



**2009: The Year of Engagement**



Andy Steggles  
CIO, RIMS  
andy@steggles.com

Connecting Great Ideas and Great People

## Engaging in a big, big world

- Currently there are 118.2 million blogs and growing
- Public social media websites such as Facebook add on average 250,000 new users each day
- Across the world, activity in "member communities" accounts for one in every 11 minutes spent online.
- Unique visitors to Twitter increased 1,382% in one year, from 475,000 unique visitors in February 2008 to 7 million in February 2009




## Agenda

- Social Web 101 - Public vs. Private - Benefits of Private
- Member Demographics as part of your social strategy
- Profile "Completeness"
- Chapter/Component Social Strategy
- Quest for more data: Need updated profiles - good for everyone - demographics are key
- Viral Engagement
- Personal Professional URLs
- Definition of Engagement

- Engagement Generator Tool
- Engagement Points

Example website which utilizes social media




## Housekeeping Items



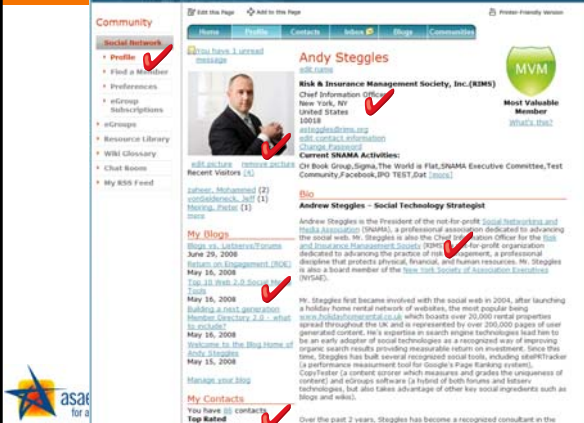
- Switch on your blackberries and cell phones
- Use your computers
- Talk to each other
- Session specific Tag: #asae09 LS1
- Annual Meeting Hub at <http://asae09.org>

= Presentation 2.0




## Social Web 101

- What is the social web?
  - Social Media
  - Social Networking
- Public vs. Private - Pros and Cons

The screenshot shows a LinkedIn profile for Andy Steggles, Chief Information Officer at Risk & Insurance Management Society, Inc. (RIMS). The profile includes a summary of his professional background, a list of his blogs, and a 'My Contacts' section. Red checkmarks are placed over various elements of the profile, such as the profile picture, the company name, the current position, the 'My Blogs' section, and the 'My Contacts' section.

**Groups**  edit

**Book Club**  
 edit  
 Sign up  
 The World is Flat

**Committee**  
 SNAMA Executive Committee  
 Test Community

**Networking**  
 Facebook  
 IPO TEST  
 Special Interest Group  
 Web Standards Working Group  
 Test group  
 Manage your groups

**Interests**  
**Media**  
 Pictured/Side shows, PodCasts, Synced Presentations, Video

**Social Platforms**  
 Facebook, HigherLogic

**Social Tools**  
 Collaboration, Ratings, Social Networking, Tagging, Wiki

**User Entered**  
 AMS, ASAE, Associations, Innovation, SaaS, Social Media, Social Networks, Web 2.0, Web Services

**Education Details**  
**Brunel University**  
 United Kingdom  
 BSc (Hons)  
 Computer in Business  
 1996 to 1999  
 edit

**Job History**  
**Risk & Insurance Management Society, Inc. (RIMS)**  
 Chief Information Officer  
 New York, NY, United States  
 August 1999 - present  
 edit

**asae & the center**  
for association leadership

**Personal Info (Confidential)**  
 Gender: Male  
 Race: Caucasian  
 Year Of Birth: 1971  
 Year Entered Risk Management/Insurance: 2001  
 edit

**Professional Certifications/Designations**  
 ARM, CEBS, CPA/AC, CLU, CPA, CPCU, CRMC(Canada), CRM(US), CIP, FCAS, FCP/FCI, FRM, RF, Other Certifications: MCAD Net  
 edit

**Expertise/Interests**  
 Actuarial Science, Audit, Claims Management, Compliance, Disability, Enterprise Risk Management, Financial Risk Management  
 edit

**Functional Job Titles**  
 Job Title: Director - IT Risk Management  
 Reports To: Chief Risk Officer  
 edit

**Company Info**  
 Stock/Ticker Symbol: MSP  
 SIC Code: Primary: 9700, Secondary: 2097  
 edit

**Organization Size and Location**  
 Total number Of Full-Time Employees(FTE): US: 0, Canada: 0, Outside US & Canada: 18  
 Financial Measure: Revenue  
 Size Range in US\$: \$20 - \$100 million  
 Headquarter Location: United States New York  
 Operations Regions: ASIA, AFRICA, CARIBBEAN, CENTRAL AMERICA, EUROPE, MIDDLE EAST, NORTH AMERICA, SOUTH AMERICA, AUSTRALIA AND OCEANIA  
 States: Select One: Alabama, Alberta  
 edit

**Risk Management Department**  
 Organization has formal risk/insurance management department  
 Number of FTE in the risk/insurance management department: 3  
 Risk Management Department Reports To: CEO/President/Mayor/Governor/Premier  
 edit

**asae & the center**  
for association leadership

## Demographics

**Personal Info (Confidential)**  
 Gender: Male  
 Race: Caucasian  
 Year Of Birth: 1971  
 Year Entered Risk Management/Insurance: 2001  
 edit

**Professional Certifications/Designations**  
 ARM, CEBS, CPA/AC, CLU, CPA, CPCU, CRMC(Canada), CRM(US), CIP, FCAS, FCP/FCI, FRM, RF, Other Certifications: MCAD Net  
 edit

**Expertise/Interests**  
 Alternative Risk Financing, Captive Management, Claims Management  
 edit

**Functional Job Titles**  
 Job Title: Chief Risk Officer  
 Reports To: Board of Directors  
 edit

**Company Info**  
 Stock/Ticker Symbol: MSP  
 Duns&Bradstreet Number: Not Specified  
 SIC Codes: Primary: 9700, Secondary: 2097  
 edit

**asae & the center**  
for association leadership

**Organization Size and Location**  
 Total number Of Full-Time Employees(FTE): US: 0, Canada: 0, Outside US & Canada: 18  
 Financial Measure: Revenue  
 Size Range in US\$: \$20 - \$100 million  
 Headquarter Location: United States New York  
 Operations Regions: ASIA, AFRICA, CARIBBEAN, CENTRAL AMERICA, EUROPE, MIDDLE EAST, NORTH AMERICA, SOUTH AMERICA, AUSTRALIA AND OCEANIA  
 States: Select One: Alabama, Alberta  
 edit

**Risk Management Department**  
 Organization has formal risk/insurance management department  
 Number of FTE in the risk/insurance management department: 3  
 Risk Management Department Reports To: CEO/President/Mayor/Governor/Premier  
 edit

**Risk Management Service Providers**  
 If you are a vendor to the risk management community, please indicate which services you provide or have an expertise in:  
 Actuarial Services, Executive/Personnel Recruitment, Legal Services, Risk Mgmt Services/Consulting  
 edit

**asae & the center**  
for association leadership

## Editing a Demographic Item

**Organization Size and Location**

Total number of Full-Time Equivalent (FTE) Employees  
 Indicate the total number of full-time equivalent (FTE) employees in your organization  
 US:  Canada:  Outside US & Canada:

Worldwide Revenue/Sales or Operating Budget  
 Provide your organization's worldwide revenue/sales (or operation budget if government entity or non-profit organization) in US dollars  
 Size Measure: Revenue | Size Range in US\$: \$20 - \$100 million

Corporate Headquarters location  
 In US/Canada, indicate state/province:  New York  
 In non-US/Canada, indicate country:  United States

Regions of Significant Operations  
 Check all regions where your organization has significant operations - other than sales offices:  
 Asia  Africa  
 Caribbean  Central America  
 Europe  Middle East  
 North America  South America  
 Australia and Oceania  
 Check all states/provinces where your organization has significant operations - other than sales offices:  
 Select One:  Alaska

**asae & the center**  
for association leadership

## Profile "Completeness"

- Member Demographics as part of your social strategy
- Profile "Completeness"
  - what elements should it consider?
  - Weighting?
  - Reporting
  - Include Your Components

100% profile complete

Completion Table

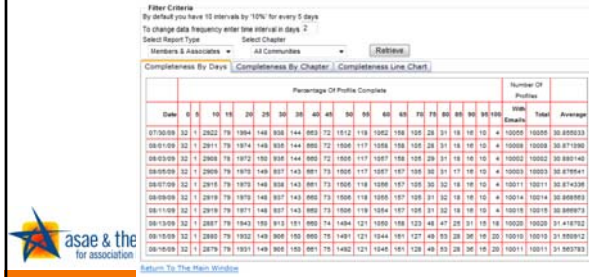
Update all the information on this page and on the MyDemographics page, except under setting, the bottom-right mark, and profile information for the respective item

- Personal Info
- Certifications
- Research/Interests
- Job Title
- Company Info
- Organization Info
- Risk Department Info
- Contact Info
- Profile
- Education
- Job History

**asae & the center**  
for association leadership

## Completeness Reports

- Total Average Completeness of
  - Communities (Chapters, Committees etc.)
  - Members vs. Non-Members



## Ranking of Chapters

- Create a Competition
- Chapter Awards Program



## Chapter/Component Social Strategy

- Centralize
- Single Source Social Network
- Give them measuring tools - overall community engagement
- Meetings
  - Speaker Profiles
  - Centralized Meeting Data
  - Member/Non-Member Rates



## Viral Engagement

- In-person Word of Mouth
- Online Word of Mouth (refer a friend)
- Viral Applications
  - Member get a Member
  - Mentoring
  - Refer a Friend
  - Tell them



## Member-Get-A-Member/Mentoring

**Andy Steggles**  
 Risk & Insurance Management Society, Inc. (RIMS)  
 Chief Information Officer  
 1065 Avenue of the Americas  
 13th Floor  
 New York, NY  
 United States  
 10018  
 Work: 212 655 6007  
 Cell: 917 664 7218  
 Home: 201 255 6274  
[asteggles@rims.org](mailto:asteggles@rims.org)  
[edit contact information](#)  
 Change Password

**Current SNAMA Activities:**  
 CH Book Group, Financial Community, Test community by Anoop, The World is Flat, SNAMA Executive Comm [\(more\)](#)

**Personal URL (PURL)**  
<http://www.asaia.org/andysteggles> [edit](#)

**Community Applications** [More Info](#)

**Member-Get-A-Member**

**My Blog**

**Andrew Steggles – Social Technology Strategist**  
 Andrew Steggles is the President of the not-for-profit [Social Interactions and Media Association \(SNAMA\)](#), a professional association dedicated to advancing the social web. Mr. Steggles is also the Chief Information Officer for the [Risk and Insurance Management Society \(RIMS\)](#), a not-for-profit organization.

## Member-Get-A-Member

- Step 1:

**Member-Get-A-Member**  
 Referral Information:

First Name

Last Name

Email



## Member-Get-A-Member

- Step 2:
  - Pay it Forward!

**Forward To Friends**  
 Select at least 3 Contacts to invite them to complete the survey

View All	Selected (0)	Unselected
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

1 / 14



Add more Contacts  
 Skip This Step  
 Return to Edit "Member-Get-a-Member"

## Mentor-Me-Mentor-You

**Become a mentor**

Select areas you would like to be a mentor in:

<input checked="" type="checkbox"/> Mzinga	<input checked="" type="checkbox"/> Ning	<input checked="" type="checkbox"/> Linked-In
<input checked="" type="checkbox"/> Socious	<input checked="" type="checkbox"/> The Port	<input checked="" type="checkbox"/> GoLightly
<input type="checkbox"/> Higher Logic	<input checked="" type="checkbox"/> Facebook	<input checked="" type="checkbox"/> MySpace
<input type="checkbox"/> MemberFuse		

Enter your own values

Select your current functional job title:

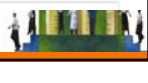
Geographical preference: Do you have a geographical preference? Does your mentor/mentee need to be located in a close proximity to you? If so, within how many miles of your profile address?  
 2000 miles  
 Note: If you are ok mentoring by phone, leave this blank.

**Find a mentor**

Select areas in which you would like to be mentored:

<input checked="" type="checkbox"/> Mzinga	<input checked="" type="checkbox"/> Ning	<input checked="" type="checkbox"/> Linked-In
<input checked="" type="checkbox"/> Socious	<input checked="" type="checkbox"/> The Port	<input checked="" type="checkbox"/> GoLightly
<input checked="" type="checkbox"/> Higher Logic	<input checked="" type="checkbox"/> Facebook	<input checked="" type="checkbox"/> MySpace
<input checked="" type="checkbox"/> MemberFuse		

Enter your own values



## Mentor-Me-Mentor-You

- Step 2:
  - Pay it Forward!

**Forward To Friends**  
 Select at least 3 Contacts to invite them to complete the survey

View All	Selected (0)	Unselected
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

1 / 14



Add more Contacts  
 Skip This Step  
 Return to Edit "Member-Get-a-Member"

## Mentor-Me-Mentor-You

- Step 3: Matching Summary

**Mentor**  
You are one of 3 number of mentors which has volunteered to take part in this program. The following graphs are all clickable and should help you browse and sort by the demographics of the possible mentees.

**Matching Mentees**

Category	Count
Mentors	2
Titles	1
Locations	1
Societies	1
The Port	1
Societies	1
Facebooks	1
MySpace	1

**Mentee**  
You are one of 3 number of mentees looking for a mentor. Use the following report to browse possible mentor profiles which match your criteria. Once you have identified someone, please click on their profile and use the link to send them a message.

**Matching Mentors**

Category	Count
Mentors	2
Titles	1



## Mentor-Me-Mentor-You

- Step 4: CONNECT...

Contact List

Edit this Page | Add to this Page | Printer Friendly Version

Export Data

Showing 1 to 2 of 2

Sort Name: Z-A | Start Company Name: A-Z | City: State: Country: | Show: 20 per page

Steggles, Andy	<b>Risk &amp; Insurance Management Society, Inc. (RIMS)</b> Chief Information Office New York, NY, United States
vonSeldeneck, Jeff	<b>Higher Logic</b> Director of Sales Washington, DC

Send Message | Remove Contact



## Pay It Forward

- What else could Pay It Forward?
  - Everything...


Forward To Friends

Select at least 3 Contacts to invite them to complete the survey

Selected (0)	Unselected
	
	
	

1/14

Add more Contacts  
Skip This Step  
Return to Edit "Member Get a Member"



## (Personal) Professional URLs


- Motivate members to include in their email signature
- Trackable Demographics
- Facilitated World of Mouth

Professional Profile URL (PURL)

More Info

**PURL Activity:**  
Views: 100 | Logged in User(s): 1  
Estimated source: 1 (Show Full)

Add to Email Signature and Track Your Hit



## Definition of Engagement is Changing

No longer limited to the traditional offline world

- Chapters
  - Volunteer Role
  - Attendance
- Events
  - Annual Conference
  - Workshops
- Committees
  - Position
  - Length Served
- Bylaw Voting
- Survey Participant




## Return on Engagement

Return on Engagement or how members, constituents and donors respond to various initiatives, through retention, donations and active participation.

What triggers emotion within a target audience to ultimately cause engagement?

Is ROI an accurate measurement?

- Social vs. Media
  - Media = impressions, response rates, website visits
  - Social = quality and depth of relationships
- Need to see concrete results



## RIMS Engagement Strategy

- Identify Goals
- Find your Creators
- Challenge your Creators
- Thank and Reward



## Engagement Strategy: Identify Goals

- What do you want to achieve?
- Does it align with your mission etc.
  - Advocacy
  - Increase Retention
  - Improve Member Satisfaction
  - More?



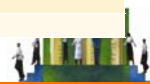
## Engagement Strategy: Find Your Creators: EngagementOmiter

Engagement Category	Probability (Weighting)
2009 Magazine Author	10
Failed Magazine Author	30
Speaker	15
Exhibitor	40
Chapter Officer	16
Committee member	20
Donor	25
Non-Member	100
2006 Abstract Submitter	38
Member	50



## Engagement Strategy: Import Activity

ID	Name	Activity Category	Weighting
20034	Andy Steggles	2009 Magazine Author	10
43433	Valerie Cammiso	2006 Abstract Submission	38
34533	Mark Jones	Chapter Officer	16
10020	Suzanne Tanguay	Non-Member	100
34453	Meg McGeady	Failed Magazine Author	30
20034	Andy Steggles	Speaker	15
20034	Andy Steggles	Donor	25
43433	Valerie Cammiso	Chapter Officer	16



## Challenge Your Creators (strategically)

- Don't just send them all a blast email
- Flag each individual with their highest engagement type
  - If someone has submitted an abstract submission but is also an author of a magazine article, flag them as "Magazine Publisher"
- Put into manageable groups (50 per time) and schedule the blast emails to them
- Ensure emails are personalized based on their engagement type



## Thank and Reward

- What happens after someone has posted their first blog? (usually, very little)
- Set expectations and encourage them to continue to "build their brand"
- Show them recognition and others being recognized
  - Feature Bloggers in Printed Periodical
  - Digital Ribbons/Printed Ribbons
  - Professional Profile Brand Awareness
  - Home Page Recognition



## Recognition: Phi Sigma Sigma



## Digital Ribbons

- Community Ribbons (Chapters etc.)
- Individual Recognition (award winners)
- Engagement Recognition
- Activity Based Recognition




## Ribbon Management - How does it work?

- Community Ribbons



## Ribbon Selector



## Ribbon Creation



## Engagement Points

- What are they?
  - How do they work?
  - Is Contributor vs. Non-Contributor
  - What do points make?
- Social Networking = Member Engagement = Improved Member Retention



## Popularity Redefined

### The Tangible Metrics

- Rumored Google Number
- Blogs:
- Created a blog
  - Rated a blog
  - Commented on a blog
  - Rated a comment on a blog
  - Shared blog
  - Emailed to a friend
- eGroups:
- Posted
  - Replied to Sender
  - Replied to eGroup
  - Viewed
  - Forwarded to a friend
- Wiki Glossary
- Measuring edits and number of character differences for updates
- Content Management
- Posting new content or editing a page which is a wiki
- Directory 2.0
- Add friend, create a group, viewing profiles etc
- Resource Library
- Adding files to share, downloading and rating



## Example of Point Values

Blog Engagement Activities			
Activity	Point Value	Activity	Point Value
Read	1	Add Author as Friend/Contact	2
Create	7	Print	1
Rate	2	Subscribe to RSS Feed	2
Comment	4	Trackback	1
Rate a Comment	1	*Forward to a friend	5
Add Related Link	2	Add to Favorites	2
Rate Related Link	1		

\*Notice how the "Forward to a friend" activity has been assigned a unusually high point value. This is because it has been recognized that each instance of this activity might generate a new prospect (since the email address of the person it is being forwarded to is being recorded).

Home eGroups Blogs Directory Wiki Resource Library

### Engagement Point Center

Engagement Activity	Current Point Value	New Point Value
Read	1	
Create	7	
Rate	2	
Reply to Sender	4	
Reply to Discussion Group	2	3
Add Related Link	2	
Rate Related Link	1	



## The Numbers



## The Engagement Aggregates

Mid-sized organization with 5000 individual members	
Total Points Generated	77,620
Average Points Per Member:	15.52
Most Valuable Member:	Mike Stevens, 343 Points
Total Blogs Created:	87
Total eGroup Postings Submitted:	700
Total Wiki Glossary Edits:	250
Total Files Shared:	160



## Example: <http://test.nysaenet.org>

## Social/Viral Applications

- Business Sheep Throwing
- What type of apps are viable viral apps?
  - Mentoring Applications
  - Salary Surveys
  - Industry Benchmark Surveys
- Note: mostly research related
- Public vs. Private Platform Apps
  - Public - Get-A-Member (no accountability)
  - Private - Industry Benchmarks, Award Nominations, Competitions (accountability)

## Sample Business Social/Viral App

<http://apps.facebook.com/areyoupaidenough/>

## Refer a Friend

<http://apps.facebook.com/areyoupaidenough/>

## View Benchmark Results (real time)

Statistic	Value
Participants	3
Lowest Amount	\$18,000.00
Median Amount	\$29,383.33
Highest Amount	\$45,000.00



**asae & the center**  
for association leadership

Contact Information:



Andy Steggles  
CIO, RIMS  
Websites: [www.RIMS.org](http://www.RIMS.org)

Andy Steggles  
Chief Operating Officer  
Higher Logic, LLC  
Tel: 917.664.7218  
[andy@higherlogic.com](mailto:andy@higherlogic.com)  
[www.HigherLogic.com](http://www.HigherLogic.com)

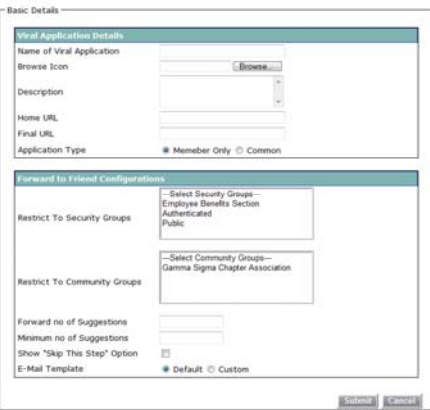


Connecting Great Ideas and Great People

## Bonus Slides

Viral/Social Applications on Private Platform



Basic Details

**Viral Application Details:**

Name of Viral Application:

Description:

Home URL:

Final URL:

Application Type:  Member Only  Common

**Forward to Friend Configurations:**

Restrict To Security Groups:  —Select Security Groups—  
Employee Benefits Section  
Authenticated  
Public


Restrict To Community Groups:  —Select Community Groups—  
Gamma Sigma Chapter Association

Forward no of Suggestions:

Minimum no of Suggestions:

Show "Skip This Step" Option:




E-Mail Template:  Default  Custom



## RIMS Case Study

Source : Forrester Research/*Groundswell*

- Creators: Publish Blog, Upload Own Video/Audio
- Critics: Post Ratings/Reviews of products: comments on other's blogs
- Collectors: Use RSS Feeds, Voting on sites like Digg
- Joiners: Maintain Profile on social networking site
- Spectators: Read Blogs, Watch Video/Audio from other users
- Inactives: Do not create or consumer any social media







## RIMS -The Results

	Creators	Critics	Collectors	Joiners	Spectators	Inactives
RIMS	10.7%	22.9%	10.7%	23.0%	73%	23.5%
MA Med	13.0%	21.6%	14.9%	20.6%	73.9%	22.1%
USA	19.0%	25.0%	12.0%	25.0%	48%	44.0%
Average:						
USA	11.0%	19.0%	8.0%	12.0%	45.0%	50
Age 45-54						



Note: The average age of a RIMS member is currently 49 years.

Finding: Need to incentivize the creators

## Exit Strategy

- Who blogs for your association?
  - Person or Org?
- What happens when the person leaves?
  - Who owns the brand?
  - Is it transferrable?
- Ideal Solution is to have a person write the blog under a corporate brand Example:
  - "Risk vs. Reward" by Andy Steggles... but when Andy leaves, it is still "Risk vs. Reward" but by Mark Smith

## Engagement Central

- Social Networking is powerful, but need to measure and reward
- Tie in measurements to mission and vision statement
- Ability to assign point values for activities

