

BEYOND VANITY METRICS

Toward better measurement of member engagement

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ABOUT MOBILISATION LAB



MOBILISATION LAB.ORG

We exist to transform how campaigns are fought and won, pioneering a powerful new era of “people-powered” strategies that amplify campaign impact and create positive change.

The Mobilisation Lab at Greenpeace provides the global organization and its allies a dynamic, forward-looking space to envision, test, and roll out creative new means of inspiring larger networks of leaders and people around the world to break through and win on threats to people and the planet.

ABOUT CITIZEN ENGAGEMENT LAB



We exist to provide a home for those taking daring attempts to close the gap between the existing world and the more equitable and sustainable one we all need.

CEL supports over thirty leading social change startups across a broad range of issue areas that reach millions of people across the U.S. As a learning laboratory and network hub, we also catalyze collaborative insights and shared strategies that help accelerate the pace of change.

AUTHOR AND ADVISORS

Colin Holtz, author, is a progressive writer and strategist who most recently served as National Campaigns Director at Rebuild the Dream. He has worked with CREDO Action, Dream Corps, Faithful America, MoveOn.org, and SumOfUs.org. Colin previously served as a Senior Strategist at M+R Strategic Services, Senior Email Campaigner for Advocacy and Elections at Organizing for America, and Internet Director for Joe Sestak's 2006 congressional campaign. (Twitter: @cdholtz)

Michael Silberman, advisor, leads the Mobilisation Lab at Greenpeace, a global team dedicated to pioneering a powerful new era of people-powered strategies that amplify campaign impact and create positive change. (Twitter: @silbatron)

Jackie Mahendra, advisor, is a digital strategy and storytelling expert who serves as Director of Strategic Collaboration at Citizen Engagement Lab, where she brings online campaigning leaders together to forge shared insights and make a greater impact than they could alone. (Twitter: @jaxsun)

WHAT ARE VANITY METRICS?

- **Vanity metrics:** data that are easily manipulated, are biased toward the short-term, often paint a rosy picture of program success, or do not help campaigners make wise strategic decisions.
- **Common vanity metrics:**
 - List size
 - Number of petition signatures
 - Open rates
 - Website traffic
 - As we will uncover, “vanity metrics” look different in different contexts

WHAT IS THIS REPORT?

- This report was sparked by practitioner concerns that common metrics used by online campaigning organizations, especially in fundraising and external reports, fail to accurately measure engagement.
- That's especially troubling for organizations whose core strategy for advancing their mission is to engage large numbers of their members at a high level over time.
- The question became: **Are there better ways to measure how engaged members are with your organization?**

METHODOLOGY

- First, we collected responses to a five-question online survey distributed to the international progressive campaigning community.
- Next, we held a session at RootsCamp in Washington, D.C., USA in November 2014, to share survey responses and hear from the over 100 people in attendance.
- Then, we dove deeper with 19 in-depth interviews:
 - 6 interviews with 5 campaigning organizations
 - 6 interviews with 5 consultancies or incubators
 - 2 interviews with staff at prominent eCRMs
 - 5 individual practitioners

METHODOLOGY

- Our findings are based on the consolidated opinions of individuals.
- In some cases those findings are based on data and test results, but more work would be required to assemble hard evidence of every assertion.
- Due to time and schedule constraints, we were unable to talk to everyone we wanted to – consider this a conversation starter, not the final word!

THE BASICS

How commonly used are vanity metrics? What are the pitfalls?

OUR KEY QUESTIONS

We started out by asking online campaigners the following questions:

- What are your key metrics?
- What are the upsides and downsides of those metrics?
- How would you measure engagement in a perfect world?
- What are the barriers to doing that?

WHAT WE EXPECTED

- We expected to find a fairly widespread understanding of the flaws of vanity metrics, and to unearth a few new, innovative metrics used by the leading online campaigning organizations to measure member engagement.
- Our hope was to elevate these solutions and share them with others who recognized the problem, but lacked potential solutions.

WHAT WE FOUND

- Instead, we found cases where an uncritical use of vanity metrics led to flawed decision-making and lost opportunities — and cases where people were critical of vanity metrics but had not adopted alternatives.
- The old maxim proved true: “You care about what you measure” — and many groups were measuring vanity metrics, instead of metrics directly tied to their mission.

WHAT WE FOUND

- We also encountered far more **confusion** than **concrete** new ideas, even amongst groups with data expertise.
- Leading practitioners all recognized the **problem**, but most were only scratching the surface of possible **solutions**.

FIVE PITFALLS OF VANITY METRICS

1

Flawed understanding, leading to poor decisions:

- *“We assumed that more growth would lead to an equivalent increase in fundraising”*
- *“It turns out that the issues our members care about most are always just the issues that the media is covering the most.”*
- *“They poured tons of money into growing their list, but the members they recruited never did anything else.”*

FIVE PITFALLS OF VANITY METRICS

2

Shortsighted decision-making:

- *“We found that the performance of a fundraiser after one hour had nearly zero predictive power.”*
- *“They test for which appeal will raise the most money right now, and never factor in whether it makes people less likely to give or engage in the future.”*
- *“Right now, our metrics bias us towards recruiting the most new members, not the right new members.”*

FIVE PITFALLS OF VANITY METRICS

3

Bad staff incentives:

- *“If someone’s budget or salary depends on hitting numbers, they will hit the numbers – whether it is strategic or not.”*
- *“You can increase ‘actions taken’ just by sending lots and lots of petitions with little substance.”*
- *“Your members don’t really respond to an email test, but your staff send it anyway to hit a goal. That’s not smart long-term.”*
- *“They knew they were acquiring worthless email addresses, not recruiting quality members, but leadership was demanding growth so they did it anyway.”*

FIVE PITFALLS OF VANITY METRICS

4

Failure to engage members, leading to unsubscribes and people tuning out:

- *“I think if people feel like they are being treated like a cash register, or asked to sign things that don’t make a difference, that could make them tune out – or grow disillusioned with all social change organizations.”*
- *“People engage in all sorts of tactics that hit short-term goals at the cost of long-term engagement.”*

FIVE PITFALLS OF VANITY METRICS

5

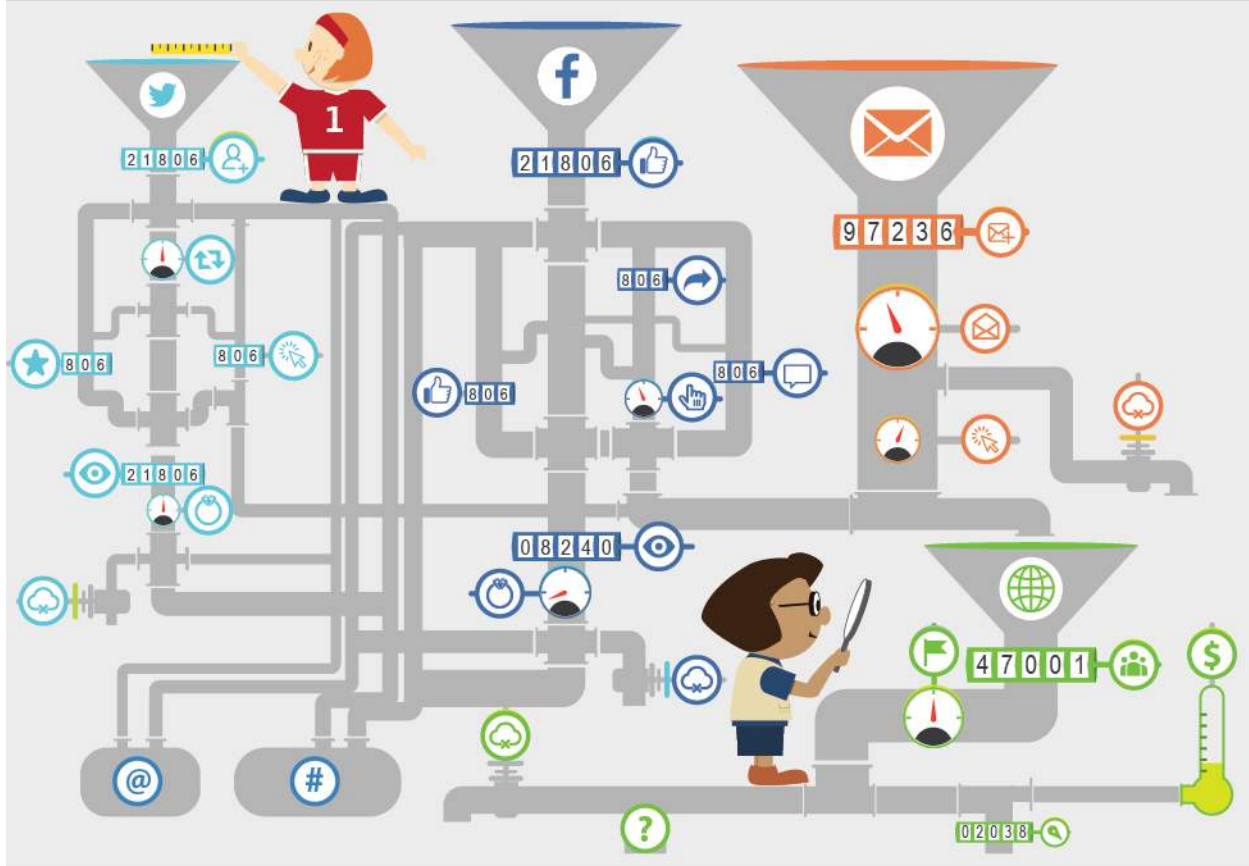
Organizations that don't live up to potential:

- *“If our impact was as rosy as our metrics, we would be winning a lot more fights.”*
- *“We hit our goals! We lost... but we hit our goals!”*
- *“We raise money and engage members to create change. If we are raising money and engaging members but not creating change, there is something wrong.”*

THE FIVE PITFALLS OF VANITY METRICS

1. Flawed understanding, leading to poor decisions.
2. Short-sighted decision-making.
3. Bad staff incentives.
4. Failure to engage members, leading to unsubscribes and people tuning out.
5. Organizations that don't live up to potential.

What are your metrics really measuring?



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WHY VANITY METRICS ARE EVERYWHERE

With all those pitfalls, why are vanity metrics everywhere? Respondents had no single reason, but responses included:

- 1. Lack of awareness.** Too few are aware of the pitfalls.
- 2. Practitioner know-how.** You know the problem, but what's the alternative?
- 3. Technology.** Commonly used and affordable technology makes it easy to track vanity metrics, but harder to collect, aggregate, and evaluate other metrics.
- 4. Simplicity.** Vanity metrics are simple and easy to understand and track.
- 5. Pressure from higher up.** Funders and senior leadership often demand vanity “topline” metrics.

WHY VANITY METRICS ARE EVERYWHERE

Why every group relies on vanity metrics:

- We expected the biggest problems to be technology, time, and buy-in from leadership.
- In contrast, the majority of respondents cited lack of awareness of the problem and lack of practitioner know-how as key barriers for themselves, and others.
- In other words: Yes, we need better technology, more capacity, and funders and leaders open to new metrics – but these alone are not going to solve the problem.

WHAT WE FOUND

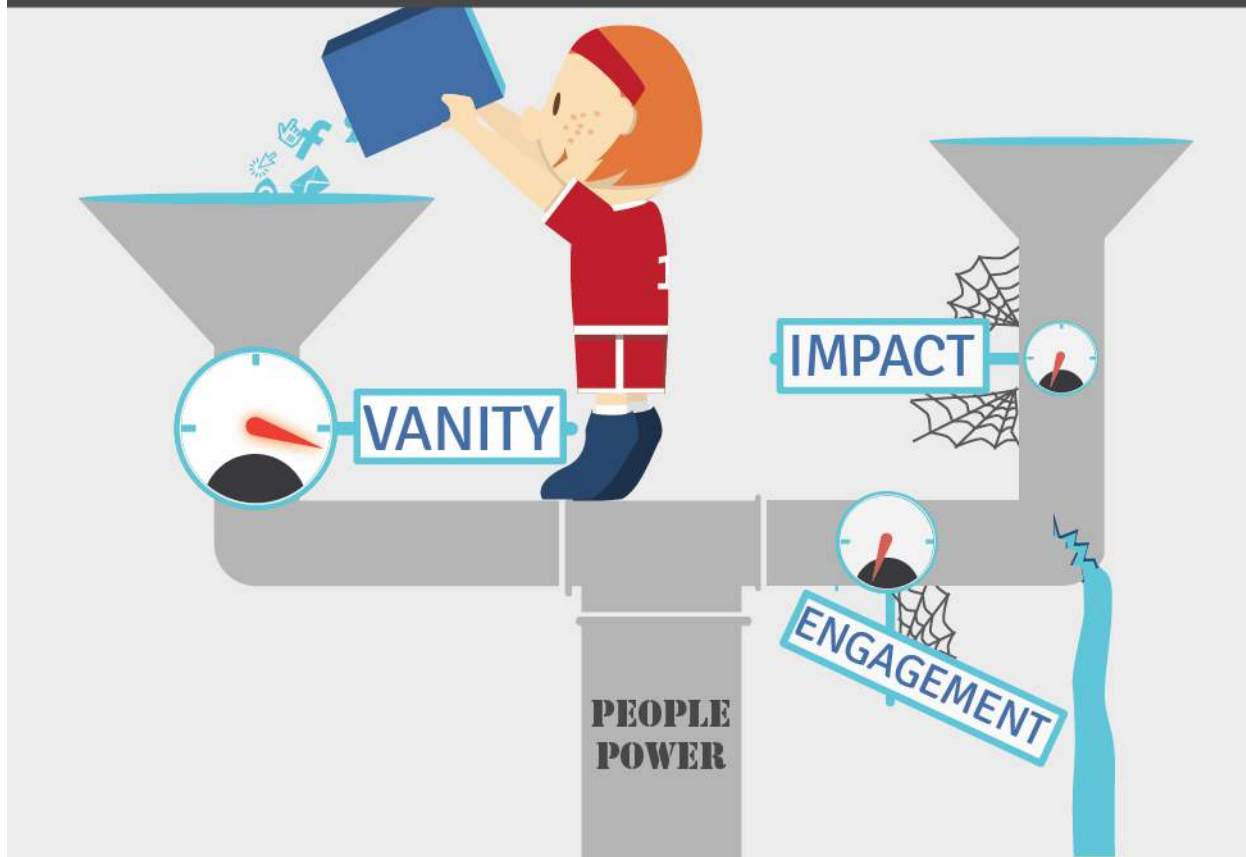
- Finding new solutions is critical:
 - Respondents believe that leveraging people power is the best way to achieve their mission and change the world, and so poor metrics of member engagement undermine their work.
- There is no such thing as a “perfect metric”:
 - No single metric will be ideal for all groups.
 - But we did unearth some potential starting points for groups seeking to improve.
- All metrics incentivize certain behavior – you have to pay attention to what it is!

THE TWO MOST IMPORTANT QUESTIONS

Which tactics do your
CURRENT METRICS
INCENTIVIZE?

Which tactics
WOULD YOU LIKE
TO INCENTIVIZE?

Which tactics do your current metrics incentivize?



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DIGGING DEEPER

The Starters and the Seekers

THE STARTERS AND THE SEEKERS

No one is completely free of vanity metrics. But the organizations we surveyed fall into one of two groups:

- **THE STARTERS** are organizations that are too reliant on vanity metrics, and are just starting to understand the pitfalls.
- **THE SEEKERS** are organizations that understand the pitfalls, and are seeking new alternatives.

WHAT BOTH GROUPS HAVE IN COMMON

Both groups rely on vanity metrics to some extent:

- Even the most cutting-edge organizations still look at vanity metrics.
- This is especially true if you narrow in on key decision points, like: “Should this email go to the full list?” or “Which petition language do members like?”
- If organizations use other metrics to gauge their success on a monthly or quarterly basis, day-to-day decisions still tend to be based on vanity metrics and campaigner instinct.

WHAT SETS THEM APART

THE STARTERS

- Heavy use of vanity metrics
- Metrics used to hold staff accountable, if used at all
- Culture of celebrating vanity metrics, not understanding pitfalls
- If aware of problem, seeking to lessen reliance on vanity metrics

THE SEEKERS

- Use both vanity and more meaningful metrics
- Metrics used for decision-making AND staff accountability
- Culture of evaluating and discussing strengths and weaknesses of metrics
- Seeking new methods of more accurately measuring member engagement on a regular basis



METRICS

THE STARTERS

- Over-reliant on vanity metrics such as:
 - List size
 - Total actions
 - Number of petition signatures
- Are more limited by technology or staff capacity

THE SEEKERS

- Use both vanity and alternative metrics
- Tend to track and report on vanity metrics publicly, but not give them much weight internally – except in day-to-day decisionmaking
- Experiment with alternatives (See “Key Learnings”)
- Have developers or data scientists on staff to reduce tech or capacity barriers



USE

THE STARTERS

- Often fail to use metrics to guide decision-making
- Metrics are usually used as a staff accountability device
- Incentive is for staff to hit metrics, regardless of real-world outcome:
 - Grow list by adding people who don't care about issue
 - Raise money at cost to organization's brand

THE SEEKERS

- Almost always track, consider, and use metrics to make decisions
- Metrics used for staff accountability, with leadership mindful of what is being incentivized
- Metrics also, and more importantly, used to help staff make better decisions:
 - Do people care about this issue?
 - Are we raising money but causing people to tune out or unsubscribe en masse?

CULTURE

THE STARTERS

- Rarely have organizational culture that pays attention to metrics
- Limited awareness of pitfalls
- Celebrate vanity metric milestones, like hitting a certain list size
- Metrics siloed between departments, or leadership and practitioners
- The potential effects of using different metrics rarely discussed

THE SEEKERS

- Regularly evaluate and discuss metrics
- Understand what vanity metrics do and don't tell us
- Tout vanity metrics externally, but internally view with caution
- Range of staff at all levels regularly sees the same metrics
- Constantly discuss how metrics could incentivize different behaviors

On the road to engagement, are you a starter or a seeker?



STARTERS

- Heavy use of vanity metrics
- Metrics used to hold staff accountable
- Culture of celebrating vanity metrics



SEEKERS

- Use both vanity and more meaningful metrics
- Metrics used for decisions AND staff accountability
- Culture of evaluating and discussing metrics

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THE STARTERS AND THE SEEKERS

THE STARTERS are too reliant on vanity metrics, and are just starting to understand the pitfalls

THE SEEKERS understand the pitfalls, and are seeking new alternatives.

Which one best describes **YOU?**

KEY LEARNINGS

What are the key lessons? What would we like to measure?

THREE KEY LESSONS

1

There is no “perfect metric”:

- Every single metric has flaws or biases your thinking in some way:
 - Dollars raised is very hard to artificially inflate. But it doesn't tell you whether those dollars are coming from big first-time donors or small repeat donors.
 - Actions/recipients is considered better than opens/recipient. But it doesn't tell you whether people are excited about the action, the issue, or your organization.

THREE KEY LESSONS

2

Your mission should define your metrics:

- The best metric comes from a deep, shared understanding of the organization’s theory of change.
- If a large number of petition signatures almost always guarantees a win for you, then use it as a key metric. But respondents thought this was rarely true.
- Identify your specific sources of power, and use metrics that incentivize your team to grow these.
 - Depend on a cadre of volunteer lawyers? Track “new lawyers recruited,” not “total petition signatures.”

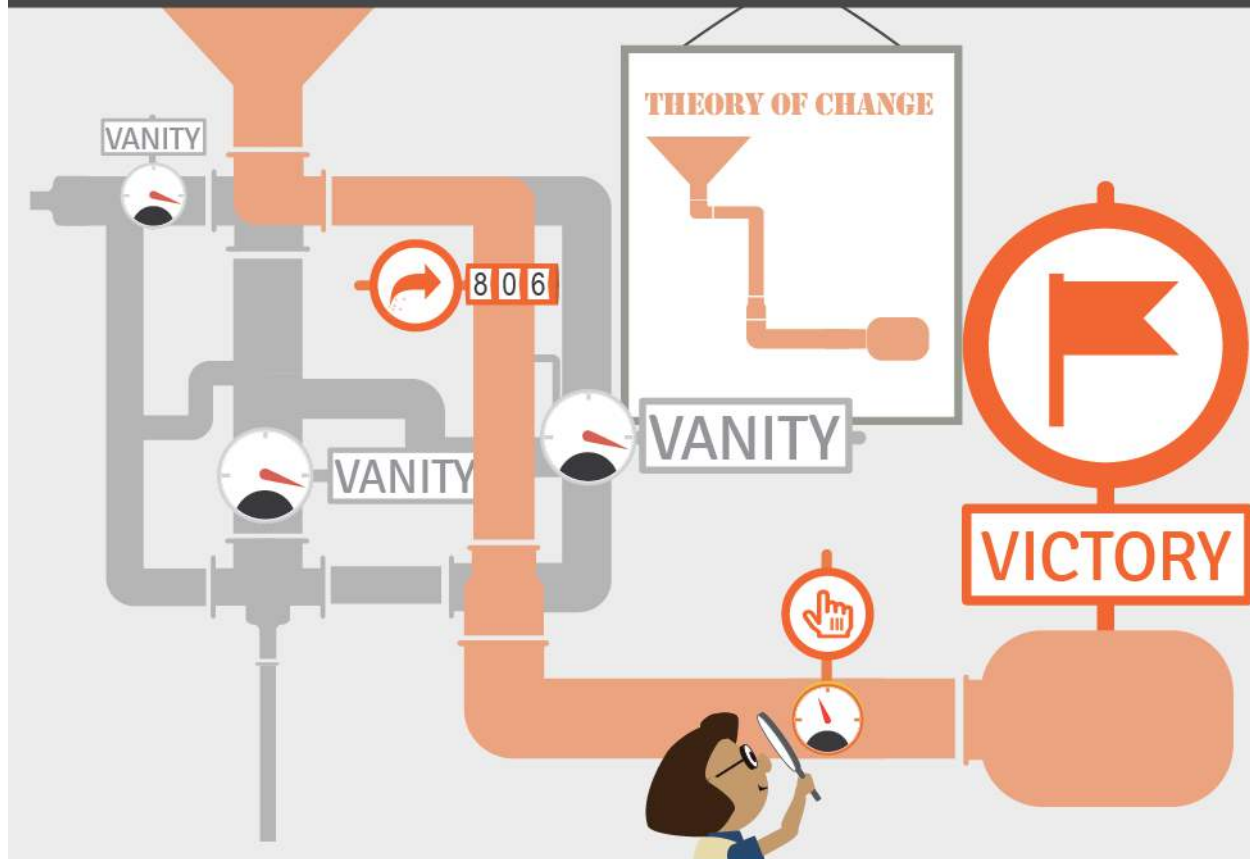
THREE KEY LESSONS

3

Get the sequencing right:

- First: Your organization’s mission.
- Second: What it will take to achieve that mission.
- Third: Metrics for measuring progress.
- Fourth, if necessary: Identify and track “leading indicators”(see below).
- Fifth: Regularly assess your metrics, and don’t be afraid to change them.

Do your metrics reflect your mission?



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WHERE TO GO NEXT

Respondents highlighted four specific areas where there is opportunity – especially for Seeker groups – to make the most progress:

1. Engagement / member lifecycle
2. Multi-channel connection
3. Leading indicators
4. Impact

1. ENGAGEMENT

- Respondents argue that current metrics paint an incomplete picture of how engaged members are with an organization, forcing organizations to simply expand the “wide end of the funnel” – recruiting more people, in the hopes that some become core activists.
- Instead, they want to understand the reality of:
 - How members get more engaged
 - What they care about
 - How they progress along a ladder of engagement
 - How to optimize these interactions

2. MULTI-CHANNEL CONNECTION

Respondents noted that while email remains the gold standard for activating members, social media offer more diverse audiences and a wealth of data about how members connect with the org and what they care about ...

... leading most groups to hope for technological solutions to more easily aggregate data from multiple channels into one member portrait, and use that to make decisions based on issue interest and organizational “brand affinity” as well as email response.

3. LEADING INDICATORS

- Seekers noted that we often want to optimize for actions that a) relatively few members will engage in, or b) trends that can be hard to measure on a per-email basis, such as:
 - Donations
 - Phone calls to targets
 - Monthly members returning for action
- Organizations are devoting data analyst time to uncovering “leading indicators,” or behavior which accurately predicts future actions:

“We are looking to create a model that combines data from the first hour of a test fundraising appeal – clicks, opens, and most importantly what types of members are responding – to predict its long-term performance.”

4. IMPACT

- Respondents frequently noted that “engagement” does not equal “impact” – engaging a member is only valuable if that engagement tactic helps advance an organization’s mission – but this question of impact was beyond the scope of this report.
- It is worth considering future studies to examine two related challenges:
 - How organizations can measure and quantify the real-world impact of various tactics, so that organizations can better understand which forms of engagement produce results.
 - Examining which metrics funders require of organizations in an attempt to document impact, and thereby creating incentives for organizations to track those metrics.

STARTING POINTS

What are some alternatives to get us started?

POSSIBLE STARTING POINTS

- As noted previously, there is no perfect metric.
- But here are four places where some respondents have started out in their quest to take metrics to the next level:
 - More frequent use of rates;
 - Cohort analysis;
 - Integrated engagement scores, and;
 - Mission-centered metrics.

1. RATES TRUMP AGGREGATES

The Seekers groups tend to use rates instead of aggregate numbers for common vanity metrics:

- Actions per 10,000 or 1,000,000 members, instead of list size.
- Actions per mailing to the list, instead of absolute number of actions.

1. RATES TRUMP AGGREGATES

- **Pros:**

- Understand if your list is active, or just big!
- Easier to adopt, since it is already common practice to look at rates for individual emails.
- It is harder to manipulate rates than aggregate numbers – for instance, sending many emails to increase the total number of actions would decrease actions per mailing.

- **Cons:**

- Assumes how often a member engages with a specific tactic is a proxy for engagement.
- An improvement over aggregate numbers for overall engagement, but does not help you distinguish different activity levels among groups of members.

2. COHORT ANALYSIS

Cohort analysis: Rather than looking at all members as one unit, breaking into cohorts of people who share a common characteristic over a certain period of time.



- Example:
 - MeRA: [SumOfUs tracks](#) the number of existing **M**embers **R**eturning for **A**ction on a monthly and quarterly basis.
 - Another prominent organization tracks the composition of various cohorts – defined by how many actions members have taken – weekly over time.

2. COHORT ANALYSIS

- **Pros:**
 - Understand the changing composition of your members
 - See the lifecycle of membership
 - Incentivize your staff to grow particular valuable cohorts
- **Cons:**
 - Likely requires data scientists on staff
 - Harder and more time-consuming to collect, evaluate, and explain

3. ENGAGEMENT SCORES

Respondents raised the possibility of assigning points for various forms of engagement, weighted by importance, to produce a numeric score reflecting engagement of the list or individual members.

Example:

- Klout measures an individual's influence by factoring various data points from social media platforms into a "Klout Score." Organizations or eCRMs could do the same for engagement.

3. ENGAGEMENT SCORES

- **Pros:**
 - Incorporated into daily dashboards, can exert “gravitational pull” of an unavoidable reminder to factor engagement into strategy.
 - Difficult to manipulate unless campaigners know exactly how scores are formulated.
- **Cons:**
 - The score is only as good as the data you can aggregate and your judgment in weighting activities.
 - Would require new technology or staff capacity to implement where not included in eCRMs; Commercial solutions like Radian6 can be helpful but cost prohibitive to many orgs.
 - Staff may be reluctant to rely on metrics they don’t understand.

4. MISSION-CENTERED METRICS

- In certain situations a raw, aggregate number can still be useful if there is a clear connection between volume and a desired outcome. We call these “mission-centered metrics:
 - One organization has used “total victory experiences,” defined as the number of members who have been part of a winning campaign, in order to incentivize campaigners to make sure members felt part of success.
 - One online program used, “# of people who attend labor strike rallies,” subordinating all online measures of performance to that key metric.
 - “Doors knocked” or “votes pledged” in the context of an electoral campaign.
 - “Recruiters,” the number of members who have recruited another.

4. MISSION-CENTERED METRICS

- **Pros:**

- Aggregate numbers are simple and easy to understand.
- With proper discussion, it can be clear what outcomes are being incentivized.

- **Cons:**

- As noted previously, all aggregate numbers can be “vanity metrics” in a sense, and are thus filled with pitfalls.
- It is crucial for all stakeholders to understand how such a metric could potentially “torque” the work and adjust over time.

MOVING FORWARD

How do we get moving?

NEXT STEPS

THE STARTERS

- If aware of problem, seeking to lessen reliance on vanity metrics
- Next steps include:
 - Expanding staff awareness;
 - Using metrics as a decision-making tool, and;
 - Changing internal culture.

THE SEEKERS

- Seeking new methods of more accurately measuring member engagement on a regular basis
- Next steps include:
 - Incorporating “big-picture” metrics into daily decisions, and;
 - Innovating new models to assess engagement.

MOVING FORWARD: THE STARTERS

Is your organization **TOO RELIANT** on vanity metrics,
and **JUST STARTING** to understand the pitfalls?

Wondering **WHERE TO START?**

Here are key tips and questions to ask yourself.

THE STARTERS: TIPS

- **Start talking.** Don't underestimate the power of awareness and conversation. Just talking about the pros and cons of your metrics can increase understanding and change your program.
- **Ask questions.** Host a conversation about your current metrics, and ask yourself some of our key questions (see below).
- **Party smarter.** Celebrate real victories, not vanity milestones. Skip the party for hitting one million members.

THE STARTERS: TIPS

- **Ask more questions.** Revisit your metrics often — on a yearly, biannual, or quarterly metrics — and examine if they are working for you.
- **Aim for balance.** If considering introducing new metrics, balance simplicity and complexity, so that metrics capture nuance and detail but are not so complicated that staff cannot access, interpret, or explain them.
- **Start small.** It's ok to think big, then drill down. Start by evaluating new metrics on a yearly or quarterly basis. Even The Seekers groups don't evaluate on a per-email basis — yet!

THE STARTERS: KEY QUESTIONS

- What are your metrics really measuring – progress toward achieving your mission, or something else?
- What do your metrics incentivize? What do they NOT incentivize, that might be valuable?
- What pitfalls listed above in the report have you encountered?
- What is your internal culture of metrics? How do you use metrics as an organization?

THE STARTERS: KEY QUESTIONS

- What is the timeframe of your metrics? Are they biased toward the short-term, here and now?
- Can your metrics be artificially inflated through tactics that don't actually help your organization achieve its mission?
- Is the metric based on measurements that are consistently accurate?
- Is the metric simple to access, understand, and evaluate on a regular basis?

MOVING FORWARD: THE SEEKERS

Does your organization understand the pitfalls of vanity metrics, and is **SEEKING NEW ALTERNATIVES?**

Wondering how to **GO DEEPER?**

Here are key tips and questions to ask yourself.

THE SEEKERS: TIPS

- **Focus in.** One of the biggest opportunities for advancement is simply implementing metrics at a day-to-day level. If you already measure “members who have taken 1+ actions” on a monthly basis, for instance, build systems to evaluate emails based on whether they will increase that metric.
- **Simplify!** The Seekers groups are often awash in data. Simplicity can be powerful. If your teams are responsible for more than three key metrics, respondents believe you aren’t incentivizing *any* metric-driven behavior.
- **Revisit.** Go over your metrics often — on a yearly, biannual, or quarterly basis — and examine if they are working for you. This can be even more powerful for groups with a widespread appreciation of the incentives different metrics create.

THE SEEKERS: TIPS

- **Visualize.** Consider investing in new or custom dashboards to make key metrics more prominent and easier to access, so you get the most out of using them.
- **Personalize.** Many The Seekers groups utilize some form of cohort tracking, but don't think that's the one option. Experiment with engagement scores or simplifying with mission-centered metrics — for instance around key constituencies.
- **Time it.** Results of tests often fail to accurately predict future success or assess the long-term effect on fundraising or engagement. New models could help predict which fundraisers will do well, and which action alerts are performing strongly based on more than the political moment.

THE SEEKERS: KEY QUESTIONS

- What are your metrics really measuring – progress toward achieving your mission, or something else?
- What do your metrics incentivize? What do they NOT incentivize, that might be valuable?
- Where are you still reliant on vanity metrics? Are you doing so intentionally to incentivize certain behavior, or out of old habits?

THE SEEKERS: KEY QUESTIONS

- Are your data scientists tasked with optimizing performance based on current metrics, or innovating entirely new metrics?
- Think about ways your organization has shifted this year. Do you need new metrics, or simply to reinforce your organization's culture of metrics?
- How can you incorporate long-term benefits like organizational identity and a member's willingness to help into shorter term decision-making?
- Can you simplify your metrics, or prioritize fewer key metrics, to provide clearer direction to your team?

MOVING FORWARD



Remember: what we measure matters! Our choice of metrics incentivizes behavior. By measuring what will grow our impact, we can more fully achieve our mission.

This report is just the beginning of the conversation. Let's talk about how we move **#BeyondVanityMetrics**.

MORE?

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Want to make a bigger impact? Let's talk:

bettermetrics@engagementlab.org

Twitter:

@engagementlab

@mobilisationlab

Web:

www.engagementlab.org

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