AFWA President's Task Force on Angler R3

2024 Angler R3 Recommendations

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ASSOCIATION *of* FISH & WILDLIFE AGENCIES

AFWA President's Task Force on Angler R3 (2024)

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Introduction:

In March 2018, the Association of Fish & Wildlife Agencies (AFWA)'s Angler Recruitment, Retention and Reactivation (R3) Task Force released a report that was approved by state Directors with five angler R3 recommendations for state agencies. The Angler R3 Recommendations have been instrumental in driving agency progress on the R3 front. In 2023, the Association established a new Task Force to develop the next version of the Angler R3 Recommendations, which are contained herein and aimed at gaining a renewed commitment to the original Angler R3 Recommendations and furthering marketing and evaluation progress and emphasis on developing Customer Relationship Management (CRM) systems.

2024 Task Force Recommendations:

1. **Commit to Customer Relationship Management (CRM).**
   Commit to developing a Customer Relationship Management (CRM) system to track and engage with all customers.

   Customer Relationship Management (CRM) is the combination of principles, processes, data and technology an organization utilizes to interact with its stakeholders. Examples of CRM data include customers, leads, prospects, lapsed users and partners. Examples of CRM system features include:

   - Email Marketing
   - SMS Marketing
   - Interactive Landing Pages
   - Phone App with Push Notifications
   - Beacon and Geofence Automated Messaging
   - Call Center Integrations
   - Direct Marketing Triggers
   - Data Segmentation
   - Analysis and Activity Tracking Dashboards
   - Pipeline Analysis and Projection
   - Messaging and Live Chat
   - Social Media Advertising

   As per the [2018 AFWA Angler R3 Task Force Recommendations], commit to Customer Relationship Management (CRM). A CRM system can integrate all event, licensing, marketing and evaluation data streams into one platform. CRM system costs are challenging to provide here due to various considerations, such as the data utilized and features included, however the return on investment (ROI) is proven. The Association and the Recreational Boating & Fishing Foundation (RBFF) will continue to share case studies, lessons learned and success stories to inform CRM considerations and development.

   In this regard, the Wildlife Management Institute (WMI) recently produced a document, *CRM Development Guidance for State Fish and Wildlife Agencies,* which provides information on the types of data, marketing automation tasks, and reporting and analytics features, and includes tables with "Critical, Highly Desired and Nice to Have" aspects, to consider. This document is included on the following pages as an **Addendum** and a helpful resource for state agencies. Key actions include:

   - Focus efforts on developing a Customer Relationship Management (CRM) system.

- Prioritize the “critical” aspects in CRM system considerations.

2. **Commit to Marketing.**
   Commit to implementing and advancing marketing strategies to leverage emerging technologies.

   Technology is continually advancing, and raising the bar on customer expectations. It is important to reach customers where they are. As per the 2018 AFWA Angler R3 Task Force Report, it is important to develop and implement a marketing plan that supports R3 programs. Resources that may be helpful in this regard include RBFF’s marketing toolkits and R3 resources, the NEAFWA Retention Marketing Guide, and the CAHSS Marketing R3 Topic Guide. Key actions include:

   - Strive to utilize the latest advancements in technology to meet customer needs.
   - Develop and implement a marketing plan that supports angler R3 programs.

3. **Commit to Evaluation.**
   Commit to evaluating angler R3 efforts to assess desired outcomes.

   Evaluation of angler R3 efforts is critical in determining the success and allocation of agency resources. As per the 2018 AFWA Angler R3 Task Force Report, assessing each angler R3 program against desired outcomes is an essential component of agency R3 efforts. Successful programs should be strengthened, while those that do not achieve desired outcomes should be modified or eliminated. It is important to focus on incorporating and implementing evaluation efforts. Resources that may be helpful in this regard include RBFF’s Best Practices Guide to Program Evaluation, Evaluation Resources in the National R3 Clearinghouse, as well as a forthcoming R3 evaluation metrics definitions document currently in development by the Western Association of Fish & Wildlife Agencies R3 Committee’s R3 Evaluation Criteria Working Group. Key actions include:

   - Establish program evaluation measures to assess outcomes of angler R3 efforts.
   - Utilize results to inform and prioritize future R3 efforts.

4. **Continued Commitment to Original Task Force Recommendations.**
   a. *Ongoing commitment to developing and implementing an angler R3 plan.*
   b. *Ongoing commitment to reallocating agency resources (staffing and funding) to ensure angler R3 success, including a full-time Angler R3 Manager.*
   c. *Ongoing commitment to sharing angler R3 successes and lessons learned.*

Commitment to the original Angler R3 Task Force recommendations is critical. As per the 2018 AFWA Angler R3 Task Force Report, commit to developing an angler R3 plan; commit to reallocation of sufficient agency resources (staff and funding); commit to establishing a full-time Angler R3 Manager; and commit to establishing a clearinghouse where state agencies can share angler R3 efforts. In this regard, a National R3 Clearinghouse was developed by the CAHSS with the Association, RBFF and partners. The National R3 Clearinghouse contains a wealth of R3 resources, including R3 plans, job descriptions and case studies as posted by state agencies and partners. Additionally, RBFF and state agencies have shared best practices and recommendations from states developing second versions of their R3 plans. Key actions include:

- Commit to the 2018 recommendations, with focus on three above aspects.
- Continue developing and implementing second (and future) versions of R3 plans.
- Share R3 successes, lessons learned and resources in the National R3 Clearinghouse.

ADDENDUM:

CRM Development Guidance for State Fish and Wildlife Agencies

Report Completed by:

Wildlife Management Institute &
Bob Byrne Consulting

Thank you to the R3 Committees of the:

Northeast Association of Fish and Wildlife Agencies
Southeastern Association of Fish and Wildlife Agencies
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Western Association of Fish and Wildlife Agencies

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As state fish and wildlife agencies seek to increase revenue from, and relevancy to, more constituencies, they are increasingly recognizing the need for automatic, individual customer tracking for effort evaluation, nuanced customer demographic profiles, automated marketing tools, and access to powerful data analysis in formats easily comprehensible for staff not trained in advanced social science. Multiple reports recommendations, research findings, and recruitment, retention and reactivation (R3) implementation experiences are coalescing around a critical, and singular solution to all of the previously mentioned needs. That is, an organizational Customer Relationship Management (CRM) system that can integrate all of their event, licensing, marketing, and evaluation data streams into one platform.

Simply put, customer relationship management is the process of managing existing, potential, and past customers. The purpose of such a process is to use known information (data) about each audience your organization engages with to improve their relationships and experiences while expanding your reach to new audiences. A CRM software platform is used to automate the aggregation and analysis of said data streams, as well as the actions taken to leverage it, such as sending an email or pulling a report. This approach has been adopted by nearly every leading company in the world to manage their customers and grow their business. It is important for fish and wildlife agencies to realize that their role as Public Trust managers requires remarkably similar customer service and management models as those used by leading consumer businesses. It is likely that most agencies neither recognize the evolution of their customer base nor understand the dramatic expansion of expectations, needs, and values of those who want to engage with nature in the 21st century. The diversity and scope of these new customer needs requires a commensurate capacity increase by state fish and wildlife agencies to meet and manage them.

Specifically, agencies need the ability to:

1. Create efficiencies in data collection and synthesis that can unburden IT staff, R3 coordinators, marketers, and social science staff from having to pull and analyze periodic data reports to evaluate engagement efforts and gauge return on investment of marketing and outreach programs.
2. Collect and reflect granular customer demographic data in an application-friendly way that can be understood and applied by non-technical staff.
3. Implement fully automated R3 marketing, email, and advertising campaigns known to lift license sales.
4. The ability to segment out content and messages to diverse demographics by meeting them at their expectations throughout the year – not by conducting "one-off" or semi-annual marketing efforts, but by continual engagement with them to address their fluctuating motivations over time.
5. Integrate all their data streams: event registration, customer ID numbers, license purchase records, and customer profile data.

In addition to the above, research related to best practices for the R3 of outdoor participants has documented the critical need for agencies to improve the ability to track and engage customers in order to improve the efficiency and effectiveness of their R3 efforts. Application of these best practices within the constraints of state fish and wildlife agencies has clearly indicated that leveraging data and automated marketing tools is essential to the successful implementation of customer tracking and effort evaluation at a scale needed to drive policy and practice change. However, integrating and implementing a CRM may involve changes of a magnitude that cause many agencies to struggle with knowing where to begin.

With knowledge of what a quality CRM should achieve and what an agency should expect to get out of one, agency staff will be better equipped to select a system that will not only solve their current data management challenges, but also be able to adapt and grow with their agency's future customer engagement goals. Currently, there are many CRM systems and CRM look-alikes available to agencies, but little guidance has been developed to help agency staff determine how to select a system that will serve the specific needs of their agency and achieve both current and future data needs. The purpose of this summary is to provide that guidance and summarize critical considerations specific to agencies that must be made before a CRM system is selected.

To begin, it helps to focus on the specific functionality that is most useful to a fish and wildlife management agency. Knowing what functionality is critical, what is desired, and what is nice to have will help agencies begin to navigate their many choices.

Agencies should focus on four primary areas when comparing CRMs. These are:
1. Marketing/R3 Staff Access
2. Data Integrations
3. Marketing Automations
4. Reporting Capabilities

1. Marketing/R3 Staff Access

To fully drive results and staff efficiencies, agencies must ensure that their CRMs are fully accessible by those who rely on them to drive results day in and day out. Marketing Coordinators, R3 Coordinators, and other outreach staff should have direct access to these data analytics and marketing tools without navigating cumbersome gatekeeper processes or relying on internal or external IT experts, graphic designers, etc., to accomplish their marketing objectives.

While powerful, the tools should not be complicated to the point of making them inaccessible to non-technical users. An effective CRM should empower marketers to analyze data, draw insights, develop and activate campaigns, and evaluate results themselves. The capability to free staff from reliance on others to do routine marketing tasks (reports, visualizations, lists, segmentation, emails, evaluation, etc.) drives significant efficiencies throughout an agency and enables marketers to spend more time developing, activating, and evaluating campaigns critical to driving engagement and participation.

2. Data Integrations

The primary purpose of a CRM is to consolidate data about your customers. Therefore, the CRM that you choose must include ready access to the data needed to form actionable insights.

Effective CRMs create a single repository of data across platforms ranging from mobile, licensing and permitting, campground management software, volunteer and event management systems, and potentially much more. Essentially, CRMs enable a unified view of an agency's customers and potential customers across their interactions with the agency.

A CRM should enable your agency to gather data from many sources, both within and outside your agency. Assembling this data empowers you to deduct sound insights and act expediently to have the best chance to lead current and potential customers to their next steps or participation opportunities.

The table below details the types of data that agencies should consider integrating into their CRMs.

Data Type	Critical	Highly Desired	Nice to have
Customer Data: This is data specific to people who have previously purchased a product from your agency (customer ID, contact info, demographics, etc.)	✓		
Agent Data: This is data specific to where customers purchased their products (sales channel, name, location, chain, etc.)	✓		
Product Data: This is data specific to the purchased product (licenses, tags, price, seasons, etc.)	✓		
Transaction Data: This is data specific to an individual transaction (date, products purchased, prices, etc.)	✓		
Event: This is data specific to an agency event that a customer may have attended (name, type, date, location, etc.)	✓		
Certification: This is data specific to a certification that a customer may have earned (type, number, date, etc.)	✓		
Marketing: Data derived from on-going customer engagement is essential to improving ROI	✓		
Prospect Data: This is data from people who have not purchased a product from your agency but have in some way expressed an interest in learning more (name, contact information, interest, etc.)		✓	
Associated Data: The ability to integrate other data sources, such as harvest report data, campground reservation data, state, and national conservation organization data, etc., from within and outside of your agency allows you to leverage your CRM capabilities fully.			✓

3. Marketing Automations

Thanks to the application of R3 best practices, fish and wildlife management agencies have demonstrated that targeted marketing campaigns can easily and effectively increase fishing and hunting participation rates. In particular, license renewal reminders and lapsed license campaigns have shown great promise and high ROIs.

To replicate, scale, and build upon the many successfully implemented R3 efforts, agencies must take next step in securing modern, automated marketing tools that leverage data collected in a CRM system. Significant efficiencies can be realized when a CRM and Marketing Automation tool are fully integrated into a single platform solution. Recruitment, retention, and lapsed license buying campaigns should all be automated with the ability to easily target different customer segments with personalized messaging unique to their motivations and demographics.

Marketing Automation Task	Critical	Highly Desired	Nice to have
Analytics/ROI Tracking	✓		
Campaign Segmentation	✓		
Contact Management	✓		
Email Drip Campaigns	✓		
Customer Journey Mapping	✓		
Persona Capabilities		✓	
Dynamic Content Capabilities (same list, different message based on segmentation)	✓		
WYSIWYG Email Builder		✓	
A/B Testing Capabilities		✓	
Email Deliverability Optimization		✓	
Landing Pages/Web Forms		✓	
Lead Management		✓	
Integrated SMS Capabilities		✓	
Integrated Survey Capabilities	✓		
Integrated Direct Mail Capabilities			✓

4. Reporting/Analytics Capabilities

One of the single most significant pain points that many agency marketing and R3 professionals have is the ability to access reports at the level of detail and frequency needed to gain timely, actionable insights. Powerful analytical tools that deliver more than traditional website reports, quarterly dashboard analytics, or high-level metrics are essential to identifying and understanding critical, but sometimes nuanced, opportunities to engage and convert customers.

Modern reporting tools must enable agencies to build custom ad hoc reports on any data field included in their CRM. They must also provide the ability to visualize those reports in dashboards customized for the exact needs of each individual. Finally, automating and sharing reports and visualizations is an important driver of agency staff efficiency.

Reporting/Analytics Feature	Critical	Highly Desired	Nice to have
Build Reports	✓		
Filter Reports	✓		
Share Reports & Report Data		✓	
Subscribe to and Schedule Reports			✓
Work with Report Data in other Tools		✓	
Build Dashboards		✓	
Filter Dashboards		✓	
Share Dashboards			✓
Subscribe to and Schedule Dashboards		✓	