Membership Analytics Predictor - User Guide

2019 - Summer Edition

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Overview

The Membership Analytics Predictor (MAP) tool allows Clubessential Office Users to calculate the Membership Analytics Predictor score based on the following factors:

1. **Money spent at the Club**
2. **Dependent money spent at the Club**
3. **Years of Membership at the Club**
4. **Number of Late Payments Made**
5. **Number of Reservations Made**

Users can also recalculate the Map score with adjusted formulas for various weighting criteria for score changes.

Users can also include Map as a category for building Office Dynamic Groups that sync to the Website and allow for hyper-targeted marketing.

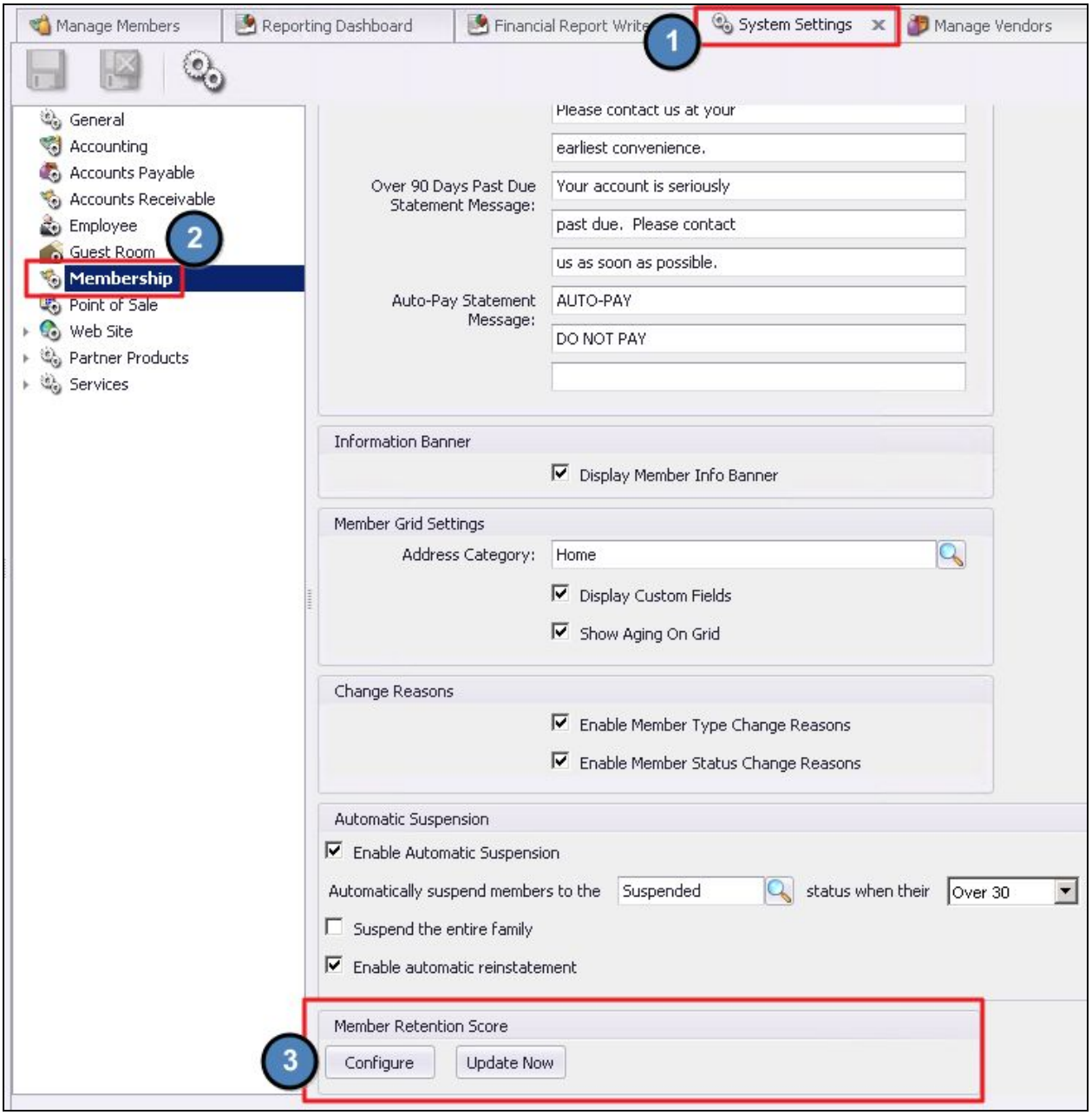
Use Case(s)

- Membership Managers would like to know which of their Members are engaged, and which are at risk of leaving the Club, by evaluating the score calculated by the Member Relationship Management tool.
- Further, once the Club is aware which Members are at risk, they want to create a Dynamic Group that will open opportunities to target market those Members in an effort to save the relationship.
- Club Staff would like to analyze how a certain Member Type's spending habits compare to the rest of the Club through the reporting tools within the Membership Analytics Predictor Module.

Accessing the Tool

System Settings - Membership

To access the MAP, go to **System Settings**, **Membership**, then at the bottom of the Membership settings menu, select **Configure**, as shown below.


Manage Members
Reporting Dashboard
Financial Report Write
System Settings
Manage Vendors
1
General
Accounting
Accounts Payable
Accounts Receivable
Employee
Guest Room
Membership
Point of Sale
Web Site
Partner Products
Services
2
Please contact us at your
earliest convenience.
Over 90 Days Past Due Statement Message:
Your account is seriously
past due. Please contact
us as soon as possible.
Auto-Pay Statement Message:
AUTO-PAY
DO NOT PAY
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 30
Suspend the entire family
Enable automatic reinstatement
Member Retention Score
3
Configure
Update Now

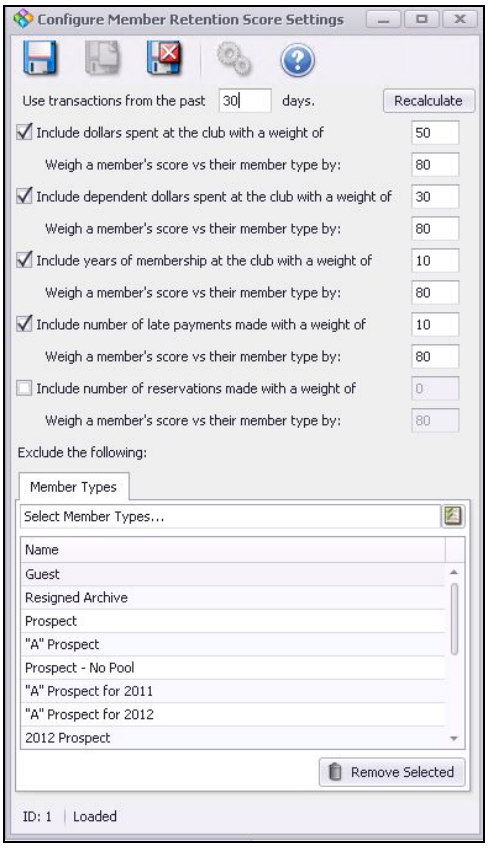
Configuration

Scores

MAP settings will be configured for the Club prior to launch. There are five factors that make up the full MAP score; Member Spend, Dependent Spend, Years of Membership, Late Payments, & Reservations. The MAP Score is calculated out of **100**, with 100 being the best, most engaged Member. Each factor will be assigned a score of how much that factor should contribute to the member's overall score. All factors must add up to 100. It is important to note that Member scores of 50 are average and any Member score below this should be considered **at-risk**, and any Member score above this could be considered an **advocate** for the Club.

Please Note: *All scores are also weighted against the same Member Type to increase accuracy, the default weight is 80.*

Users can access and change these settings in the **Configure** menu if the default settings are not weighting scores to the Club's preferences. Once scores are adjusted, Users will need to select Recalculate. Users can also choose to exclude certain Member Types from this scoring process at the bottom half of the menu. Please reference the Configure MAP Score Settings menu, seen below.



Please Note: *All scores are a great base-level indicator of Member engagement. However, staff involvement and Member knowledge is important when interpreting the data. For example, a Member may be out of town for a month which would negatively impact their Dollars Spent and Reservations scores; but is not a definitive reason for concern if it lowers their 30 or 60 day score.*

Member Spend

This score factor includes all dollars spent by the Member at the Club. The highest weighted factor, Member spend is a large indication of Member engagement at the Club.

Dependent Spend

This score factor includes all dollars spent by spouses and dependents of the primary Member.

Please Note: *While Dependent spend is included in the overall MAP score, Dependents do NOT receive their own score. The MAP score is one unit, tied to the Primary Member and their Dependents. The Primary Member is typically the decision maker, and therefore has greater impact.*

Years of Membership

This score factor takes into account the amount of time that a Member has been an active Member at the Club. It has a smaller impact than Dollars Spent, but is still an important indicator of the overall Member score.

Late Payments

This score factor includes all late payments by a Member, and could be indicative of a Member beginning to withdraw from Club activities and involvement for a variety of reasons.

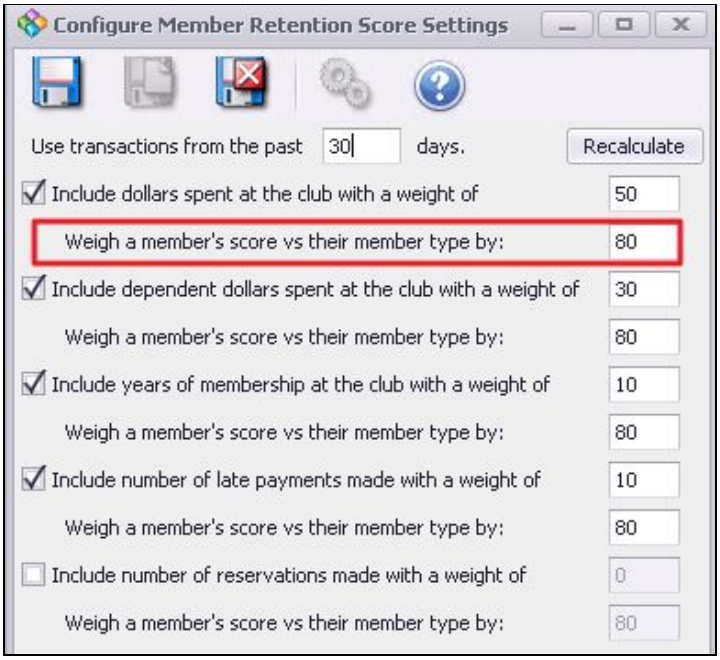
Number of Reservations

This score collects Reservation data from the integrated Reservation products. The number of Reservations (Dining, Tee Times, Courts) is a strong indicator of Member involvement and engagement at the Club. In addition to the above, Events data is also captured in this metric.

Please Note: *In order for Users to be able to include this score in the total, the Club **must** have all of the following Clubessential Products: Clubessential Website, Reservations system(s), CRM, and Office product.*

Weighted Averages

Member types spend differently, therefore Users should look at the Member score against the Member type rather than the Club average. The weighted score is set to 80% by default, so that the majority of the Member score is derived from Member type habits. This setting can be accessed in the **Configure MAP Settings** menu.

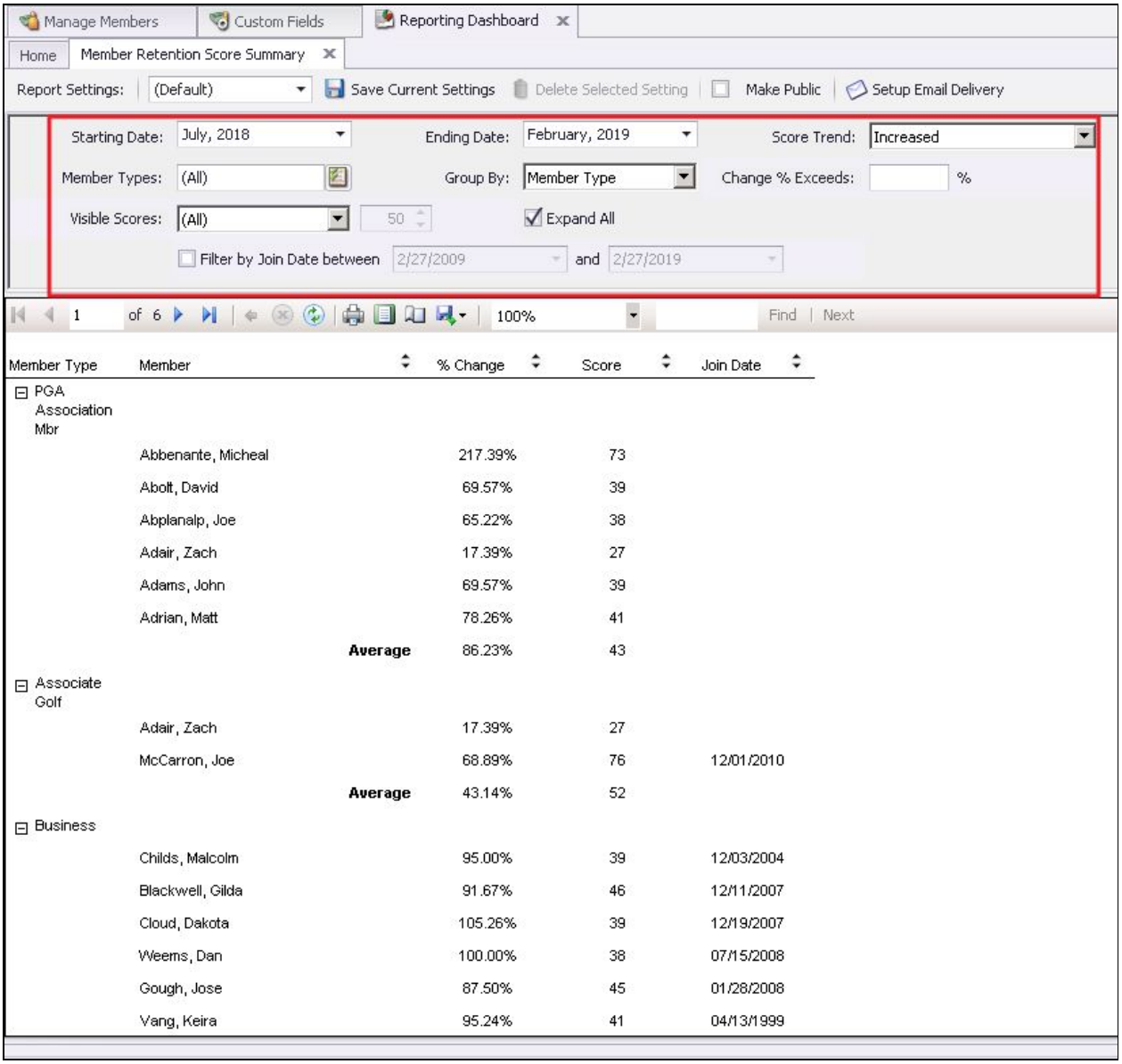


For Example: Shane is a Seasonal Member and he spends winters out of town. His Member spending habits are great while he is in town at the Club, taking part in seasonal offerings, drinks by the pool, and dinners with his family, but no spending happens when he is vacationing. Delia is a full time Associate Member, lives near the Club, actively plays tennis, attends most special events, and dines at the Club with her family weekly. Delia's average spending habits would be drastically different than Shanes; but this does not mean that Shane is at any risk of leaving the Club. For this reason, the Member score needs to be weighted more against other members of the same Member type than the Club average. This gives Users the ability to understand Member behavior within a certain Member type, in addition to overall Club behaviors.

Interactive Reports

Member Retention Score Summary

Once MAP scores are configured, Users can run a **Member Retention Score Summary** report to fully understand overall Club scores, Member type scores, and comparisons. This Interactive Report can be found under the Membership section within the reporting dashboard. Filters can be set for date range, Score Trends, Groupings, and more. As with any report in Office, Users can set up email delivery and have this report automatically run at a preferred interval and emailed, allowing for a full and current view of MAP scores and trends.

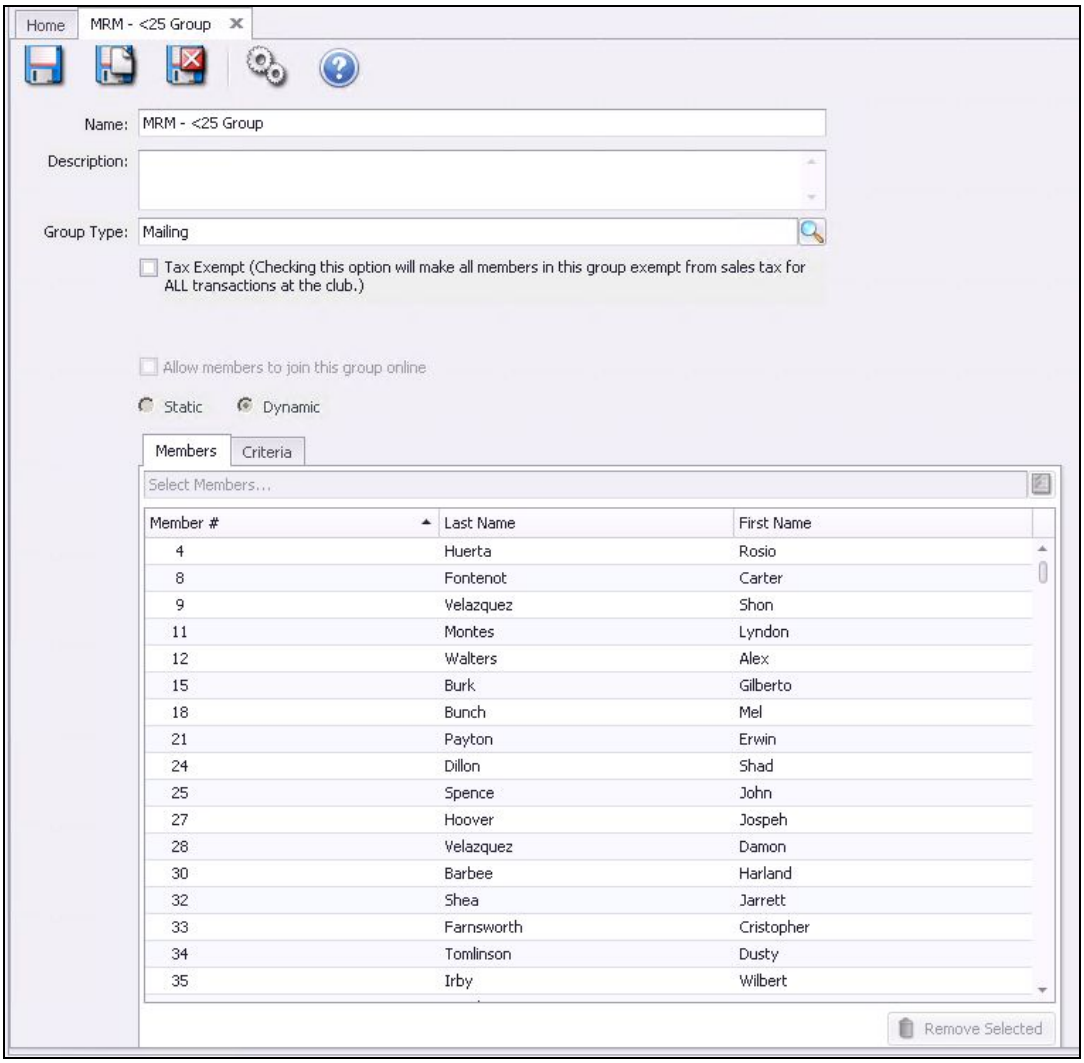


Member Type	Member		% Change	Score	Join Date
PGA Association Mbr					
	Abbenante, Micheal		217.39%	73	
	Abolt, David		69.57%	39	
	Abplanalp, Joe		65.22%	38	
	Adair, Zach		17.39%	27	
	Adams, John		69.57%	39	
	Adrian, Matt		78.26%	41	
		Average	86.23%	43	
Associate Golf					
	Adair, Zach		17.39%	27	
	McCarron, Joe		68.89%	76	12/01/2010
		Average	43.14%	52	
Business					
	Childs, Malcolm		95.00%	39	12/03/2004
	Blackwell, Gilda		91.67%	46	12/11/2007
	Cloud, Dakota		105.26%	39	12/19/2007
	Weems, Dan		100.00%	38	07/15/2008
	Gough, Jose		87.50%	45	01/28/2008
	Vang, Keira		95.24%	41	04/13/1999

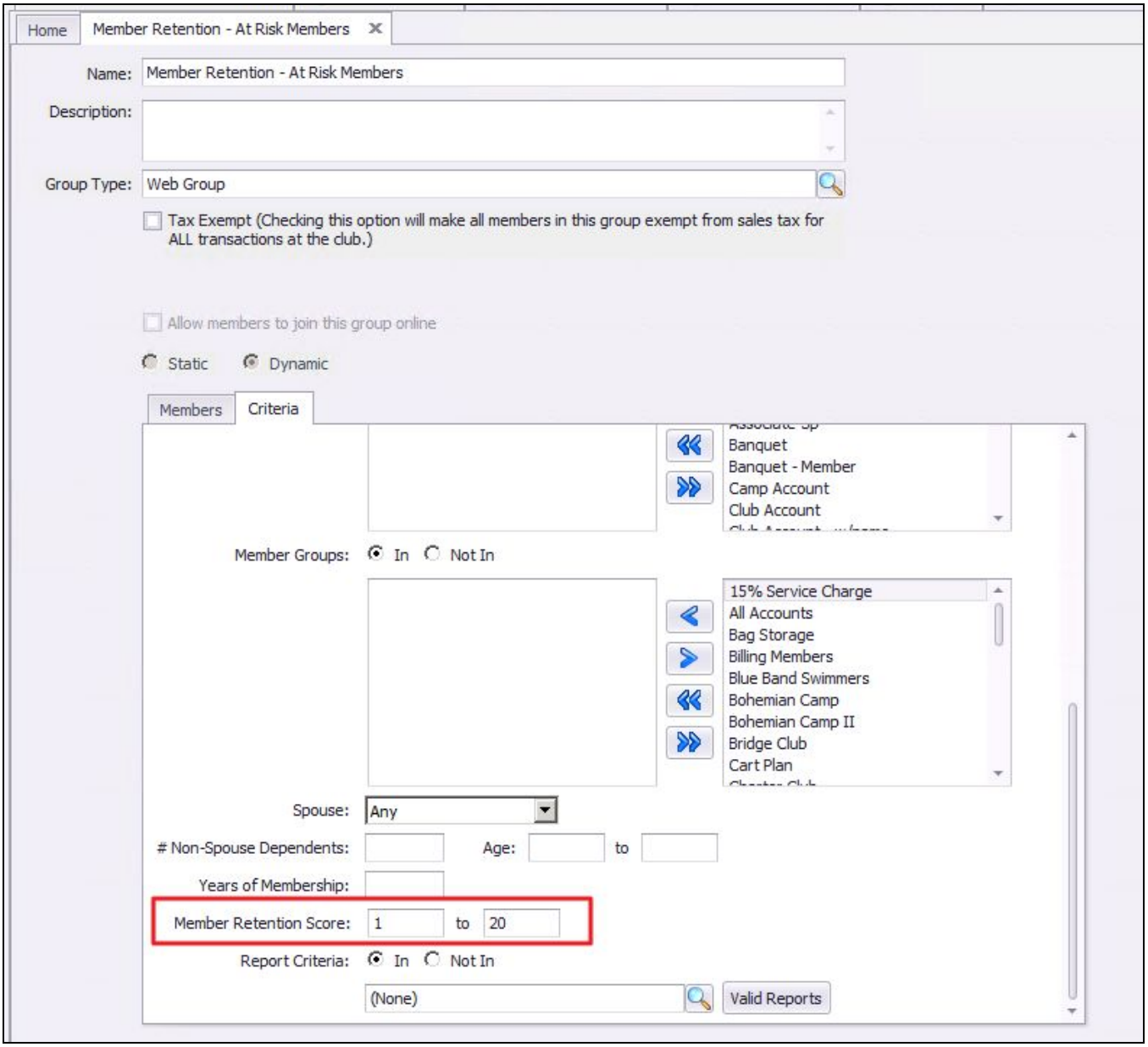
Dynamic Groups

The Clubessential Office tool allows Users to create Dynamic Groups using the MAP score as a group **criteria**. Groups can be accessed from Membership, then Groups, and finally create **New**. Group Criteria must be set, based on User preferences and needs for the group (age, Member Type, gender, etc.), by selecting the Criteria tab. The Members tab will show all group Members that will be included basic on the Criteria set.

For Example: Users can create a group based on Members with a MAP score of 20 and under within a specific Member Type. Then, use the list of Members created by the group to not only research any specific factors that would impact their low score, as well as target market these specific Members to revitalize their Club engagement. See Group setup below.



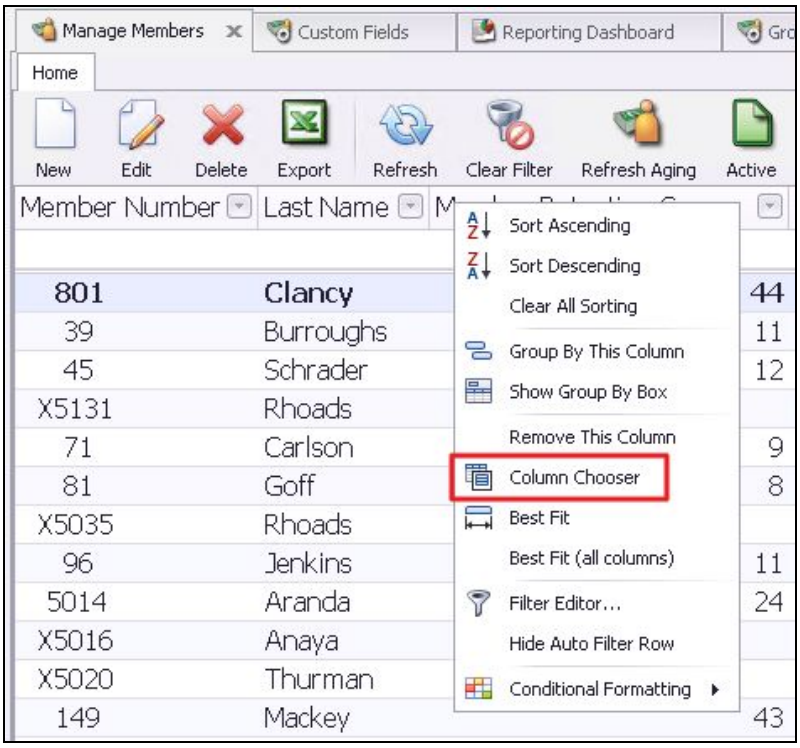
When creating a MAP Score Dynamic Group, the MAP score range must be added in the Criteria section. The example below shows a group that would be made in order to contact severe at risk Members, including all Members with scores from 1-20. In addition, Users can add or remove certain Member Types and/or Member groups from this Criteria tab as well.



Manage Members

Member Retention Score Column

To ensure Member Scores are visible, the MAP score column must be added to the Member grid, as shown here. Users can right click the Member Grid and select Column Chooser to add the Member Retention Score Column to the Member Grid view, allowing not only Member scores to be visible, but also able to be sorted by score.



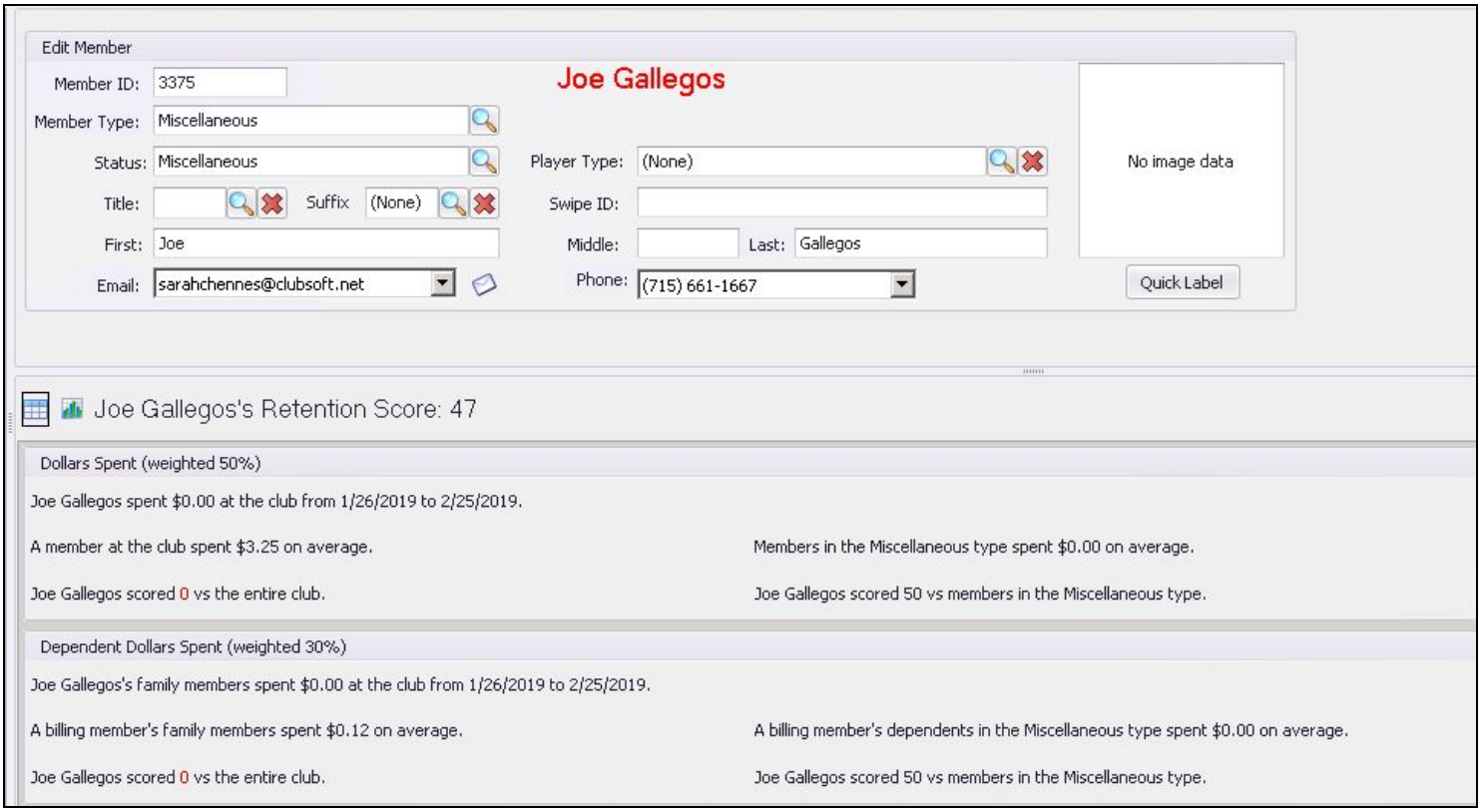
AR Activity

What Members spend and where they spend it, are vital pieces of information that influence Member engagement trends. For example, if you see that a certain Member has a significant drop in their score, it could be directly related to Dollars Spent (the highest percentage of MAP score makeup). To check this Member's spending habits, Users can view the Member AR Activity to really drill down into what the Member is, or in this case is not, spending their money on. This can be accessed via **Manage Members**, select a Member, click **Financial Information** in the left hand column, and then **AR Activity**.

Member Profile View

Users can view Individual MAP scores through the Member Profile (**Manage Members**, then **Retention**) in order to get a better idea of exactly how that specific Member is interacting with the Club, compared to their Member Type counterparts and Club Membership as a whole.

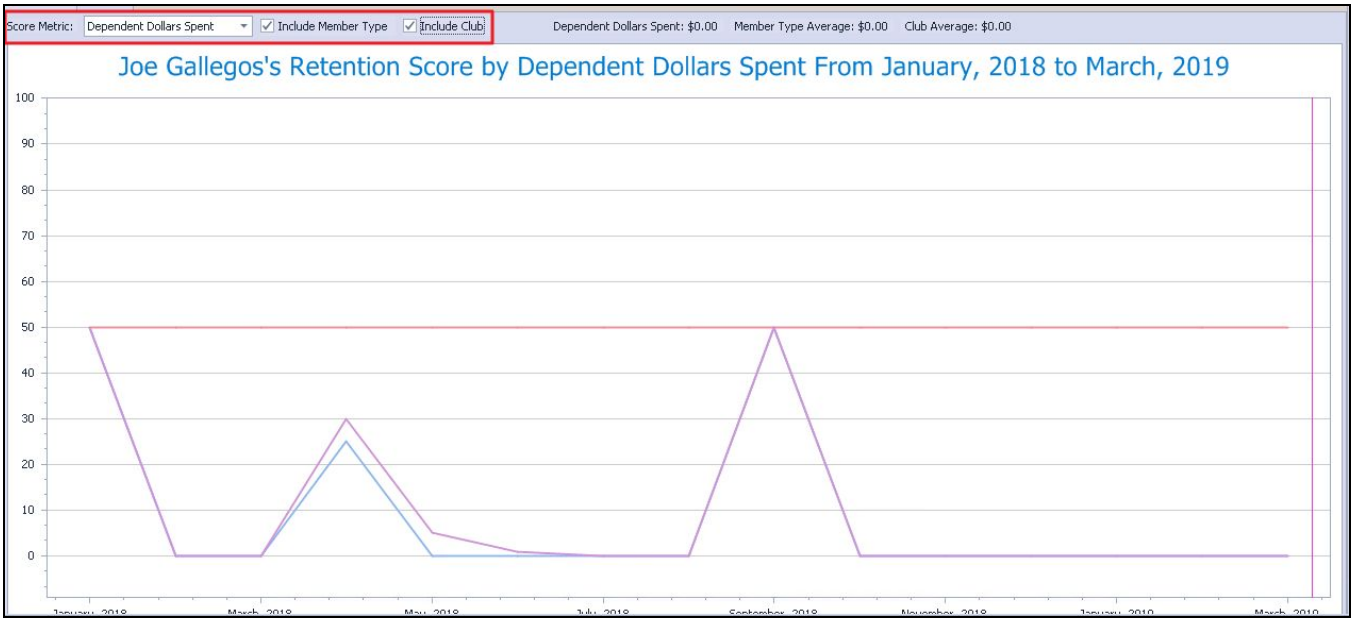
In a Member's profile view, it will show the score for the day, all of the criteria used to create the score, and also where that specific Member falls. This is a great way to view the member's story compared to other member's of his or her Member type and the club average. See an example below.



Member Score Line Graph by Metric

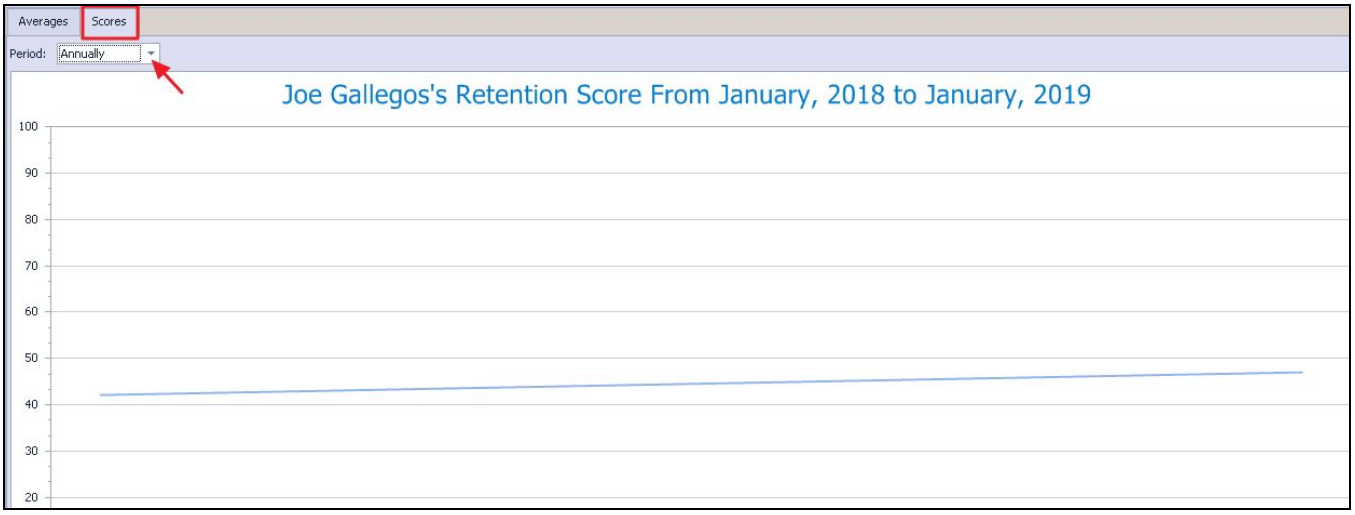
By using the chart option within the member profile, access more information on a member's score based on the five factors.

This graph will show each score metric individually, and can also include information on the Member Type Average and Club Average by enabling the checkboxes at the top of the graph. Using the Score Metric dropdown, easily toggle between each metric.



Member Score Over Time

Within the member profile, view how a member's score has changed monthly, quarterly, or annually by clicking the scores tab within the Line Graph interface. Member scores can easily change on a monthly basis, so this is best used to gauge changes over a year. Using this information, you can easily see if a member is on an upward, or downward trend, for their member score.



Influencers vs. At-Risk Members

Members that score higher than 50, can be considered in good standing and well engaged with the Club. These Members can advocate for the benefits of involvement at the club, even be considered Influencers. While those that score below 50 can be seen as disengaged with the Club, and require special attention to ensure no loss of Membership.

For more information on working with At-Risk and High Scoring Members, please view the fact sheet here.

FAQs

Q: How do I schedule the Interactive Report Member Retention Score Summary to be emailed to me on a daily, weekly, or monthly basis?

A: Once a report has been run, Users can then select Setup Email Delivery on the top right of the screen when viewing the report. Then set up their preferred frequency and delivery for that specific report.

Q: Can I recalculate/adjust the scoring criteria?

A: Yes. Scoring Criteria can be adjusted and recalculated from the Configuration menu under System Settings and Membership. Please refer to the Accessing the Tool and Configuration sections of the guide.

Q: How often are member scores calculated?

A: Member scores are calculated daily.

Q: How do I set up an email group to contact at risk members?

A: Creating a Dynamic group of Members with ‘At-Risk’ scores. Users can then use that group for targeted email campaigns to bolster engagement.

Q: How do I see information on a Member’s individual score?

A: Member’s individual scores can be viewed from their Profile from the Member Grid. Please refer to the Member Profile View section within this guide.

Q: What is the best way to review member trends over a period of time?

A: The Office Interactive Reporting tools are great for viewing MEM score trends. Longer date ranges can be selected when viewing the Member Retention Score Summary Report.

Q: How can I see all members that have a low score, or a high score?

A: Please refer to the various ways to run the Member Retention Score Summary Report.

Best Practices

- Staff involvement and Member knowledge is important when interpreting score data. For example, a Member may be out of town for a month which would negatively impact their Dollars Spent and Reservations scores; but is not a reason for concern if it lowers their 30 or 60 day score.
- Membership Type typically shifts due to age at most clubs (i.e. - Junior or Associate Member to Full Member). This is a common time for Members to reevaluate their Membership at the Club, leading to some Member loss. This would be an ideal time to make contact with Members about to make this transition to ensure their happiness and engagement prior to their Member Type Shift.
- For more information regarding Best Practices, specifically working with Reporting tools, At-Risk, and High Scoring Members, please view the fact sheet here.