Association Executives of North Carolina
Success *Live*
BY ASSOCIATION

Breaking Strategic Goals into Measurable Touchpoints

February 15, 2023

SHARE THIS CONTENT

MORE...

Breaking Strategic Goals into Measurable Touchpoints

Galileo Gali-lay once said, "measure what is measurable, and make measurable what is not so."

In business and in life, it can be difficult to know whether your day-to-day efforts are contributing to your long term goals. We all know that breaking down our effort into smaller, more measurable steps is a good practice for life, but how do you do that for your association? With so many analytical tools available today, it's no longer necessary or even advisable to just "go with your gut." Let's discuss some easy to implement tools that can help you be more successful.

When you are working in an association, you have many touchpoints with your members, prospective members, and the public at large. While many of these touchpoints are in-person at meetings or events, ever more of these touchpoints leverage technology such as email, your website, your Association Management System, or your mobile app. It can be difficult to assess whether your use of these technologies is moving the needle on your organizational goals. Thankfully, the same process that we all use in your day-to-day efforts can be used to break your organizational goals into measurable pieces to help you and your organization assess what is working and what needs to change.

Strategic Goals

When talking with our clients, we start by identifying each organization's Strategic Goals. These are what the organization is trying to accomplish in the real world, above the level of technology (e.g. website) or program (e.g. annual conference). These could be goals like:

- Improve our members' skills to help them be more successful
- Educate our members to keep them abreast of new technologies and trends in their industry
- Promote a legislative environment that allows our members to be more successful
- Improve recruiting and retention of members to ensure our association remains financially healthy and dynamic

Articulating these goals is a critical first step to helping your organization achieve them.

Organizational Obstacles

Once you have your goals articulated, we find it helps to identify the obstacles that prevent your organization from achieving these goals. Or, put another way, why haven't you done this already? Potential obstacles might include:

- Lack of knowledge of your association and the benefits you offer amongst potential members
- Your members' (and potential members') busy schedules

- Legislators' lack of context for the nuances of your industry

While it may seem difficult to identify obstacles at the start, we find it is very helpful for associations to frame their more day-to-day efforts as steps to overcome obstacles and contribute to the organization's strategic goals.

Potential Metrics

As I alluded to earlier, the variety of touchpoints can be overwhelming, but technology can make it easier to track and measure, if you are using it correctly. Several potential ways that technology can help measure your day-to-day efforts include:

Email
Most bulk email services provide the following metrics to help gauge the effectiveness of your email efforts:

- Delivery rate: How many of your emails were successfully delivered
- Open rates: How many of your delivered emails were opened by a recipient
- Click-through rates: How many recipients "clicked" on a link in your email to take the next step

Website
Nearly every website platform (including those provided by AMSs) supports some form of analytics that track user interactions. Some common (and useful) metrics include:

- Traffic source: Where did website visitors come from (email, Google, other websites, etc.)?
- Conversions: Did website visitors do what you are hoping they will (e.g. sign up for an event, renew their membership, sign up for a newsletter)?

Viewed separately, these can give you pieces of the puzzle but it can be hard to connect them and see the big picture. Or put another way, "Are my email blasts about our upcoming conference promoting registrations or are these email blasts wasting my staff's time?"

Thankfully most mature platforms make it easy to tie together your bulk email and your website interactions to allow you to start to ask questions like:

- Did our new email layout promote more registrations for our annual meeting?
- How often do website visitors abandon our membership sign-up and renewal process? Is it too long and complicated?
- How many website visitors come to our site to read out legislative updates and what do they do afterwards?

Your IT, website, or AMS vendor can almost certainly help you tie this data together and start to glean actionable insights.

S.M.A.R.T. Framework

As you can see, the possibilities are endless, but that might seem overwhelming. We recommend leveraging the S.M.A.R.T. goals framework and starting small.

S.M.A.R.T in this context is an acronym that is attributed to a 1981 article by George Doran, Arthur Miller and James Cunningham, "There's a S.M.A.R.T. Way to Write Management Goals and Objectives". The pieces break down as:

Specific
What needs to be accomplished and by whom does it need to be accomplished?

Example: We want our membership to register for our upcoming annual meeting early, so we are able to best plan.

Measurable
How do we gauge success for our specific goal?

Example: Our annual meeting typically has 500 member attendees. We would like to encourage 200 registrations by our early-bird deadline to help us plan.

Achievable
Reality check time: It's important to assess during the goal setting phase whether we have the capacity and capability to achieve the stated goals and, where necessary, identify how we might increase capacity or augment capability. Be realistic, but look at ways that technology could be leveraged to save staff time.

Example: Rather than asking your staff to repeatedly write emails, use scheduled repeated social media posts to keep the early bird opportunity at the top of your member's social feeds.

Relevant
It might seem obvious but, why do you want to set this specific goal?

Example: You want to get more members to the annual meeting so they can learn about the critical new trends in the industry or they can connect with visiting legislators and share their concerns first hand.

Time-Bound
A very important aspect of S.M.A.R.T. goal setting is that the tasks have a stated frame of time in which they need to be accomplished. While this may seem self-evident, it's critical to think about when tasks need to be accomplished in order to implement goals.

Example: For the annual meeting early bird push, we need to set the registration site up by April and have email blasts and social posts ready at the same time.

Information Into Insight
Former tech CEO Carly Fiorina once said, "the goal is to turn data into information, and information into insight." Start with one initiative and you will likely find that this will be easier to apply to your second, third, and fourth initiatives. This approach will also help your organization measure what is working and what isn't, so you can focus your team's efforts on what works going forward.

Over the last decade I've used this methodology of identifying and documenting goals, obstacles, and creating data analytics systems to measure progress to help countless organizations. These run from small nonprofits to $100 million dollar per year companies. I'm confident it can help you and your organization as well. If you try it, let me know how it works for you.

Important Website Analytics Note
When it comes to collecting and processing website data many organizations have been using Google's legacy Universal Analytics (UA) platform. Introduced in 2012 UA has consistently been the leader in data analytics, with an at least 65% market share of web analytics. Statistically, you have likely already been using Google Analytics UA version without knowing it for years.

Google has announced that on July 1, 2023, UA will cease to collect data and all of the data it has collected over more than a decade will likely be unavailable after January 1, 2024. We recommend connecting with your web or IT vendor to make sure you are transitioning to the current version of Google Analytics, Google Analytics 4 (GA4).

As GA4 collects data and stores data differently than UA, there is not migration path for historic UA data into GA4. Additionally, GA4's data reporting functionality is significantly different. We have

recommended that our clients implement GA4 side by side with UA immediately to build historic data in GA4 to help a smooth transition.

Bio

As Account Manager at DesignHammer, Stephen focuses on sales, account services, community outreach, project management, and providing Accessibility, SEO, strategy and Usability consulting for DesignHammer clients. With over a decade of experience in the industry, Stephen is a regular speaker at technical conferences throughout the country. Stephen lives in Durham, NC with his wife Amy and their three cats.