

The Ways and Means

M A R K E T I N G F O R A S S O C I A T I O N S

Member Engagement Scorecard

For Professional and Trade Associations

It's easy to think your members are engaged, but how do you really know? This Scorecard helps your association take a look at how you're connecting with members across all your channels. It will help you identify strengths, uncover weaknesses and pinpoint how to fix them.

How Well Are You Engaging Your Members?

Instructions:

1. **Get your team involved:** Get input from every department (membership, marketing, events) that interact with members.
2. **Go section by section (Part A and B):**
 - **Start with Part A: Engagement Channels Checklist** to identify all the ways you currently interact.
 - Then, move to **Part B: Channel-Specific Assessment**. For each channel you use, go through the scoring questions.
 - **Score yourself:** For each question, give yourself a score (e.g., on a scale of 1 to 5, where 1 = Needs Work, 3 = Average, 5 = Excellent).
 - **Add Comments/Evidence:** Why did you give that score? What specific examples support it?
3. **Calculate your scores (Part C):** Add up your scores to assess your overall engagement health.
4. **Identify improvements (Part D):** Brainstorm specific actions you can take to boost your scores.
5. **Review regularly:** Use this template annually to track your progress and adjust your strategies.

Part A: Engagement Channels Checklist

Instructions: Check off all the channels your association uses to communicate with or engage members.

- Email Newsletters / Updates
- Event Invitations (Virtual & In-Person)
- Social Media (Organic Posts - Facebook, LinkedIn, X, Instagram, etc.)
- Digital Ads (Paid Ads on Google, Youtube or social targeting members)
- Member Portal / Website Login Area
- Online Community / Discussion Forum
- Educational Webinars / Online Courses
- Physical Mail (Magazines, Letters)
- Phone Calls (Welcome calls, check-ins)
- SMS / Text Messages
- Member-Exclusive Content (Reports, Guides, Templates)
- Surveys / Feedback Requests
- Volunteer Opportunities
- Mentorship Programs
- Advocacy / Policy Updates
- Automated Communications (Welcome emails, renewal reminders)
- Personalized Communications (i.e. birthday messages, anniversary)
- Other

Part B: Channel-Specific Scoring

Instructions: Use this format to score your efforts (1-5) for each checked channel from Part A. Add detailed comments.

Channel: [i.e. "Email Newsletters"]

Question	Score (1-5)	Comments/Evidence
1. Consistency: Do we communicate through this channel regularly and reliably?		
2. Relevance/ Personalization: Is the content tailored to different member groups? Do we use member data effectively?		
3. Clear value: Is it obvious what benefit the member gets from this communication?		
4. Call to action (CTA): Is it clear what we want the member to do next ?		
5. Two-way communication: Does this channel allow members to easily give feedback or ask questions? Do we respond?		
6. Visual Appeal/User Experience: Is it easy to read, navigate, and visually appealing?		
7. Measurement: Do we consistently track metrics for this channel		
8. Optimization: Do we use data from Question 7 to make changes and improve our approach for this channel?		
Total score for this channel:		

(Repeat this entire "Channel Name" section for every channel you checked in Part A)

Part C: Overall Engagement Health Scorecard

Instructions: Summarize your scores here.

Category	Your Total Score	Possible Max Score	Your Percentage (%)
Total Score for Email (Newsletters/ Updates):			
Total Score for Events (Invitations/ Attendance):			
Total Score for Member Portal/ Website:			
Total Score for Social Media (Organic & Paid):			
Overall Engagement Total:			

Your Overall Engagement Health Status:

- Excellent (80-100%)
- Good (60-79%)
- Needs Work (40-59%)
- Urgent Attention (<40%)

Part D: Areas for Improvement & Action Plan

Instructions: Based on your low scores and comments from Part B, list specific areas for improvement and propose concrete next steps.

Area of Improvement (Channel & Issue)	Proposed Action / Next Step	Responsible Person	Deadline
Example: Email Newsletters - Low Personalization	Implement email segmentation based on member interests.	Marketing Manager	Next Quarter
Example: Member Portal : Low Two-Way Communication	Add a dedicated feedback form and "contact us" widget.	IT/Web Manager	Within 2 months

Conclusion

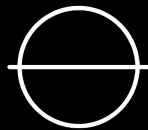
This scorecard is your starting point for building a truly engaged membership base. By regularly assessing your efforts, you'll gain clearer insights, make smarter decisions, and create a stronger, more vibrant community for all your members.

About Us

The Ways and Means is a marketing agency focused exclusively on helping associations and other membership-based organizations achieve their marketing and business goals.

Our team has poured their decades of experience and insights into developing a suite of resources that address common challenges faced by associations: from member recruitment, engagement, and retention to generating new revenue and building your reputation. We're offering these as a way to contribute to your success and demonstrate our commitment to helping associations grow.

We're here to help associations achieve their marketing and business goals. Connect with us for a quick chat to discuss your marketing goals or challenges, and we'll schedule a time that works for you: [Connect with Us](#)



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This resource is offered as a helpful tool but does not guarantee your level of success if you employ the strategies and tactics specifically or generally. Your results will vary depending on industry, location, expertise, effort, application, experience, and background.