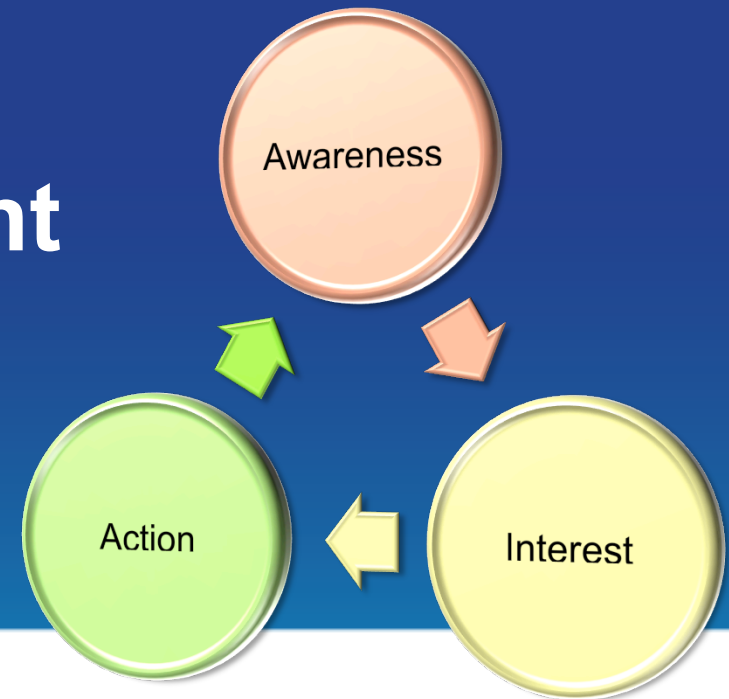# Data-Driven Member Engagement

John Day

IEEE Senior Member

Director, Membership Development

Member & Geographic Activities

IEEE Region 3 Meeting
Nashville, TN, USA
18-20 March 2011

Today's Talk

- Stand-up for the First-Year Member
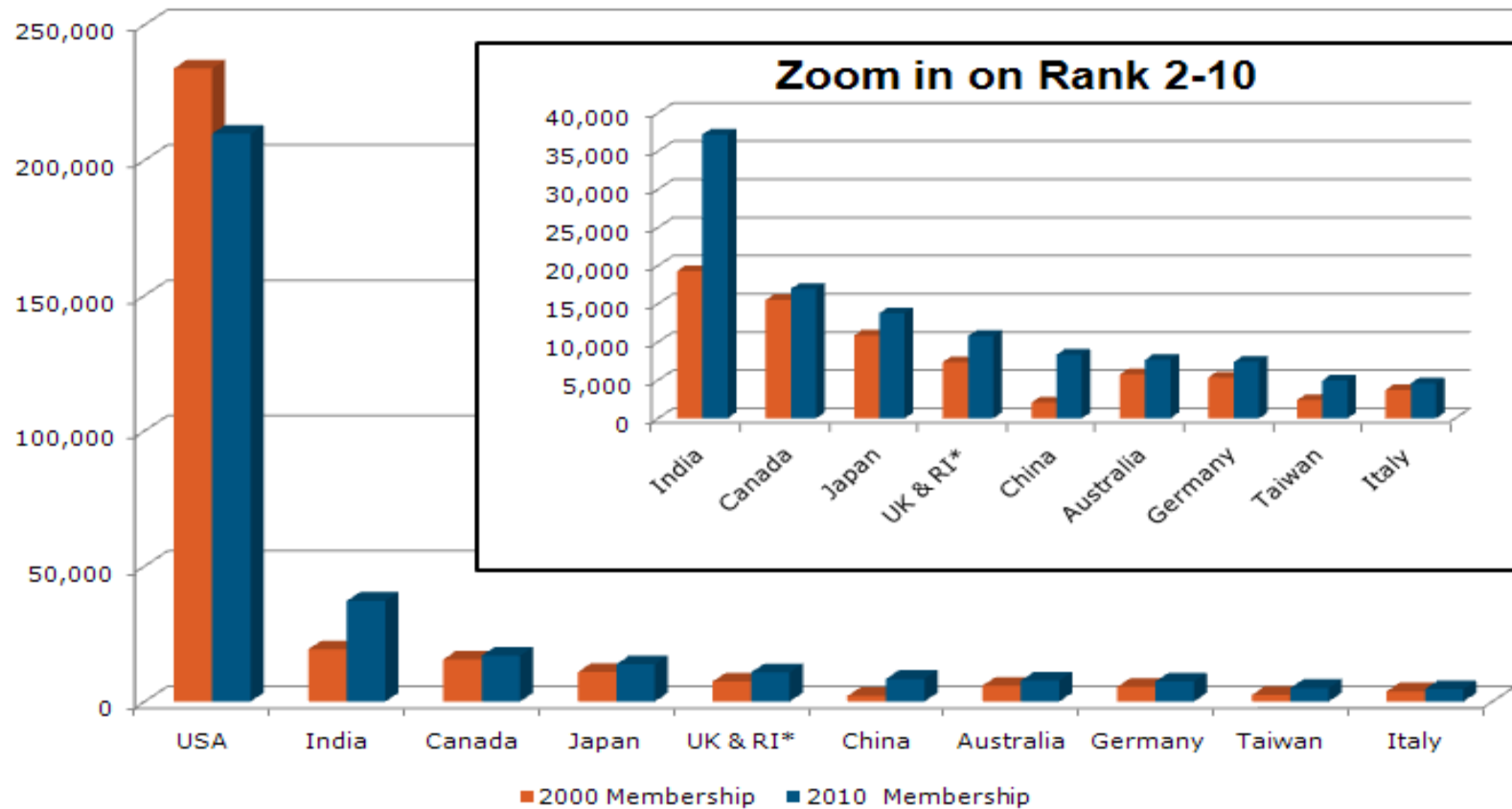
- Context / Membership Trending

- Engagement Framework

Appendix

Member Segmentation Data

Membership Development Program & Resources

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Context & Membership Trending

Membership by Country Trending Over 10 Years 2000 vs. 2010

Comparative Market Share

Country	IEEE Higher Grade Member s*	IEEE Occupations**	Tier 1 Market Penetration
USA	178,853	2,480,000	7.5 %
China	5,475	1,981,649	0.2 %
Japan	12,088	1,188,558	1.0 %
India	9,981	647,405	1.3 %
Italy	3,800	489,150	0.7 %
United Kingdom	7,528	321,534	2.4 %
Argentina	636	16,663	3.2 %

2-million+ prospects for higher-grade (HG) membership across the United States

IEEE has recruited **3,869** HG members the first six months of the 2011 membership year

* Membership Data : As of August 2010

**Sept 2009, Plexus Consulting Group prepared for IEEE.

IEEE Occupations include Aeronautical, Biomedical, Electrical, Electronic, Computer, Computer Science, Computer Software/Hardware, Information technology, Mathematics, Physics, Telecommunication, Automotive and Biological Engineering.

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Annual Recruitment Trending – 2008 through 2010

Annual Member Recruitment: 2008-2010											
Region	Undergraduate Student			Graduate Student			Higher Grade			Total		
	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010
R1	1,303	1,458	1,469	730	938	791	1,824	1,666	1,396	3,857	4,062	3,656
R2	1,197	1,592	1,456	626	808	766	1,693	1,571	1,360	3,516	3,971	3,582
R3	1,960	2,242	2,048	803	1,015	1,038	1,642	1,389	1,227	4,405	4,646	4,313
R4	1,307	1,581	1,568	645	850	802	1,200	1,108	920	3,152	3,539	3,290
R5	1,309	1,787	1,817	628	801	854	1,678	1,551	1,268	3,615	4,139	3,939
R6	1,910	2,550	2,404	1,074	1,346	1,169	3,496	2,842	2,350	6,480	6,738	5,923
R1-6	8,986	11,210	10,762	4,506	5,758	5,420	11,533	10,127	8,521	25,025	27,095	24,703
R7	938	1,055	1,115	655	701	693	1,069	966	757	2,662	2,722	2,565
R8	6,726	6,898	7,116	4,217	4,796	5,066	5,204	4,766	4,449	16,147	16,460	16,631
R9	5,307	4,274	4,920	707	554	742	1,551	863	1,134	7,565	5,691	6,796
R10	17,288	18,446	21,063	5,129	6,197	7,119	5,731	5,018	6,133	28,148	29,661	34,315
R7-10	30,259	30,673	34,214	10,708	12,248	13,620	13,555	11,613	12,473	54,522	54,534	60,307
Total	39,245	41,883	44,976	15,214	18,006	19,040	25,088	21,740	20,994	79,547	81,629	85,010

Region 3	2008	2009	2010
Total Recruitment	4,405	4,646	4,313
Higher Grade	1,642	1,389	1,227 ⚠
Grad Student	803	1,015	1,038
Undergrad Student	1,960	2,242	2,048

Member <u>Recruitment</u> - YoY 2011 vs. 2010, through Feb

YoY Recruitment	<u>Higher-Grade</u>	<u>Graduate Students</u>	<u>Undergrad Students</u>	<u>Total</u>
Region 3	(14.7%) (90)	(18.3%) (107)	+ 5.0% + 65	(5.5%) (132)
U.S.	+ 0.3% + 10	(14.9%) (436)	(8.1%) (563)	(7.2%) (989)
Global	+ 14.4% + 1,332	+ 1.1% + 105	+ 4.1% + 944	+ 5.7% + 2,381

- With a pool of **2.2-million prospects** for higher-grade membership across the United States, IEEE recruited 3,869 higher-grade members during the first six months of the 2011 membership year, 10 more than same period last year

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Member Recruitment - Predominately Peer-to-Peer

2010 Recruitment Source
source: join application

	HG% Total	STU % Total	Overall % Total
College professor	18.1%	30.6%	**26.8%**
Friend/colleague	22.1%	24.4%	**23.7%**
Member referral	10.8%	22.2%	**18.7%**
IEEE conferences	12.5%	6.9%	**8.6%**
IEEE publications	13.9%	4.9%	**7.6%**
Other	10.4%	4.2%	**6.1%**
Search Engines	3.8%	1.9%	**2.5%**
Advertisement	2.0%	2.2%	**2.2%**
Manager/supervisor	2.8%	1.1%	**1.6%**
Email Invitation	2.2%	1.2%	**1.5%**
Direct mail/Postal mail	0.8%	0.2%	**0.4%**
Non-IEEE publications	0.6%	0.2%	**0.3%**

- Largest sources of new members are existing members
  - Without an awareness of membership, there will not be interest
  - Individuals who are not asked to join IEEE wont
  - Membership brochures stored in boxes are unemployed

- Member referrals are more likely to occur when we deliver an exceptional experience to existing members

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Member Retention – 2011 through February
> Total Membership vs. First-Year Members

REGION	Higher-Grade Members		Graduate Student Members		Undergraduate Student Members	
	Total	*First-Year*	*Total*	*First-Year*	*Total*	*First-Year*
R1	82.5%	34.7%	66.1%	47.0%	43.3%	34.6%
R2	82.1%	34.1%	67.2%	46.9%	43.7%	37.4%
R3	79.7%	31.6%	69.1%	54.8%	44.7%	39.2%
R4	80.9%	33.4%	69.0%	54.4%	45.2%	38.9%
R5	80.7%	34.3%	68.6%	52.4%	42.4%	36.0%
R6	81.1%	34.4%	67.2%	47.9%	43.7%	36.3%
Feb '11	*81.2%*	*33.8%*	*67.8%*	*50.6%*	*43.8%*	*37.1%*
Feb '10	*80.8%*	*34.7%*	*74.2%*	*50.6%*	*45.1%*	*36.9%*

Member Attrition

New member loss accounts for most of our attrition

Region 1-6 Higher Grade Attrition

2008

- 11+ Years of Service, 20.9%
- 6-10 Years of Service, 10.3%
- 5 Years of Service, 3.4%
- 4 Years of Service, 4.8%
- **3 Years of Service, 7.9%**
- **1 Year of Service, 37.0%**
- **2 Years of Service, 15.7%**

Total US Higher Grade Attrition: 26,963

2009

- 11+ Years of Service, 24.8%
- 6-10 Years of Service, 11.9%
- 5 Years of Service, 3.8%
- 4 Years of Service, 5.7%
- **3 Years of Service, 9.1%**
- **1 Year of Service, 30.6%**
- **2 Years of Service, 14.1%**
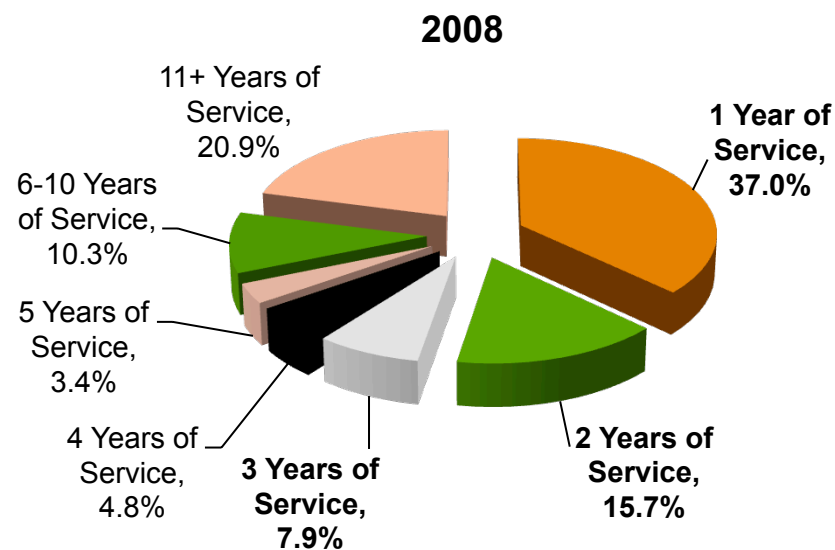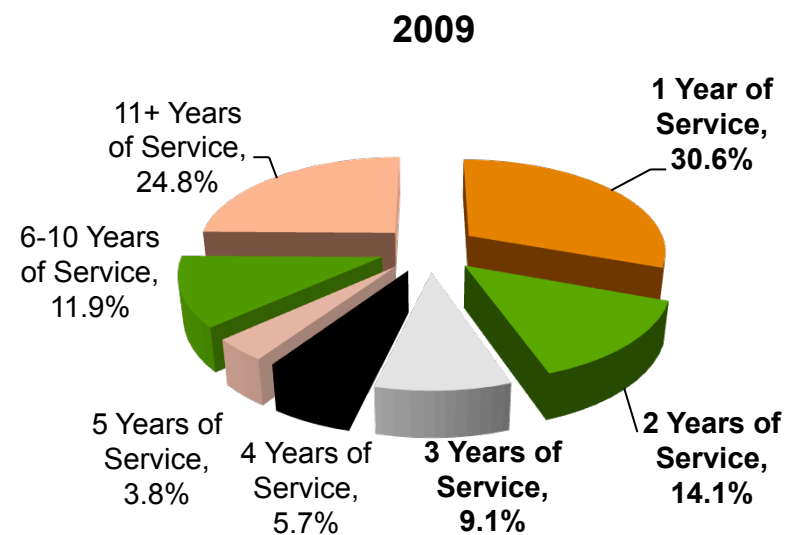
Total US Higher Grade Attrition: 26,604

In 2008 and 2009, members with 5 years or less of membership accounted for 69% and 63% of our member attrition in the US

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Engagement Framework

Why Members Come – Why They Leave

Top Reasons for Joining:

1. To obtain IEEE Publications (55%)
2. To remain technically current (52%)
3. To join IEEE Societies (42%)
4. Enhance my career opportunities (37%)
5. For continuing education (34%)
6. Enhancing my stature (29%)
7. Networking with other professionals (27%)
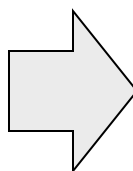
What they will miss (top reasons):

1. IEEE Spectrum(35%)
2. *Nothing (25%)*
3. Technical society membership (21%)
4. Discounts on conferences (15%)
5. Opportunities to stay technically current (13%)
6. Discounts on publications (12%)
7. IEEE Educational Products (11%)

While non-renewing members join for the same reasons that renewing members join; when we ask them what they will miss, we are clearly not meeting their initial needs.

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Taking a Member Focus

When we focus on "Membership" the member and their needs get lost in the crowd.
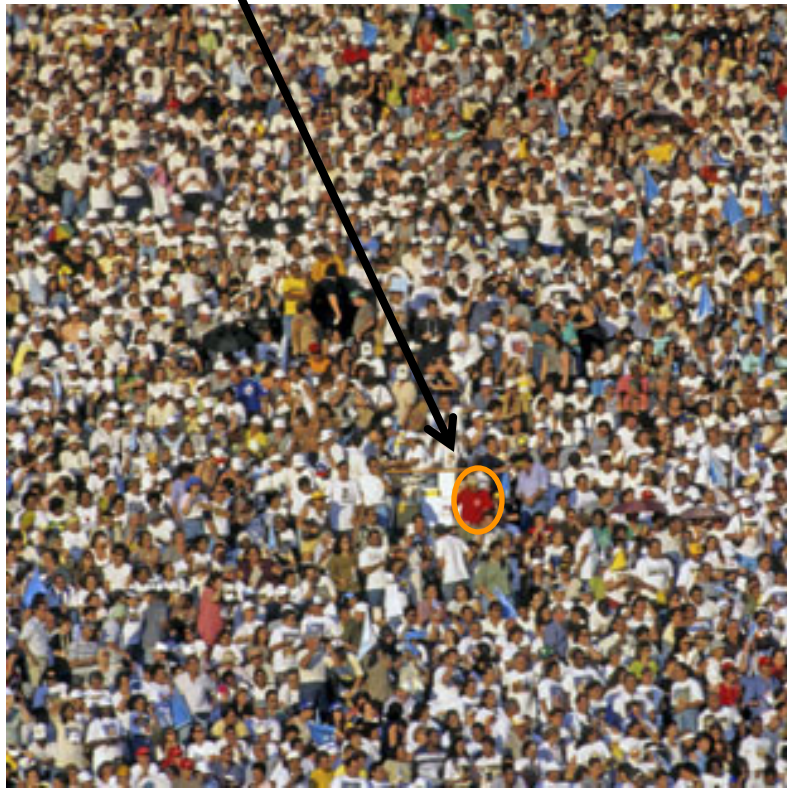
If we focus on the "Member" we strive to satisfy them, on their terms (using data, not our opinion)
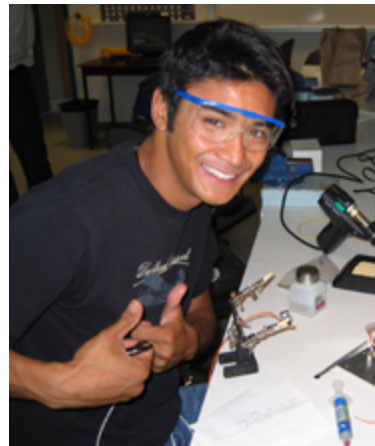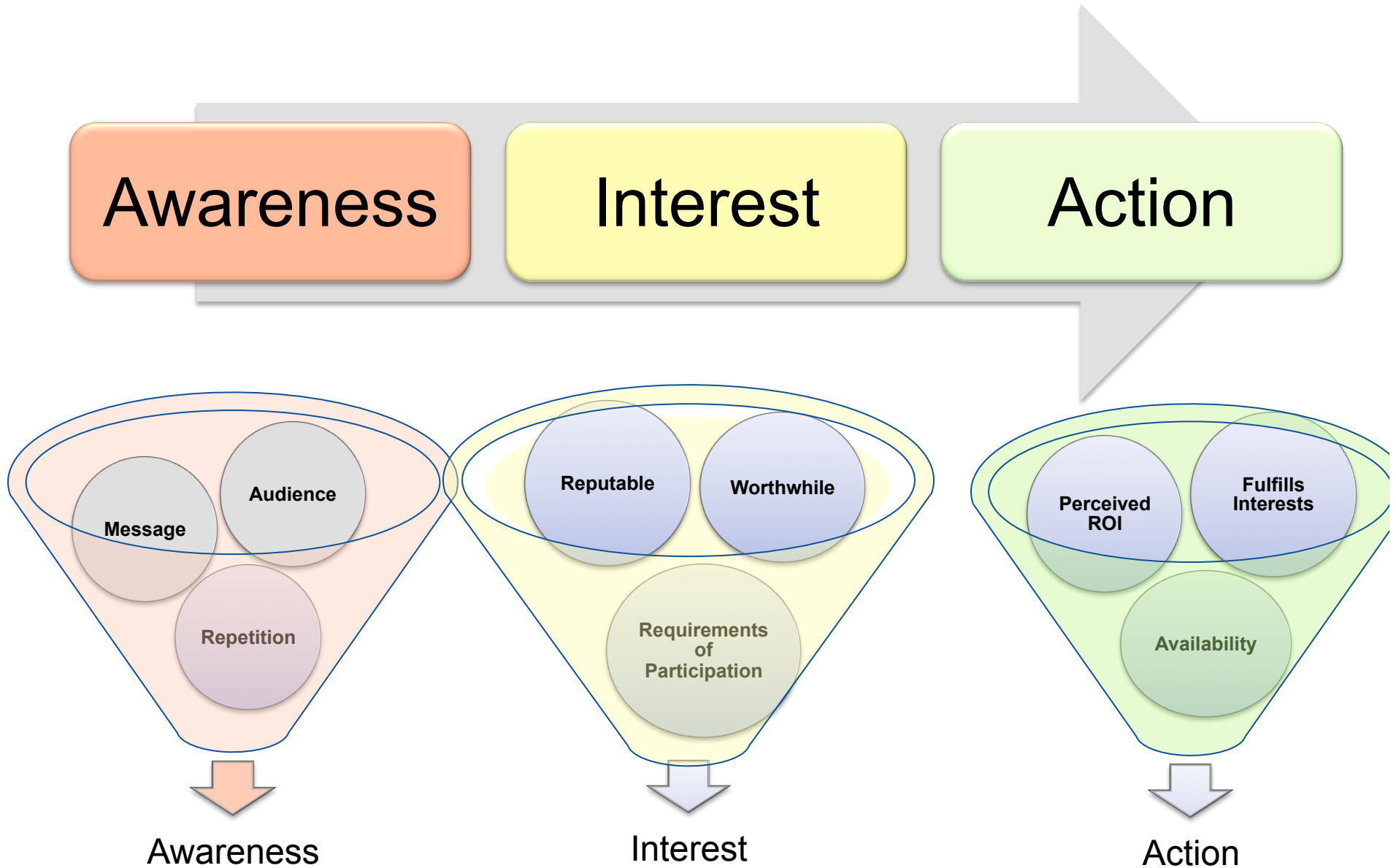

"I feel welcome"

"My needs are met"

"I make a difference"

"I am the IEEE"

"I am a part of something great"

Truly satisfied members renew; truly satisfied members refer others to IEEE

Continuum & Variables of Engagement

Diagnosing Engagement

Awareness	Interest	Action
No	N/A	N/A
Yes	No	N/A
Yes	Yes	No
Yes	Yes	Yes

Success Factors	Success Factors	Success Factors
Audience	Reputable	Distinction
Media	Worthwhile	Fulfills Needs
Repetition	Participation Req's	Availability

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Success: Differentiate Between Doing vs. Driving

Doing Assessment	Driving Assessment
We held three workshops with a total of 168 attendees, 32 more than last year	We held three workshops, attracting 5% of our target audience, delivering 54% top-box satisfaction

Means to achieving the objective

Objective

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In Closing …

You Make the Difference

1. **Focus – Member Development: Value, Engagement, Satisfaction** (opportunities and offerings responding to varying member needs, throughout their career - aspire to a top-box satisfaction ranking of 80%)

2. **Focus – First-year member retention** (improves when #1 is fixed)

3. **Focus – Member recruitment** (squandered when #2 is not fixed)

   Focus – More emphasis on driving, based on member needs - leverage existing tools, resources, and support

Stand-up for the first-year member

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Thank you

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Appendix

Member Needs vs. Satisfaction - Higher Grade Members

Top 3 Box % (out of 10)

Less critical strength

More critical strength

% Satisfaction Ranking (Mean = 41)
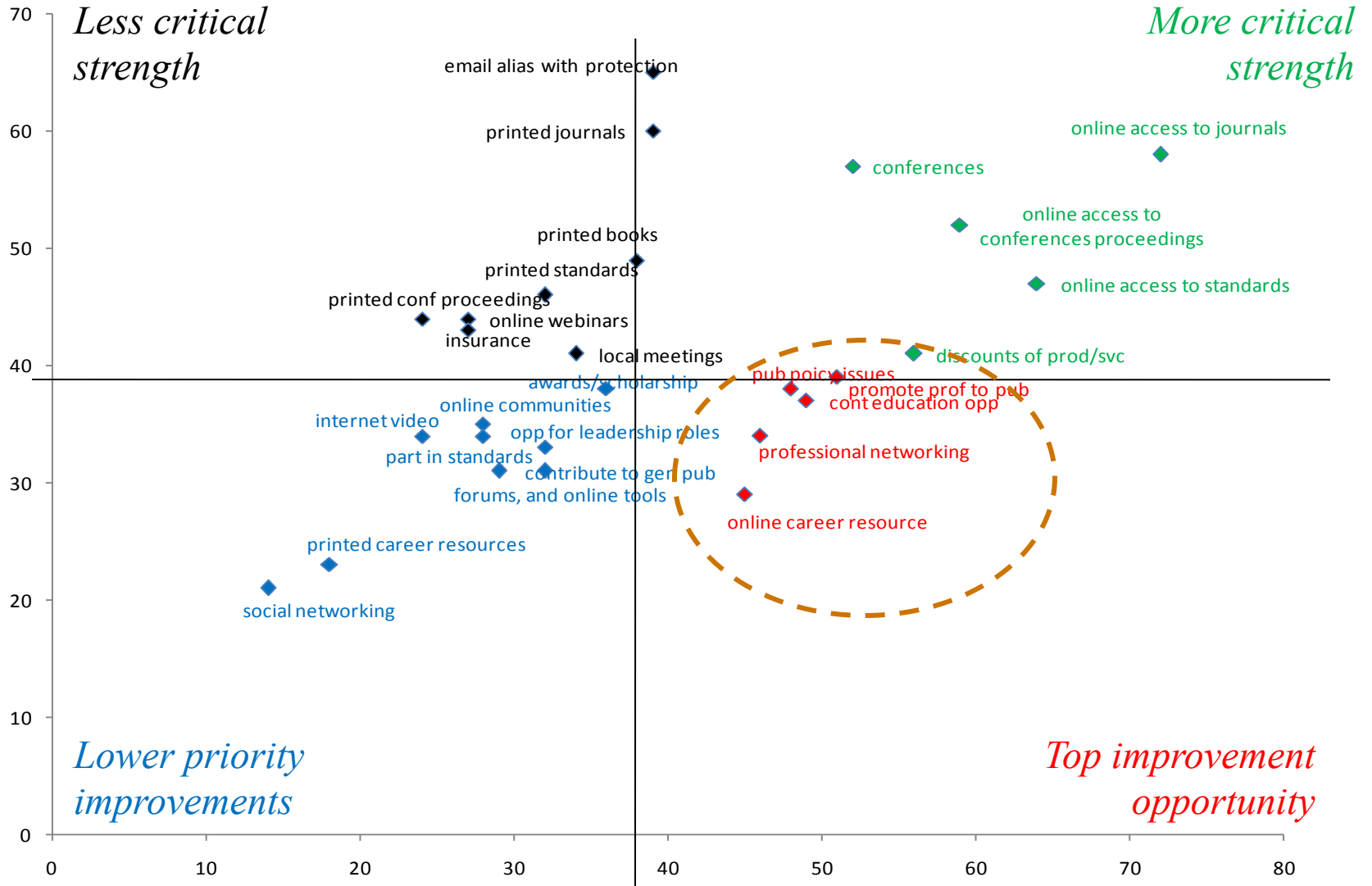
Importance Ranking % (Mean= 39)

Lower priority improvements

Top improvement opportunity

email alias with protection
printed journals
online access to journals
conferences
printed books
online access to conferences proceedings
printed standards
printed conf proceedings
online webinars
insurance
online access to standards
local meetings
discounts of prod/svc
awards/scholarship
pub poicy issues
promote prof to pub
online communities
cont education opp
internet video
opp for leadership roles
part in standards
professional networking
contribute to gen pub
forums, and online tools
online career resource
printed career resources
social networking

Source: 2008 Member Segmentation Study

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Focus #1: Member Satisfaction

▣ Make member satisfaction your #1 priority

▣ Deliver high-quality products, services, local events in the career services / professional activities space

▣ Embrace a philosophy of achieving a 'top box' satisfaction ranking of 80% (world class)

- E.g., on a scale of 1 to 5, 80% selected, "1"
- E.g. on a scale of 1 to 10, 80% selected a combined "1,2,3"

▣ Take an active role in the Board-approved, Region 1-6 strategy

▣ Learn more about the member product-service portfolio management principals and process

MGA Staff Contact
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j.moesch@ieee.org

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Focus #2: First-Year Member Retention

- Know your members' interests

- Act upon the new member alerts that go to Section Chairs and Section MD officers every month

- Create and assign a first-year member liaison in your Section
    - If necessary, pull from the GOLD and student ranks for Volunteers (high energy)

- Identify creative ways to recruit new members as Volunteers
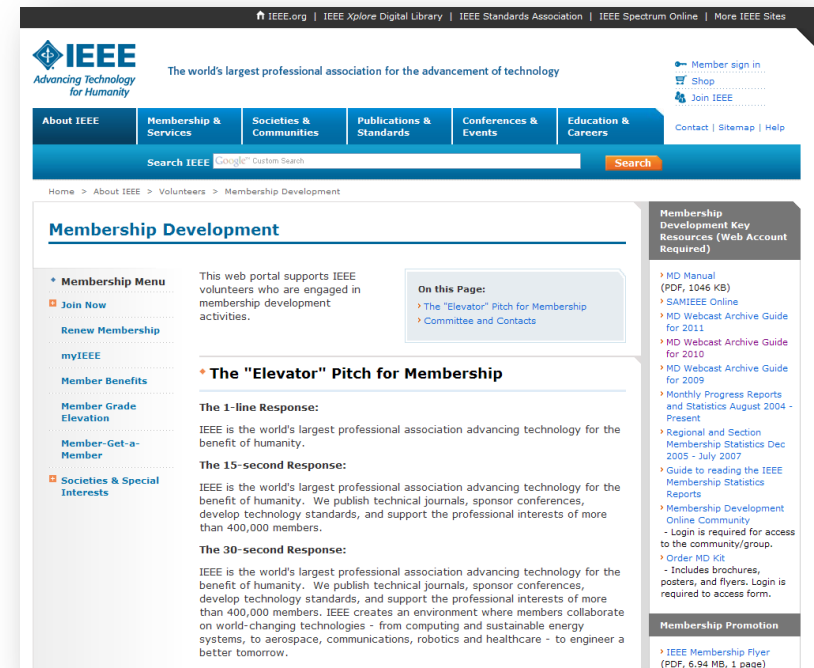
MGA Staff Contact
Adrienne Hahn
a.hahn@ieee.org

New Member Engagement Checklist

Communications

- Open and review data from new member e-mail alerts / SAMIEEE
- Initiate communications to new members welcoming them to the Section / Chapter (e.g., e-mail, note cards, phone call)
- Consider designating a Volunteer as a new member mentor

Recognition

- Highlight new members in Section / Chapter communications / newsletters
- Introduce new members at each event, meeting

Participation

- Hold special event for new members
- Solicit new members for open Volunteer positions
- Investigate/survey new members on their interests for types of activities

Evaluation

- Monitor new member participation in Section / Chapter events
- Review first-year member retention rate for Section, with year-over-year comparisons

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Focus #3: New Member Recruitment

■ Familiarize yourselves with the <u>existing</u> membership development resources, tools, and best practices

■ Add yourself to the MD-Alert-All alias, to receive important invitations and reports

■ Participate in <u>existing</u> collaborative activities and training, e.g., MD Webcasts (live or archive)

www.ieee.org/md

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c.downer@ieee.org

Focus #4: Leverage Existing Initiatives, Resources

- Survey development and execution processes, resources, tools

- Data analysis processes, resources, tools

- Product development processes, resources, tools (methodology is transferable to activities and events)

- Membership development processes, resources, tools

By working collaboratively, we optimize Volunteer, Staff, and financial resources and best practices
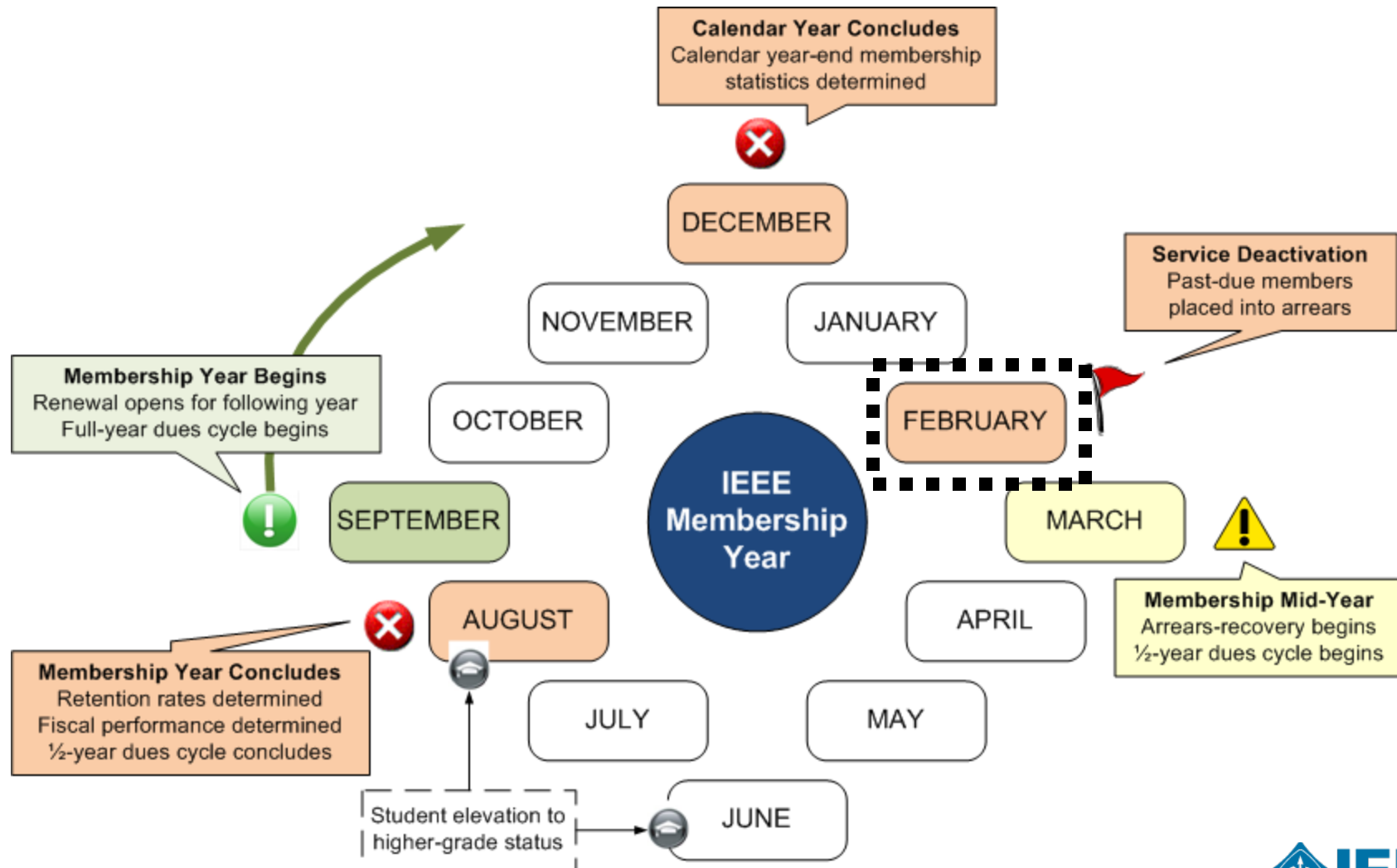
<u>Appendix</u>
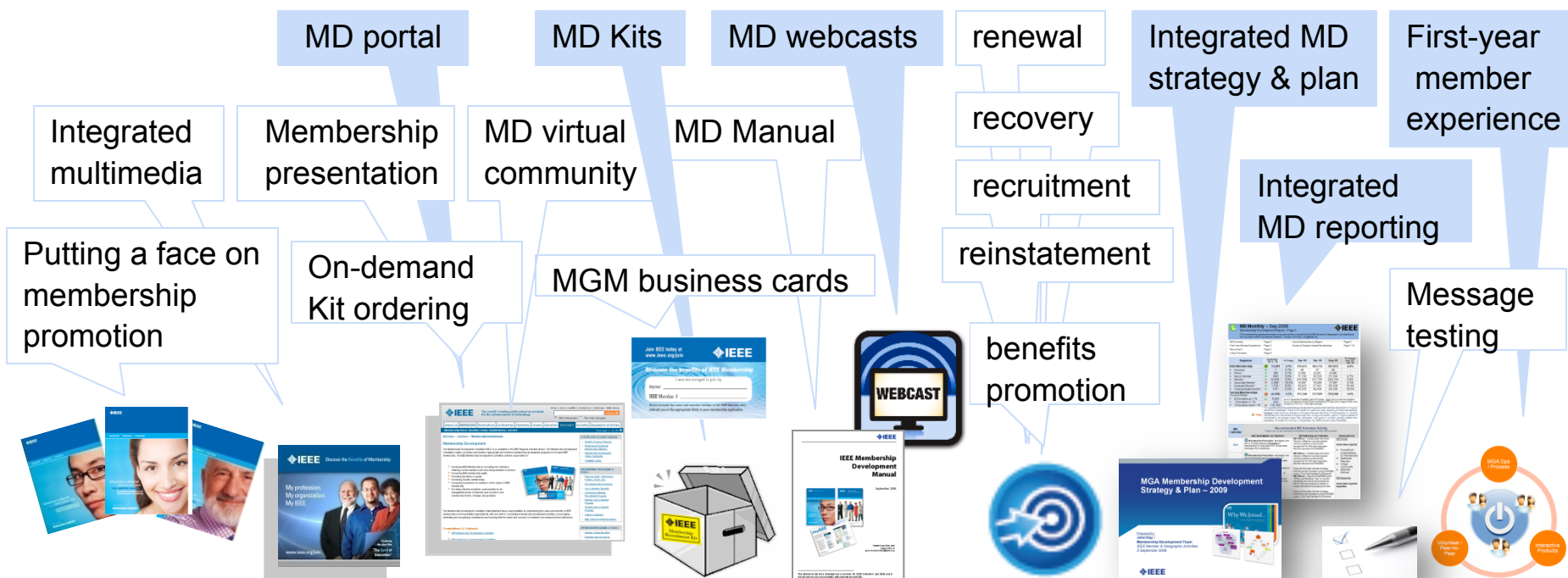# Membership Development Program

Membership Development Strategy

TACTICS	Existing Members (retention)	Prospective Members (recruitment)	Reinstatement (former members)
Field Team Support (Volunteers)	✔	✔	
Direct Outreach	✔	✔	✔
Peer-to-Peer		✔	
Advertising	✔	✔	
Telemarketing (selective)	✔		
Conferences	✔	✔	

Membership Cycle

Evolution of MGA Support

MD portal

MD Kits

MD webcasts

renewal

Integrated MD strategy & plan

First-year member experience

Integrated multimedia

Membership presentation

MD virtual community

MD Manual

recovery

recruitment

Integrated MD reporting

Putting a face on membership promotion

On-demand Kit ordering

MGM business cards

reinstatement

Message testing

benefits promotion

365,500 members	367,400 members	374,800 members	382,400 members	397,000 members
2005	**2006**	**2007**	**2008**	**2009**

myIEEE   ieee.tv   membernet

(next generation, online member experience)

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2010 …

- Finalization of 5 Year Member Experience Roadmap
  - Defining the path to a "Wow" experience in the areas with the largest gap between importance and satisfaction:
    - Professional Networking
    - Career Resources and Recognition
    - Access to Publications
    - Continuing Education
    - Discounts on Products and Services

- Student and GOLD Volunteer Mobilization

- Student Web Presence

- Expansion of First Year Experience

2011 …

- Region 1-6 Membership Revitalization
- Improved navigation of member benefits on IEEE.org
- Continued Enhancements to Member Engagement
  - First year experience improvements
  - Student competition portfolio management
  - GOLD (Young Professional) strategy implementation
- myIEEE/memberNet Integration and Collaboration
- Implementation of Member Experience Roadmap Improvement Recommendations
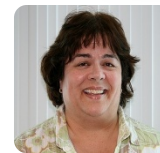
Membership Development Web Portal   www.ieee.org/md

- Membership Presentations
- One-page membership and program fliers
- Membership Supply Ordering (no cost)
  - Brochures, product sheets, giveaways
- MD Webcast Archive
- MD contacts

Membership Development operations & Volunteer support:

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First-Year Member Experience
> Volunteer Support

MGA Staff Contact
Adrienne Hahn
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- ❑ **NEW: Monthly New Member E-mail Alerts** to Section Chair and MD Officers

- ❑ **Strategic Exercises** for Local Groups

- ❑ **Best Practices Guides**
  - ◾ Suggested activities & frequency
  - ◾ Communications Samples

- ❑ **Greeting Cards & Envelopes**
  - ◾ Shipped with MD Kits

- ❑ **Updates in Monthly MD Progress Report**
  - ◾ Dedicated section of the 'MD Monthly'
  - ◾ Existing activities underway, new tools
  - ◾ Volunteer recognition

- ❑ **How do we engage the entire geographic and technical leadership in this activity?**
  - ◾ **Should not only be an MD function**

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First-Year Member Experience (cont.)
> Member-Facing Activities

Launched:

- First Year Member Monthly Webinar
- New "Getting Started" guide to all new members
- Contact center courtesy calls & Inbound call routing
- Metrics and Benchmarking
- Website for new members ieee.org/start
- New question in join application as of Dec '09
    - "How can IEEE best serve your needs"

Future Planning

- Specialized contact center service
- Upgraded new member website
- "Experience Tracks" based on "Needs" question during join

A guide to activating your IEEE membership

Get started.
Get involved.

Your IEEE membership starts here
www.ieee.org/benefits

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Celebrating 125 Years
of Engineering the Future

First-Year Members: Establishing a Partnership

New Members

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Awareness	Interest	Action
• Receive confirmation of membership	• Members review and utilize member benefits / opportunities	• Members access benefits, opportunities, and events, e.g., new member webinar
• Monthly e-mail alert to Section and MD officers linking to new member roster • MD Staff review new member data	• Volunteer access to roster of new members • MD Staff extend invitations to new member orientation	• IEEE Volunteers and Staff initiate welcome activities

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First-Year Members – New Member Alert

- E-mail sent from IEEE monthly to all Section Chairs and Section MD officers containing special hyperlink to SAMIEEE log-in page

- Upon log-in, SAMIEEE will automatically run report of new members from previous month

- Report contains contact information, as well as the reason(s) why they joined IEEE (required field on application)

- Report date-range can be modified to pick-up new joins from previous months in your dashboard

New Member Alert Process

(1) Membership month concludes

start

(2) MD Staff initiates new member e-mail alert (monthly) to Volunteer officers, indicating new member report is available.

(3) Volunteers click hyperlink contained in e-mail alert, sending them to SAMIEEE log-in page. Log-in.

end

(4) Upon log-in, SAMIEEE automatically runs new member query and generates report.

(5) Volunteers can review contact info online and/or download into Excel, to initiate localized welcome greeting.

Section communications & activity development implications

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First-Year Members – Guides, Templates

New Member Engagement Checklist

Communications

- Open and review data from new member e-mail alerts / SAMIEEE
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- Consider designating a Volunteer as a new member mentor

Recognition

- Highlight new members in Section / Chapter communications / newsletters
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Participation

- Hold special event for new members
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- Investigate/survey new members on their interests for types of activities

Evaluation

- Monitor new member participation in Section / Chapter events
- Review first-year member retention rate for Section, with year-over-year comparisons

Sample, First-Year Member Welcome Letter

Dear ‹member›,

Welcome to the ‹IEEE Section›,

I want to formally welcome you to your local IEEE network. IEEE has over 300 local Sections worldwide to provide a more personalized experience for our members, offering activities and events tailored to the needs of our engineering and technical community.

The ‹IEEE Section› will provide you with numerous opportunities to meet other professionals who share your passion for technology. I encourage you to join us at one of our upcoming Section meetings and/or events. A schedule can be viewed at ‹Section website URL›.

It is an honor to be one of the first to congratulate you on joining IEEE, and I look forward to meeting you in person. Do not hesitate to contact me if you have any questions about your membership, and how to participate in our Section.

Sincerely,
‹Name›
‹Officer›
‹IEEE Section›
‹Contact information›

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Transition from Student to Professional

Student Elevation Kits/ Campaign

- Campaign mailing to every graduating student
  - Celebration of accomplishment, and introduces IEEE's opportunity after graduation
  - Showcases benefits for a beginning professional, Job Site, Mentoring Connection, MemberNet

- Emphasis on members-only discounts to counter sticker-shock of pending dues increase

- Incentive for those who update their profile information
  - Drawing for MDL Subscription

Graduating Students Retention Rate - Years Since Graduation ■ +1 year ■ +2 years ■ +3 years ■ +4 years ■ +5 years

Graduates	+1 year	+2 years	+3 years	+4 years	+5 years
2003 graduates	40%	31%	26%	23%	21%
2004 graduates	40%	30%	25%	24%	22%
2005 graduates	39%	29%	26%	25%	22%
2006 graduates	35%	30%	30%	26%	
2007 graduates	43%	33%	27%		
2008 graduates	46%	35%			
2009 graduates	47%				

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