



Summary of discussions and recommendations for  
**Constituent-centered e-communications**  
October 2019

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**Statement of Purpose**

The group agreed that common definitions and understandings of the concept of “constituent-centered communications” will advance the program and communications practices at the institution.

**The Philosophy of Constituent-Centered Communications**

- Our constituents own their relationship with us.
- We create the kind of communications that we would like to receive.
- We listen to our constituents, and we act on what they’re telling us actively (or through data analysis).
- Our communications should be building a relationship with our audiences.
- We aim to quiet “the noise” of the experience.
- We don’t believe email is the only communications channel.
- We always ask, “Why?”
- We recognize we will need to consistently adapt and act on the feedback we are receiving from our audiences.

**The Guidelines of Constituent-Centered Communications**

- We take into account the varied communications a constituent receives.
- We take into account a constituent’s varied relationships with the institution.
- We provide integrated, automated and self-service experiences.
- We agree on Key Performance Indicators (KPIs) for successful relationship building.
- We consistently strive to move communications into centralized channels so they are trackable and easily accessible to our constituents.
- We recognize that digital communications tools are always changing.
- We share and maintain a common set of constituent data.

**An Examination of KPIs for Constituent-Centered Communications**

- Measure through passive feedback (are we seeing people taking the actions we want them to take with our communications?).
- Send surveys for constituent feedback.
- Start to use tools like Net Promoter Score.
- Investigate how we marry passive feedback with survey results.
- Place feedback surveys on 404 pages, unsubscribe pages.



### How Might We Build an Engagement “Propensity Score”?

- Opens
- Clicks
- Actions on items presented to them (registered, donated, attended, surveys, subscribes)
- Event attendance, clicks on to links to more content, opt-ins to other communications
- Social feedback, direct feedback (tying it to a constituent record)
- Anticipated behaviors: a constituent who behaves the way we expect
- Acting on when to *remove* people from communications journeys
- Note: In-person connections and opportunities should be heavily weighted.

### What Common Data Set Do We Need to Build Constituent-Centered Communications?

Including, but not limited to:

- What communications they receive (types, how many)
- Opens, clicks, forwards
- Opt-ins, opt-outs
- Interests (varied) – “If you liked that, you might like this...”
- Affiliations (varied)
- Day and time of sends (to help answer what’s getting more engagement)
- What devices are they using?
- Where are they going *next*?

### What Does it Take to Implement Constituent-Centered Communications?

- A program champion—and agreement on our philosophy toward our constituents (unit, campus and system-level)
- Recognition that this is:
  - not simple
  - requires a fundamental shift in perspective
  - will require investment
- A culture where the constituent is at the core of the experience:
  - Commitment to these philosophies and guidelines from our leadership (unit, campus and system-level)
  - Shared training and understanding of the tools and processes
  - Aggregation of tools (including ecomm, CRM, web, social, incoming channels)
  - Professionalization of communications/communicators
  - Technical expertise
- Alignment of university-wide data environments to share data sets
- Governance model for coordination at unit, campus and system level
- Financial support (budget for tools and personnel)
- Structured content strategies (unit, campus and system level) to drive personalized experiences