

How to Build an Engagement Score

An engagement score is not another report.

It is an early-warning system that helps you:

- Identify members at risk of lapse
- Prioritise outreach
- Improve renewal forecasting
- Target communications more intelligently
- Demonstrate value to trustees and boards

Moving you from reactive reporting to proactive retention

Predict churn earlier

- Allocate team resource intelligently
- Personalise communications at scale
- Demonstrate measurable member value
- Improve long-term retention stability

Lets avoid:

- Overcomplicating the formula
- Overweighting portal logins
- Ignoring payment method and tenure
- Building a score without linking it to action
- Failing to validate against renewal data

An engagement score must be simple, transparent, and actionable.

Engagement Score Guide

Define

Agree internally what behaviours demonstrate that a member is receiving value?

1

For most UK membership organisations, these fall into five areas: Digital activity, Events & community participation, CPD / learning engagement, Commercial commitment, Communication interaction.

Make it Meaningful

Avoid complexity, choose measurable behaviours already captured.

- **Digital Activity:** Think logins, downloads and profile completeness
- **Events & Community:** Think Events attended and volunteer/ committee involvement
- **Learning / CPD:** Think Entries logged, course enrolments and completions
- **Commercial Signals:** Think upgrade history, add-on purchases, tenure length and how they pay
- **Communication Interaction:** Think Email open and click rates and survey participation

2

Weight the Metrics

Create a score out of 100

- Digital activity – 25%
- Events & community – 25%
- CPD / learning – 20%
- Commercial commitment – 20%
- Communications engagement – 10%

Weightings can be refined over time once you compare scores against renewal data.

Engagement Score Guide

Categorise

Segment members into clear bands:

- 80–100 → Highly engaged
- 60–79 → Moderately engaged
- 40–59 → At risk
- Under 40 → High churn risk

This turns a number into an action framework.

4

Automate Actions

An engagement score should trigger behaviour, not sit in a dashboard.

Examples:

- Automatic re-engagement journeys
- Targeted event invitations
- Renewal reminder acceleration
- Internal task creation for high-value members
- Upgrade or cross-sell campaigns for highly engaged segments

5

If using a CRM such as Microsoft Dynamics 365, this can be automated through workflows or scheduled scoring updates.

Review Annually

Compare scores against actual renewal outcomes.

Ask:

- Which metrics best predicted retention?
- Are weightings appropriate?
- Are we overvaluing digital activity vs real-world participation?

Refinement is part of maturity.

6

For further help contact us.