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Lens 2: From Data to Decision Building Confidence in a Connected World

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14%

Organisations across the membership sector are increasing digital spend – but only **14%** confirm their investment is firmly aligned with a clear digital strategy.

#1 Biggest Sector Challenge

The inability to measure member engagement accurately and act on it.

Does more reporting equal better decisions?

Often, it just creates more noise.

The challenge is not the quantity of data,
it's what you do with it.

Insight Overload



CHALLENGE 1

Organisational Silos

Departments operate independently, hoarding data and preventing a unified view of the member journey.

CHALLENGE 2

Disconnected Tools

A patchwork of systems for marketing, finance, and operations that don't communicate, creating competing data islands.

61%

of organisations primarily measure member engagement through surveys and online webinars.

A Single Source of Truth



Before: Fragmented Data

- Data trapped in departmental silos, inaccessible to teams who need it
- Inconsistent metrics and conflicting reports across the organisation
- No single, trusted view of the member, just partial pictures

Multiple databases and silos: still the sector's 3rd biggest challenge

After: Connected Data

- + Centralised, accessible data hub that every team works from
- + Consistent KPIs and shared definitions that leaders trust
- + A true 360-degree member view, enabling confident, timely decisions

Clarity comes from connection — not volume.

Behavioural Insight



The Insight Gap

*Surveys tell you what members say.
Behavioural data tells you what they do.*

Acting on behaviour is what separates a connected organisation from a reporting one.

19%

of organisations use behavioural data to drive personalisation — the rest rely on basic member details alone.

Source: Digital Excellence 2026

What is Behavioural Data?

- Conversions
- Event attendance patterns
- Content downloads
- Community interaction signals

What Good Looks Like



How Forward-Thinking Organisations Are Evolving

From Outputs to Outcomes

Measuring success based on member value, not internal activity or report volumes.

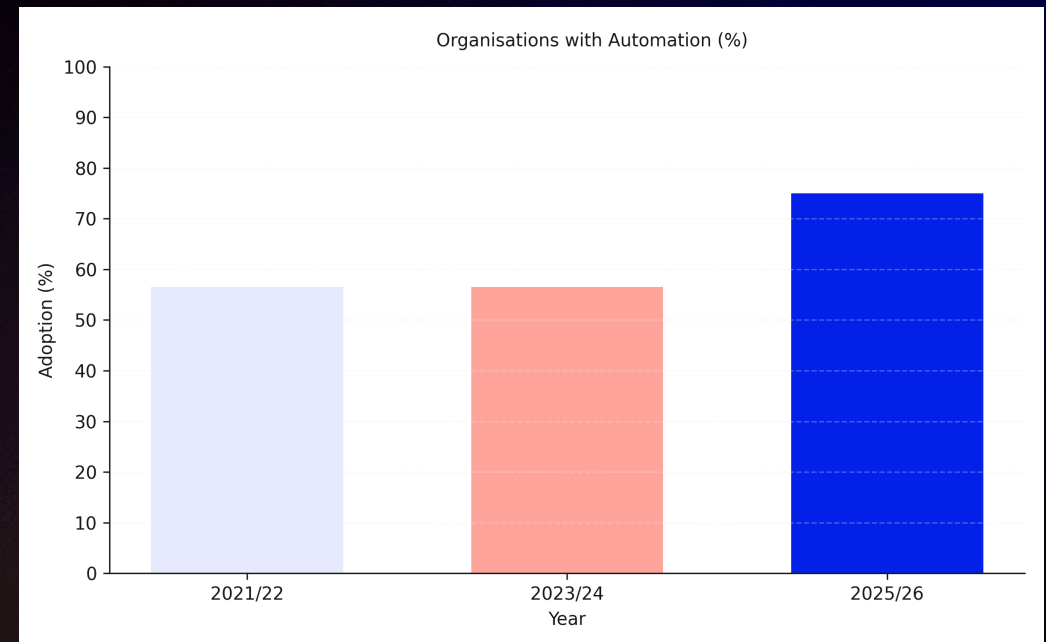
From Reactive to Proactive

Using connected data to anticipate member needs rather than respond to problems after the fact.

From Manual to Automated

Freeing up capacity for high-value, strategic decisions by automating routine journeys.

Automation Adoption — Sector Progress



Source: Digital Excellence 2026

Personalisation: Done Right vs. Done Often

43%

of organisations claim to personalise member communications and online experience.

Source: Digital Excellence 2026

The Reality: Surface-Level

Most personalisation is limited to using a member's name in an email, or segmenting by membership tier or location (87% rely on member details alone).

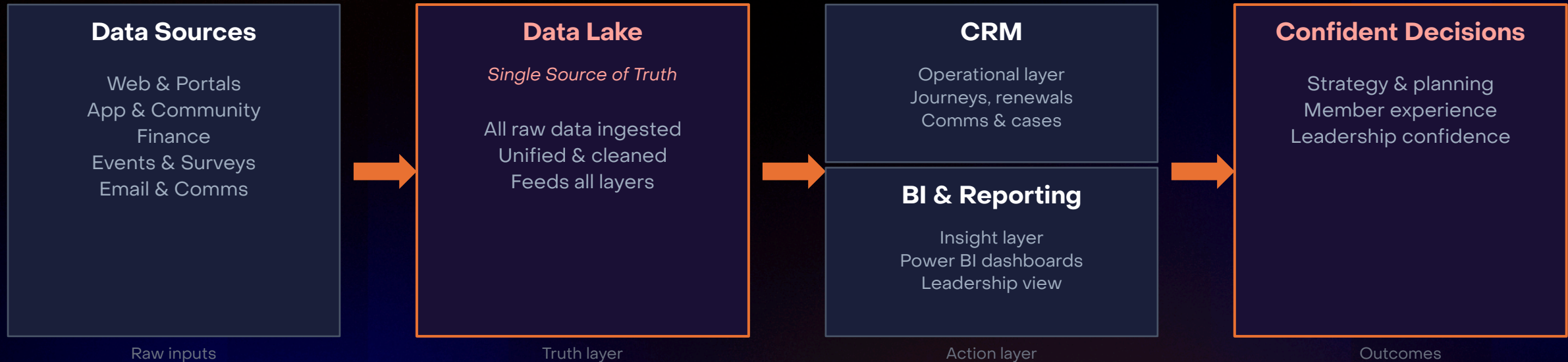
Only **29%** use persona segments. Only **19%** use behavioural signals.

The Goal: Behaviour-Driven

Personalisation that uses what members do — not just who they are — to tailor content, recommend resources, and anticipate needs before they ask.

Outcome-led, not feature-led.

From Data to Decisions: The Architecture of Confidence

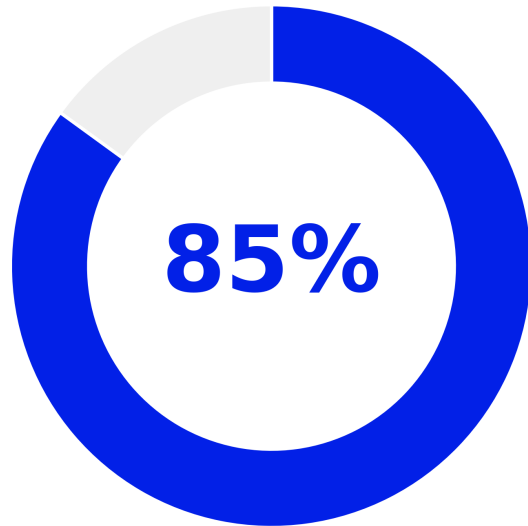


"In next-generation organisations, CRM is not just a system — it's part of how organisations understand, respond and build trust with their audiences."

Source of Business Process Automations



Source: Digital Excellence 2026



AMS / CRM Other Systems

CRM as the Connective Tissue

The overwhelming majority of high-value automations — member journeys, communications, renewals, data processing — are anchored in the organisation's central CRM.

It is the operational backbone of modern membership organisations — not a contact list, but a decision-making platform.

CRM systems now drive **85% of all automations** across the sector — up year-on-year since 2000.

Technology is the enabler.

Leadership is the driver.

The organisations that are winning are not the ones with the most data — they are the ones with the clearest questions.

Four Questions for Your Team

1 Are we using data to inform decisions, or just to report on activity?

2 Where are we creating noise rather than clarity for our teams?

3 Are our data and technology investments aligned to what we actually need to decide?

4 What would change if we focused only on the data that drives action?

Where Organisations are Focusing Next

A connected approach where data, experience and trust work together

Phase 1

Consolidate & Connect

Establish a more connected and trusted view of members, systems and organisational data.

Reduce fragmentation and create greater confidence in the information teams are using to make decisions.

Phase 2

Activate Behavioural Insight

Build a clearer understanding of engagement patterns and member behaviour across channels and touchpoints.

Use insight to better support prioritisation, decision-making and organisational focus.

Phase 3

Automate & Personalise

Use connected insight to create more responsive, personalised and scalable member experiences.

Enable teams to operate more proactively, consistently and confidently over time.

Key Takeaways



01

Confidence from Connection

Confidence doesn't come from more data — it comes from connected data. A single, trusted source of truth is the foundation of every confident decision.

02

Go Beyond Surveys

What members do is more valuable than what they say. Behavioural insight — clicks, visits, patterns — is the difference between surface-level reporting and real understanding.

03

Your CRM is the Backbone

CRM is the engine for connection, automation, and personalisation. Invest in it as your central hub — not as an admin tool, but as a decision-making platform.

04

Ask Better Questions

Take the four leadership questions back to your team. Focus only on the data that drives action, and simplify everything else.

Sector Signals

Key trends from the Digital Excellence 2026 Report



“Reporting capability has improved across the sector — but decision confidence has not kept pace. The gap between knowing and acting remains our defining challenge.”

MemberWise Network, Digital Excellence 2026

01 Data Strategy Gaps

Only 20% of organisations have a formal data strategy — and only 14% align investment to it.

02 Personalisation: Increasing but Inconsistent

43% personalise — but predominantly using basic member details, not behaviour.

03 Silos Limit Effectiveness

Multiple databases and data silos remain the sector's 3rd biggest challenge, creating team disconnects.

04 The Efficiency Mandate

64% face pressure to generate more income without proportionate resource increase.

Confidence isn't found in more data.

It comes from knowing what matters
and being able to act on it.

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