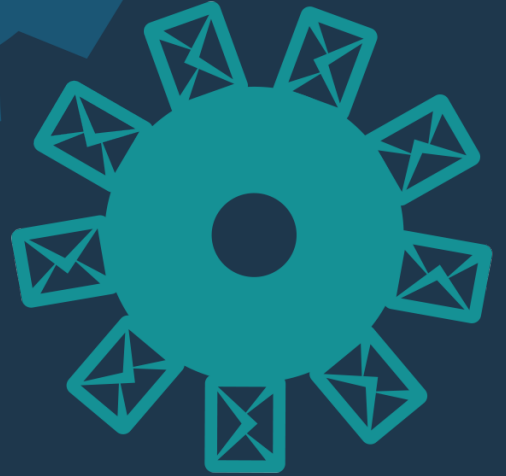




**REAL MAGNET**  
*Attract. Engage. Deliver.*



# Member Engagement Scoring –

**A Pro Forma Model  
for Associations**

# About Real Magnet

Real Magnet is changing the way associations market to their members and prospects. For the first time, a comprehensive marketing platform has been designed specifically for Association marketers.

Based just outside of Washington in Bethesda, MD, Real Magnet has been providing Associations with marketing technology for more than 15 years. More than 600 associations and nonprofits, including the American Hospital Association, American Chemical Society, the American Red-Cross, and the National Association of Home Builders, are using the Real Magnet as their primary marketing platform.

# Member Engagement Scoring – A Pro Forma Model for Associations

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## Part I

**We'll begin with a truism – no two associations are quite the same.**

Given this, any specific Member Engagement Scoring model will need to be tailored to match the unique needs of the organization whose members it is monitoring.

That's a good thing, and conversations around priorities are healthy exercises within any organization.

Even so, there are approaches to scoring that can be discussed across associations and we at Real Magnet felt that the time was right to provide a straw man model for our hundreds of association clients, as well as the industry as a whole, to use as a starting point for conversations.

When reviewing the model that follows, we encourage you to look at the overall structure of the scoring system and the proportions/weighting of the scores for each action. It is our hope that you will come away from even a brief examination of this model with both an improved sense of how your association might apply member engagement scoring and a few questions (again, these are healthy).

### **A few contextual points:**

Most associations will wish to score actions that take place across different systems (including systems other than your marketing automation platform) and in different ways. Your scoring process needs to bring all of these together so that you have an accurate sense of each member's true level of engagement. Real Magnet's own Marketing Automation for Associations solution was designed to do this with particular ease, but you should be able to find workarounds to most obstacles no matter what your approach to scoring is.

### **Typical actions to be scored include:**

- Email interactions (opens, clicks, etc.)
- Website visits (with different scores depending on the content of each page visited)
- Association Events (attendance of annual meetings, webinars, training, etc.)
- Participation (volunteering, serving on a committee, referring a new member, etc.)

An interesting concept to consider is that of negative points – the model that follows deducts points for certain things, and you may decide that this capability helps you more accurately score certain actions (or inactions) among your own members.

This model does not score the actual membership renewal (or initial join), with the logic that all members will have done this within the past year, but you may have reasons to provide a score for this (or different scores, perhaps, for different membership types or circumstances).

Please note as well that these scores are designed with a rough 50/100 point scale in mind – a member who accumulates 50 points or below in a given year might be considered at risk (and thus be a good candidate for inclusion in an automated re-engagement email campaign 90 days before his/her renewal date) and a member with 100 points or more might be considered a candidate for committee invitations or might earn some form of thanks (such as a phone call from a board member or an emailed gift certificate to your online store). Again, every part of this is meant to be adjusted so that it reflects exactly what matters most to you and your members.

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Member Interaction	Type	Score	Notes
Opened Email	Email Interaction	+2	Difficult to tell if it is "Real" open or an automated one. Consider not only scoring a generic open, but different scores for different types of "opens" (marketing messages vs annual meeting etc)
Clicked Link	Email Interaction	+10	Consider not only a generic clicks, but different scores for different types of "clicks" some may have more value than others
Website Visit: Article or blog on Association website	Website Visit	+5	Relatively low score -- indicates interest in association-related subject areas
Website Visit: Member center/logged in	Website Visit	+10	Higher score due to member trying to access more in-depth content
Website Visit: Event information page (abandoned)	Website Visit	+5	We value that the member was sufficiently interested to visit the page, but don't want to give many points because they did not in fact register
Registered for online event	Participation	+10	Registration shows a higher level of interest/engagement
Registered for online event (but did not participate)	Participation	-5	This is an example of potentially assigning negative points - the member registered but did not attend

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Registered for non-online event (meeting reception)	Participation	<b>+15</b>	In-person events require a greater commitment than online events, so we've chosen to score registration for a meeting or reception higher than a web event
Registered for non-online event but did not participate	Participation	<b>-10</b>	Another potential use of negative scoring - the member did not actually participate
Website Visit: Annual conference registration page (abandoned)	Website Visit	<b>+10</b>	Most associations value participation in the Annual Conference highly, so we view a visit by a member to the event registration page as a strong indication of interest in attendance. For this reason, we score a visit to this web page more highly than a visit to other event registration pages.
Registered for annual conference	Participation	<b>+25</b>	Taking part in the Annual Conference is one of the most significant actions a member can take (and is also an excellent indicator that they will renew) and is thus scored highly
Registered for annual conference but cancelled/did not attend	Participation	<b>-20</b>	One might choose to reduce the number of negative points if the reason for cancellation is medical, etc.
Website visit: Online membership renewal page (abandoned)	Website Visit	<b>+15</b>	We value the fact that the member was sufficiently interested in renewing to visit the renewals page

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Member updated their account profile/contact information	Participation	+15	This example comes from anecdotal customer evidence, but makes sense - if a member takes the trouble to make sure that the association has the correct contact information, it is a solid indicator that he/she wishes to continue their involvement with that association
Registered for training/learning	Participation	+20	Online training is of particular importance to some associations - this score will vary depending on its importance to yours
Registered for training learning, but did not participate	Participation	-15	Another example of potential negative scoring
Was active in association community	Participation	+25	Online communities are vitally important to some associations and some members, and most online community software systems have some means of measuring participation by individuals - this community involvement score should be reflected in your engagement scoring model
Served on a committee	Participation	+25	Donating one's time to serve as a committee member indicates a strong interest in the association and its activities

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Referred a membership prospect	Participation	<b>+20</b>	Referring a member is a very strong indicator that a member feels positively about the association - if incentives are provided, however, this score might be reduced (as the member might just be pursuing the incentive)
Volunteered for association	Participation	<b>+15</b>	Donating one's time to serve as a volunteer indicates a strong interest in the association and its activities
Purchased a book or other 3rd-party item from your online store	Participation	<b>+5</b>	Awareness of the online store and choosing to make a purchase from it are positives
Purchased an Assn logo item from your online store	Participation	<b>+15</b>	Demonstrating this level of affinity with the association is a very positive indicator



# PART II

Part I focused on providing scores that could be used throughout the year in preparation for understanding each member's engagement level leading up to his/her individual renewal date. The goal was to recognize under-engaged members in time to re-engage them before they make their renewal decision and thus improve the chances of retaining them as members. An additional goal was to recognize exceptionally-engaged members so that they could be rewarded or encouraged (and perhaps invited to participate in committees, etc.).

Part I was thus an overview of a calendar-year scoring model with its focus being the member renewal date.

The purpose of Part II is to study the implications of a rolling scoring model, meaning one that can continue year after year. Key characteristics of this model, from a technical standpoint, will be things such as engagement scores that automatically deteriorate over time. These can be extraordinarily useful and are not terribly complex but do bear a bit of initial explanation.

## **Engagement Score Deterioration**

Marketing Automation solutions can assign points to each of your members and prospects for taking certain actions. Registering for an Annual Conference is typically one of the highest-scoring actions for most associations, as it is often a positive indicator that a given member will renew. Part I allocated 25 points for annual conference registration on a "100 points = healthy engagement level" scale. This might vary for you, of course.

The fact that John Brown registered for your 2014 User Conference is less relevant, however, in 2015 and in the years that follow. Ideally, your Marketing Automation solution will assign John 25 points on the day he registers, but then that score will deteriorate (be reduced) over time.

You could decide to delete the Annual Conference Registration score entirely, and some organizations choose to do this exactly one year from the date of his registration.

Another approach, however, is to reduce the score by a certain percentage over time. Reducing the 2014 conference 25-point score by 50%, for example, one year after registration would allow you to more fully automate your 2015 conference invitation process. You could use the fact that John had 12.5 points in his Annual Conference Registration field to let the system recognize that he registered in 2014 but had not yet registered in 2015 (because if he had registered already for 2015, he would receive an additional 25 points).

Member Interaction	Score	Deterioration	Score for 2014 Registration in Year 1	Score for 2014 Registration in Year 2	Score for 2014 Registration in Year 3
Registered for 2014 Annual Conference	+25	50% yearly	25	12.5	5.75

Your Marketing Automation system could thus identify members who registered for the 2014 conference but have not yet registered for the 2015 event by the fact that they have exactly 12.5 points in their Annual Conference Registration field. Your promotional teams can write tailored messages and set up campaigns months in advance knowing that each member's score will be reviewed by the system on the exact day and time that each email is sent, ensuring that only appropriate members (those who registered for 2014 but have not yet for 2015) receive those messages. Those members who do register for 2015 will have higher scores, and your system will identify those scores as appropriate recipients for the emails that you've prepared for registrants.

Taking this a step further, you could continue this in 2016, with both the 2014 and 2015 scores deteriorating by 50%. Your system could perfectly identify those who registered for your conference in just 2014, in both 2014 and 2015, in all three years, or in 2016 only. The benefit is that scoring allows your Marketing Automation system to always know, up to date and without staff having to run reports, the precise registration status and history of your entire member/constituent database. This makes it easy for your events and/or marketing teams to conduct perfectly tailored conference invitation campaigns.

## The model as it would look in 2016:

Member Interaction	Score	Deterioration	2014 Registrant (total points)	2014 and 2015 Registrant (total points)	2014, 2015, 2016 Registrant (total)
Registered for 2014 Annual Conference	+25	50% yearly	6.25	18.75	43.75

Score Deterioration is equally relevant and useful for other actions that members and prospective members may take throughout the year. Cumulatively, use of score deterioration across all of the actions that you monitor helps maintain an accurate understanding of each individual member's current level of engagement. The fact that a given member volunteered or purchased something from your online bookstore two years ago is less significant, of course, than a more recent purchase.

Another extraordinarily useful way to maintain awareness of (and respond to) the engagement level of individual members is through **Re-Engagement Campaigns**.

Using Marketing Automation systems such as Real Magnet's, these can be based on Engagement Scoring using score deterioration methods as described above or on more focused monitoring of things such as email opens.

Most associations communicate regularly with their members via email and one example of an automated Re-Engagement Campaign could be based on email opens. You might decide that if a given member hasn't opened any of the last 5 emails they have received from your organization, you want some action to automatically be taken by your marketing automation solution so that this potentially-unengaged member can be re-engaged. You will choose the action that is taken – It could be that an alert is sent to your Member Services or Renewals team, it could be that a special email campaign is launched to that individual member with a subject line and content designed to get their attention ("We haven't heard from you for a while" or any other approach you prefer).

Regardless of the type of actions you are monitoring as your trigger for automated Re-Engagement Campaigns, the benefit is knowing that these campaigns will take place at exactly the right time for each individual member who meets your campaign criteria. This set-it-and-forget-it functionality allows you to build an unlimited array of such campaigns, providing your members with more individualized attention and earlier, more proactive re-engagement communications.

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To further discuss the ways in which your organization might either launch a member engagement scoring program for the first time or improve an existing one through the use of a Marketing Automation system designed expressly for associations, email [contact@realmagnet.com](mailto:contact@realmagnet.com) or speak to one of our subject matter experts at 240-743-2941.



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