

HowTo: Membership tracking

Overview of process for tallying membership numbers.

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Membership Tracking

Overview

Because Woodbine used both Patreon and Withfriends, RC created a presence on both platforms, with the idea that Woodbine would send out messages to their members with links to our profiles.

Each platforms reports stats differently:

Patreon

Has a [dashboard](#) with table views, charts, filters etc. Allows for exporting a CSV which uses a primary key of the "patron," so historical data is only visible via their dashboard charts.

Fields:

- name
- email
- current tier
- pledge
- lifetime (total amount over subscription duration)
- status (paid/free)
- join date
- last charge date
- subscription source (?)

Withfriends.events

Withfriends information is scattered.

Current active memberships are listed on the [memberships tab](#), with a total # listed at the top, and #s accompanying each tier listing, in descending \$ amount.

Non-membership based contributions are listed on the account [home tab](#), along with next payout, all-time revenue, membership count, etc. Period-based contribution totals (last 30 days, last month, year) don't appear to be available.

A record-by-record history of all events can be found under the [analytics tab](#), which can be used to reconstruct historical data, though the entries can be confusing (e.g. a membership cancellation can generate two records for cancellation).

Tracking

Current practice

Current process is to manually copy over current tier counts to a spreadsheet each week, either Sat or Sun.

There are formulas and array formulas which copy data to other sheets in order to create various charts.

Socials are similarly manually copied from various platforms.

Options

We have used automated tools to tally membership counts based on CSV exports, but the complexity of anonymizing the data, and parsing the withfreinds records was error-prone.

Zapier and IFTT can be used to integrate with both platforms, but the data would still need massaging in order to create weekly historical records.