The Complete Guide to Working with Tasio

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We translate your data into individualized action plans to improve business outcomes year after year.

Tasio offers AI-assisted decision-making solutions to the problems associations and nonprofits face day in and day out. Our AI techniques provide data-driven answers to help you increase membership, event attendance, donations, and other desired business outcomes.

Through predictive modeling, **we use the data you already have** to identify which members, donors, or attendees to pay attention to, and how to get them to take a preferred action to achieve a targeted organizational goal.

In other words, it's not just about forecasting what's likely to happen but also helping you CHANGE individual behaviors over time to improve a specific future outcome.

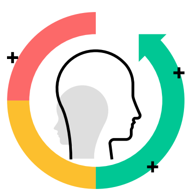
This guide explains everything you need to know about what to expect when working with us, and exactly how we unseal the secrets of your data to change behavior on a member-to-member, individual-to-individual basis.

The Value of Working with Tasio

Knowing how your members will react to a campaign is great, but knowing the types of outreach that will prompt a member to renew, make a purchase, or attend an event is your golden ticket to running more effective campaigns and reducing outreach costs and resources.

With Tasio's **predictive models**, you can gauge how members will respond to specific communications beforehand. With this insight, you can determine the next best actions to take right away to change that future outcome and make a bigger impact month after month, year after year.

What kinds of problems does Tasio solve?



Member Retention

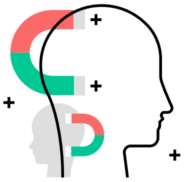
Let's say out of 10,000 members up for renewal, about 75% of them are actually planning to renew. How do you capture those 7,500 members? And how do you pinpoint which 2,500 members aren't planning to renew?

Our predictive models hone in on the renewal likelihood at the individual level—and the reasons why. Knowing which individuals are likely to renew vs. which ones are not, and the reasons for this prediction, your marketing team can be more efficient and targeted in your outreach efforts.

We help you answer questions like:

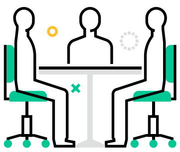
- **If I email this member, are they more likely to renew? Less likely? What kind of email?**
- **Who should I call instead?**
- **Who should I send a personalized mailer?**
- **Which specific members should I send a gift box to?**
- **Who's unlikely to renew unless they get a discount? How much of a discount?**

In other words, we tell you which outreach approach to take for specific members to increase renewals and the reasons WHY. The result? **You spend less on marketing, save time on unnecessary outreach, and achieve higher ROI.**



Member Recruitment

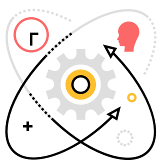
Find out who is likely to become a member in the future based on their types and level of engagement. You also get a clearer understanding of campaign-specific responses and learn over time the best way to engage specific types of individuals to convert them into members.



Event Attendance

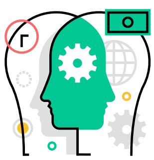
Predict future attendance on an individual basis based on past attendance or whether someone new is likely to attend for the first time. Then strategically focus your marketing efforts where they'll be the most valuable.

Our predictive models can also help you minimize attendance churn (i.e. registrants who don't attend and/or previous attendees who don't register for annual/recurring events) by pinpointing which sessions to recommend and the best automated drip campaigns to send specific individuals based on their interests.



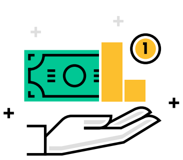
Event Management

Our predictive models can help you determine expected volume for each session, event logistics (i.e. what resources are needed at each location), staff timing (i.e. when sessions will be busy and how many people you'll need), session planning (i.e. when to schedule each session based on the topics and speaker), as well as session selection.



Event Exhibitors & Sponsors

Predict exhibitor and sponsor churn and determine individualized outreach strategies to prompt recurring participation.

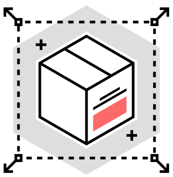


Donations & Fundraising

Increase recurring donations by gauging likelihood and determining the best outreach methods and follow-up sequence for individual donors: email, phone call, SMS, glossy mailer, etc.

Certifications

Increase engagement in your credentialing programs and continuing education/ professional development courses. Get a better understanding of the factors or variables that contribute to the likelihood of participation for individual members.



Purchase Recommendations

For each of your members, figure out which products, events, or courses they're most likely to buy as well as how and when to engage them to prompt a conversion.

How does Tasio work? What do we get?

There are three main areas we focus on:

1 Likelihood Score

We use your data to predict the likelihood each member will not take some desired action (e.g. renew, attend an event, donate, etc.) and how likely you are to change that by acting now. This predictive calculation helps you hone your efforts and avoid wasting marketing resources on the wrong targets.

Here are some types of behavioral factors that we look at individually based on the intended business outcome we're interested in. We then combine relevant factors to calculate individual prediction scores.

- **When was the last time they logged in? How often do they log in?**
- **Have they purchased anything? How many times? When was their last purchase?**
- **How much did they spend in the last year and a half?**
- **How many events did they attend? How many sessions?**
- **How long have they been a member? What is their level of membership?**
- **Have they donated? When was the last time they donated? How much? How often?**
- **Have they been in a committee? Position? Role? Length of time?**
- **Do they subscribe to the newsletter? Other publications?**

2 Key Indicators

Beyond providing predictions of behavior individually, we also tell you what was important in determining that prediction (i.e. the reasons for that likelihood score). We look at the historical patterns of behavior in your association's data that are predictive of a future outcome. Then, we give you a breakdown of those factors or behaviors to pay attention to, along with how much each of those indicators contributes to the likelihood score.

At each individual level, we may say this person has a 90% chance of renewing their membership based on these specific engagement behaviors over the past year. Whereas this other person has a 5% chance of renewing and here are the specific red flags or reasons why our model predicts that score.

3 Individualized Outreach Strategy

Once we have the likelihood score and key indicators, we map those individual patterns of behavior to a set of AI-derived outreach strategies, and then gauge the impact of these personalized strategies in terms of how likely they are to change the prediction for each low-scoring member or individual.

Then we work with your marketing team to sub-segment your members over time as we find out which sequential outreach actions work and which don't for specific types of individuals.

In essence, we pair strategies to members, allowing you to focus limited resources where they're the most effective.

The first time around, outreach efforts are mainly directed towards a small batch of individuals and are based on your institutional knowledge. But as we collect more data, we're able to progressively tailor those order of actions to each individual, while still exploring different sequences of steps to steer each low-scoring member back towards the preferred path.

Over time, our models are able to better determine which next best steps are effective for whom. After a year or so, we'll be able to fine tune an outreach playbook that details a targeted action plan to improve a specific business outcome.

What's the impact?

- **Higher returns on outreach campaigns.**
- **Reduced marketing costs and resources.**
- **Understanding of campaign impact & ROI ahead of time.**
- **Continual optimization of member-specific outreach roadmaps.**

Let's consider how this would help with member retention, in particular.

You have members who, no matter what you do, are just not going to renew. Naturally, you don't want to spend the time and resources calling them or sending them an expensive gift box, right?

Then there are other members who may only renew if you gave them a 20% discount over the next year on any purchase. Of course, you don't want to give everyone this discount as there are members who would have renewed regardless.

Still yet, you may have other members who could be swayed with a simple thank you card and follow-up phone call or vice versa.

Imagine if you knew which series of outreach works best for subsets of members beforehand? Not only would you be sending out fewer gift boxes and thank you cards or making less phone calls and discount offers, but your outreach methods would also be more effective.

This is exactly what we work with you over time to accomplish at Tasio.

We work together to understand how specific individuals or members in your organization respond to different engagements so you can take the appropriate sequences of actions now to change their behavior and future business performance.

How much does Tasio cost?

Tasio costs $1,500 a month baseline, paid annually, if we're analyzing data from one data source such as your AMS.

If you want to combine multiple databases, we add a discounted monthly fee per an agreed upon annual contract. This discounted price for each additional data source may be a couple hundred dollars per month depending on the database in question.

When we first begin working together, we charge two months upfront. In other words, there is a $3,000 baseline startup fee. Then after those initial two months, you'd pay a baseline of $1,500 a month on an annual basis.

What makes Tasio different?

There's a common misconception that Tasio is a visualization tool, but what we provide is much different from the standard visualization tools in the association industry today.

Visualizations, dashboards, and other data presentations are valuable tools for anybody running a business. Such tools organize your data, and allow you to drill down and interact with the data.

These tools may show you what percentage of your members live in California or have a certain level of membership. Or they may show you what your membership numbers have looked like over the last year.

While these visualization tools look at data as a whole and big-picture trends, we're more focused on data at the individual level and the actions you can take now to change individual behavior.

Visualization isn't the main basis of what we do at Tasio. Instead of just organizing your data and letting you figure out what it all means, we tell you what your data says. We list the actions that'll be the most effective in delivering an outcome for specific individuals. It's a bit like aggregate visualization combined with next best steps.

There are companies in the for-profit and software-as-a-service (SaaS) space that provide similar human centered, machine learning services; but we're unique in that we have the association and non-profit expertise.

How does the Tasio deliverable relate to member engagement scoring?

Oftentimes, associations designate a member engagement score based on intuition because it can mean different things to people across the organization.

For example, membership people may prioritize membership renewals, whereas marketers may look at newsletter subscriptions when calculating member engagement scores. Event people, on the other hand, may focus on event attendance and the number of sessions attended.

In other words, member engagement scoring has traditionally been subjective. Instead of debating the activities and behaviors that should be considered and the number of points to designate for each, we let the data tell us what's happening and what's important.

For us, member engagement scoring is data-driven and linked to a specific outcome. **We focus on how engaged a member is in accomplishing a specific business goal and the behaviors that lead to that outcome.** You can think of it as member engagement scoring on steroids because it's more personalized and goal-oriented.

We're running the necessary models to see how to best move the unengaged to becoming more engaged in your organization, and the engaged to becoming the promoters and lifelong loyalists.

Tasio's Process

What exactly do we get and what is the process for getting it?

There is a six-step process that we cycle through to create and optimize a predictive model for your organization's business goals. This 6-step process occurs on a monthly cadence and is tailored to the needs of your organization. Step one, the business understanding meeting, of course doesn't have to be recurring.

The beauty of the process though is that as we gather more data, the model improves over time and we can find out which targeted outreach strategy works best for each individual member.

1

Business Understanding Meeting

We start off with a business understanding meeting. The goal of this initial kickoff or discovery meeting is to understand your business, the problems you're looking to solve, and the primary objectives of your organization.

During this meeting, we interface with the primary Subject Matter Expert (SME) for the target business vertical, whether its membership, events, marketing, or fundraising. We'll discuss your current process and value propositions to get a deep understanding of the human and structural aspects of your organization.

2

Meeting with Data Person

We'll then talk with the primary data person or "data steward" behind the target vertical and/or organization as a whole to get on the same page. This is usually the person who has access to the appropriate database so we can export the necessary data in an appropriate format.

During this meeting, we'll walk step-by-step through your AMS or the data system(s) from which we'll need information, and let them know exactly which data fields we'll need on each page or screen. We'll document the process as well.

Often, your data person can just click to export each data field to a simple Excel file. Other times, your data/system administrator may need to write some SQL script to export the data for us, which we can help with as well.

In either case, we'll make sure they know the exact data assets we'll need and work with them to get that information in the easiest way possible.

3

Taking in the Data

Next, we'll build our predictive models on top of your data.

In particular, we'll review the exported data, collate it, and develop an AI-driven predictive model. Our models are specifically designed to show the actions, attitudes, and habits of your members, attendees, and/or donors.

We'll then organize your membership (or target audience base) into cohorts of behavior, helping to pinpoint key indicators of behavior. We'll go even further to create individual profiles for your members.

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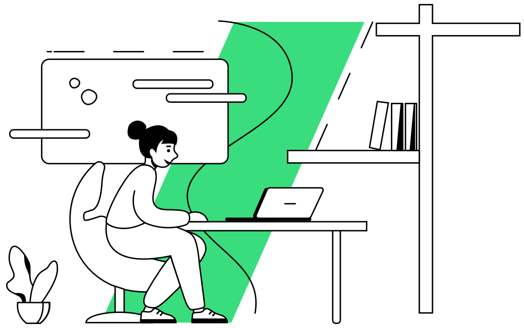

Validating the Models

The fourth step of the cyclical process is validation. We use different techniques to validate that our predictive model actually works.

5

Making Predictions on Future Data

All the data that we've worked with up to this point has been historical.

Once we validate our model, we'll then run it on top of data from your next membership cycle or event that's coming up. We'll use our model to predict who's likely to renew, attend the event, donate, get certified, or whatever target action we're forecasting.

6

Developing Targeted Strategies

The last part of the cyclical process is working with the appropriate team within your organization to develop targeted strategies to increase member retention, attendance, or the goal in question.

Timeline of typical engagement?

After the initial Business Understanding Meeting, it takes approximately two to four weeks to take in your data and validate a working model. The exact time frame depends on how quickly your data person can send the initial data exports to us or whether we can just connect to the necessary data through an API.

Then, we'll simply need to obtain new data on a monthly cadence, or whatever frequency makes sense for your business model, to monitor and optimize the predictive model.

That way, we can run the model again based on the latest data and your members' responses to the previous month's outreach strategies, and then present the new results and next best actions to your team.

What kind of data and how much do we need to provide?

The more data you provide, the better insights and the more targeted and actionable strategies we'd be able to generate. Ultimately, the type of data we'd be interested in would depend on the business problem we're looking to solve and the desired outcome.

If we're focused on member retention, for example, at the very least we'd want a list of all Member IDs without any personally identifiable information, how long they've been members, as well as their purchase history including dates and amounts.

If you have at least a thousand members in your database and at least five years of transactional history, then that's enough for us to get started calculating meaningful retention likelihood scores, key indicators, and outreach strategies.

It'd also be helpful if you have a history of their chapter enrollment, committee engagement, any publications they've purchased, and event attendance; though the bare minimum is the list of members, membership renewal history, and financial transactions.

For event attendance, we'd request a history of previous registrants and attendees, as well as their financial transactions.

What data details can we share and how safe is the data?

Firstly, keep in mind that we never own your data. Secondly, if the data isn't useful for what we're trying to accomplish, then it's not necessary.

Thirdly, and most importantly, we do not want any personally identifiable information (PII). For example, we **wouldn't** want the following information:

- Email addresses
- First name and last name
- Address line one (street address)
- Phone number

However, data fields like Member ID are fine to share because there's no way to identify someone from it.

Once you share the data with us, it's safe because there shouldn't be any identifiable information. Of course, there's always some risk, especially when you're transferring data back and forth. That's why we prefer data to be free of PII that could put someone at risk.

We host the data you give us in Azure, meaning it has limited access and all the standard security measures of Microsoft Cloud. Plus, even if the data was stolen, there's not much anyone could do with it as there shouldn't be any PII details.

How do we get the data to you?

Essentially, all we need is an export of the data in a simple Excel or CSV file. This data export should include all the contacts in your AMS or whatever data source(s) that we're working with, without any personally identifiable information.

Typically, this export of data includes multiple files, possibly six to ten, more or less. Then, on our end, we'll merge the information together in a way that makes sense.

You can send that file through email, Google Drive, or an FTP site. Or, if your system has APIs that we could connect through to get the data, that could work as well, but it's not a requirement.

Buyer/Seller Relationship

Who needs to be involved from the association?

A relatively small team is involved in the process. This primarily consists of the people who know the current process and can implement the recommendations plus a data person, system administrator, or whoever can export and send the data to us.

To keep communications streamlined, there should be a designated primary point of contact depending on the problem that we're trying to solve.

If we're focused on member retention, for example, the main go-to may be the membership director as they are the SME and the one who would be using the recommendations. The other team members would be the people who are actually doing the day-to-day outreach for retention or whatever the specific focus.

How much time is needed from staff? What effort is required from us?

The goal is to minimize the time and effort as much as possible.

The initial Business Understanding Meeting takes about an hour to an hour and a half.

The requirement for the person exporting the data is about half a day or less the first time around. After that, it should take about 30 minutes to an hour on a monthly basis. If your data person is spending more than three to four hours pulling the data the first time, then we'd want to work with them to simplify the process. We don't want to over-complicate anything.

After we take in the data and work out the model, we then need to explain our analysis and recommendations to the applicable group of people who would be implementing the findings and the outreach playbook. This typically takes about an hour on a monthly basis.

Beyond that, your team would need to actually implement the recommendations we provide. The amount of time depends on what those recommendations are and what's required to roll them out. The quality of future recommendations depends on each batch of recommendations being used and not becoming shelfware. That way, we can improve those recommendations as we get more data each month.

Again, the six-step process gets repeated on a monthly basis, but the time requirement should get less and less as we fine tune the system together.

What references and examples can you provide?

We are happy to provide references and examples of our various client projects upon request.