# CASE Leverages Acumen *to* Identify Opportunities *to* Improve Retention *and* Recruitment

-------

CASE STUDY

# The Goal

## Grow Membership *and* **Improve Retention** *by* **Proving Value**

The Council for Advancement and Support of Education (CASE) is the global non-profit association dedicated to educational advancement—alumni relations, communications, development, marketing, and advancement services—who share the goal of championing education to transform lives and society.

As a membership organization, CASE's goals are to grow their membership and provide value to members with their content, programs, and services. They ultimately need to know what causes members to renew, how they can improve recruitment of new members, and ways to tap into what is driving value for members. To accomplish their goals, CASE partnered with Association Analytics to implement their data analytics platform, Acumen to gain more insight into their members' behaviros and needs. By looking at the data, CASE is now able to understand what's effective and identify opportunities to improve how they interact with their members.

*"We wanted to pivot to become more data focused as an organization and support our decisions with data. We've launched many different types of campaigns and over the last year **we've seen big improvements in retention**."*

**Jamie Paulsen**
Director of Business Analytics
CASE
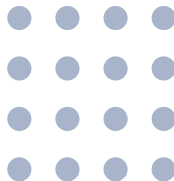
We spoke with Jamie Paulsen, Director of Business Analytics at CASE, who explained that "We wanted to pivot to become more data focused as an organization and support our decisions with data. We've launched many different types of campaigns and over the last year we've seen big improvements in retention."

The data in Acumen has become a jumping off point for staff to ask questions, dig into the details, and ultimately develop strategies or tactics to address what they are seeing and then measure the improvement over time. By analyzing trends in the data and identifying where to focus their efforts, CASE is able to take actions like:

» Adjust pricing or offer an incentive

» Develop proactive communications

» Reach out to understand stumbling points for members

» Launch campaigns to get members more engaged

By digging into the data and seeing the trends, CASE can develop targeted campaigns that are designed to help them improve key business outcomes, like retention and recruitment. They can also filter down to the demographic level or by member type to identify which segments of members they should be focusing their efforts on.



A2
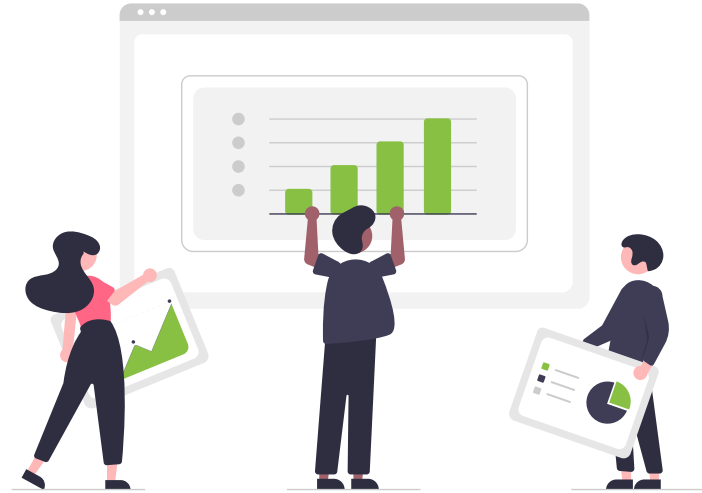
# The Benefits *of* a Data-Driven Culture

For many businesses today, the goal with analytics is to create consistent and trusted data, that can be accessed by anyone who needs the information. For CASE, the challenge, historically, was that they were operating in silos, with different regional offices and staff reporting on the same data, but with different results.

"We had four offices around the world and those four membership teams were each recruiting members their own way, each reporting on membership their own way, and each reporting retention with slightly different formulas. So as part of this process we just had to come together and agree on a common language and definitions. Now it's very clear and it's on the dashboard so everyone can see it and it's transparent," said Paulsen.

Once the data is standard in Acumen, associations can ask questions of the data on an on-going basis and have it become self-service. For CASE, their goal is to make data accessible to everyone, and at this point more than 50% of CASE's 100+ staff have access to dashboards for decision making.

"

*We had four offices around the world and those four membership teams were each recruiting members their own way, each reporting on membership their own way, and each reporting retention with slightly different formulas. So as part of this process, we just had to come together and agree on a common language and definitions. Now it's very clear and it's on the dashboard so everyone can see it and it's transparent.*

"

A2

# Tapping *into* **Best Practices** *from* **Across** *the* **Association Industry**

The reality for many organizations is that it doesn't make sense to hire an entire in-house team that can be entirely devoted to analytics. A more cost-effective solution is to outsource the work, which is where Association Analytics can help to provide resources and expertise that can be utilized as needed.

"We're not in the business of technology - Our business is to be a membership association, so it makes sense to find resources whose business is technology. By tapping into the A2 team, we get a database architect, a project manager, BI developers, we get kind of this whole team of other people without having to hire a whole staff," said Paulsen.

Organizations also benefit from the best practices Association Analytics can share from working with others in the industry, as well as the nature of SaaS products that include continuous product upgrades over time.

*"We're not in the business of technology - Our business is to be a membership association, so it makes sense to find resources whose business is technology."*
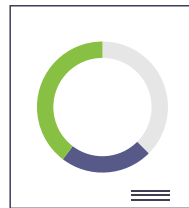
# Monitoring Business Results *with* Acumen

Many organizations have started to invest more in digital member engagement and are developing new strategies and tactics to adapt.

For CASE, they have found that data plays an important role for understanding how these new online initiatives are performing. "I think data is more important now than ever. We need to know what's happening with these programs," said Paulsen.

CASE has historically focused on in-person events, but has now started to incorporate virtual events and they anticipate that in the future it will become a mix of both in-person and virtual. They plan to look at the data to see which programs worked well as virtual events and continue to offer those programs for members.

This type of analytical mindset can be helpful to continuously monitor the data, adjust strategies based on the findings, and then repeat again over time. This allows associations to remain agile and make adjustments to their plans based on the results they are seeing in the data.

CASE is investing now in predictive analytics within Acumen, and they plan to use these insights to better understand factors that contribute to member retention and recruitment. Their goal is to continue making data accessible to all staff members who need it and to encourage staff to ask questions of the data, test new approaches, and monitor results over time to see how they are improving upon key business outcomes.

# CASE

The Council for Advancement and Support of Education (CASE) is the global non-profit association dedicated to educational advancement—alumni relations, communications, development, marketing, and advancement services—who share the goal of championing education to transform lives and society.

## Association Analytics

Association Analytics is a team of passionate people who love helping associations discover insights and take action on their data. That's what drove us to create Acumen, our data analytics platform built exclusively for associations. We help you bring all of your data together in one place to visualize, analyze and take action. Helping you grow.