



Membership Analytics Predictor Training Course GUIDE

November 5, 2020



Clubessential Client Resource Center

<https://kb.clubessential.com>

- Select the **Office** Product
- Under Webinars, select **Click to View Webinars**



Ask a Question at Any Time!

Questions will be addressed at the end of this webinar as time permits. If we are unable to address your question during today's webinar, we will follow-up with you offline and ensure you have the information you need.

At the end of this Webinar, you will be prompted with a brief post-training survey. We highly encourage you to give us your feedback so we can improve.



Kim Saunders
Clubessential Education
Specialist



Justin Brown
Clubessential Education
Specialist



Agenda



- How to Access and Configure MAP Scores
- Specifics about Each MAP Score Factor
- How & When MAP Scores are Calculated
- What Happens When You Reconfigure Your MAP Scores
- Viewing Members Scores
- Using Interactive Reports to Analyze Scores
- Creating Dynamic Groups Based on MAP Scores
- Questions and Answers

What is a MAP Score

- A MAP score is a numerical value that represents your members' engagement.
- Scores are calculated using configurable variables set by your Club to constitute an engaged member.
- The MAP module then aggregates all the system data needed to calculate a MAP score and then assigns a score to each of your primary members.
- Scores can range from a value of 0 to 100 with 100 being the best possible score a member could receive to 0 being the worst.
- MAP score can then be used to identify who is engaged and predict who is at risk.



Products Your Club Needs to Use MAP

Clubessential Office (CMA)

Required

Mobile or Classic Point of Sale

Recommended

Membership Analytics Predictor

Required

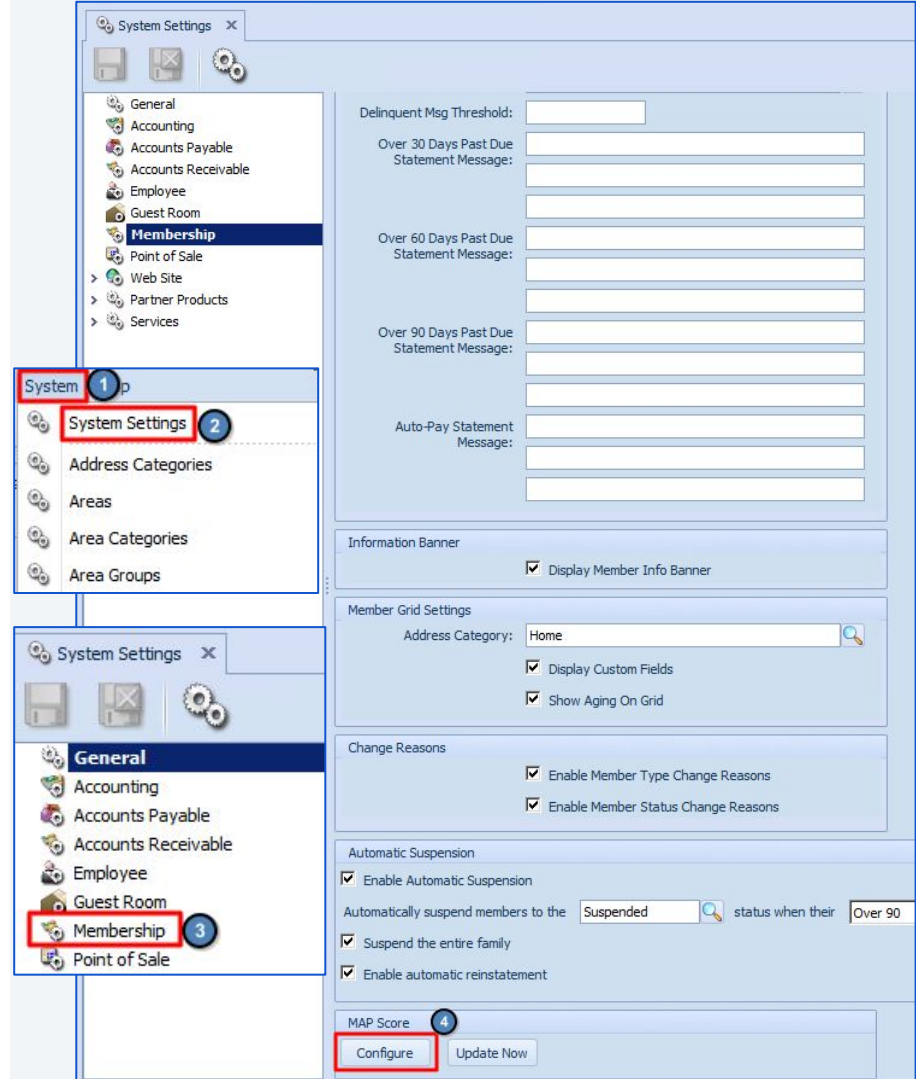
Reservations

- Website
- Tee Time Reservations
- Dining Reservations
- Court Reservations

Recommended

Accessing the MAP Tool

- Click on **System** and then **System Settings** in Office
- Double click on **Membership**
- Scroll down to the bottom on the page and click **Configure** under **MAP Score**



The screenshot displays the 'System Settings' application window. The left sidebar shows a tree view of settings categories. The 'System' category is selected, and the 'System Settings' sub-category is highlighted with a red box and a blue circle labeled '1'. Within 'System Settings', the 'Membership' option is highlighted with a red box and a blue circle labeled '2'. The main content area shows various settings for the Membership category, including 'Delinquent Msg Threshold', 'Over 30 Days Past Due Statement Message', 'Over 60 Days Past Due Statement Message', 'Over 90 Days Past Due Statement Message', 'Auto-Pay Statement Message', 'Information Banner', 'Member Grid Settings', 'Change Reasons', 'Automatic Suspension', and 'MAP Score'. The 'MAP Score' section at the bottom is highlighted with a red box and a blue circle labeled '4', and the 'Configure' button within it is highlighted with a red box.

System Settings x

General
Accounting
Accounts Payable
Accounts Receivable
Employee
Guest Room
Membership
Point of Sale
Web Site
Partner Products
Services

System 1

System Settings 2

Address Categories
Areas
Area Categories
Area Groups

System Settings x

General
Accounting
Accounts Payable
Accounts Receivable
Employee
Guest Room
Membership 3
Point of Sale

Delinquent Msg Threshold: []

Over 30 Days Past Due Statement Message: []

Over 60 Days Past Due Statement Message: []

Over 90 Days Past Due Statement Message: []

Auto-Pay Statement Message: []

Information Banner

Display Member Info Banner

Member Grid Settings

Address Category: Home []

Display Custom Fields

Show Aging On Grid

Change Reasons

Enable Member Type Change Reasons

Enable Member Status Change Reasons

Automatic Suspension

Enable Automatic Suspension

Automatically suspend members to the [Suspended] status when their [Over 90]

Suspend the entire family

Enable automatic reinstatement

MAP Score 4

Configure Update Now

The 4 Main Components of MAP

- 1) The number of days you want to use for looking back at member activity.
- 2) The 6 possible factors you can use to calculate MAP scores.
- 3) The Member Types you want to exclude from MAP scoring.
- 4) How you want your MAP scores weighed against members of the same type.

Configure MAP Score Settings

Use transactions from the past 90 days. Recalculate

2 Include dollars spent at the club with a weight of 50
Weigh a member's score vs their member type by: 80

2 Include dependent dollars spent at the club with a weight of 10
Weigh a member's score vs their member type by: 80

2 Include years of membership at the club with a weight of 20
Weigh a member's score vs their member type by: 80

2 Include number of late payments made with a weight of 10
Weigh a member's score vs their member type by: 80

2 Include number of reservations made with a weight of 10
Weigh a member's score vs their member type by: 80

2 Include number of check ins made with a weight of 10
Weigh a member's score vs their member type by: 80

Exclude the following:

Member Types

Select Member Types...

Name
Non-Resident - Distant
Elected Wait List



Products Needed For Each MAP Factor

MAP FACTOR	PRODUCTS NEEDED
Dollars Spent At the Club	Office (required) Mobile or Classic POS (recommended)
Dependent Dollars Spent at the Club	Mobile or Classic POS (required)
Years of Membership at the Club	Office (required)
Number of Late Payments Made	Office (required)
Number of Reservations Made	At least 1 of the following 4 products (required): Websites, Tee Time Reservations, Dining Reservations, Court Reservations
Number of Check-ins	Mobile or Classic POS (required)



What's Included in Dollars Spent At the Club

MAP FACTOR	INCLUDES	EXCLUDES
Dollars Spent At the Club	<ol style="list-style-type: none">1) Any Mobile or Classic Point of Sale transaction regardless of how the member paid for it, whether that be Credit Card, Member Charge, Gift Certificate, Credit Book or Cash2) Any Member Charge Wizard transactions and3) Any Folio Charge Wizard transactions	<ol style="list-style-type: none">1) Monthly Member Charges, Minimums and Late Fees2) Event Registrations paid at time of registration via the Paycloud Form Integration

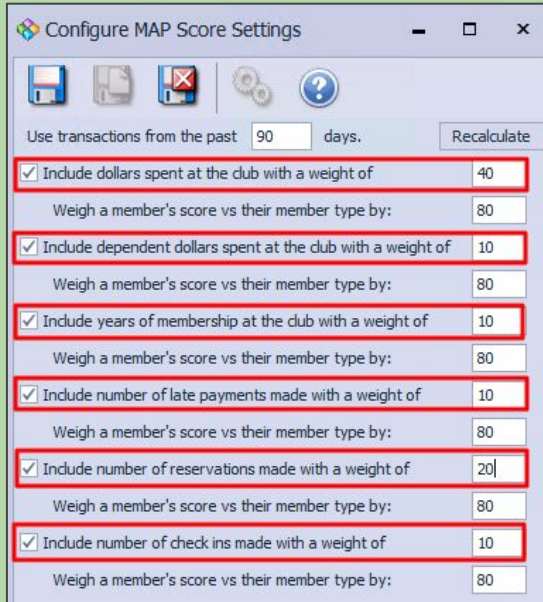
What's Included in the Other MAP Factors

MAP FACTOR	INCLUDES
Dependent Dollars Spent At the Club	Includes any Mobile or Classic Point of Sale transactions made by the member's spouse or children regardless of how it was paid for.
Years of Membership at the Club	The number of days the primary member has belonged to the Club over the course of time.
Number of Late Payments Made	The number of times the primary member has been late with their payment over the course of time they have been a member of the Club or over the course of time in which Clubessential has data for the member.
Number of Reservations Made	The sum of the following: 1) the number of reservations made by the primary member, 2) the number of reservations made by the member's spouse or children, 3) the number of Event registrations made by the Primary member, 4) the number of Event registrations made by the member's spouse or children.
Number of Check-ins	The number of times a primary member checks into the Club. If the member's spouse and children check-in along with the primary member via a Family check-in, their check-ins are counted as well. If they check in separately, they are not counted.

Select Your MAP Factors and Assigning a Weight

- Decide which factors your Club is going to use. Assign the weight you want to give each factor per its importance and relevance to your Club. Distribution of weight among all included factors must equal 100%.

Good Example: Weight of all factors included = 100

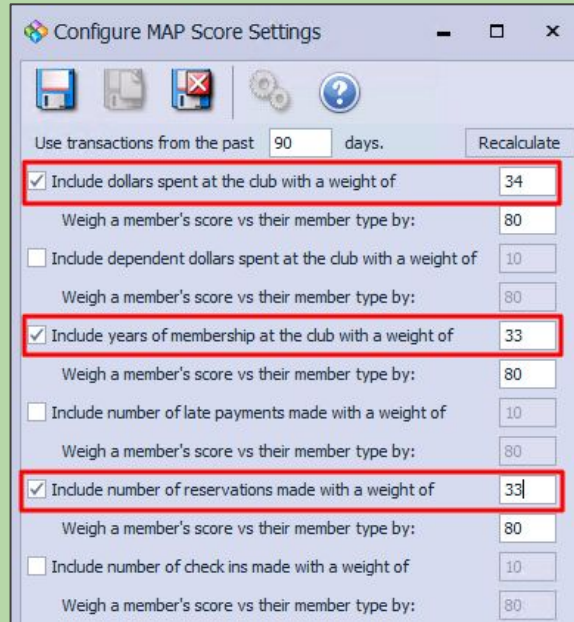


Configure MAP Score Settings

Use transactions from the past 90 days. Recalculate

<input checked="" type="checkbox"/> Include dollars spent at the club with a weight of	40
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include dependent dollars spent at the club with a weight of	10
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include years of membership at the club with a weight of	10
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include number of late payments made with a weight of	10
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include number of reservations made with a weight of	20
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include number of check ins made with a weight of	10
Weigh a member's score vs their member type by:	80

Good Example: Weight of all factors included = 100

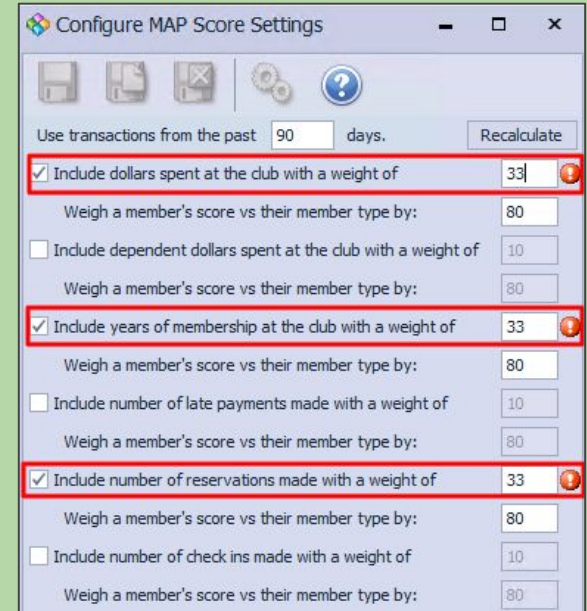


Configure MAP Score Settings

Use transactions from the past 90 days. Recalculate

<input checked="" type="checkbox"/> Include dollars spent at the club with a weight of	34
Weigh a member's score vs their member type by:	80
<input type="checkbox"/> Include dependent dollars spent at the club with a weight of	10
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include years of membership at the club with a weight of	33
Weigh a member's score vs their member type by:	80
<input type="checkbox"/> Include number of late payments made with a weight of	10
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include number of reservations made with a weight of	33
Weigh a member's score vs their member type by:	80
<input type="checkbox"/> Include number of check ins made with a weight of	10
Weigh a member's score vs their member type by:	80

Bad Example: Weight of all factors included **NOT** = 100



Configure MAP Score Settings

Use transactions from the past 90 days. Recalculate

<input checked="" type="checkbox"/> Include dollars spent at the club with a weight of	33
Weigh a member's score vs their member type by:	80
<input type="checkbox"/> Include dependent dollars spent at the club with a weight of	10
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include years of membership at the club with a weight of	33
Weigh a member's score vs their member type by:	80
<input type="checkbox"/> Include number of late payments made with a weight of	10
Weigh a member's score vs their member type by:	80
<input checked="" type="checkbox"/> Include number of reservations made with a weight of	33
Weigh a member's score vs their member type by:	80
<input type="checkbox"/> Include number of check ins made with a weight of	10
Weigh a member's score vs their member type by:	80

Exclude the following:

Member Types

Select Member Types...

Name

Non-Resident - Distant

Elected Wait List

Non-Resident

Lookup Value

Search: resign

Select All Unselect All

Name	Company
Resigned	Clubessential Club

Exclude the following:

Member Types

Select Member Types...

Name

Club Account

Tournament

HOA

A - Independent Living

A - Assisted Living

All Resort

Camp Account

Resigned

Remove Selected

Excluding Member Types

- Select the Member Types you want to exclude from MAP scoring
- When excluded, these Member Types will not be given a MAP score and will not be included when calculating Club averages that are used for MAP scoring
- To **Add** Member Types to the Exclusion List:
 - 1) Click the **Lookup** icon
 - 2) Search for the Member Type
 - 3) Check the Member Type to be excluded
 - 4) Click **Select**
- To **Remove** Member Types from the Exclusion List:
 - 5) Select the Member Type from the Exclusion List
 - 6) Click **Remove Selected**



Weighing Members' Scores Against Their Type

- Weighing members' MAP scores against their member type is indicated on this slide by the number **4**
- Each MAP factor included in your configuration must be given a percentage value
- The default percentage is 80 but can be changed
- Weighing factors more heavily against members of the same type is going to give you a more accurate representation of that member's MAP score
- Member Types spend differently. If you compared your Seasonal members against your Full Time Golf Members without weighing them against their Member Type, your Full Time Golf Members are going to have a much higher MAP scores than your Seasonal Members because they're Club activity and spending is most likely greater

Configure MAP Score Settings

Use transactions from the past days. Recalculate

2 Include dollars spent at the club with a weight of
Weigh a member's score vs their member type by:

2 Include dependent dollars spent at the club with a weight of
Weigh a member's score vs their member type by:

2 Include years of membership at the club with a weight of
Weigh a member's score vs their member type by:

2 Include number of late payments made with a weight of
Weigh a member's score vs their member type by:

2 Include number of reservations made with a weight of
Weigh a member's score vs their member type by:

2 Include number of check ins made with a weight of
Weigh a member's score vs their member type by:

Exclude the following:

Member Types 3

Select Member Types...

Name
Non-Resident - Distant
Elected Wait List

Exclude the following:

Member Types

Select Member Types...

Name

Non-Resident - Distant

Elected Wait List

Non-Resident

Lookup Value

Search: resign

Select All Unselect All

Name	Company
Resigned	Clubessential Club

Exclude the following:

Member Types

Select Member Types...

Name

Club Account

Tournament

HOA

A - Independent Living

A - Assisted Living

All Resort

Camp Account

Resigned

Remove Selected

Excluding Member Types

- Select the Member Types you want to exclude from MAP scoring
- When excluded, these Member Types will not be given a MAP score and will not be included when calculating Club averages that are used for MAP scoring
- To **Add** Member Types to the Exclusion List:
 - 1) Click the **Lookup** icon
 - 2) Search for the Member Type
 - 3) Check the Member Type to be excluded
 - 4) Click **Select**
- To **Remove** Member Types from the Exclusion List:
 - 5) Select the Member Type from the Exclusion List
 - 6) Click **Remove Selected**

When the Daily MAP Process Runs & What it Does

- Each morning, at 2:30 AM per whatever time zone your Club is in, Clubessential executes the Daily MAP processing.
- Each time this process runs, the system calculates members' MAP scores for the current calendar Month and Year.
- Using 11/5/2020 as an example, when the Daily MAP process runs at 2:30 AM, it calculates members' scores for November 2020
- When it runs on 11/6/2020, it will again calculate members' MAP scores for November 2020, overwriting the score that was calculated on 11/5/2020 since members can only have 1 MAP score per Month/Year.
- This process continues until the last day of the month. On 11/30/2020, the system will calculate final MAP scores for November 2020.
- When the Daily MAP process runs on 12/1/2020, it will start calculating members' MAP scores for December 2020.

Recalculating MAP Scores

- Use **Recalculate** to populate MAP scores for your members over a period of time.
 - Example: You're an existing Clubessential client but you just recently added our MAP product. Use **Recalculate** to give all your members MAP scores for the past 6 months - 12 months.
- Use **Recalculate** when you change your MAP configuration and want your new configuration applied over a period of time.
 - Example: You decided a 90 look back period is better than 30 and you want all members' scores recalculated for the past year using the new 90 day look back.

Configure MAP Score Settings

Use transactions from the past 90 days.

Include dollars spent at the club with a weight of 50

Weigh a member's score vs their member type

1 Recalculate

Recalculate Member Retention Scores

As Of Date: January, 2020

Wednesday, November 04, 2020

January, 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Clear

2

Recalculate Member Retention Scores

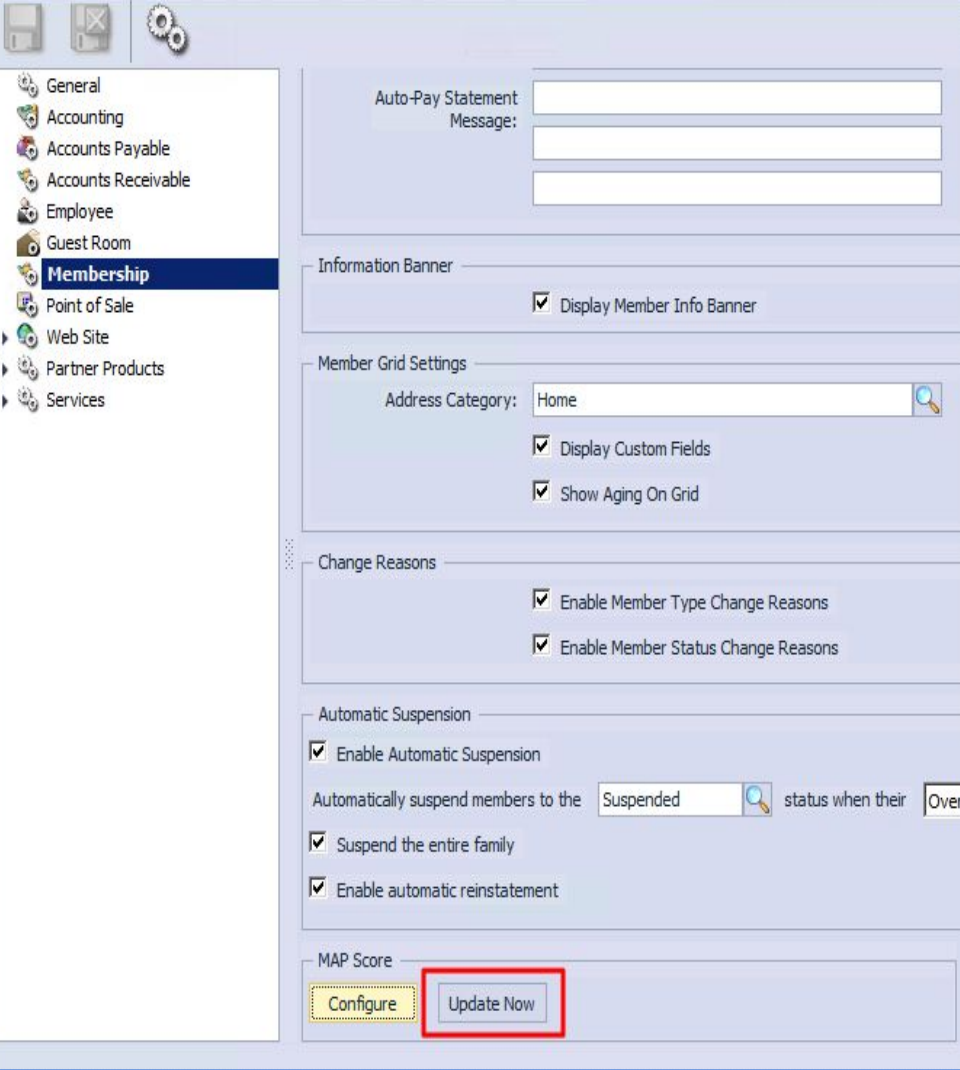
As Of Date: January, 2020

4 Recalculate

Are you sure?

Calculating the Member Retention Score can take a very long time and will slow down all operations at the club until the process is complete. Are you sure you want to continue?

5 Yes No



Updating MAP Scores

- Executes the exact same process that the 2:30 AM Daily MAP process executes with the exception that the system will pull in any activity or transactions up until the point in time that the **Update Now** button is hit.





Viewing MAP Scores on the Membership Grid

- Open the **Membership** module in CMA
- Add the **MAP Score** column to your Membership Grid using the Column Chooser
- You can sort your **Membership Grid** in ascending or descending MAP Score order if desired, or filter on MAP Scores.

The screenshot displays the Membership Grid interface. On the left, a navigation menu lists various modules, with 'Membership' highlighted in a red box. The main area shows a table of members with columns for Member Number, Last Name, First Name, Join Date, Phone, and MAP Score. The MAP Score column is highlighted in a red box, and the table is sorted in descending order of MAP Score.


Member Number	Last Name	First Name	Join Date	Phone	MAP Score
104	Blakely	Virgilio	03/01/19...	(651) 484-4...	76
286	Boucher	Rich	06/10/2009	(651) 484-3060	74
51	Bledsoe	Leandro	05/18/1994	(651) 308-0588	73
15	Burk	Gilberto	11/01/1997	(651) 490-1121	71
666A	Steph	scarder.Billin...		(913) 850-5312	70
178	Koenig	Owen	03/30/1976	(651) 484-7534	70
7761485	Abbott	Richard			69
133	Duane	Aaron	01/21/2011	(612) 812-7539	69
801	Clancy	Duane	04/20/1964	(651) 429-0788	69
788	Weikert	Nick	07/31/2018		68
7	West	Doyle	08/22/2002	(651) 484-3282	68
4	Huerta	Rosio	02/26/2004	(651) 483-3573	67
792	Baer	Alison			66
777	Meier	Scooter			64
42	Arnett	Javier	04/11/2012	(651) 407-0069	64
566	Jones	Davy			63
21	Payton	Erwin	09/01/1998	(651) 482-1177	62
790	Mouse	Mickey			61
421	Sommers	Reyes	11/09/1999	(651) 482-8079	61
6	Behrens	Haywood	08/22/2002	(651) 787-0081	61
5	Rudolph	Darrick	04/01/1997	(651) 484-8864	60
733-JD	Dimitroff	Dimitrious		(123) 456-7891	59
162	Sylvester	Gilberto	04/01/2010	(651) 765-0450	59
3113	Calloway	Carlos	06/20/1979		59
30	Barbee	Harland	04/01/2006	(651) 628-9629	59
2356	Smith	Gale	03/01/2006	(763) 783-5787	59
10890	Overstreet	Santiago	04/17/1997	(651) 765-0050	58
3	Shanks	Xavier	06/01/1997		58
0000000	Mader	Jack	07/16/2019		57
174	Aguirre	Henriette	04/13/2011	(651) 797-2534	57
541R	Abbaa	Abba			56
157	Delarosa	Alfonzo	11/23/2010	(651) 483-8265	56
1001	Aiken	Arron	12/01/1991	(651) 482-0326	56
74	Leach	Leonardo	04/15/1996	(651) 486-8816	56
559	Stanbery	Erik "Chief"			55
1000	Smith	Martha	07/15/1996	(651) 486-7978	55



Grill Room, Quick Ticket, C: 1
Server: A. User


1  7444 - Head, Bailey S. 

Seat All 1 2 3 4 5

Edit Items All Fired Split Ticket More


Add Gratuity 

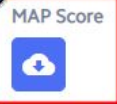

Close Member Details  

 Bailey S. Head

MEMBER SUMMARY

Member Number	Type	Birthdate
00136	Regular	February 6, 1945

Minimum 

2  MAP Score 

Favorites History Prefs Credit Book

Viewing MAP Scores in Mobile POS

- MAP scores are shown on your Mobile POS device by default
- After opening a ticket for a member, click on the member's photo or the gray placeholder image
- Click on the MAP Download icon to access the member's MAP score

Viewing MAP Data on Individual Members - Grid View

- When viewing member details in CMA, navigate to MAP under Financial Information to view the member's MAP scores.
- #1 - Details about the member's current MAP Score in Grid View
- #2 - The member's MAP scores over time in Graph View
- #3 - Use to Print what you are viewing
- #4 - The member's current MAP Score for the Month/Year



1 2 3 **Bailey S. Head's MAP Score: 49** 4

Dollars Spent (weighted 50%) 5

Bailey S. Head spent \$85.61 at the club from 8/5/2020 to 11/3/2020.

A member at the club spent \$65.48 on average. Members in the Regular type spent \$98.63 on average.

Bailey S. Head scored 58 vs the entire club. Bailey S. Head scored 43 vs members in the Regular type.

Dependent Dollars Spent (weighted 10%)

Bailey S. Head's family members spent \$927.99 at the club from 8/5/2020 to 11/3/2020.

A billing member's family members spent \$15.30 on average. A billing member's dependents in the Regular type spent \$17.91 on average.

Bailey S. Head scored 100 vs the entire club. Bailey S. Head scored 100 vs members in the Regular type.

Years of Membership (weighted 20%)

Bailey S. Head has been a member for 17 year(s).

A member at the club has been a member for 21 years on average. Members in the Regular type have been a member for 18 year(s) on average.

Bailey S. Head scored 39 vs the entire club. Bailey S. Head scored 51 vs members in the Regular type.

Number of Late Payments (weighted 10%) 6

Bailey S. Head has made 25 late payments.

A member at the club has made 15 late payments on average. Members in the Regular type have made 23 late payments on average.

Bailey S. Head scored 34 vs the entire club. Bailey S. Head scored 48 vs members in the Regular type.

Number of Reservations (weighted 10%)

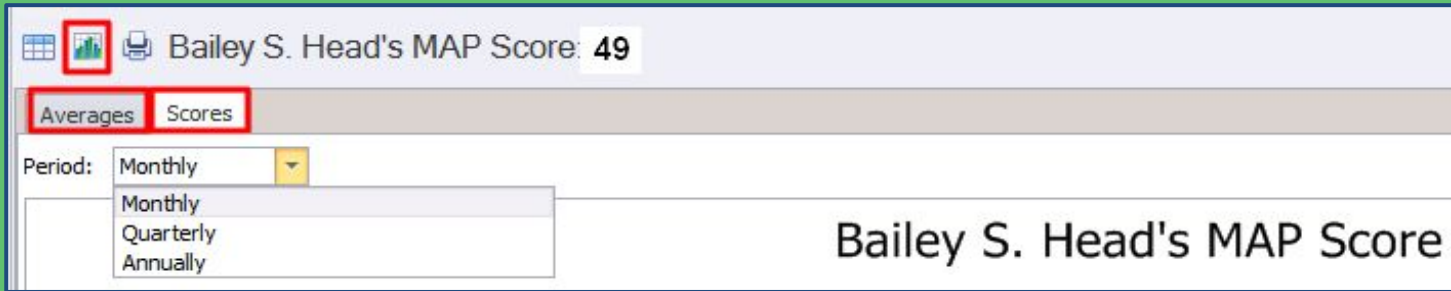
Bailey S. Head has made 1 reservations from 8/5/2020 to 11/3/2020.


A member at the club has made 8 reservations on average. Members in the Regular type have made 10 reservations on average.

Bailey S. Head scored 6 vs the entire club. Bailey S. Head scored 5 vs members in the Regular type.

Viewing MAP Data on Individual Members - Graph View by Score

- Clicking on the MAP Graphical View icon for a member presents 2 tab options: Averages & Scores
- Scores allows you to view your member's MAP scores over time in 3 different views: Monthly, Quarterly and Annually



Grid icon |  | Printer icon | Bailey S. Head's MAP Score: 49

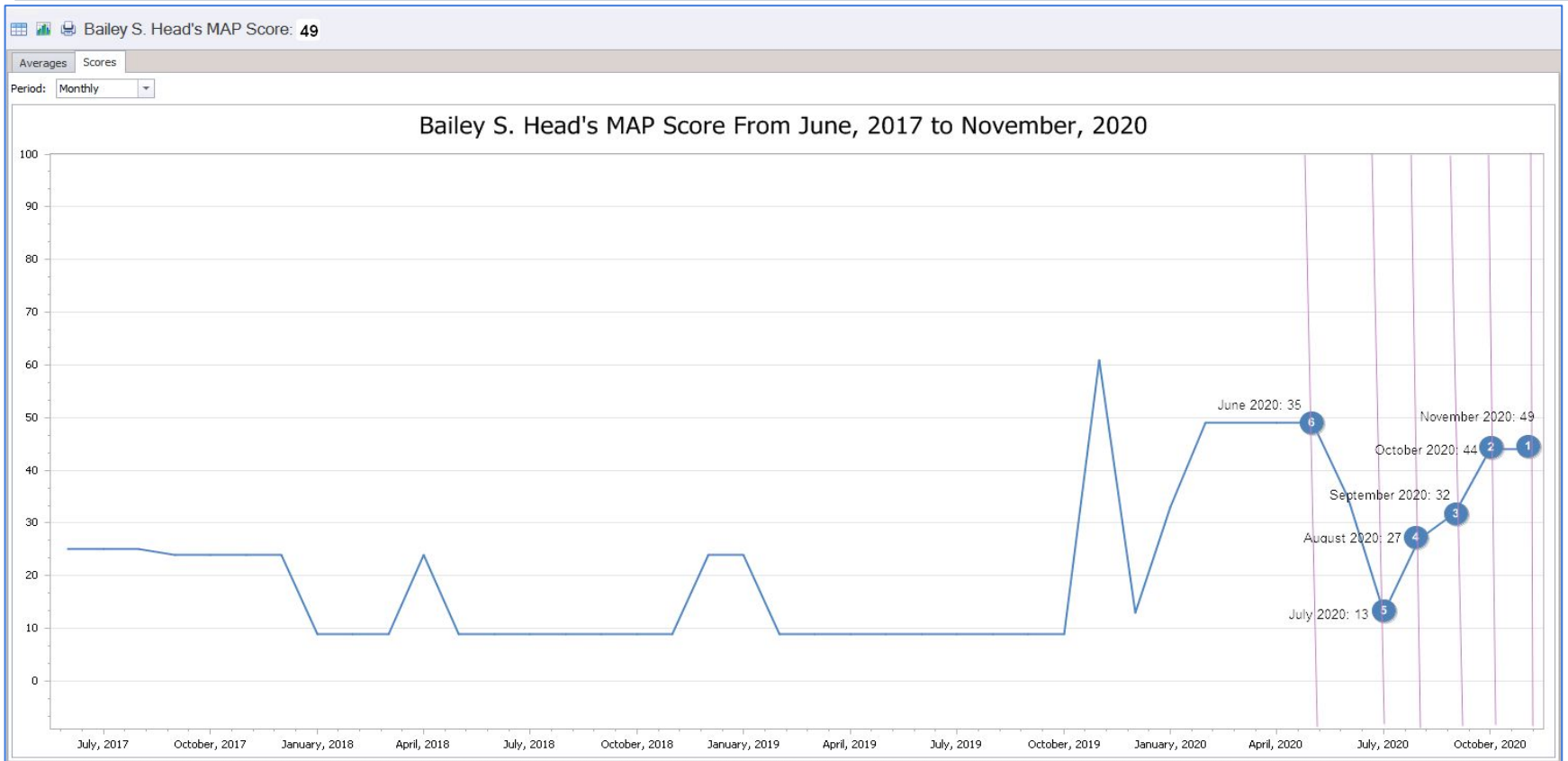
Averages | Scores

Period: Monthly

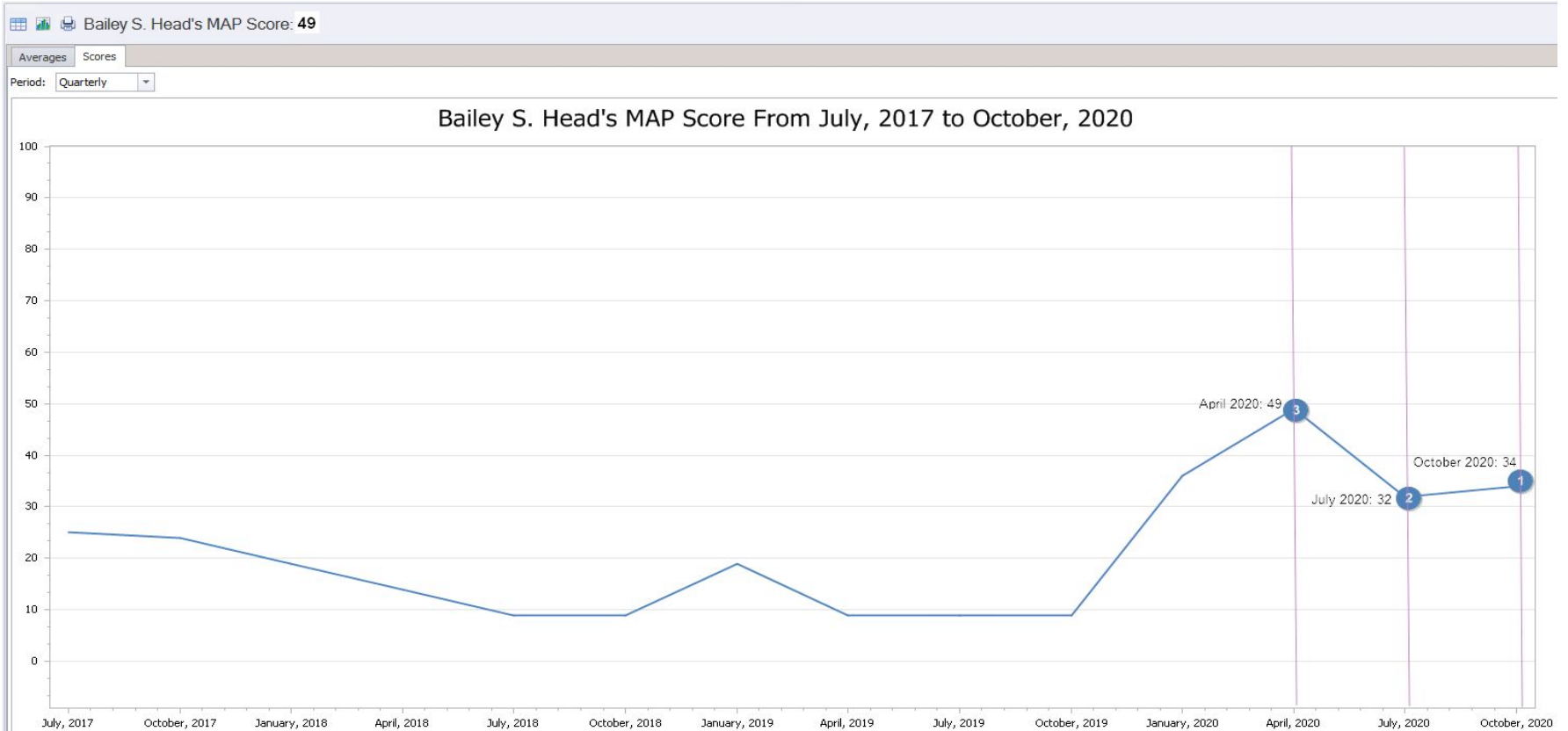
- Monthly
- Quarterly
- Annually

Bailey S. Head's MAP Score

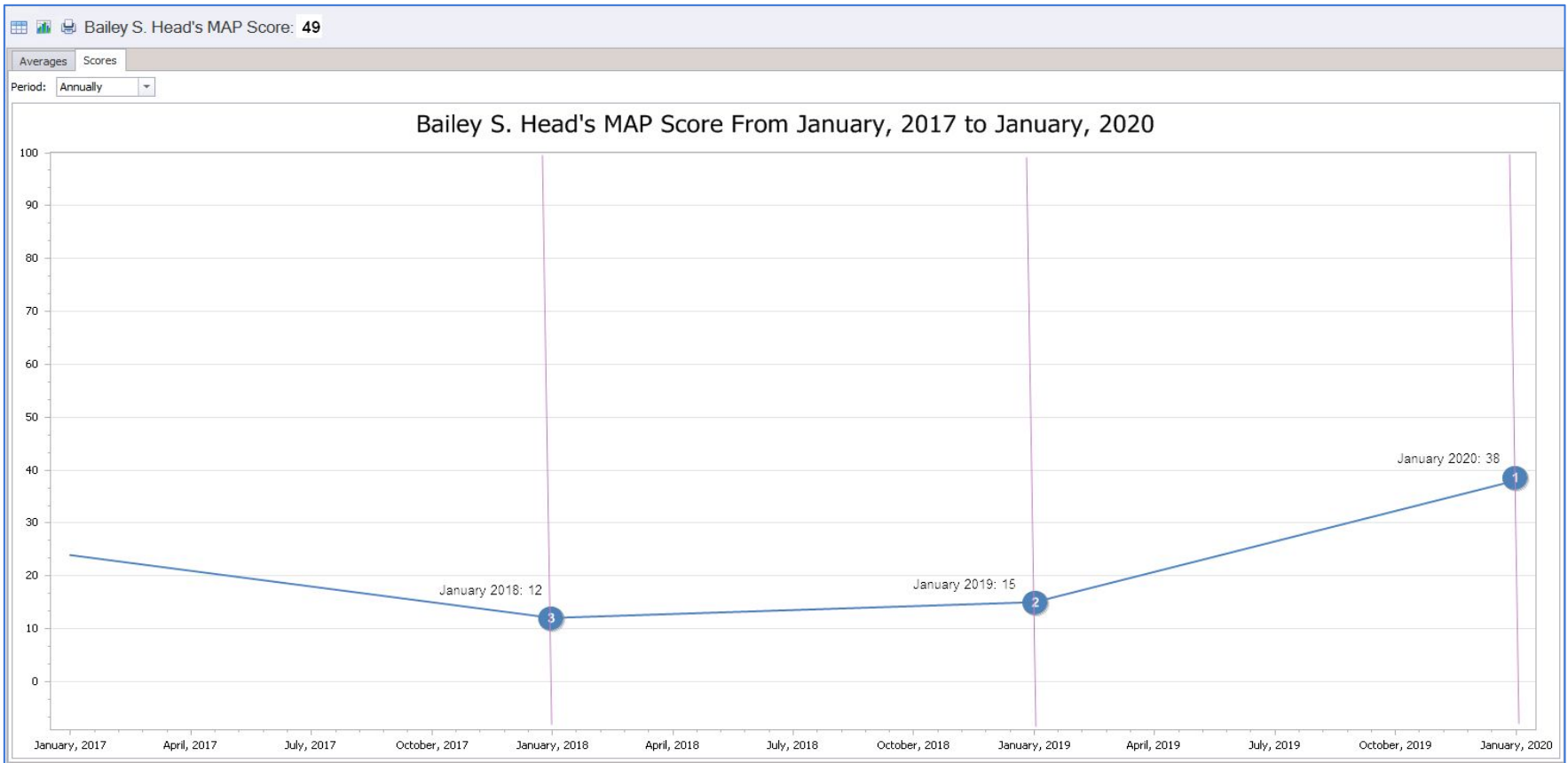
Graph View - Scores by Month



Graph View - Scores by Quarter

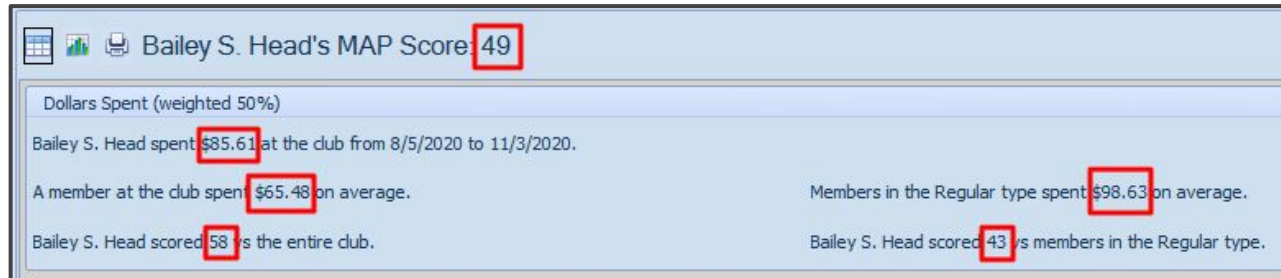
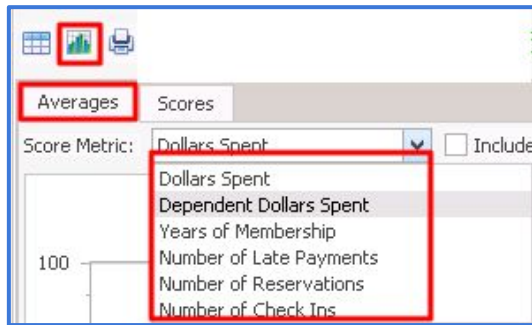


Graph View - Scores by Year

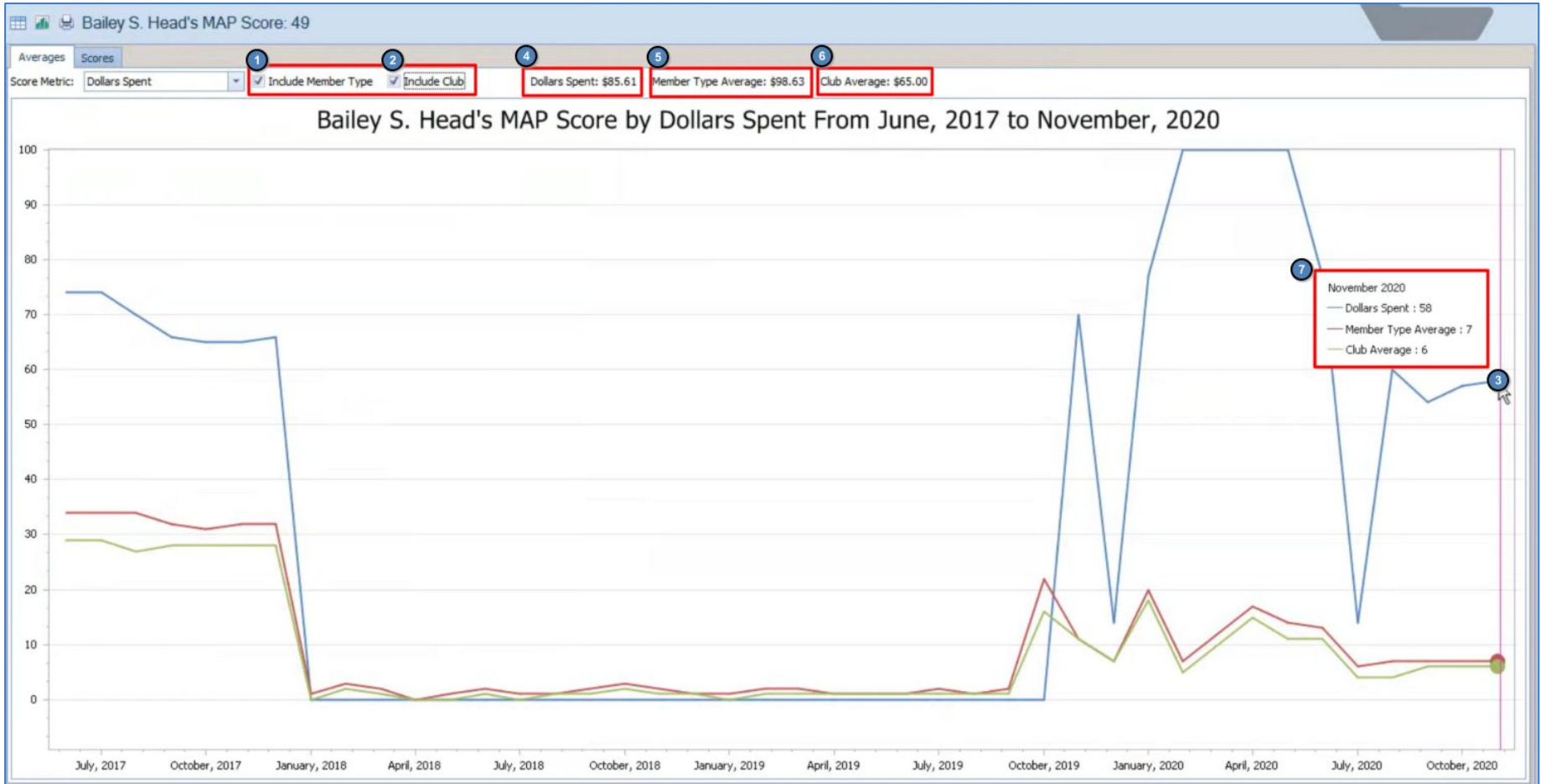


Grid View vs. Graph View For Dollars Spent for November 2020

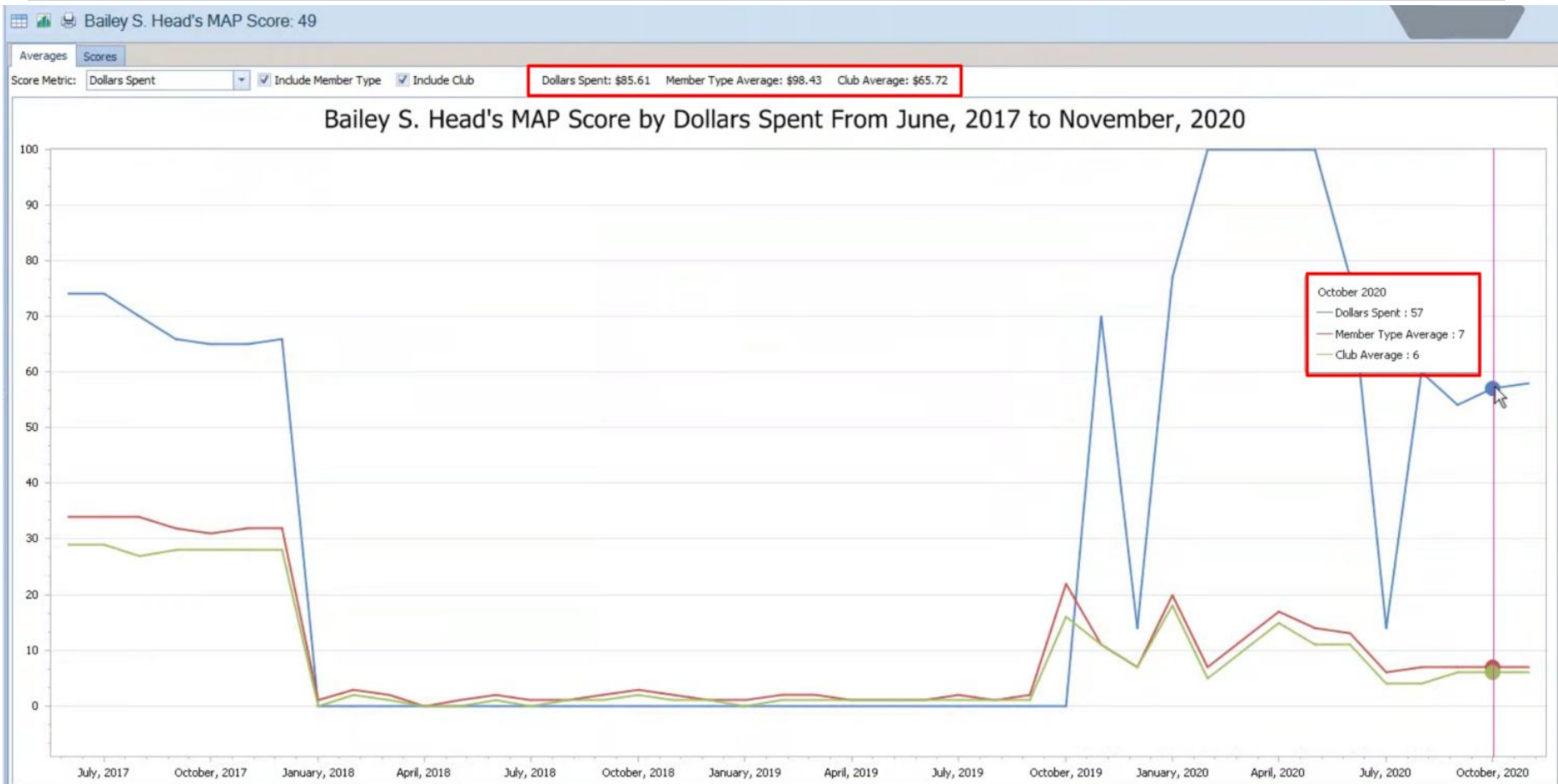
- Clicking on the MAP Graphical View icon for a member presents 2 tab options: **Averages & Scores**
- **Averages** allows you to view a member's MAP Factor (Metric) scores over time for each individual Factor you currently have configured. Configured Factors are available for selection on the Score Metric dropdown.
- Before viewing Dollars Spent at the Club in Graphical View, let's refresh ourselves on the same data points shown in our Grid View.



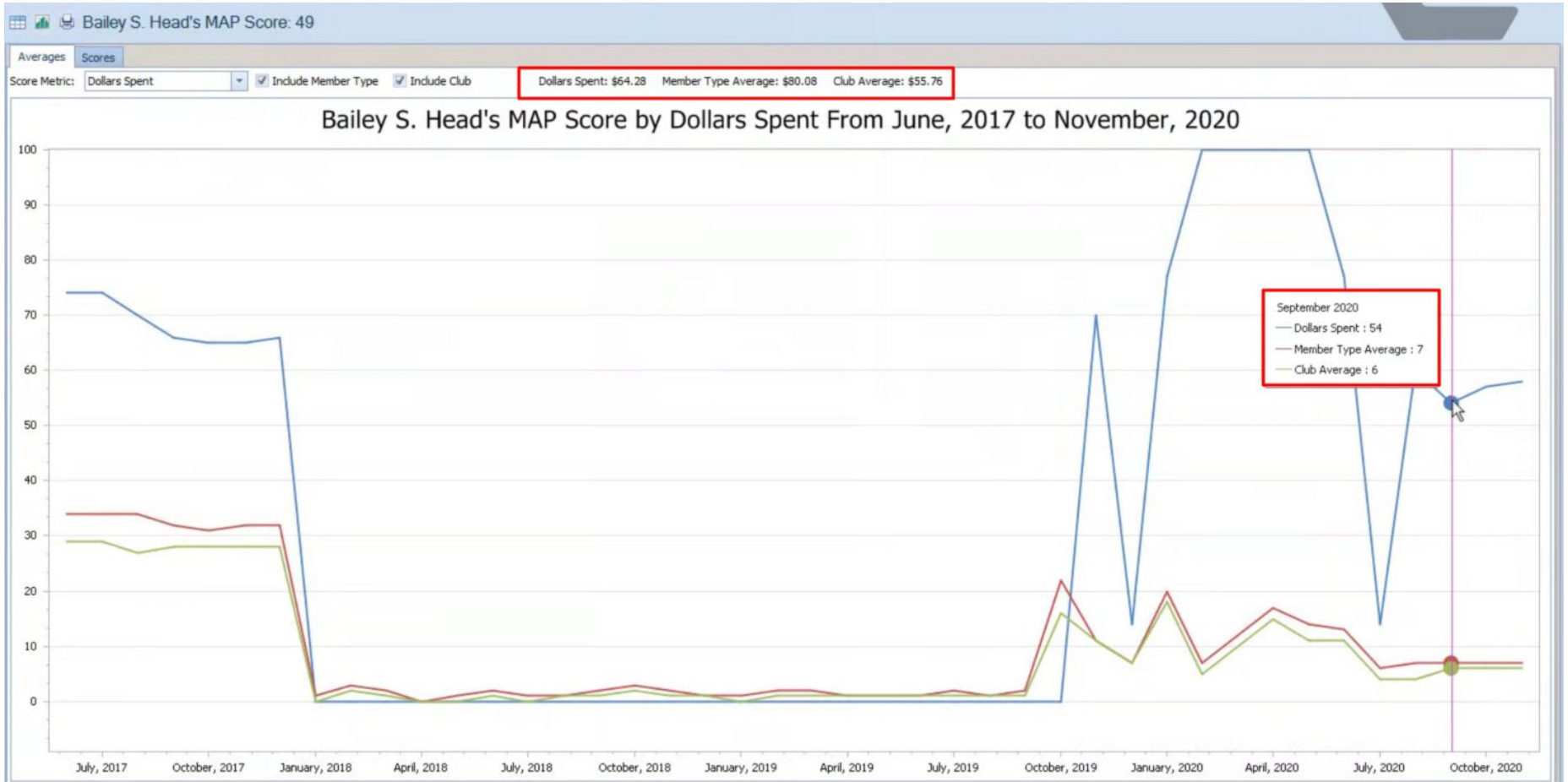
Graph View - Averages - Dollars Spent - November 2020



Graph View - Averages - Dollars Spent - October 2020

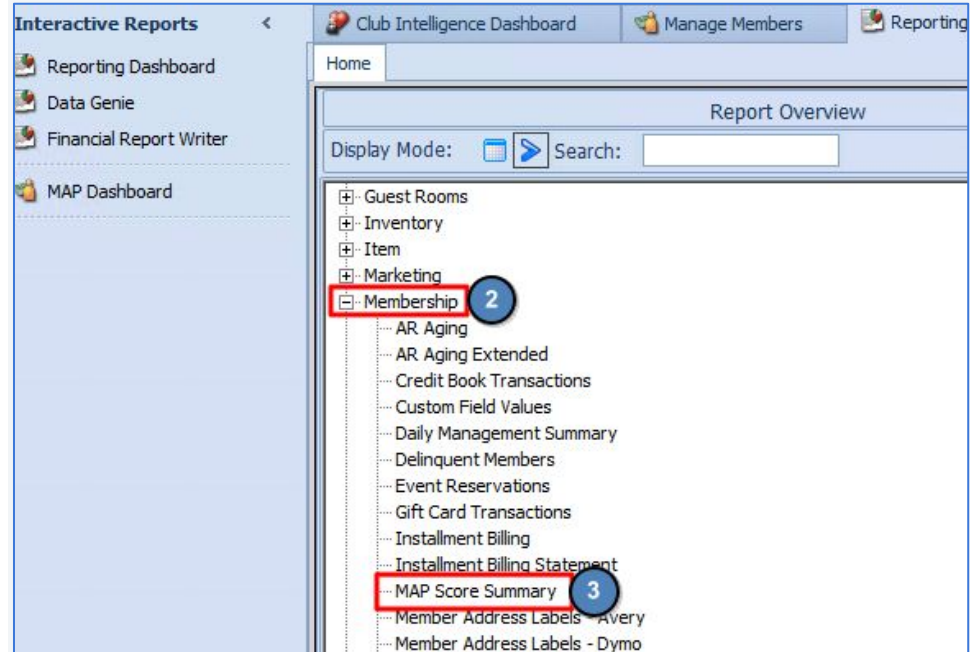


Graph View - Averages - Dollars Spent - September 2020



MAP Score Summary Report

- Use the MAP Summary Score report to analyze how your members' MAP Scores are trending
- Navigate to the **Interactive Reports** module in CMA
- Under Membership, select the **MAP Score Summary Report**



MAP Score Summary Report Parameters - Starting Date & Ending Date

- **Starting Date & Ending Date:** Gives you the ability to select the date ranges you want to use for analyzing your MAP Scores.
- Remember, MAP scores are by month, so even though you are presented with a Calendar Picker, when you select the Month/Day/Year you want to use for the Starting and Ending Dates, the system will default to using only the Month/Year of the date you select.

Home MAP Score Summary x

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

1 Starting Date: June, 2020 2 Ending Date: November, 2020 Score Trend: (All)

Member Types: None Percentages: (All) 0 %

Scores: Expand All

and 11/3/2020

Find | Next

Calendar Picker (Starting Date):

Tuesday, November 03, 2020

June, 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Clear



MAP Score Summary Report Parameters - Score Trend, Member Type & Group By

- **Score Trend:** Gives you the option of seeing scores that increased over this period of time, decreased over this period of time, remained within 0 to 5% over this period of time, or you have the option of selecting ALL which means you don't care how the score trended, you want **all** MAP scores to be evaluated per the other criteria defined.
- **Member Type:** Gives you the ability to select the Member Types you want to report on.
- **Group By:** Gives you the ability to control how you want your report data organized. Options are Member Type, % of Change, MAP Scores or None.

Home | MAP Score Summary x

Report Settings: (Default) | Save Current Settings | Delete Selected Setting | Make Public | Setup Email Delivery

Starting Date: October, 2020 | Ending Date: November, 2020

4 Member Types: (All) | 5 Group By: None | 3 Score Trend: (All)

Percentages: Increased, Decreased, Remained within 0%-5%, (All)

Scores: (All) | 50 | Expand All

Filter by Join Date between 11/3/2010 and 11/3/2020

MAP Score Summary Report Parameters - Percentages

- **Percentages:** Allows you to indicate the percentage of change that you want to report on.
- Options are **Greater Than**, **Less Than**, **Equal To** and **All**. **All** means that you are not restricting your report to a certain percentage of change.
- The **Percentages** parameter is best used in conjunction with the **Score Trend** parameter when you set the Score Trend to either **Increased** or **Decreased**.
- The below report parameters will give us members whose **MAP scores increased by more than 20%** from June 2020 through November 2020, and the results will be grouped by Member Type.

Home | MAP Score Summary x

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

Starting Date: June, 2020 Ending Date: November, 2020 Score Trend: Increased

Member Types: (All) Group By: Member Type **6** Percentages: Greater Than 20 %

Scores: (All) 50 Expand All

Filter by Join Date between 11/3/2010 and 11/3/2020

Greater Than
Less Than
Equals To
(All)



MAP Score Summary Report Results - Percentages

- Displayed here are the MAP Summary Score Report results after executing the report using the parameters displayed on the previous slide.

Clubessential Office: Club at Grand Key



MAP Score Summary

From June 2020 To November 2020

Member Types: <All>

Score Trend: Increased

Visible Scores: <All>

Visible Percentages: Percentages Greater Than 20%

THE SEA ISLAND CLUB AT
GRAND KEY

Member Type	Member	% Change	Score	Join Date
[-] Associate				
	Acevedo, David	24%	56	05/17/1989
	Doe, John	80%	18	
	Doe, Mary	80%	18	
	One, Account	47%	22	
	Wright, Joe	214%	22	
	Blazer, Johnny	273%	56	
	Mac, Joey	180%	42	
	Average	128%	33	
[-] Regular-Dep				
	Albert, Zachary	200%	3	
	Albert, Kara	100%	2	
	Adkins, Amelia	100%	2	
	Average	133%	2	
[-] Reciprocal				
	Army Navy Country Club,	21%	23	
	Annandale Golf Club,	21%	23	
	Blackhawk Country Club,	21%	23	
	Burlingame Country Club,	21%	23	

MAP Score Summary Report Parameters - Scores

- **Scores:** Allows you to define a MAP score and define how you want the score evaluated for reporting purposes.
- Options are **Greater Than, Less Than, Equal To** and **All**. **All** means that you are not restricting your report to a certain MAP score.
- The **Scores** parameter is best used in conjunction with the **Score Trend** parameter when you set the Score Trend to either **Increased** or **Decreased**.
- The below report parameters will give us members whose MAP scores decreased from June 2020 through November 2020 and are now at a **score less than 20**, and the results will be grouped by Member Type.

Home | MAP Score Summary

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

Starting Date: June, 2020 Ending Date: November, 2020 Score Trend: Decreased

Member Types: (All) Group By: Member Type Percentages: (All) 20 %

7 Scores: Less Than 20 Expand All

Greater Than
Less Than
Equals To
(All)

between 11/3/2010 and 11/3/2020



THE SEA ISLAND CLUB AT
GRAND KEY

MAP Score Summary

From June 2020 To November 2020

Member Types: <All>

Score Trend: Decreased

Visible Scores: Scores Less Than 20

Visible Percentages: <All>

Member Type	Member	% Change	Score	Join Date
<input type="checkbox"/> Regular-Dep				
	Abbott, Jackson	-11%	8	
	Abbott, Olivia	-38%	5	
	Abbott, David	-40%	3	
	Average	-30%	5	
<input type="checkbox"/> Associate-Dep				
	Acevedo, Charles	-17%	5	
	Acevedo, Cameron	-50%	2	
	Average	-34%	4	
<input type="checkbox"/> Associate-Sp				
	Adkins, Virginia L.	-25%	3	
	Average	-25%	3	
<input type="checkbox"/> Social				
	Albert, Amy	-71%	13	12/21/2011
	Justice, Joyce	-65%	19	04/29/1988
	Fry, Scott	-32%	13	09/28/2005
	Herman, Michael J.	-57%	19	09/21/1990
	Burt, Joseph E.	-14%	19	11/18/1988
	Howell, Frank B.	-19%	13	07/01/1997

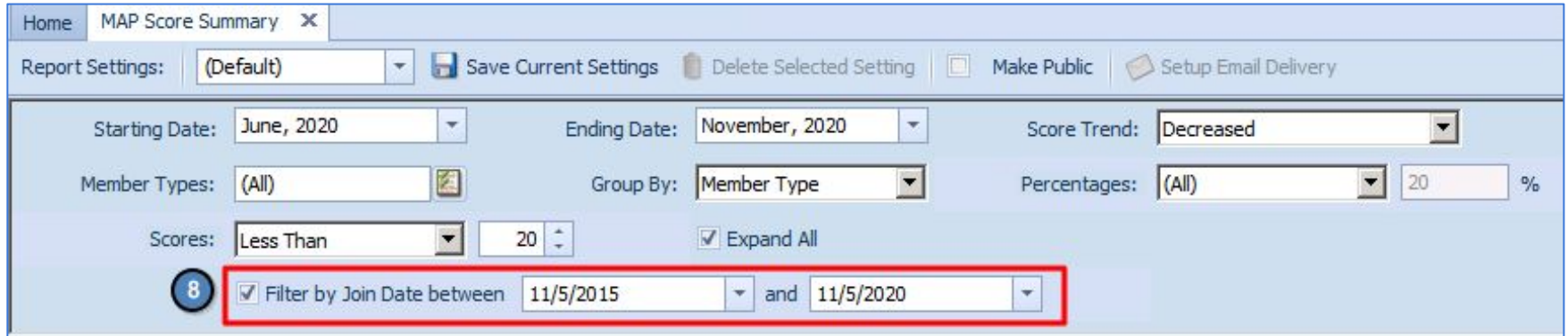


MAP Score Summary Report Results - Scores

- Displayed here are the MAP Summary Score Report results after executing the report using the parameters displayed on the previous slide.

MAP Summary Score Report Parameters - Filter By Join Date

- **Filter By Join Date:** Allows you narrow your report results to members that have a Club Join Date within a certain window of time
- The below report parameters will give us members **who joined the Club in the past 5 years**, whose MAP scores decreased from June 2020 through November 2020 and are now at a score less than 20, and the results will be grouped by Member Type.



Home | MAP Score Summary

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

Starting Date: June, 2020 Ending Date: November, 2020 Score Trend: Decreased

Member Types: (All) Group By: Member Type Percentages: (All) 20 %

Scores: Less Than 20 Expand All

8 Filter by Join Date between 11/5/2015 and 11/5/2020



MAP Summary Score Report Results - Filter By Join Date

- Displayed here are the MAP Summary Score Report results after executing the report using the parameters displayed on the previous slide.



MAP Score Summary

From June 2020 To November 2020

Member Types: <All>

Score Trend: Decreased

Visible Scores: Scores Less Than 20

Visible Percentages: <All>

Showing members who joined between 11/5/2015 and 11/5/2020

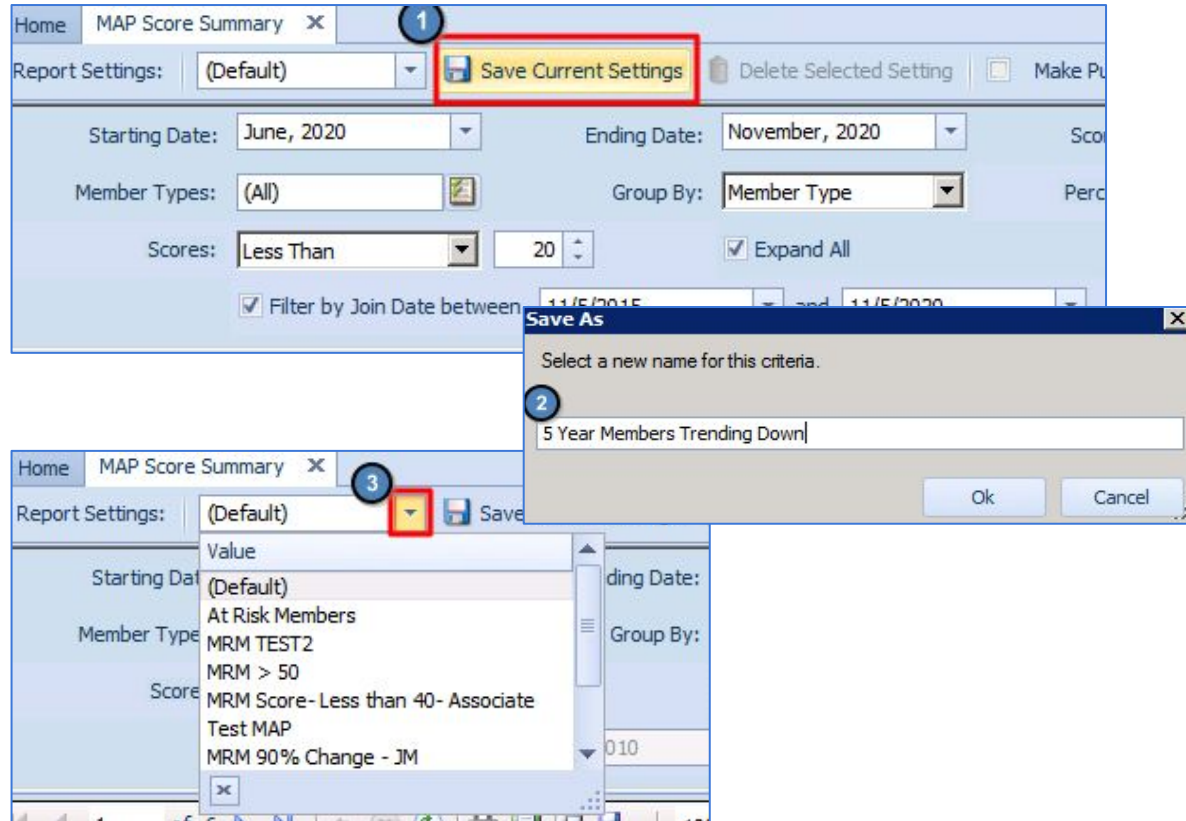
Member Type	Member	% Change	Score	Join Date
Social				
	Tan, Tom	-22%	7	02/12/2016
	Stanley, Allison	-11%	8	09/12/2017
	Average	-17%	8	
Regular				
	Zak, Stacy	-73%	15	10/06/2018
	Nelson , Ralph	-73%	7	10/18/2017
	Average	-73%	11	

Saving Your MAP Score Summary Report as a Template

- You have the ability to save your report parameters as a template so you can execute the same report if needed.

- 1) Click **Save Current Setting**
- 2) Give your template a name
- 3) The next time you want to execute this report, select the template from the **Report Settings** dropdown

- Remember to change your Starting and Ending Dates when re-executing your report in the future.



The screenshot shows the 'MAP Score Summary' report interface. The 'Report Settings' dropdown is set to '(Default)'. A red box highlights the 'Save Current Setting' button, labeled with a circled '1'. Below the report settings, there are fields for 'Starting Date' (June, 2020), 'Ending Date' (November, 2020), 'Member Types' (All), 'Group By' (Member Type), 'Scores' (Less Than 20), and a checked 'Filter by Join Date' option. A 'Save As' dialog box is open, labeled with a circled '2', with the text 'Select a new name for this criteria.' and the input field containing '5 Year Members Trending Down|'. A circled '3' points to the 'Report Settings' dropdown menu, which is open and shows a list of saved templates: '(Default)', 'At Risk Members', 'MRM TEST2', 'MRM > 50', 'MRM Score - Less than 40 - Associate', 'Test MAP', and 'MRM 90% Change - JM'.

Home At Risk Members x

Name: **At Risk Members**

Description:

Group Type: **Mailing**

Tax Exempt (Checking this option will make all members in this group exempt from sales tax for ALL transactions at the club.)

Allow members to join this group online

Static **Dynamic**

Members Criteria

Member Types: In Not In

A - Assisted Living
 A - Independent Living
 All Resort
 Associate
 Associate-Dep
 Associate-Sp
 Banquet
 Banquet - Member
 Camp Account
 Club Account

Hidden Type

Member Groups: In Not In

Cart Plan
 Charter Club
 F&B Minimum A-G
 F&B Assoc/Jr. Minimum
 F&B Mid Month Minimum
 F&B Minimum - Soc/Tenn/Inter/Jr
 F&B Reg Minimum H-R
 F&B Reg Minimum S-Z
 History Book
 Hotel Spa

Spouse: Any

Non-Spouse Dependents: Age: to

Years of Membership:

MAP Score: to

Report Criteria: In Not In

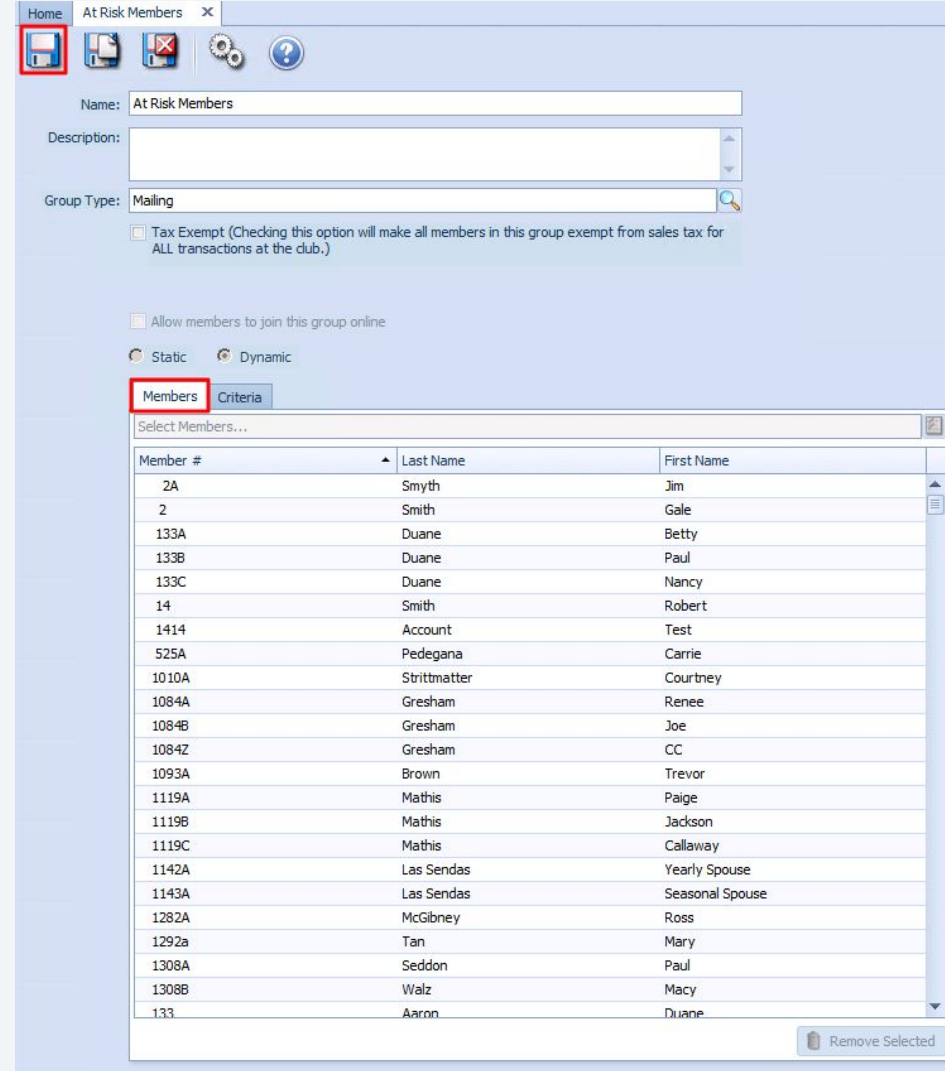
At Risk Members **Valid Reports**

Creating Dynamic Groups Based on MAP Scores

- Select **Groups** under the **Membership** Configuration section of CMA
- Select **New** to create a new Group
- Give your Group a **Name** and **Type**
- Select **Dynamic**
- Under the **Criteria Tab**, select 1 of the following 2 options:
 - MAP Score From and To. Example: **MAP Score 0 to 20** will pull members into the Dynamic Group that have a current MAP Score of 0 to 2.
 - Select an Interactive Report to link to the Dynamic Group. Members included in the report results will be pulled into the Dynamic Group.

After Saving A Dynamic Group

- After **Saving** a Dynamic Group, the **Members Tab** will populate with the members that match the criteria defined within your Dynamic Group.
- Members can always be removed from Dynamic Groups, so if a member falls into this Group that you want to exclude, you have the ability to remove them with **Remove Selected**.



The screenshot displays the 'At Risk Members' dynamic group configuration in the Clubessential software. The group name is 'At Risk Members' and the group type is 'Mailing'. The 'Members' tab is selected, showing a list of members with columns for Member #, Last Name, and First Name. A red box highlights the 'Members' tab. At the bottom right, a 'Remove Selected' button is visible.

Member #	Last Name	First Name
2A	Smyth	Jim
2	Smith	Gale
133A	Duane	Betty
133B	Duane	Paul
133C	Duane	Nancy
14	Smith	Robert
1414	Account	Test
525A	Pedegana	Carrie
1010A	Strittmatter	Courbney
1084A	Gresham	Renee
1084B	Gresham	Joe
1084Z	Gresham	CC
1093A	Brown	Trevor
1119A	Mathis	Paige
1119B	Mathis	Jackson
1119C	Mathis	Callaway
1142A	Las Sendas	Yearly Spouse
1143A	Las Sendas	Seasonal Spouse
1282A	McGibney	Ross
1292a	Tan	Mary
1308A	Seddon	Paul
1308B	Walz	Macy
133	Aaron	Duane



Clubessential Client Resource Center

<https://kb.clubessential.com>

Q&A

