Measuring the Networked Nonprofit

USING DATA TO CHANGE THE WORLD

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chapter
SIX

The Ladder of Engagement

How to Measure Engagement and Use It to Improve Relationships with Your Stakeholders

I know it's hard to measure engagement, but there **has** to be a better way.

Engagement is the first step in building the relationship between your stakeholders and your brand. And in this era of overwhelming inundation of data and messages, an organization's relationships may be what most strongly distinguishes it from every other organization on a mission to change the world and get into hearts, minds, and wallets. That's the reason that engagement is so important to networked nonprofits and why everyone is trying to figure out how to measure it.

Measuring engagement is a way to determine whether you are making progress toward building a relationship. In other words, are you really having a dialogue that leads somewhere, or are you just yelling ever more loudly?

Because nonprofit organizations don't have resources to waste and their needs are generally too many, they can't ignore anyone interested in helping. Thus, most organizations have a diverse spectrum of supporters, from the lightly touched to the superenergized. To be successful, they need to create bite-size steps to engage all these supporters in their cause and to help them become more active doers, cheerleaders, and donors if they so choose. Thinking about engagement in this incremental way helps organizations understand and assess their efforts to move more people to deeper levels of involvement.

THE NONPROFIT WORLD'S LADDER OF ENGAGEMENT

The ladder of engagement is the nonprofit version of the for-profit world's marketing funnel, a time-honored concept with many variations. The marketing funnel is elegantly simple. It illustrates the different stages that people go through to become stakeholders. Most marketing funnels are based on the 1898 AIDA (awareness, interest, desire, action) concept promoted by E. St. Elmo Lewis.[1]

The AIDA marketing funnel has four basic stages:

Awareness	When someone becomes aware of your product or service
Interest	When someone becomes interested in learning more about your product or service
Desire	When someone wants to buy from you
Action	When someone buys something from you

The nonprofit version of the marketing funnel is essentially the same, but it is usually called a ladder of engagement or a pyramid. Every nonprofit needs to move people in stages from awareness to action. The difference for nonprofits is that the desired action is not necessarily purchasing a product, but making a donation or doing something that directly supports the organization's mission.

The ladder of engagement can be used as a tool to help analyze, strategize, and measure every campaign the organization does. But there is no one ladder or pyramid that works for every nonprofit. Nonprofits discover and create these based on their audience research and specific objectives, as in the following examples from Grist and Surfrider Foundation.

FROM TWEET HUGGERS TO EMBRACING THE HABIT OF SUSTAINABLE LIVING

Grist is a Seattle-based nonprofit that supports a destination news Web site for environmental news, reports, and opinion with a wry sense of humor. Chip Giller launched Grist in 1999 to counter the stereotype that all environmentalists were either dour doomsayers or holier-than-thou tree huggers. Says Giller, "Environmentalists often fall into a few stereotypes—you know the ones: they are descendants of John Muir who could care less about people and want to marry a tree, are self-righteous scolds, or wear Birkenstocks and hemp underwear and bicycle everywhere, uphill both ways. Trust me—I know these stereotypes well because I used to be one."[2]

Grist's editorial mission is to publish a new, positive form of green journalism with a comical twist. The vision is to spread independent environmental online content free of charge to a young and growing readership. Grist reports on everything from climate change to the organic food movement, demonstrating how the environment intersects with critical issues like poverty, health care, and economic growth. What started as a quirky Web site with a hundred readers has grown to a leading news source that engages millions who might otherwise be turned off by the bummer-of-the-day environmental news.

How Grist Uses Measurement to Learn How to Deepen Relationships

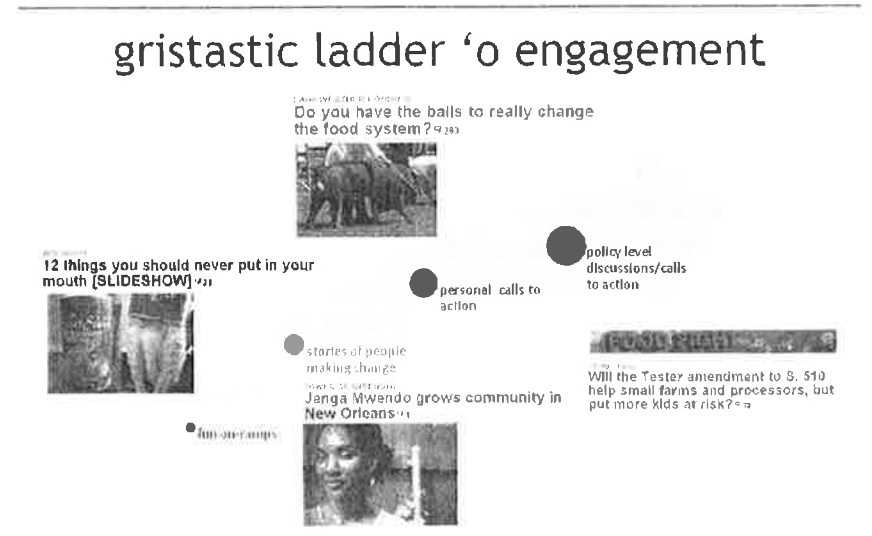
Grist has succeeded in connecting with a younger audience that not only reads its content but is also inspired to take action. It has accomplished this by using measurement to learn what it takes to move readers from being passive consumers of content to taking offline action. Says Giller, "We avoid the sign-the-petition type of actions. What we're after is getting people to change their behavior and thus creating a more environmentally just society." Grist's combination of entertaining content and clever integration of social media channels has inspired a new generation of environmentalists who don't take themselves so seriously.

Grist Builds Its Own Ladder of Engagement

Grist is a data-informed organization that uses a ladder of engagement not only to guide its content and social media integration strategy, but uses measurement at each rung of the ladder to ensure that it gets results. Says Giller, "Our theory of change is engaging users around content that empowers personal behavior change and ultimately impacts society at large. We're getting results because 87 percent of readers from our surveys have told us that they have taken action based on reading Grist."

Grist's ladder of engagement in Figure 6.1 is elegantly simple and illustrates how its audience makes the journey from passive consumers of information to

Figure 6.1
Grist's Ladder of Engagement



champions for sustainable living. The steps are fun on-ramps, sharing stories of personal behavior change, personal calls to action, and calls to action on policy change. Grist does not consider page views or other Web traffic statistics the end point, only an indicator of success at the bottom rung of the ladder. The real goal is higher up the ladder: societal change. If Grist isn't successful, the consequences are dire. Or as Giller says, "The planet will get it."

Grist's key measures are:

- *Footprint:* The reach of its activities, both online and offline
- *Engagement:* How readers engage with content by commenting, contributing content, and sharing the content with other people
- *Individual behavior change:* Impact on users' behaviors, including purchase decisions and daily routines that advance sustainable practices
- *Societal change:* Influence on society, policy discussions, and conversations that advance sustainable practices

Giller says that regardless of the topic, they are always thinking in incremental steps of engagement. They start with a simple question, "How can we inspire people to take action and change, and use social media as part of this strategy?" Consider Grist's coverage on food. It is devoured by a devoted flock of foodies, and the numbers show that it's some of the site's most popular content. For Grist, it's the bait that lures visitors to the first rung of the ladder. Organic food, sustainable agriculture practices, and climate change are all related, but most people don't associate them. Readers may come to the site looking for recipes for eggplant, but Grist's strategy is to lead them from how to prepare a tasty meal to a broader conversation on policy about nitrogen pollution or sustainable agricultural practices.

How Grist Moves from Social Media to the Real World: From Hashtags to Climate Hawks

To help make the leap from retweeting Twitter hashtags to real-world action, Erika Croxton, Grist's development director, says, "We view our social media channels as a fun on-ramp to our ladder of engagement. Once we've hooked them, we engage with our community until they own the idea and run with it. It means we have to be nimble and responsive measurement mavens."[3]

For example, Grist staff know from their survey research and analysis of comments on their posts that a lot of people care deeply about environmental issues but don't self-identify as environmentalists. As part of a recent engagement tactic, they crowd-sourced new terms for those who care about these issues but don't call themselves environmentalists, bringing in over 250 suggestions. The one that most resonated was *climate hawk*. Says Croxton, "This term eventually became the hashtag #climatehawk. What's happened now is that we have at least a hundred people a week using this hashtag without us pushing it. The mainstream media have adopted it, and it's attracting many new readers to our site. Someone is even selling bumper stickers with the phrase."

Another example comes from Grist's food and sustainable agriculture coverage.[4] It started with the Grist article, "Farming Is the New Hipster Occupation of Choice," a commentary on a *New York Times* article that reported that younger farmers are more likely to shun industrial farming techniques and embrace more sustainable practices. The problem is that the average age of farmers is rising, not dropping, and to encourage a sustainable food system, more policy support and programs need to be directed at younger farmers.

After Grist brought the discussion onto Twitter, a reader suggested the fun hashtag #hipsterfarmerbands. Readers then suggested humorous names for these bands, like "Radicchiohead" and "Lady Bah Bah" (Figure 6.2). Meanwhile, Grist continually seeded this conversation with links back to the original article. The tag trended on Twitter, capturing the attention of many and encouraging new visitors to the site to read and take action on changing federal policy. "Once something like this gets started," Croxton noted, "it takes on a life of its own."

Says Giller, "We've discovered that integrating social media, and properly tending to it and measuring and learning from it, is effective for attracting new readers, getting readers to engage with our content, and inspiring action—whether policy change or behavior change."

Grist's Measurement: Engagement, Indexes, and Surveys

Grist uses a combination of tools to measure along the ladder of engagement, including Google Analytics, surveys, real-time monitoring tools, and collecting anecdotal stories. Giller explains that "our whole team reviews reports from Google Analytics at staff meetings. It is like sipping fine wine. We analyze the content that users spend the most time on, referral traffic, and other key metrics over time." This helps inform decisions about content topics.

Figure 6.2
Farming Is the New Hipster Occupation of Choice

The editorial team, particularly the writers, uses real-time monitoring, which they describe as "crack." The team is careful not to do "drive-by" analysis, but balance this monitoring with other data sources to make editorial decisions. Says Giller, "Our content often plays off of breaking news, so real-time analysis can be really valuable in editorial choices."

For example, in August 2011, when a freak earthquake hit the east coast, Grist shared photos of some lawn chairs being turned over with the headline, "Photo of Devastation from the East Coast Earthquake."[5] Not only was the photo shared and liked by thousands of people through e-mails, on Twitter, and on Facebook, but it generated mainstream media attention and even got a chuckle out of prominent climate scientists. Because Grist staff had real-time data available, they knew they should quickly follow up with a series of articles highlighting scientific information about how extreme weather instances are tied to climate change.

To understand what people are doing with their content, Grist staff have created an engagement index based on commenting, sharing, likes, follows, and even donations. They use this index to guide decisions about engagement tactics, particularly through social media channels. Perhaps more important is how they measure behavioral change using regular surveys on the site, as well as an in-depth annual reader survey. They ask questions such as, "What actions have you taken based on something you read on Grist?" and, "Have you changed your eating behavior?" and, "Are you buying better?" They also ask whether a story has inspired them to participate in policy discussions or pursue an issue by contacting a company or local official.

To better understand the numbers, they draw insights from anecdotal stories, interviews, and comments. For example, they know from survey responses that readers who have not taken an action based on Grist content include people who say, "I'm already so green, I can't get any greener."

Giller acknowledges the huge challenge of measuring societal influence:

> We can rarely prove cause and effect and, to be honest, it is mostly based on qualitative data. We look at the company we keep, who is asking to be interviewed, and if we've broken stories or inserted new ideas into the conversation. Then we use those insights to help drive the conversation about sustainable practices and climate change to people who are not yet aware of the policy issues . . .
>
> We have embraced intelligent decision making, not excessive data collection. There's so much data we could collect, but it's potentially a morass. We pay attention to only a half-dozen key indicators related to our results around footprint, engagement, behavior change, and policy action.

With its approach of measuring along the ladder of engagement, Giller notes that Grist has garnered considerable insight about what works and what doesn't: "Our content has to meet people where they're at, so some is introductory level. We also know that facts alone do not drive behavior change. It is more important to see those changes modeled in your peer community, whatever that is. We shine a light on people who do make changes, and that inspires others."

THE LADDER OF ENGAGEMENT, ONE STEP AT A TIME

The strategy behind using a ladder of engagement is that an organization employs tactics—messaging, content, and channels—targeted to audiences at each rung of the ladder. These tactics strengthen their relationships with the organization or program and encourage them to step up to the next level. Combining this framework with measurement helps nonprofits understand which are the most effective tactics for each rung of the ladder. The ladder of engagement also provides a framework for envisioning the types of participation and involvement from stakeholders that organizations need to be successful.

But movement up the ladder doesn't just happen. As with Grist, most effective organizations make careful efforts to understand what decisions their audiences need to make to boost them to the next step. They carefully craft their asks or calls to action so as to influence those decisions.

It is important to note that not all organizations, and certainly not all audiences, will have the same ladders of engagement. Not every audience will move in an orderly step-by-step fashion from bystanders to committed movement leaders. It is not realistic, for instance, to assume that all donors will become further engaged with an organization just because they donated once to their friend's charity walkathon or to the latest international disaster relief effort.

In fact, the vast majority of fans, friends, and followers never go past that initial point of engagement. In most online communities, 90 percent of users are lurkers who never contribute, 9 percent of users contribute a little, and 1 percent of users account for almost all the activity.[6] Thus, you can't define success as getting everyone to the top.

Although everyone is probably capable of deepening their engagement with a cause, not everyone does it in the same way or at the same rate. This is why it is important to develop your own ladder of engagement based on careful observation of your own audiences and with reference to your own measures of success.

By defining a meaningful framework for understanding what motivates your audiences to progress up your ladder of engagement, your organization can better identify what data is important to collect and analyze. Here's an example.

Surfrider Creates Its Own Ladder of Engagement: More Thrilling Than Catching That Big Wave

Founded in the mid-1980s, Surfrider Foundation's mission is the protection and enjoyment of oceans, waves, and beaches through a powerful activist network.[7] It created and uses a ladder of engagement to map activism for online and offline actions, measuring success with one key metric, the coastal victory. Its ladder of engagement weaves online and offline actions together to illustrate how its activists progress—for instance, from awareness of Surfrider's campaigns, to downloading a fun iPhone app called "Beach Tetris," to showing up at the ocean shore to pick up trash.

Vickie McMurchie, community manager for Surfrider Foundation, has this to say:

> We care about people's initial engagement with us. That could be signing up for our weekly digital newsletter or commenting on a Facebook post. Since our goal is ocean activism, we measure if and when people take a deeper step. This could be coming to a beach cleanup or signing a digital petition . . .
>
> Social media has helped us build a large feeder system of people who are connected to us in a lightweight way, but that's not the ultimate definition of success. It's moving them into deeper ways to engage with our mission. This is no longer abstract, as we're measuring six different ways we can plug people into our mission.

McMurchie does regular analysis of the content that resonates with the people in the network: "We know that our audiences respond well to posts about celebrities engaging with our mission, but they *really* step it up when it comes to signing petitions or posts that ask them to vote for us to win money, or for them to watch videos or look at media."

It took McMurchie only a couple of meetings for her relatively small nonprofit to develop its own ladder of engagement: "We used our strategic plan as a starting point. Staff discussed and identified each rung of the ladder—degrees of engagement and the different actions." Once they got a description on paper, they asked for feedback from their chapter leaders. After they made the final decision about what to measure, they had different staff contribute data to the shared dashboard.

McMurchie noted that this customized ladder of engagement has helped get better results: "We've seen a steady increase of visitors and interactions on our social networks. We've learned that promoting events on our social networks has directly resulted in people attending events. In addition to the increase in attendance, we've also observed that as they become more involved, they're sharing that information with their friends and family who are then becoming more engaged online." And, she continues, measuring along a ladder of engagement is more thrilling than catching a big wave: "Before we started measuring each rung, we were really flying blind. We were just throwing Hail Marys and hoping that something would work and resonate with our audience."

Measurement has helped Surfrider staff fine-tune their engagement strategy and tactics. "We're working on a social media strategy that makes it easier for people to share Surfrider content with their network," McMurchie says. They used to post the same content to Twitter and Facebook, usually at the same time throughout the day, but they found that approach did not move people up the ladder of engagement.

McMurchie emphasizes the importance of tracking how well content resonates:

> The ladder of engagement has helped us to tailor our voice and content on different channels. For example, on Facebook I aim to be a friendly yet informative voice who will share information about our staff and offices. Mostly I'm there to educate and share pressing news stories that I think they will find informative and shocking. We mix Surfrider news and ocean-related news stories, as well as PSAs [public service announcements]. On Twitter, we're way more laid back and try to be "your friend"—a buddy you can complain to and ask questions of. Who's going to be a little more gruff and tell it like it is. We're still sharing news stories and promoting Surfrider Foundation, but we're engaging in conversations."

BEST FRIENDS MOVES PEOPLE FROM AWARENESS OF INVISIBLE DOGS TO ADOPTING REAL ONES

The use of measurement and testing has helped Best Friends Animal Society develop accurate messaging to encourage those in their network to take simple online and offline actions to save shelter dogs' lives. Here is how they used a ladder of engagement to improve the effectiveness of their Invisible Dogs campaign.

Best Friends launched the Invisible Dogs campaign in October 2011 to spotlight the plight of shelter dogs and encourage dog adoptions from shelters. Claudia M. Perrone, marketing manager for Best Friends, explained that they hoped "to call attention to the hundreds of thousands of very real but unseen dogs in U.S. animal shelters. Our goal is to capture the public's attention with the iconic invisible dog leash, which represents a homeless dog, in hopes of putting the odds in favor of invisible dogs getting adopted."[8]

The key metric is clear: dog adoption rates. And they know that the steps to dog adoption are awareness, engagement, education, visiting a shelter, and finally, adoption. The Invisible Dogs campaign is designed to move people up this ladder of engagement.

The initial push was to get people to the campaign microsite to educate them about the issue and pledge an action. David J. Neff, a consultant working with Best Friends, says, "They can adopt, which is the highest point of the ladder. But if they are not ready for that, they can volunteer at a shelter, attend a shelter event, or take a photo of a dog and spread it on their social media networks" (See Figure 6.3). The microsite makes it easy for the organization to track conversions and refine strategies.

"From the start," Perrone notes, "we wanted to have a very simple, clear message about the thousands of dogs in America's shelters waiting to be seen. Our approach was to capture people's attention in a fun, positive way and tap into their curiosity—wouldn't you look twice if you saw a bunch of people walking invisible dog leashes in your community?—and then provide easy, fun ways for them to get involved."

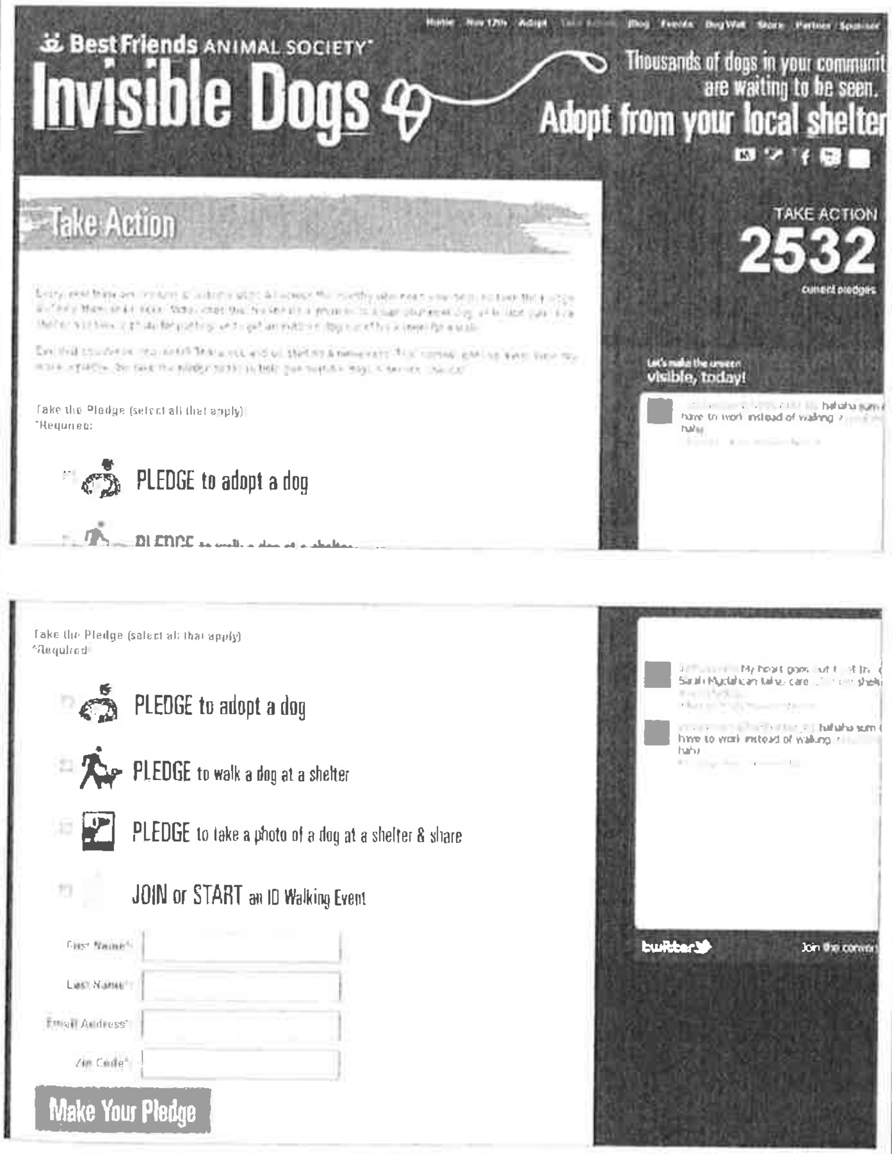
Neff says they used

> the #InvisibleDogs hashtag as part of a strategy to get them to visit the campaign site. We were able to track referrals from Twitter to see if they visited the site and if they pledged. We had over 40,000 visit the site, and 2,200 have taken the pledge to adopt a dog, walk a dog, or participate in an invisible leash walking event. We are also tracking dog adoptions. By doing a content analysis of the Tweets and conversations, we discovered that people understand the sad implications for dogs left in shelters. The hashtag also makes it very easy for our social media manager to reply to people on Twitter.

Neff notes that once people pledge at the site, their e-mail address is in the organization's database so they can send a thank-you and follow-up messages: "This allows us to test different e-mail messaging geared to get people to take the next action—visiting a shelter or adopting a dog. One thing we've learned from analyzing the chatter on Twitter and other channels is that it is important to get people to visit the shelter. So we did a National Shelter Check-in Day project, where we encouraged people to visit a local shelter and check-in on Facebook or Foursquare."

Another rung on the ladder of engagement was for supporters to create Invisible Dog events across the country. For those who pledged to attend or host

Figure 6.3
Invisible Dogs Pledge Form



an event, staff sent a follow-up e-mail directing them to the MeetUp page. Says Neff, "Within the first six weeks of the campaign, fifty-two people in twenty cities created their own local meet-ups at shelters to walk 'invisible dogs' with the invisible dog leashes."

Neff says that their online Dog Wall has been valuable because, Neff says, it provides a lot of fantastic content: "We share great photos on our Facebook page and our fans love it—based on the likes and comments we get."

DEVELOPING YOUR OWN LADDER: LOW, MEDIUM, AND HIGH ENGAGEMENT

The rungs of your own ladder of engagement will depend on your organization's goals, communications strategies, and audiences, as will the metrics you use to measure each rung. What is most important to begin developing your ladder is to define the extremes. What do *unengaged* and *disengaged* mean for your organization? What does *high engagement* mean?

Let's consider, as a simplified example, a ladder with three rungs, or levels of engagement: low, medium, and high.

Typical Examples of Low-Level Engagement Behaviors

- Facebook likes
- Twitter follows
- Unique visits to your blog
- People who spend less than thirty seconds on your page
- People who land only on the home page
- Views on YouTube or Flickr
- Click on "Read More" or "Tell Me More" links

Typical Examples of Midlevel Engagement Behaviors

- Bookmarking or Digging content
- Twitter retweets or use of hashtags
- Posting ratings or reviews
- People who spend more than a minute on your site or visit more than two pages per visit

- Ratio of comments to posts on your blog or Facebook page
- Ratio of ratings to views on YouTube
- Number of links or track backs
- Frequency of checking in on Foursquare

Typical Examples of High-Level Engagement Behaviors:

- Request for membership in a LinkedIn group or online community
- Subscribes to a blog, YouTube channel, or Hulu channel, for example
- Facebook shares (including e-mail)
- Twitter direct messages
- Creating their own content
- Creating their own video
- Downloads of video, documents, and podcasts
- Conversions
- Donations
- Volunteering

SIX STEPS TO BUILDING YOUR LADDER OF ENGAGEMENT

To explain how to build a ladder of engagement, we use a hypothetical example told from the point of view of Katie, the executive director of Katie's Kat Shelter, a local animal shelter. (We will be continuing this example in the chapters that follow.)

Katie's grandmother started Katie's Kat Shelter (KKS) back in the 1960s. She began by taking in strays, turned it into a business, and named it after her granddaughter. After several decades of steady growth, Katie's grandmother's health failed, and so did the fortunes of the shelter. It was up to Katie to bring the operation into the twenty-first century. The board had approved a new strategic plan, and now it was up to Katie to measure whether it was working.

To help her understand her organization and its audiences and to form a framework for measurement, Katie decided to build a ladder of engagement for KKS. The six steps that Katie used can be followed by any organization to develop its own ladder of engagement.

Step 1: Define the Goal

Katie knew that the first step in turning her ideas into practice was to be clear about the organization's goal. How would she ultimately define success? Was it organizational growth, social change, revenue, or something else? She knew that this critical decision would determine both the strategy and the structure of the engagement ladder.

Katie also knew that the demographics of the shelter's local area had changed from the 1960s; younger people had moved in, and the older population that was most familiar with KKS had either died or moved away.

Katie set as her SMART objective: Increase the percentage of members, volunteers, and supporters who are under the age of thirty-five by 5 percent by the end of the fiscal year.

Step 2: Define the Audiences

The KKS audience is anyone who cares about, has owned, and can own a pet within the KKS service area—about a fifty-mile radius. This includes anyone who has used the services in the past, including family members of people in the service area who may have moved away but still have family in the area.

KKS's target audience is personified by Veronica, a thirty-year-old volunteer who lives in the next town. She's been passionate about animals since she was a child, starting with two kittens that showed up on her doorstep when she was seven years old. So when a friend posted pictures of a kitten that he'd just adopted from KKS, she took notice. Since then she has moved steadily up the ladder of engagement to become one of KKS's most frequent volunteers, including helping raise thousands of dollars at the annual charity dinner. Katie knows that she needs lots more Veronicas.

Step 3: Define the Investment

Like most other nonprofits, KKS has no budget for a new program, so the cost of any new outreach will be the hours of staff time to implement the strategy and measure it. KKS has five people on staff, plus some volunteers who help with outreach. Key to this process will be the fundraising director Jason, and the office manager, Beth, who is the Webmaster, social media manager, and database geek.

Step 4: Define the Benchmarks

Katie asks Beth to pull together last year's fundraising and pet adoption reports. Beth also pulls her Google Analytics reports to see how many people visit the KKS Web site every week, how much time they spend on key pages, and how many pages they typically visit. These numbers will be benchmarks to measure future progress against.

Step 5: Define the Metrics That You Will Use to Judge Progress

The next step is to have a team meeting to get everyone on the same page, define specific metrics to be tracked, and flesh out the ladder of engagement. Given the importance of correctly defining success, Katie decides that she needs a broad range of opinions, so she includes Sally, the marketing and communications director, as well as Jason and Beth. For this meeting, they hang posters on the wall that describe each key performance indicator (KPI) for each rung of the ladder. Katie uses sticky notes to jot down data points that they need to collect for each rung and puts these on the posters. They put more paper on the wall with the following labels "Low-Level Engagement," "Midlevel Engagement," "High-Level Engagement," "Long-Term Engagement and Satisfaction," "Actions," and "Commitment." Then they brainstorm what each stage looks like and how to measure it based on what they know or have observed from their target audience.

They use Veronica's progress up the ladder of engagement as an example. When she moved to town, Veronica's route to work took her past a poster promoting an event to benefit KKS. She also noticed volunteers handing out flyers for the event in front of the grocery store. But although they had reached Veronica's "eyeballs" in a number of ways, the KKS team all agreed that those contacts were merely an opportunity to be seen, not actual engagement.

"So we can all agree what engagement is *not.* But what's the difference between low-, medium-, and high-level engagement?" Beth wanted to know.

Metrics to Measure Low-Level Engagement Jason explained, "Engagement begins only when Veronica takes some sort of action. It might be a simple click that indicates a desire to have further contact—for instance, liking KSS on Facebook or following @KSS on Twitter—but she has to actually *do* something. For example, when Veronica gets an e-mail from KSS that has been forwarded from a friend, if she clicks on it and then visits the Web site for more information about an event, she is clearly beginning to engage. Metrics to measure this low level of engagement would be unique visitors to the event page on the Web site or the number of likes on Facebook."

Metrics to Measure Midlevel Engagement Suppose that Veronica likes KKS's content enough to follow @KKS on Twitter and she regularly retweets their posts. Of late there has been a proliferation of particularly cute cat images on the KKS Web site and adorable new videos on YouTube, so Veronica routinely makes a point of visiting the sites, retweets the links to the videos, and occasionally forwards the images from the Web site to friends. She registers to receive an RSS feed of the blog. Essentially Veronica has now given KSS permission to send her content. She has also expressed potential interest in a longer-term relationship. Through her actions, Veronica is saying, "I like this; send me more." She is midlevel engaged.

Metrics to Measure High-Level Engagement The team at KKS was savvy enough about social media to know that at some point, no matter how good their content is, some percentage of their followers, visitors, or likes will get bored or become passive observers, and their relationship will stagnate. So in order to achieve its goals, KKS needs to measure whether its relationships with the Veronicas of the world are progressing. Beth suggests that they track the following as measures of high-level engagement:

- The percentage of visitors who subscribe to the newsletter
- The percentage of people who visit the site more than three or four times a month
- The percentage who visit more than two pages
- The percentage of people who spend more than one minute on the site

Most important, KKS needs to look at the content and activities that the organization is generating and compare them to the measures to see if there is a connection. When the meeting ended, they had agreed on metrics for the three levels of engagement.

The good news in this scenario is that Veronica hasn't gotten bored. She loves the "Feline Finder App" that she downloaded and is using it to connect her friends with new kittens. She gets positive feedback from her friends on the things she's sent along. She now is ready to move to the highest level of engagement by taking one or more of the most desired actions on behalf of KKS: donating to or volunteering for the shelter, and maybe even adopting a kitten.

Beth pulls up her data about the number of new adoptions, donors, the amount per donation, and the number of visits to the Donate Here page. She has noted the increase over time, not just the raw numbers. Using her spreadsheet, she correlates the increases in traffic to the Donate Here and Adoption pages with the activities that the communications team have been implementing. She also notes the number of people who go to the Donate Here page but then leave the site without making a donation.

Her research shows that when they changed the kitten picture on the Donate Here page from a standard tabby to a long-haired Maine coon cat, the number of people completing the adoption application increased. She makes a note to do some mini pretests on future kittens to star on the page. The discussion that follows this discovery leads to the creation of the Celebrity Cat Contest (more about that in Chapter Seven).

Measuring Satisfaction and Long-Term Engagement Veronica is now firmly settled in the highly engaged category. She recently became the mom of a pair of rescued Maine coon kittens. She is actively participating in Facebook threads, retweeting news updates from the KSS Facebook page, and sending out YouTube videos to all of her friends. And presumably she is convincing her friends to do the same.

Beth wanted to make sure that Veronica was satisfied with her relationship with KKS, so she looked at Veronica's loyalty to the cause. How often does she contribute or volunteer? On average, highly engaged members of the KKS community donate twice a year. Veronica, however, has already donated three times this year and is actively recruiting new donors, so Beth figures that's a pretty good indicator of satisfaction. Beth also tracks Twitter posts and Facebook comments to make sure that no one is expressing any dissatisfaction with KKS. She uses these metrics for long-term engagement:

- Percentage who donate more than once per year
- Percentage increase in average amount per donation
- Percentage increase in number of volunteers

Beth is also worried about donor fatigue, so she keeps a close watch on the ratio between the number of asks to the number of commits and the number of referrals from existing volunteers. She brings the data to a meeting to get answers to the following key questions:

- What are we doing/writing/posting that has convinced all those lurkers and low-level engagement folks to go to the next step?
- What is convincing them to care more about the organization or cause?
- Which posts or tweets or videos contributed to this increase in engagement?

Then they dig into the numbers to decide on goals for the coming year. What are reasonable increases to plan for? They came up with the following key performance indicators for the year ahead:

- A 30 percent increase in low-level engagement, specifically Facebook likes and first-time visits to the Web site
- A 20 percent increase in midlevel engagement, including the number of Twitter followers, the number of YouTube votes, and the ratio of comments to posts on their blog and Facebook page
- A 10 percent increase in high-level engagement, including sign-ups for the newsletter, download of application for adoptions, download of application for volunteering, number of retweets, and the use of hashtags
- A 5 percent increase in important actions: first-time donations, first-time volunteers, and adoptions
- A 5 percent increase in commitment, including multiple donations in one year, automatic renewal of memberships, and formal engagement, for instance, becoming a board or committee volunteer

Step 6: Select the Right Tool to Collect Data

Katie writes a one-page description summarizing the goals for each rung of the ladder and reviews it with staff. At the next meeting, they discuss choosing the best data collection tools, and Katie makes sure that the in-house experts who are using the tools are present. The tools they consider are Google Analytics, Facebook Insights, Twitter metrics, the spreadsheet programs Excel and Convio, and SalesForce or other membership management software. (These are discussed in detail in Chapter Eight.)

Then Katie leads a discussion with the team about how they can collect data efficiently on a regular basis. They realize that the reports will require data from a couple of different places and decide to split up the workload using a Google spreadsheet. To make sure that the staff collect data weekly, Katie declares that they're going to have "metrics every other Monday afternoon," and that Katie will bring ice cream or other treats.

CONCLUSION

Building a ladder of engagement and using measurement is a powerful combination to improve strategy and get dramatic results. Take the time to create a customized ladder based on what you know motivates your audiences. But remember that no matter what your goal or your cause, engagement is never revealed by just one metric; it will always be indicated by a range of actions. The key is to measure on a regular basis and associate shifts in engagement with the activities or content that you are posting.

REFLECTION QUESTIONS

1. **What does high-level engagement mean to you? To your boss?**
2. **How well do you understand where your stakeholders are on the ladder of engagement?**
3. **What are the specific decisions for which data would be most useful?**