies from one organization to another. That is, all organizations understand and value revenue and member-counts in the same way.

However, the engagement behaviors desired by one organization may be entirely different from the way another organization wants its members to be engaged. In fact, the measurement may even vary within the same organization, over a period of time. All organizations go through different phases in their life cycles, and it is important to align an organization's definition of effective engagement with each

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of those phases. During some phases, member attendance at conferences may have the most value. At other times, perhaps due to a shift in the marketplace, the organization may focus more on engagement through the Web or social media channels. The point is that engagement is always in flux, and the way organizations measure it has to evolve. Even though the method of measurement isn't static, it is critical to understand how your organization is doing relative to past periods, both at the macro level and at the individual member level. This critical need for

the accurate comparison of engagement levels across time—**even as the method of calculation changes**—is a core feature of the way Composite Engagement Score is defined.

Composite Engagement Score (CES) is a new, unique, and powerful way to measure engagement, both at a given point in time and over longer intervals. It is flexible

CES is applicable to every organization on the planet in some way and is directly relevant to all membership organizations.

enough to accommodate a variety of inputs that drive the aggregate score and allow for changes in its calculation method over time—all while providing a mechanism for historical comparison. It is our view that CES is applicable to every organization on the planet in some way, and it is directly relevant to all membership organizations where engagement is essential to their core purpose.

The rest of this eBook is dedicated to defining the ideas in CES in more detail and providing a guidebook for actually implementing CES in your organization.

Composite Engagement Score

OVERVIEW OF CES

Calculating a composite engagement score (CES) should be done in the *simplest possible way.* That is, rather than adding more to a score, it is better to keep it lean.

Often, business professionals create "reports" for management that include a wide array of summary data points, many of which are unnecessary. Worse yet, these superfluous data points can distract the reader, preventing the successful transmission of the relevant and valuable parts of the report. For this reason, in the process of defining CES for an organization, we recommend limiting the number of factors included in the calculation to no more than five. We will refer to this as our **TOP 5 KPI** values. KPI is a commonly used term that stands for "Key Performance Indicator." In the context of CES, a KPI is an input value in the calculation of the Composite Engagement Score.

How do we generate an organization's CES? We take a number of KPI values, ideally no more than five, then normalize their values and assign a weighting to each value. Finally, we combine those values to create a composite score. The remainder of this section will explain how each of these steps works.

KPI SELECTION

Selecting your organization's KPIs is critical. These are the core inputs that will define what engagement really means to you. Some examples of KPIs relevant to your organization may include:

Number of years as a member

Number of referrals

Number of events attended
- Current year
- Last X years
- Life to date

Total revenue from member
- Current year
- Last X years
- Life to date

Number of speaking engagements

Number of committees served on
- Committee positions that require more time, such as Chair, Vice-Chair, Secretary, etc., might be considered differently than standard committee member positions

Social engagement
- Number of "likes," "plus ones," or "shares" on a social stream

- Number of tweets that refer to any of the association's hashtags or handles

- Number of blog posts that are tagged with topics relevant to the association, with some factor for the number of followers

- Number of relationships an individual member has with other members and potential members

These are only a few examples of KPIs that may be relevant to engagement with your organization. There are many other possibilities. The key, of course, is to find the KPIs that *truly reflect what is most important to your organization.*

Question: Which top three or five KPIs best measure a member's engagement level with your organization as it relates to your strategic vision?

Focusing on supporting your strategic vision is a better way to decide on engagement KPIs than relying on the "gut" reactions of staff and board members, which tend to be highly subjective—and the purpose of the CES is to provide an objective measurement of engagement.

It is also important to remember that this is not "set and forget"—you must continually revisit the way you calculate CES to keep it relevant. If your organization changes gears and decides to focus on a different set of objectives next year, your CES needs to adapt accordingly, or it won't reflect the type of engagement that truly matters to your group.

As an additional resource, this eBook includes an Appendix with a more complete (but still rudimentary) list of ideas for KPIs.

CES POINTS—NORMALIZATION OF KPIs

After selecting the KPIs that are important to your association, the next step is to normalize their values so that we can combine them into a single measurement. There are basically two steps required to normalize the values from individual KPIs into CES. The **first step** is determining the weighting of each KPI. The **second step** is determining how to translate the units from each KPI into CES points.

Weighting a KPI simply means ranking its importance. For example, let's say that we have the following three KPIs in our association's engagement scoring model.

▸ Total number of events attended (Last three years)
▸ Average annual revenue to organization (Last two years)
▸ Total number of committees served on (Last three years)

These three KPIs are not necessarily of equal importance, so you must determine how to weigh their impact on CES based on their relative importance. CES makes this easy to do.

With CES, you have a total of 100 possible points to award a given member, with 0 being no engagement and 100 being maximum possible engagement. Given that,

we can take our total of 100 points and divide them amongst our KPIs based on their importance. In this example, let's say that we feel committee service is the most important KPI, since it reflects a large time commitment by the member. We therefore decide to allocate 50 of our 100 possible CES points to this KPI. We then determine that event attendance is the second biggest driver of engagement, and we assign 35 points to that KPI. The remaining 15 points are assigned to the revenue KPI, indicating our belief that though revenue is important, it carries less weight than the other two KPIs. The pie chart at left shows how we weighted the individual KPIs to devise our CES score.
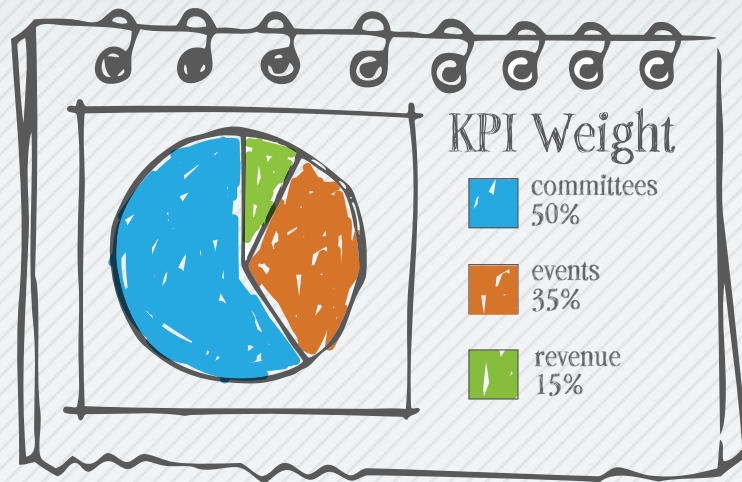
After we have assigned CES points to each KPI, we then determine how to translate the units from each KPI into points. This is something you need to spend considerable time thinking about, including an in-depth analysis of your existing data for each KPI. To continue working with the same example, we will review our three KPIs and

KPI Weight

committees 50%

events 35%

revenue 15%

provide an example table for each one, *mapping the KPI units of measure to CES points.* We are translating the KPI's native unit of measure (be it dollars, time, etc.) into an abstract unit called CES points.

Total Number of Events Attended (Last three years)
Let's say your association considers attending fewer than one event per year to be a low level of engagement, attending between one and two events per year to be a good level of engagement, and attending three or more events per year to be a strong level of engagement.

Average Revenue to Organization (Last two years)
The association may determine that a member who spends less than $400 on average per year has a low engagement level, between $400 and $1,000 to have a moderate engagement level, and $1,000+ to have a high engagement level.

Total Number of Committees Served On (Last three years)
Here, the scale may shift—committee service is fairly time-intensive and active compared to the other KPIs. We may consider one instance of committee service to be a moderate level of engagement and more than one to be a high level of engagement.

We've now broken down each KPI into sub-categories, and each sub-category has different units of measurement and value ranges based on the nature of the KPI.

In the Composite Engagement Score model, we then normalize these values by assigning "points" to the KPI scales. Let's review this again with the same three KPIs.

Total Number of Events Attended (Last three years)

EVENTS
0

0
CES POINTS

EVENTS
1

5
CES POINTS

EVENTS
2

15
CES POINTS

EVENTS
3+

35
CES POINTS

NUMBER OF EVENTS

40
30
20
10
0

0   1   2   3+

It can be helpful to visualize this point assignment structure in a line chart to show whether we are assigning points within the KPI on a linear, accelerating, or decelerating basis. In this case, you can clearly see that we are accelerating the assignment of points until someone has attended three events, at which point the member has achieved the maximum points for this KPI.

Average Revenue to Organization (Last two years)

REVENUE/YR	REVENUE/YR	REVENUE/YR
✓ $0-$400	✓ $400-$1K	✓ $1K+
🏆 0	🏆 3	🏆 15
CES POINTS	CES POINTS	CES POINTS

REVENUE

16 ►
14 ►
12 ►
10 ►
8 ►
6 ►
4 ►
2 ►
0

$0-400 $400-1K $1K+
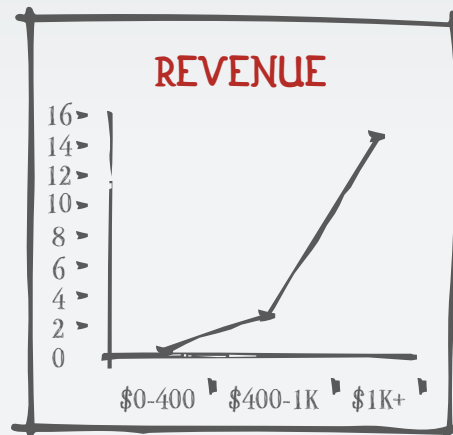
This KPI also uses an accelerating curve that has zero points under $400 of revenue, a small number of points between $400 and $1,000, and the maximum number of points above the $1,000 threshold.

Total Number of Committees Served On (Last three years)

COMMITTEES ✓ 0
0 CES POINTS

COMMITTEES ✓ 1
20 CES POINTS

COMMITTEES ✓ 2
50 CES POINTS

NUMBER OF COMMITTEES

60
50
40
30
20
10
0

0   1   2+
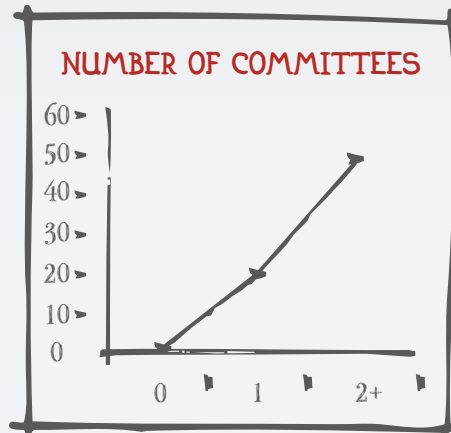
In this final example, we have a slight degree of acceleration with the addition of a second committee, yet significant points are provided to members belonging to only one committee. This KPI was designed to provide immediate engagement recognition in the form of CES points as soon as the member joins his or her first committee, given the importance of that activity to this hypothetical association's strategic goals.

Important Note: The above tables are intentionally very simple. In an actual implementation, you might have many more levels within each KPI, or perhaps even use a formula to define how points are allocated up to a maximum. Additionally, while these examples all show accelerating curves, it may be appropriate to design a KPI that has a decelerating points curve. For example, if the initial activity is valuable but, incrementally, there comes a point of diminishing marginal returns, you may design a KPI to have a flat number of points, or even decreasing points, when the KPI's measure increases past a certain point. Also, member "burnout" is a factor to consider. For example, you may want to ask yourself whether a member is overextended. Is that level of over-commitment a threat to the member's relationship with your organization?
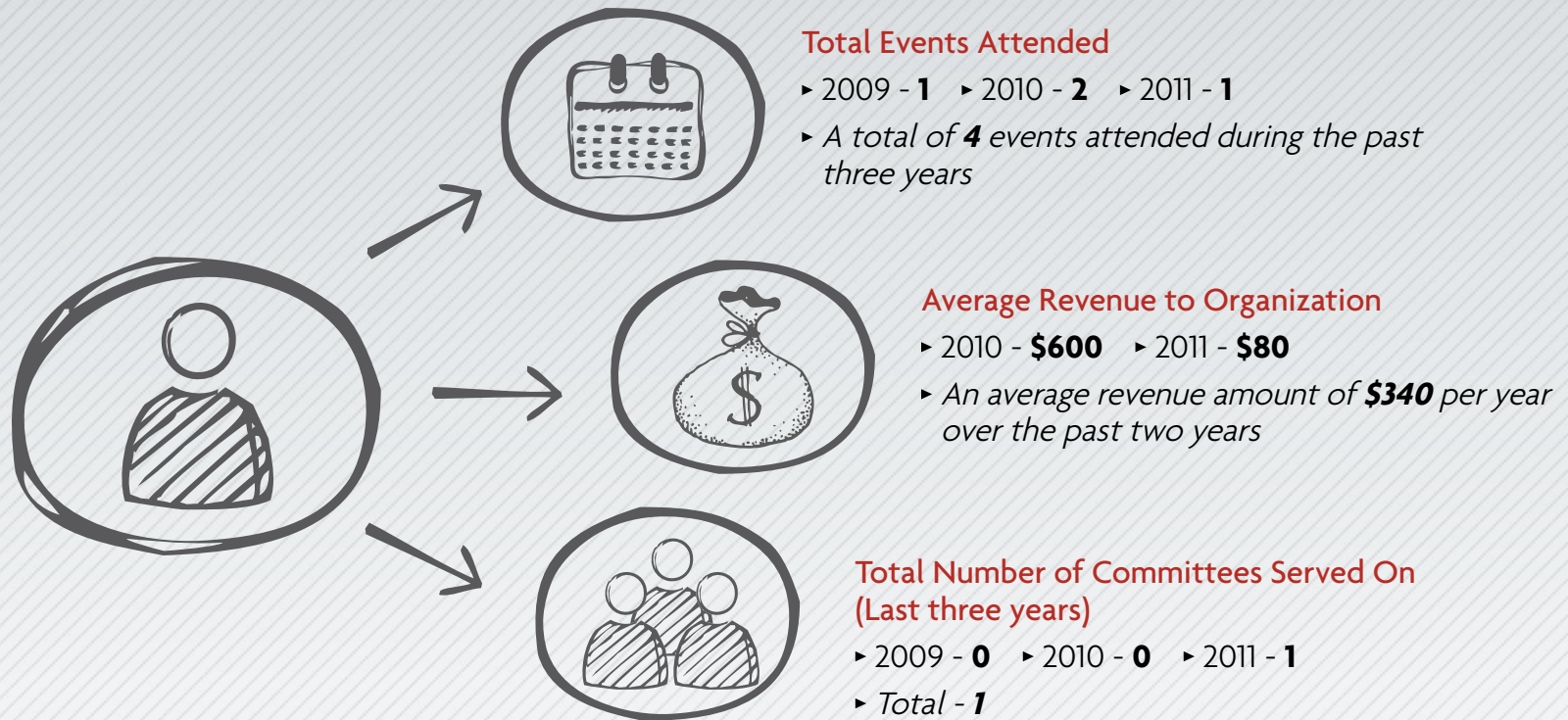
CES points allows you to **accurately weight** the activity based on its impact on **the organization's strategic goals**.

The KPI normalization tables we've shown have a simple, built-in reward system. The mapping shown between each value and the accordant CES points allows you to accurately weight the activity based on its impact on the organization's strategic goals.

In the following example, we will awarding a significant amount of points to a member for event attendance and committee service, and fewer points based on revenue generated. If an organization valued committee service less than attending the event, the scales could easily be changed. The key here is that we have normalized the units and scale of each KPI into a singular unit of measure called CES points. The sum of a member's CES points determines his or her level of engagement.

Note that in order to have a range of values from 0 to 100 for engagement, it is important to ensure that the maximum amount of points is 100 if someone achieves the highest rank in each KPI area, which is what we have done in this example: 35 (maximum score for attending events) + 15 (maximum score for revenue generated) + 50 (maximum score for committee service) = 100.

To further illustrate this concept, let's build an example wherein we have an individual member and we want to calculate his or her CES. The next page shows the relevant data points for that member given the set of KPIs from our example:

Total Events Attended

‣ 2009 - **1**   ‣ 2010 - **2**   ‣ 2011 - **1**

‣ *A total of **4** events attended during the past three years*

Average Revenue to Organization

‣ 2010 - **$600**   ‣ 2011 - **$80**

‣ *An average revenue amount of **$340** per year over the past two years*

Total Number of Committees Served On (Last three years)

‣ 2009 - **0**   ‣ 2010 - **0**   ‣ 2011 - **1**

‣ *Total - **1***

Now, let's calculate the CES points for each of those KPI values:

Total Events Attended (Last three years)

‣ Four events map to **35 CES points** based on the events table.

+

Average Revenue (Last two years)

‣ $340 maps to **0 CES points** based on the revenue table.

+

Total Number of Committees Served On (Last three years)

‣ 1 committee maps to **20 CES points** based on the committee table.

=

55

CES for this member

You can see the calculation process for CES is actually quite simple once you know the KPI values, determine how to weight those KPIs, and map them to specific point values. You can also see that this CES model clearly puts a great deal of weight on volunteer committee service, since service on just one committee over three years results in 20 CES points. The key idea to recognize here is that the calculations are quite simple once the strategic work is complete. The good news is that the CES calculation can be automated fairly easily. The hard part of the process occurs at the strategic level: determining which factors matter, how much each factor matters, and how to scale and weight the level of activity within each KPI. There are a wide array of variables in play here that you can manipulate to drive the CES model to reflect your strategic priorities.

ORGANIZATIONAL CES CALCULATION

You can take one of two approaches to calculate an organization's CES (versus an individual member's CES). **First,** you could define a set of KPIs that are specific to company-level engagement. One quick example of a company-level engagement KPI is the percentage of company employees who are members versus the percentage who are non-members (adjusted for the positions within the company that qualify).

This KPI would provide the ratio of people in an organization who are members to those who could be members. This only applies to membership models with individual subscribers.

Weighing a KPI simply means raking its importance...the calculations are quite simple once this strategic work is complete.

The **second** approach is to sum up and then average all of the CES points of the people associated with the organization. For example, let's say that an organization of 100 people has an aggregate CES (that is, the sum of all individual CESs) of 5,200 in Year One and 6,800 in Year Two, or an average organizational CES of 52 and 68. This would tell us that overall engagement in the organization increased by about 30% from Year One to Year Two.

Both approaches have merit, and you could actually use a hybrid approach. Both models work exactly as described above in terms of the mapping of individual KPI values to CES point values. The main difference is that when you aggregate

individual KPI results, you add them up and then take a statistical mean or median value to determine the company-level CES score. Alternatively, if you determine a set of KPIs that are relevant at the macro level, you could dispense with the idea of aggregating individual data from within the company and directly calculate the CES scores for the company's level of engagement. Lastly, you could pursue a hybrid approach that utilizes some KPIs at the company level and some that are aggregates of individual members, factoring these into a portion of the overall company score.

REAL-TIME AND HISTORICAL CES MEASURES

When you start tracking KPI values and CES points, it is critical to aggregate those values and then store them in aggregate form in your database. That is, rather than storing all of the individual KPIs that make up a member's CES, only store the member's CES—the one number that sums up his or her level of engagement.

The reason for this is two-fold. First, as you look at the data in your system, everything will run faster if these values are pre-computed. Second, you will want to retain a historical CES value for each member, perhaps for each year and, in some cases, more frequently. The key takeaway here is to not rely solely on the individual

CES points that are being allocated to members, but to have a mechanism in place within your system that aggregates these values on a recurring basis so that you have historical results.

Rather than storing all of the individual KPIs that make up a member's CES, only store the member's CES—the one number that sums up his or her level of engagement.

As for tracking real-time CES results, you can set up your system to calculate KPI results and CES points with the frequency you deem appropriate. For smaller organizations with limited to zero automation, it will be impractical to do this more than quarterly or annually. However, for larger organizations that have the resources to automate the process described here, it could be done daily or even more regularly. The value of up-to-date CES values applies in some cases, but for many organizations, a quarterly or annual update is more effective.

CES is, by definition, an abstract number, because it combines normalized values from several actual measures of impact into a single number. Since CES normalizes

these values based on their relative importance, or weight, the resulting numeric score in CES is inherently abstract in nature. For that reason, over a period of time, if the CES scoring methodology changes with regard to KPIs or their normalization mappings, the question remains: Does that mean CES scores can no longer be compared year over year? Our viewpoint is that CES scores can indeed be compared year over year, even as the KPIs and their mappings change. The idea behind CES is to score a member's engagement relative to the organization's priorities at the

> The idea behind CES is to **score a member's engagement** relative to the **organization's priorities** at the time of the engagement.

time of the engagement. So, as the KPIs and their weighting change, the way you calculate CES should also change. Comparing the CES values from year to year is still valuable, though, because you are comparing the member's historical engagement relative to the way the organization desired the member to engage at that point in time. This is precisely the value of CES. The creation of an abstract definition of "engagement" affords the opportunity to simplistically and consistently evaluate the level of member engagement over time, even as the method of calculation

changes. Each year, the CES value for a member is something that is calculated relative to the priorities of the organization at that time.

As a side note, it is of course possible to go back and ask a question like, "If our priorities now were applied to the 2005 time frame, what would that member's engagement have looked like then?" Our view is that this is generally a theoretical exercise and not particularly valuable in most situations. The key to understanding the value of CES is to evaluate the member's engagement based on the priorities of the association at the point of evaluation. Then, you can easily analyze the engagement-level of the member over time, with your organization's changing priorities continually reflected in each year's CES calculation method.

HOW TO IMPLEMENT CES

Now that we've covered the basics on what the Composite Engagement Score is and how to build a CES method for your organization, we will switch gears and talk about how to implement CES. There are two primary ways to do this: The **first** is to leverage your Association Management Software (AMS), if you have such a tool in place. The **second** method is to manage CES scoring outside of your AMS,

which is appropriate if you do not have an AMS, or, more likely, if you have an AMS but decide against implementing CES within it. Many associations have older AMS products in place that are inflexible, and—on limited budgets—these organizations do not have the ability to invest in automating the CES model within their AMS.

There are two primary ways to implement CES: The first is to leverage your Association Management Software (AMS). The second is to manage CES Scoring outside of your AMS.

Clearly, each organization must choose a path forward in alignment with its strategy and budget. Assuming that an organization's AMS is capable of accommodating the CES model without breaking its upgrade path, and a budget exists for implementing these capabilities within the AMS, we suggest that this is the best route forward. The reason is that implementation within an AMS will provide two major advantages over the external method: The first is that the AMS will contain CES values available for use in reporting or simply reviewing individual member records. The second advantage is that CES calculations are more seamlessly automated within an AMS.

However, since every organization does not have an AMS, we'll first outline our suggested method for implementing CES outside an AMS. Following this, we'll provide suggestions for using an AMS to set up and run a CES program.

Outside of an AMS

If you do not have an AMS or you choose not to implement CES inside your AMS, we suggest you rely on Microsoft Excel as your implementation tool. Excel is a widely available tool, and it is flexible enough to accommodate just about any formula requirements that KPIs and CES models may have. Excel also has some nice features for importing data from just about any type of database out there today.

Step 1: Figure Out Where Your AMS Data Lives

This sounds obvious, but some associations have been using the same AMS (or custom system) for so long that they don't have a good handle on the location or structure of their AMS data. If you don't have the in-house knowledge, get your vendor involved, or bring in a database consultant for a short time to help you evaluate this. The goal here is to determine where the member-related data is stored in the AMS at the database level (not in the AMS screens), so that it can be extracted over time in a consistent manner.

Step 2: Identify Data Sets to Bring into Excel

There will be many tables and fields in your system. Only a small subset will matter for KPI calculation and CES aggregation. You will need to determine which subset of information is vital. Remember that you must bring across your member ID or member number so that you have a unique identification method for each calculated CES value. The data required in Excel will change over time in relation to the KPI values you use. In the earlier example where we looked at event attendance, revenues, and committee service, we will need three worksheets—one for each of the incoming categories of data. Additionally, there will be a fourth worksheet that tabulates the KPI results from the three source data worksheets, and a fifth worksheet that displays each member's CES.

Step 3: Calculate KPI Values

Since Excel is such a widely known tool, there are many resources available to you to help with this step. If you or a colleague is not fluent in Excel formulas, online training and help are available directly from Microsoft and from other vendors. Additionally, a wide number of financial professionals are well versed in the more complex areas of Excel, such as formula creation and macros. Your KPIs may not

require anything particularly exotic, but it is a good idea to have the right Excel knowledge to get correct results. The goal of this step is simple once the Excel skills are in place. Create a new worksheet in the Excel workbook. For each worksheet of imported data, create your KPI formula so that the new worksheet is populated with the KPI results for each member ID that came from the individual data worksheets. Below is an example of how this might look:

Event Worksheet

Member ID	Event Name	Event Date
250	Annual Meeting	05/01/09
250	Annual Meeting	05/03/10
250	Super Great Meeting	12/15/10
925	Annual Meeting	05/06/11
264	Annual Meeting	05/03/09
346	Annual Meeting	05/01/09
346	Annual Meeting	05/03/10
346	Annual Meeting	05/06/11

Revenue Worksheet

Member ID	Order Number	Order Date
115	$325	05/25/10
250	$50	03/01/09
250	$75	07/09/10
250	$150	11/15/09
925	$2,500	05/06/11
264	$325	05/03/10
346	$442	03/01/09
325	$152	05/23/10
362	$325	09/06/11

Committee Worksheet

Member ID	Committee Name	Start Date	End Date
250	New Membership	01/01/09	12/31/09
562	Industry Council	01/01/09	07/01/10
925	New Membership	01/01/10	
264	Board of Directors	01/01/10	12/31/11
346	Board of Directors	01/01/11	
346	Industry Council	07/01/10	01/01/12
346	New Membership	01/01/07	12/31/11

Member ID	KPI Name	KPI Value
250	Total Events (Last 3 Yrs)	3
925	Total Events (Last 3 Yrs)	1
264	Total Events (Last 3 Yrs)	1
346	Total Events (Last 3 Yrs)	3
115	Avg Revenue (Last 2 Yrs)	163
250	Avg Revenue (Last 2 Yrs)	138
925	Avg Revenue (Last 2 Yrs)	1,250
264	Avg Revenue (Last 2 Yrs)	163
346	Avg Revenue (Last 2 Yrs)	221
325	Avg Revenue (Last 2 Yrs)	76
362	Avg Revenue (Last 2 Yrs)	163
250	Total Committees (Last 2 Yrs)	1
562	Total Committees (Last 2 Yrs)	1
925	Total Committees (Last 2 Yrs)	1
264	Total Committees (Last 2 Yrs)	1
346	Total Committees (Last 2 Yrs)	3

The previous three tables show how the individual worksheets might appear in Excel. Keep in mind that you can automatically update data into Excel from many types of data sources *after* you initially import. This is a great feature, but make sure you have backups of the older files before you do this for each date where you ran the calculation.

The fourth worksheet in this example (at left) contains a table that shows the KPI results, by member, for all of the KPI values. Keep in mind that to automatically compute the KPI values as shown here, an Excel formula and/or macro will be required.

What does this fourth worksheet tell us? It tells us which members are most engaged in which areas—we see that members #250 and #346 were most active in attending events, and that member #925 is the most engaged member in terms of money spent with the organization.

Member ID	KPI Name	KPI Value	CES Point Values
115	Avg Revenue (Last 2 Yrs)	163	0
115 Composite Engagement Score			0
250	Total Events (Last 3 Yrs)	3	35
250	Avg Revenue (Last 2 Yrs)	138	0
250	Total Committees (Last 2	1	20
250 Composite Engagement Score			55
264	Total Events (Last 3 Yrs)	1	5
264	Avg Revenue (Last 2 Yrs)	163	0
264	Total Committees (Last 2	1	20
264 Composite Engagement Score			25
325	Avg Revenue (Last 2 Yrs)	76	0
325 Composite Engagement Score			0
346	Total Events (Last 3 Yrs)	3	35
346	Avg Revenue (Last 2 Yrs)	221	0
346	Total Committees (Last 2	3	50
346 Composite Engagement Score			85
362	Avg Revenue (Last 2 Yrs)	163	0
362 Composite Engagement Score			0
562	Total Committees (Last 2	1	20
562 Composite Engagement Score			20
925	Total Events (Last 3 Yrs)	1	5
925	Avg Revenue (Last 2 Yrs)	1,250	15
925	Total Committees (Last 2	1	20
925 Composite Engagement Score			40
Organizational Average			28.125

Step 4: Calculate CES Values

Once you have created the KPI worksheet noted here, you can then create a CES worksheet that aggregates the KPI results into a single CES score. This final worksheet (seen at left) will look just like the above KPI worksheet except there will be a single CES value on a per-member basis.

This final worksheet, which provides a CES for each member, shows us that although member #925 far outspent all other members, he is only the third most-engaged member. The most engaged member, #346, spent very little with the organization, yet has been very involved in committee work, which our organization believes to be much more important to member engagement, as the weighted scores show. We also see that the average level of member engagement is a somewhat moderate 28.125 CES.

Step 6: Do Something!

You have calculated a CES value for each individual member record (person or organization, or both). Now what? If your AMS allows you to easily import data, it is possible to drive the data back into the AMS. If not, you can use the Excel CES worksheet as a **data source** for more Excel worksheets, where you can perform analysis by creating charts and pivot tables and using other facilities within Excel. Remember: if you are not going to import the CES values back into the AMS to handle your reporting and analysis, make sure you export all of the demographic

What you do with CES is up to you, but you have a flexible tool that will support any set of KPIs and any CES method you choose.

and other data from the AMS to Excel. There, you can analyze CES by member, creating averages, standard deviations, etc. Additionally, you can analyze CES by segment (such as region, age, years of membership, etc.). What you do with CES is up to you, but you have a flexible tool that will support any set of KPIs and any CES method you choose.

Within an AMS

As we noted above, we suggest that implementing CES within an AMS is the best way to use this powerful tool. Furthermore the complexity and cost of implementing CES should be significantly lower if your AMS has built-in functionality to leverage. However, as long as you can add fields and new rules to the database, you should be able to implement CES in any AMS.

Step 1: Storing CES Values

While this is the end result of CES calculation, you should begin by deciding where in the AMS system to store the current CES value for each member. This should be pretty straightforward—in most systems you'll simply add a field to the database for the member record. However, in some systems that do not allow you to do this, check to see if you have any available "User Defined Fields" that can store a numeric value. Beyond storing the current value, it would be ideal if your AMS allowed you to capture historical CES values per member, but this will require an additional table be created within the AMS since there will be multiple values over time for each member (e.g., a member's CES score in 2008, 2009, 2010, 2011, etc.).

Step 2: Finding KPI Data

The second step we recommend is to determine, for the current CES KPI set, where the underlying data is stored. For example, we had three KPIs in our earlier example: events attended, revenue, and committee service. Your AMS provider (or your IT team if you have one) will need to help you determine where event, revenue, and committee data are stored in the system so that you can build a database formula (typically a stored procedure in IT talk) that will calculate the KPI value on a per-member basis. Once this discovery process is complete, you would then have your AMS provider, or your IT team, build the KPI formulas so that they can be calculated automatically on-demand. (In IT talk, this would be building the stored procedures in the database for each KPI.)

Step 3: Building the CES Calculation

Since your CES calculation will change over time, you will want to keep each CES calculation separate—that is, retain the old ones in your system for prior years as you make changes. This will allow you to recompute CES values using any prior CES formula in the system. The main work here is to have your IT team or AMS vendor build a formula in the database that will appropriately aggregate the KPI values and normalize them the way your mapping tables specify (as noted here). Make sure that

this work is reviewed by at least one person other than the developer to validate that the normalization and calculation work is correct.

Step 4: Scheduling the Calculations

All of the above steps set you up so that your database has built-in formulas to calculate individual KPI values and the CES score on a per-member basis. Now the question is, how often do you want to recalculate the CES scores for your membership? Depending on the size of your membership and other factors, this could be something that requires considerable thought. For most small- to medium-sized organizations, it makes sense to schedule the CES calculations to be done off-line once a month with the results of the calculations being placed into the appropriate spot in the member record (which we covered in Step 1).

Step 5: Using the CES Values in the AMS

By implementing Steps 1 through 4, you have created a basic level of automation for a specific set of KPIs and a specific CES model. This is great progress, but you now need to figure out what you are going to do with this data. The following are some examples of things you should consider doing in your AMS to take advantage of this incredibly valuable data.

Automation is a great feature, of course, but the key is to use the engagement score daily, in a meaningful way.

▸ Place the CES score on the top of each member record so that whenever a record is opened, the CES value will be prominent and visible. Of course, this requires that you roll out an internal training process to ensure staff knows what CES means.

▸ Include CES scores on all rosters for internal use. Examples include meeting rosters, committee lists, and member renewal lists. Wherever a member's name appears, include the CES value to highlight its importance in your operations.

▸ Put organization-wide CES score averages on big screens in your offices. If you are shooting for a long-term average CES score as part of an organizational goal/campaign, pull a report directly from your AMS that includes CES data.

▸ Make sure your AMS vendor enables the CES data for searching and querying in your system, if that is possible. This data can be analyzed in seemingly limitless ways.

In summary, implementing CES within your AMS is preferable, because it integrates the CES value directly into the operations of the association, making the information visible to everyone at all times. The automation is a great feature, of course, but the key is to use the engagement score daily, in a meaningful way.

Beyond what is noted above, it is possible to implement far more sophisticated CES capabilities in an AMS by storing historical CES values and building analytical tools that show trends in member engagement—by member, organization, or any other segment you can think of.

Implementing CES within your AMS is preferable, because it integrates the CES value directly into the operations of the association.

We realize that not all AMS products and systems are able to handle the changes that are described above in a cost-effective way, if at all. In those cases, it is still possible to implement CES in your organization. You simply need to do it outside of your AMS, as noted above.

CES Reporting and Analytics

SEGMENTATION

This section provides examples of segmentation that may prove useful to your organization when analyzing CES values. Segmentation is only as good as its relevance to your association, so we urge you to work hard on evaluating the right segments to analyze. If you need help with this, enlist a consultant who has experience in this area. Also, you can use data mining tools to help you find potential segments. These tools (such as the one in Microsoft Excel) will help identify patterns that you may not have recognized. For example, if you enter a large data set containing member information and CES values, the tool might discover a correlation between member age and level of engagement, or perhaps geographic location and engagement, which you may not have thought to analyze initially. Let's explore some examples of segments worth looking at.

Segment of One

Perhaps it goes without saying that you should carefully evaluate individual members (both the VIP folks that you know well and, on a randomized basis,

dozens more) to determine how CES scores reflect your perception of the member's engagement and correlated value (in both directions). The key here is to use this feedback for iterations in your definition of appropriate KPIs and CES normalization/weighting rules.

Geographic Region

This is an area that many associations spend less time thinking about today with the Internet and social media blurring the boundaries. However, don't forgot to analyze engagement by geographic region, you may learn some interesting things.

Depending on the nature of your membership, you might uncover some very interesting facts about how you engage members by geographic region.

This particularly impacts events, but it can affect a wide array of other things. For example, online chats and webinars can be less successful if you run them in a time zone that isn't aligned with your member's preferences. Let's say your members are

all software developers, you are located on the East Coast and they are dispersed across the country. Perhaps you set up webinars at 11 a.m. Eastern time, which, of course, would be 8 a.m. in California. For many professionals, 8 a.m. might seem fine, but for most of the software developers I've known in my career, that is much earlier than they would like to start their day. The point is, depending on the nature of your membership, you might uncover some very interesting facts about how you engage members by geographic region.

Age

Age is a demographic that often determines how members engage, and it definitely influences their interests. If you are aiming to engage more of your members with educational content and finding you are having a hard time getting attention from mid-career members and beyond, an engagement score (CES value) might help you understand that experienced professionals crave different content than younger professionals.

Years in Profession

In some ways this is correlated to age, but it's important to not confuse the two. Some people enter a profession earlier or later in life relative to others, due to

family circumstances, military service, second careers, or any number of other factors. For this reason, distinguishing between "years in the profession" and "average membership age" is crucial for individual-member associations. Engagement based on "years in profession" can be a useful and revealing segment to analyze.
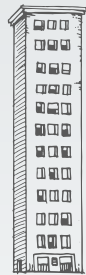
Organization Size (Revenue/Employees/Etc.)

For company members, this is a key segment to analyze. Any member-based organization that considers the company a member should use several factors for analysis, including the company's revenue, its number of employees, its number of offices, its international scope (if applicable), and its ownership structure (public, private, etc.). These factors can dramatically alter the organization's priorities and affect how the association drives engagement in order to provide value to the company.

However, the important thing to remember about company-based members is that—underneath the hood—they are a mass of individuals. So, for company-based membership organizations, you must also track and manage engagement at the individual level, considering everything individual-based membership organizations emphasize. Conversely, individual-member organizations should consider the

aggregations of their individual members within firms or companies, and the impact they have at that level. This "hybrid" model of membership thinking is helpful in determining engagement and value creation. You may be serving individual people within a company quite well, but completely missing the boat on what the overall organization needs. An example would be that you provide continuing education courses/credits to a variety of individuals within the company, and they are happy

You may be serving individual people within a company quite well, but completely missing the boat on what the overall organization needs.

and reasonably well engaged. However, the company requires the training their people receive to be more focused on topics that they are not learning through the existing engagement. In this instance, the professional society probably believes the individual is the member, though it is the company that often pays the bill for all of the individual members. The engagement and value creation at the company level to achieve corporate objectives is of critical importance. For this reason, you

could see large losses of members at a corporate site due to the perception of your company lacking value. Organizational engagement measures are a great way to test this. One example of testing organizational engagement is volunteerism. Generally speaking, if individuals from a company are engaged in committees and other forms of volunteer activities, the corporate sponsor is behind them far more than they are by simply paying the bill for their membership dues each year.

Member Type and Class

Finally, most organizations have several categories of member type and member status. In individual member organizations, these are often indicative of the level of membership the person has attained based on achievement in the industry or whatever the association's focus is. For company-based members, this can reflect things such as industry sector, company size, and so on. Also, member classes in some associations reflect distinctions such as industry partners (who wish to market to the general members) compared to members who are from the industry. All of these attributes are potential segments to consider analyzing when you evaluate your engagement statistics. You can evaluate each KPI against these segments and CES as a whole, as well.

The Unknown Segment

Last but certainly not least, it is important to remember that we only know what we know, which is limited for all of us. The bottom line is that we have a lot more to learn than we already know, and one aspect of CES that is incredibly powerful is that data mining algorithms these days are readily available in tools, such as Microsoft Excel, that will help you find patterns in data sets based on data values like CES. A typical example you will find in books and training materials is using something like revenue to mine for patterns that help you predict which

Your custom-built CES score, which uniquely reflects your organization's strategic priorities, will show you an amazing number of things.

customers may buy the most. These types of examples are great, but what is much more effective than using a single KPI like revenue, is to take your custom-built CES score, *which uniquely reflects your organization's strategic priorities,* and drive the data mining/pattern search on that value. You will find an amazing number of things as you feed more history into such a tool. Even smaller groups

that probably think "data mining" is beyond their grasp should put this notion behind them. The tools may be a bit technical, but for a very limited investment you can get help to build simple predictive models and pattern extraction models. These will bring new insights that could dramatically reshape your views on what matters to your members.

TREND ANALYSIS

We've covered a lot of ground: establishing our KPIs...understanding the CES methodology for weighting KPI values...mapping KPI values to CES points...and the segmentation and analysis of CES values at a given point in time. Now we can move on to something even more fun—evaluating the trend lines of CES values *over time.* Depending on how you implement CES, you can establish a baseline by calculating what CES scores would have been in the past. Keep in mind that since your current CES model probably factors in engagement methods that didn't exist (or weren't as important) in the past, it is probably best to go back no more than a year or two with any given CES model, especially if it uses contemporary engagement methods at its core.

That said, as your CES methods and KPIs evolve, you will have a **consistent measure of engagement**—nicely tucked away in your database—that you can easily analyze to determine how things are moving. Let's explore how we can use this information over time.

Member Level Trends

At the individual member level, it is possible to see exactly how much a member's level of engagement has changed across an interval of time. Since CES values for each member will continue to fluctuate over time, you can chart this data, put it in a table, and display it with an up or down arrow on a member record.

The value of this data is obvious—whenever you look at a member record, you can immediately determine the member's level of engagement and whether it has increased or decreased. With a simple line chart, you can easily assess the rate of change and whether engagement has gradually increased, decreased, or plateaued.

This, of course, leads to the question of what you can do to influence engagement. We'll address that topic later in this eBook.

Segment Level Trends

Similar to the above discussion on segment analysis, you can use CES data history to evaluate segment-specific trends. For example, you might ask: What is the level of engagement today for members in the East region compared to the last three years? Has it gone up, down, stayed the same? How about members in the first five years of their careers—how are we doing on engaging those folks compared to the last few years? For each segment, evaluating trends over time can provide very powerful insights.

Association-Wide Trends

A key piece of data I would like to see reported to every board of every association in the world is the overall level of engagement of the membership for the year/quarter/month compared to the last several years. Speaking of year/quarter/month and similar time periods, engagement may have seasonality to it. This is perhaps obvious if you have a big annual conference every spring, but there may be other trends beyond macro events, such as holidays. For example, in the accounting industry, most members are very busy in the January 1 through April 15 time period in the USA due to tax season. There may be other factors that are seasonal where CES

trend analysis can help you discover and then find ways to harness to the mutual benefit of the association and the member.

Predicting Future Engagement Levels

Nobody can predict the future, right? Well, not exactly, but "predictive modeling" analytic tools can help determine the probability of certain outcomes taking place. You can use predictive modeling along with CES historical data and other segment

> You can use predictive modeling along with CES historical data and other segment information to gain additional insights.

information to gain additional insights. Predictive models are in no way perfect and are an emerging science and art. However, they do exist today and are within the reach of all associations through desktop software such as Microsoft Excel. Earlier in this book we discussed the use of data mining to find previously unnoticed patterns by correlating levels of engagement with other attributes in a member's activity or profile. The model described now for predictive analysis is very similar to this in that it looks for patterns that drive increased or decreased engagement

based on historical values. This helps provide insights into which segments (or members) are more or less likely to increase or decrease their level of engagement. The intellectual capital you must deploy to really leverage this type of tool is substantial, and the more you put into modeling and analyzing this information, the more useful it will be.

However, the most important thing to note here is that these tools work best when the element you are predicting or analyzing is singular in nature. The great thing about CES is we've aggregated and weighted a lot of other key data into a single measure that reflects our strategic plan already, so the data mining and predictive tools can work their "magic" more effectively. In this sense, CES and data mining are perfect complements to one another *if* an organization is willing to invest the time into understanding and leveraging those tools effectively.

ALERTING

When discussing trend analysis, often the question comes up: Can we automatically be notified if something good or bad is happening? The answer is, sure you can, but it depends on what you are using internally to manage all of this information. The core

The question comes up: **Can we automatically be notified if something good or bad is happening?** The answer is, sure you can.

data you need to drive alerting is the CES calculation, and if you implement the model described here, you will have CES values on a per-member basis in your database, which can be recalculated on whatever frequency you would like (quarterly, monthly, weekly, etc). From there, you can set up tools to run analysis on these changes and send reports to users, or perhaps even kick off specialized lead nurturing campaigns.

A lead nurturing campaign is an element of an inbound marketing strategy that creates a highly specialized messaging model for each segment (or even sub-segment) that can be sent on an automated or semi-automated basis. In addition, you might want to have alerts in place if highly engaged members, such as VIPs, start slowing down their level of engagement. Similarly, you might want to be alerted if someone is dramatically increasing his or her engagement so he or she can be properly recognized and offered bigger opportunities to be involved with the organization.

Moving the Needle

HOW TO MOVE THE ENGAGEMENT SCORE UP

The primary goal of this eBook is to provide a comprehensive, flexible, and quantitative method for scoring engagement, one that retains relevance and comparability over a long period of time. This eBook is not intended to address in great detail ideas for improving engagement. However, to spur some ideas for future discussion, or a potential follow-up eBook, here are some thoughts on how the CES model can help you improve engagement:

▸ **Find the** Unknown Segment(s) and determine what can be done to drive more value to these people/organizations, then, implement campaigns to reach out to them. Knowing about segments and their correlated CES scores will allow you to understand what appeals to them and what doesn't. Armed with this information, you can channel relevant content to these segments on a continual basis to increase their engagement.

▸ **Rising Stars.** Using Trend Analysis and Alerting, you can keep an eye out for members whose engagement level is on the rise. Find them early, latch on to them with human outreach, and find ways to bring them in even tighter. A prime example of this occurs when someone volunteers for a committee. Even if the member is not accepted into the committee, the mere fact that he/she has offered to help is a **huge piece of information** to be part of the

KPIs you use to drive CES. Why? Because this individual's willingness to devote time to your organization is, by far, a higher level of engagement than money in nearly all cases. Keep an eye out for leading indicators of future engagement like this, and make sure that key players in your organization (not just staff, but also highly engaged connectors and influencers in the membership and on the board) reach out to these folks and warmly bring them in.

With CES you can **pinpoint segments that truly drive value**, both for the association and the member.

▸ **Fading Stars.** Again, using Trend Analysis and Alerts, find these folks before they go lights out completely. It is much easier to reverse the trend of declining engagement earlier than later. If a long-term member who has been highly engaged for years is slowly pulling back, find out why. Have an executive personally call that member to thank them for their years of membership and engagement and ask how it is going and what the association can do to create more value for them. Don't delegate this to a lower level staff member. Make it a priority for executives to get this level of member insight and it can open up entirely new worlds of opportunity.

▸ **Unconnected Knowledge Centers.** These folks are capable and knowledgeable individuals whom one might characterize as "introverted." They probably won't come out and nominate themselves for a committee, for example, but they may offer tremendous value if brought on board. One way to find these members is to take a good look at your organization's online

forums and educational offerings. People who have taken many courses and contributed to forums, but who have not spoken at events, served on committees, or written for journals, have big potential. Also, all associations are familiar with attendees evaluating speakers and instructors in sessions and courses. Do the reverse, as well—have your instructors take notes on "superstar" attendees or students and keep this information in your database for future reference. These folks should be on the short list for outreach and driving engagement. The best part? CES can help you figure out who these people are because you can compare those high marks in forums, courses, and instructor notes to a lower CES score, quickly locating a potential population of Knowledge Centers to whom you can give a small nudge (e.g., inviting them to speak, write, or serve on a committee) and have a big win.

As noted above, this is a very short list. There is a galaxy of possibilities for leveraging CES in your organization to move the needle on engagement. Unlike broad-based "member value" campaigns, with CES you can pinpoint segments that truly drive value, both for the association and the member. With your focus in the right place, your organization's success will cascade into a wide array of valuable new members and segments.

Conclusion

The core purpose of CES is to create a simple and singular measurement of engagement that stays relevant but is comparable over time. CES allows you to have nearly unlimited flexibility in its calculation method, but it also retains a mechanism to allow divergent methods of calculation to be compared to one another.

To leverage this as a powerful management tool in associations, you have to take a short a leap of faith: you are leveraging this new CES value as a key piece of member data, but it doesn't involve a unit of measure you are familiar with. Once you become familiar with it, however, you will find it to be an incredibly useful and commonsense way to move your organization forward rapidly, with the confidence that comes from using real, verifiable, objective data.

Additionally, the scoring of CES will change over time based on your association's priorities, but the meaning of the number should be consistent—the higher the value between the range of 0 and 100, the more engagement is occurring. Therein lies the power of CES—without being built for change, no measure of engagement is really meaningful. Ten years ago, few predicted the coming wave of social media

and its impact on associations. The way we would have measured CES for a typical association in 2000 is fundamentally different than the way we measure CES for a "typical" association today. However, if that association were building a set of KPIs for their CES calculation each year, it would still be possible to **compare** member engagement in 2000 with that of 2012. The most impactful aspect of CES is, in fact, that it stays consistent as a measure of engagement and relevance regardless of what the core focus of the association is at any given time.

CES is inextricably linked to a good and actionable strategic plan. It becomes part of your daily management toolset.

In the above case, an individual member can be tracked in his or her engagement level over a long period of time based on what was important in each time period, and the organization still has its finger on the pulse of what really matters, whether or not this member truly engaged in a way that is adding value for them, their peers, and the association.

CES is inextricably linked to a good and actionable strategic plan. It becomes part of the execution fabric of your association and part of your daily management toolset. It is a number that is front and center on each member record in your database and something all of your staff and volunteers should know about immediately when referencing any member. Yes, CES is a bit complex to initially comprehend, and as it changes, communication is important so that the relevant team members know what is going on. However, these changes *only occur* when you pivot in your strategy, so the communication should already be happening. CES is simply keeping score about how you are achieving the type of engagement you say you want in your strategic plan. In this way, CES is one of the best ways to create organization-wide accountability for engagement.

Our commitment to the association community is to continually evolve the CES principles in upcoming editions of this eBook, which will be made freely available to all association executives. We believe that by sharing the practices we've learned from working with some of the best-run associations in the world, we can bring value to everyone in our field. A

APPENDIX

CANDIDATE KEY PERFORMANCE INDICATORS (KPIS)

This list is by no means complete. It is intended only as a set of ideas that an association could consider for determining if its KPIs are accurately measuring alignment between engagement and strategic plan/priorities.

To recap a key point from the discussion in the eBook: Don't just pick a basket of KPIs to appease all departments. You must align the KPIs with your organization's overall priorities. If you simply form a committee with someone from each functional area and ask them to each pick one or two, you'll end up with a Composite Engagement Score that effectively means nothing. This is because the weighting will not be in alignment with the top-level priorities. Rather, it will reflect the priorities of individual departments, which may not align with the overall strategy.

One more key point: Remember the section on weighting. NOT ALL KPIs are equally important to your organization. Selecting the right KPIs is

important, but weighing them based on their importance to your strategic direction is even more critical.

Membership

Length of membership: Some would argue that the longer someone stays a member continuously, the more value that member theoretically adds to the organization. The key here to remember is that if you are focusing heavily on replacing retaining members with new members, this is not the KPI that will give you the best measure of your priorities.

Membership level: You might use this KPI to award CES points based on higher levels of membership (higher costs in some associations).

Referrals

Referrals (such as "Member Get a Member campaigns"): Referral systems can move the needle, but they are frequently not as effective as they are hoped to be. But, for those members

who do actually generate referrals that convert to new members, it is very important to reward them in your engagement calculation, and easy to do.

Committee Service

Number of committees served on: Variations of this would be LTD, YTD, last three years, etc.

Number of hours served: Not all committees are equal with regard to the necessary time commitment, so it may make sense to base your KPI on number hours served instead of number of committees served on.

Actual impact: This is subjective, but you could create specific goals for each committee, and if members of a committee achieve a successful outcome, you award points to the committee. This is a results-based approach as opposed to simply rewarding members for being on a committee.

Evaluations from co-members: This is not a common practice, but should be. Anonymously survey all committee members on their views of their co-members and ask this key question: "If you were to form this committee again, would you want to include this person on the committee?" The higher the colleague rating, the more "points" someone would get. Since this is anonymous, it isn't a popularity contest but a question of impact. More valuable members get more "credit" and are bubbled up to management as being more engaged members.

Voting: This is something that would apply to committees, and beyond. Taking part in a voting process is a form of engagement and may be a KPI for some associations.

Use of Affinity Programs

Many associations have affinity programs with third-party vendors wherein the vendor provides a discount to association members. Use of these third-party programs definitely constitutes a form of engagement. In some cases, associations actually receive a commission from the third party. Even without the commission, though, this is an

important metric because the member receives value from the third party.

Tracking Affinity Program use can be done in several ways such as:

- ▶ Total $ Spent on All Affinity Programs (YTD/LTD/etc.)
- ▶ # of Affinity Programs Used in Last 12/24/36 months
- ▶ Total $ of Commission to Association from Affinity Program Use

Of course, some of these data points are available or not, based on the nature of the relationships you have with the third parties.

Volunteerism

There are a number of ways associations leverage their members for volunteerism, and each forms a possible engagement KPI.

One of the simplest is tracking number of volunteer hours and using that in a KPI.

Another method is to track the number of volunteer assignments on which a member offered to assist. (In some cases a member seeks to help in many areas, unsolicited.)

Thought Leadership

Thought leadership as part of the association's work in writing, speaking, publishing, etc., are key factors for driving connectivity, community, learning, and engagement.

- ▶ # of articles written (for blog, newsletter, journal, magazine, etc.)
- ▶ # of forum posts written or commented on (in your organization's private or public forums)
- ▶ # of comments posted on others' articles/posts
- ▶ # of speaking opportunities applied for—this is not the same as number of speeches actually given, but how many "calls for speakers" a member has applied for
- ▶ # of speeches given—this would track the number of actual speeches someone has made
- ▶ Average speaking evaluation. If your attendees do not find a speaker to be effective, the speaker is hurting your organization and thus has a lower (perhaps even negative, in extreme cases) level of engagement impact

The above can of course all be broken down into typical life-to-date (LTD), year-to-date (YTD), and multi-year KPIs, as well.

APPENDIX

Events

▸ # of events attended—The basic KPI is the number of events a member has attended

▸ # of event hours—instead of tracking the number of events, consider event hours, which of course increase quickly for big meetings but accrue more slowly when a member attends small sessions

Again, these and other KPIs can and should be broken down into LTD, YTD, and multi-year based on the time frame you want to "reward" in your CES calculation. Someone who attended many events ten years ago but few recently is probably not very engaged.

Social Engagement

This is an area that continuously evolves, but tracking social engagement is valuable for many associations. Here are a few examples:

Tweets

Tweets can reference your organization by name, hashtag, or Twitter handle (e.g., @Aptify). Tracking tweets that reference your organization can drive a KPI (e.g., "number of tweets").

Retweets

Favorites—tracking the number of tweets from your organization that someone has labeled "favorite" in his/her Twitter account.

Google Plus

Tracking links, plus ones and mentions here is similar to Twitter and can be quantified with analytics tools.

Other Social Media

Facebook, LinkedIn, and private social media all have metrics similar to the Twitter/G+ examples noted above.

Social engagement KPIs should be focused on recent history, as this metric changes so rapidly.

ABOUT THE AUTHOR

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Amith Nagarajan is co-founder of Aptify, a leading provider of association management software. He is responsible for the long-term strategy of the firm, as well as its day-to-day operational leadership. Mr. Nagarajan focuses on finding new ways to leverage technology as a strategic business tool, arming organizations with the flexibility to ensure that change is an asset to their competitiveness. He actively works with Aptify's staff, partners, and clients to lead the organization forward and is also a frequent speaker at many industry events.

Mr. Nagarajan greatly values input from the community, and has established a blog to share his thoughts with the public and receive feedback. Prior to founding Aptify Corporation, he worked in the Research and Development laboratories at Hewlett-Packard Company in Palo Alto, California. He is a graduate of California Polytechnic State University in San Luis Obispo, California, with a concentration in business administration.

ABOUT APTIFY AND CES

Founded in 1993, Aptify provides powerful, flexible, and comprehensive association and membership management software (AMS) solutions to a global clientele. With a focus on delivering a complete solution for association business needs, Aptify offers the most flexible technology platform in the world—helping clients unlock their full business potential, without constraints.

Aptify has been named to the Inc. 500 list of the fastest growing privately held companies in America, as well as receiving recognition from *Software* magazine as one of the top 500 software companies in the

world. Headquartered in Washington, D.C., Aptify maintains offices in California, Illinois, Pennsylvania, Louisiana, and Pune, India. Aptify has a broad partner presence internationally, with local support in countries ranging from Australia to the United Kingdom.

Aptify believes in the power of shared ideas and makes an effort to be a thought leader within its industry. Part of this effort involves sharing new ideas with the broader association community. We hope this material is valuable to not-for-profits and associations across the spectrum.

Composite Engagement Score (CES) is the result of years spent working with clients of all stripes, learning about the unique relationship each has with its members, and understanding the industry-wide need for a simple method to measure engagement. The ideas behind CES started in 2009 with three blog posts: Predictive Analysis - Part 1, Predictive Analysis - Part 2, and Member Engagement Scoring.

PATENT PENDING

The Composite Engagement Scoring method described in this eBook is intellectual property of Aptify Corporation and is patent pending. The eBook and the implementation of the methods included herein, while related to the patent application, are available on a royalty-free basis to any not-for-profit organization worldwide under the license terms here. The only substantive restriction noted in the license agreement referred to in the previous link is that when referring to Composite Engagement Score in an implementation, Aptify's ownership of the method must be given appropriate credit. For more information click here. It is not our intent to monetarily benefit from this intellectual property from not-for-profit organizations, but rather to share the material herein as far and wide as possible to the benefit of the worldwide not-for-profit community. Our patent application is designed to protect us in our market given the unique and compelling method and technology we have developed and is an innovation we have brought to the Association Management industry.

Do you have questions about Composite Engagement Scoring?
Learn how we can help.

Request a Demo Today!