

# Using data to understand your membership base

Foundation audit for membership organisations



## What is a foundation audit?

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A wealth of information about members is often locked away in CRM systems. A foundation audit by Wood for Trees drills into the data held by membership organisations to give a full picture view of your base and deliver actionable insight.

We seek to uncover the demographics and activities that underpin your members. What do your members look like and how do they interact with you?

Understanding who your members are and what they do will help you engage with them better, deliver on their requirements and, ultimately, drive more value from your organisation.

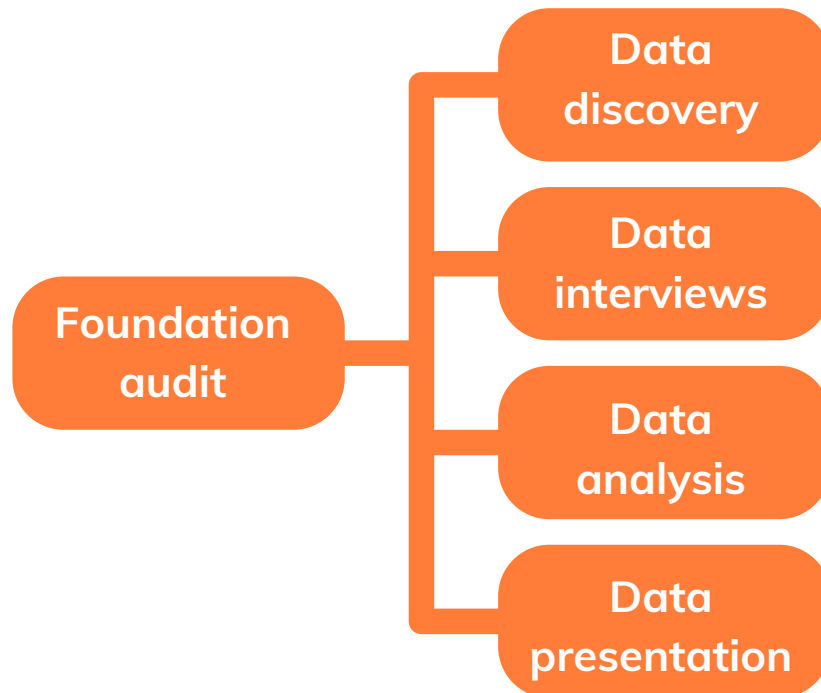
A Wood for Trees foundation audit aims to answer common questions, such as:

- How many members do you have and how does this change over time?
- How do your members engage with you?
- What do your members look like and does this vary with levels of engagement?
- How much and how often do members engage with your services?
- Who are your most and least engaged members?

Being equipped with optimised member data at your fingertips allows you to make more informed, strategic decisions, whilst discovering new opportunities.

## Foundation audit process

The foundation audit combines four key elements designed to unlock the value in your data, align to your organisational objectives and deliver clear and actionable insight in an easy to digest manner.



### 1. Data discovery

We gain an understanding of what data and systems exist and what they're used for.

### 2. Data interviews

Interviews take place between Wood for Trees staff and the wider organisation to discover data capabilities and stakeholder objectives.

### 3. Data analysis

Our expert analysts consolidate and optimise the data using advanced software and systems to provide insight and knowledge about your members and their behaviours.

### 4. Data presentation

We produce a comprehensive foundation audit report and present our findings and recommendations using data visualisation to your team.

## Next steps

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The foundation audit is just the beginning of your data journey and it's important you continue to use, and build on, the insights. Our recommendations will provide a roadmap of next steps and we'll work with you to deliver the outcomes.

Following a foundation audit, we often support membership teams in two key areas: reporting and contact optimisation.

### Reporting

We can help make the information we uncover more readily available to all users. We've vast experience in developing reports that can sit at the top of your CRM system to deliver key trends and KPIs. We also have our own reporting tool, InsightHub, which allows us to make these reports available through a simple web log in and interface.

### Contact optimisation

We can help segment and prioritise the targeting of your communications so that they're sent to the most relevant audiences across your membership. This includes building segmentations and simple rules based on selection criteria through to data modelling and utilising next best action tools.

# Get in touch

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## Email

getinfo@woodfortrees.net

## Call

+44 (0)1225 636 017

## Visit

woodfortrees.net



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for **trees**