

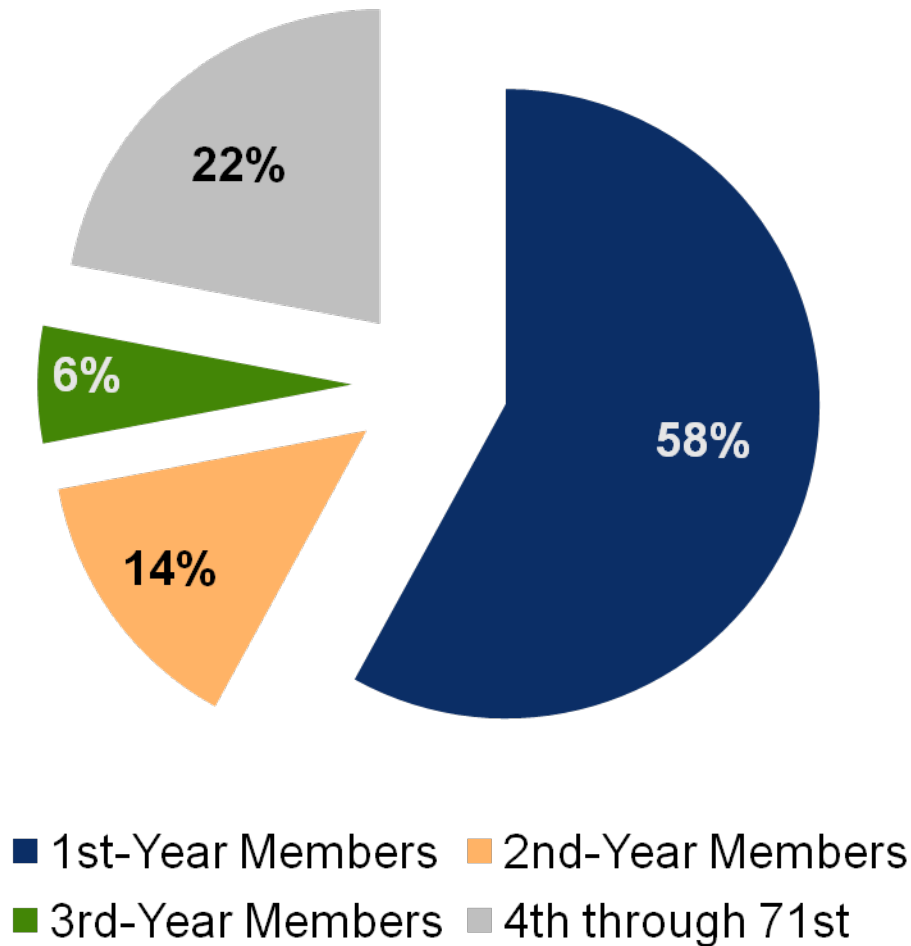


Region 3 – First Year Member Experience Project

April 10, 2015

Presented by: The Region 3 FYME Team

Total Attrition – Outflows, All Grades in a typical year



Why are we here ?

- ▶ To build a relationship with new members
- ▶ To ensure that new members completely understand the value of IEEE
- ▶ To help them find a professional home
- ▶ To help members network within the IEEE community
- ▶ Help with personal growth and identify IEEE alignment
- ▶ Identify and link with a mentor
- ▶ To help advance technology for humanity
- ▶ To grow Region 3 and the IEEE

The IEEE Membership Challenge

- ▶ The IEEE does a great job in getting new members
- ▶ We just lose too many in the first, second, third and fourth years
- ▶ The attrition is basically the same whether you pick any three years since 2000
- ▶ If we could do a better job in the early years, we could grow by 5% - 10% per year
- ▶ Region 3 could double our size if each one of us signed up one new member, but we would still need to keep them

Goals of First Year Member Experience Project:

- ▶ To build relationships with the new member and the IEEE that can last for an entire career
- ▶ To increase the retention of members after their first year of paying IEEE dues
- ▶ To develop the next generation of volunteer members
- ▶ To maintain and grow the IEEE and its ability to provide value for its members and humanity
- ▶ **SECON2015: Provide 5 specific, actionable, suggestions for Section chairs to implement in the next few months**

Region 3 Membership – January Snapshot

Region Snapshot	This Month	'15 vs. '14	% Change
Total Membership	23,197	▼ (903)	-3.7%
Higher-Grade	19,246	▼ (238)	-1.2%
Students	3,951	▼ (665)	-14.4%
IEEE Worldwide	302,183	▼ (5,165)	-1.7%

Five Specific Suggestions for Section Chair Action:

- 1) Section chair checklist
- 2) Develop mentor pool and MD volunteers
- 3) Telephone call introduction and welcome script
- 4) Interest/goal collection with not-so-hidden agenda
- 5) Include First Year Member Engagement in yearly planning

1-Develop Section Chair Checklist for New Member Engagement

Tailored to section and could include:

- Welcome Letter and personal contact script
 - Include section focus, special events, where to find more information/training, when is next event of interest to new member
- Tool to run new member report and obtain profile info
- List of section volunteers to perform personal contact tasks
- Follow-up on contact process and results

1-Where do Section Leaders Start?



Get Acquainted...
www.ieee.org/start

**Expand Your
Membership**



Quick Links



2-Develop Mentor Network

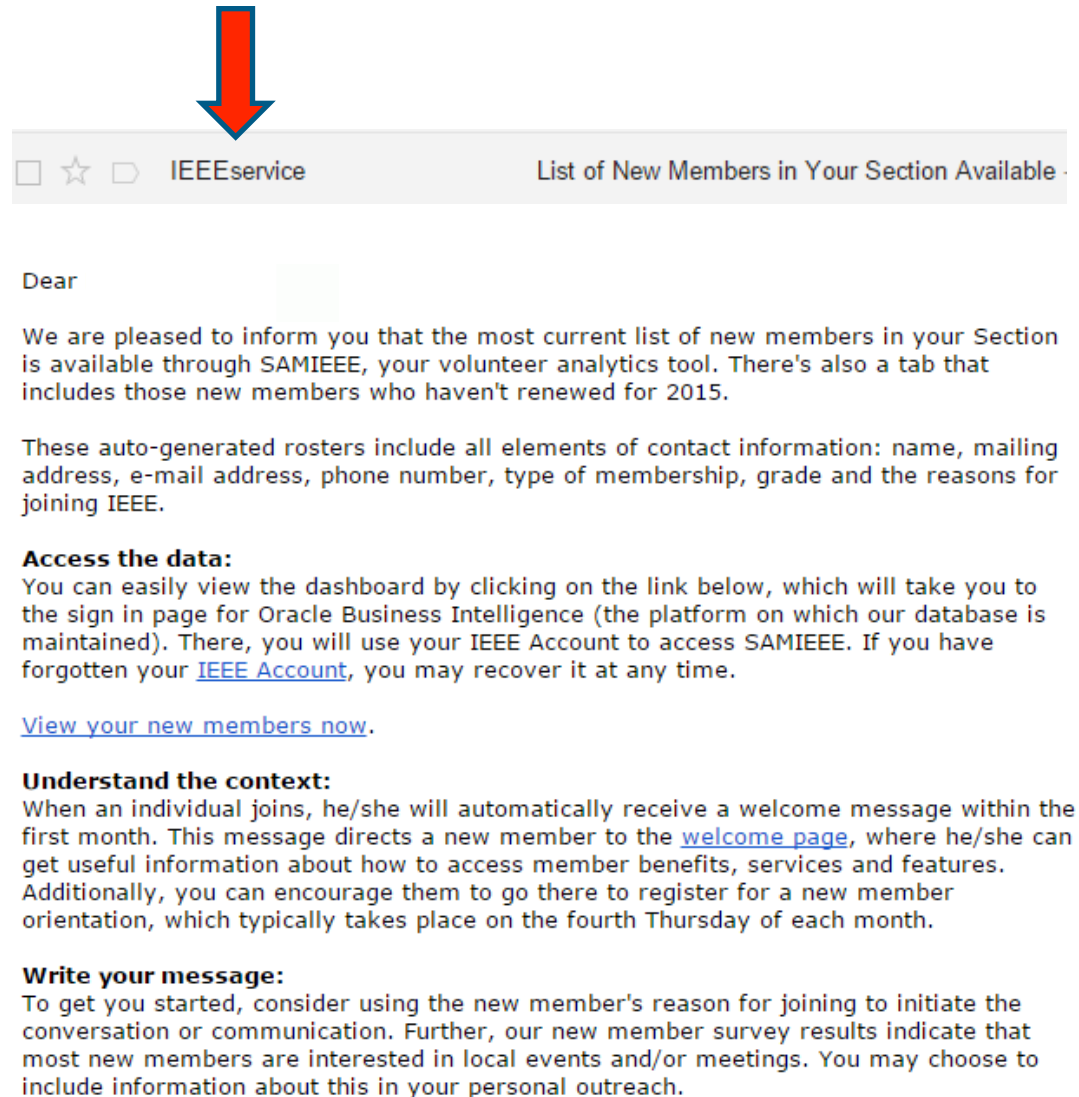
- 1) Look for 3 -5 members who have a passion for helping others to form mentor recruiting group. Ideally, they should include a young professional, a mid career professional, WIE member and a life member.
- 2) Meet each individually to discuss your vision of developing a mentor network. Gauge their interest and if appropriate, ask for their help to identify potential networks.
- 3) Meet with mentor recruiting group to develop a strategy to identify mentors. For example, can each mentor recruiter identify 3 other potential mentors. Continue as needed.
- 4) Once a core group of mentors is identified, reach out to student branches and Young Professional and WIE affinity groups to offer help in matching mentor and mentee.
- 5) Ask mentors to attend student branch, Young Professional, WIE and Section activities and provide mentoring when possible.
- 6) Continue to recruit mentors and mentees. Enable match up activities.

3-First contact with the new members

1. Find out who are the new members.

1.1. Each section chair, and MD chair received at the end of the month an email from IEEE Services, with the list of the new members of the section.

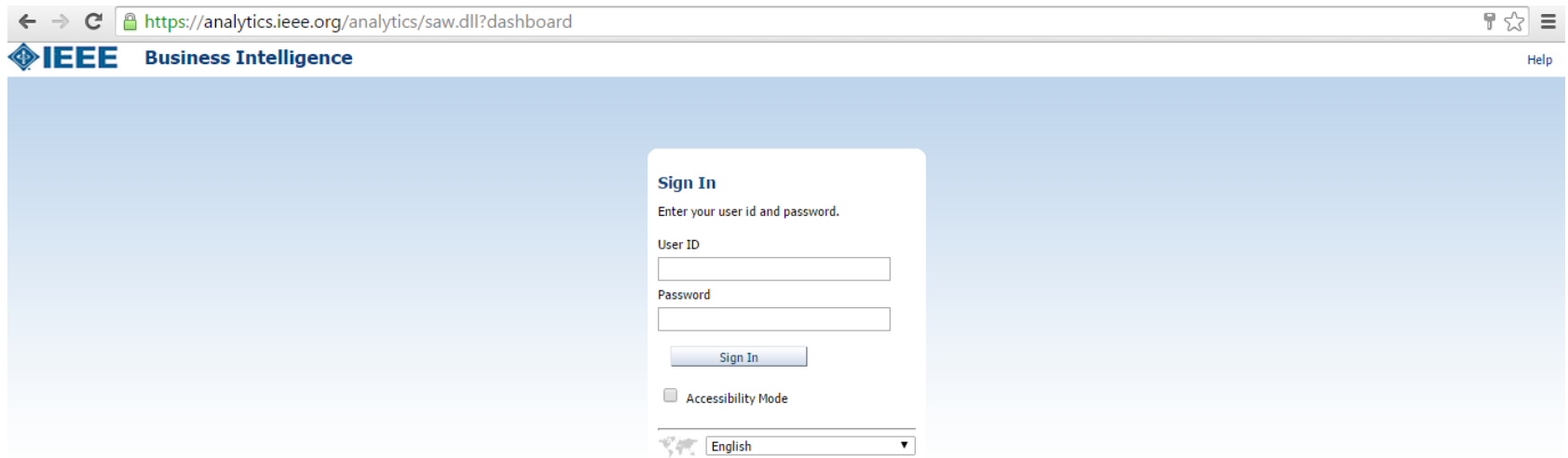
1.2. Click in **View your new members now**. It will send you to SAMIEEEE.



The screenshot shows an email interface. At the top, there is a header bar with a search icon, a star icon, a refresh icon, and the text "IEEEservice" on the left, and "List of New Members in Your Section Available" on the right. A large red arrow points down to the "IEEEservice" text. Below the header, the email body starts with "Dear", followed by a blurred name. The main text reads: "We are pleased to inform you that the most current list of new members in your Section is available through SAMIEEEE, your volunteer analytics tool. There's also a tab that includes those new members who haven't renewed for 2015." This is followed by: "These auto-generated rosters include all elements of contact information: name, mailing address, e-mail address, phone number, type of membership, grade and the reasons for joining IEEE." Then, a section titled "Access the data:" follows, with text: "You can easily view the dashboard by clicking on the link below, which will take you to the sign in page for Oracle Business Intelligence (the platform on which our database is maintained). There, you will use your IEEE Account to access SAMIEEEE. If you have forgotten your [IEEE Account](#), you may recover it at any time." Below this is a blue link: "[View your new members now.](#)". A red arrow points to this link. The next section is "Understand the context:" with text: "When an individual joins, he/she will automatically receive a welcome message within the first month. This message directs a new member to the [welcome page](#), where he/she can get useful information about how to access member benefits, services and features. Additionally, you can encourage them to go there to register for a new member orientation, which typically takes place on the fourth Thursday of each month." The final section is "Write your message:" with text: "To get you started, consider using the new member's reason for joining to initiate the conversation or communication. Further, our new member survey results indicate that most new members are interested in local events and/or meetings. You may choose to include information about this in your personal outreach."

3-First contact with the new members

1.3. Log in, with you IEEE account information.



The screenshot shows a web browser window with the URL <https://analytics.ieee.org/analytics/saw.dll?dashboard>. The page header includes the IEEE logo and the text "Business Intelligence" on the left, and a "Help" link on the right. The main content area features a "Sign In" form with the following elements:

- Sign In** (Section Header)
- Enter your user id and password.
- User ID (Text input field)
- Password (Text input field)
- Sign In (Submit button)
- Accessibility Mode
- Language selection (Dropdown menu showing "English")

3-First contact with the new members

1.4. Export the information.

Member Activity Update

New Members of IEEE

Region Code: R3, Section Name: Eastern North Carolin, IEEE Join Date: Between [] [] Apply Reset

Results default to provide a list of IEEE members who joined between the first day of the previous month and today. If necessary, you may select a different date range.

Section Name	Sub Section Name	Full Name	Join Date	IEEE Current Grade Description	IEEE Membership Type	Primary Address Line 1	Primary Address Line 2	Primary City	State	Zip	Address Line	Primary Address Country	Email Address	Work Phone	Home Phone	Society Affiliation	Reason for joining IEEE	Region Code	
Eastern North Carolina Section	Lower Cape Fear Subsection	Karin Dana	06-Mar-2015	Student Member	IEEE Membership Traditional	406 George Creek Rd		Owensboro	NC	28434-7783		USA	kdana3@gmail.com				Local Activities;	R3	
		Josh Eugene Locklear	17-Mar-2015	Student Member	IEEE Membership Traditional	2107 Preston Rd		Maxton	NC	28564-0037		USA	jlocklea@unc.edu		9107860306		Technical Information; Professional Network; Career Opportunities; Local Activities;	R3	
		Amy Phillips	21-Mar-2015	Student Member	IEEE Membership Traditional	300 Talon Cir Apt 2F		Jacksonville	NC	28546-6928		USA	ambitionmpe@gmail.com		7133169342		Professional Network; Career Opportunities;	R3	
		Whitney Rainey	16-Mar-2015	Student Member	IEEE Membership Traditional	4400 Owendon Dr		Charlotte	NC	28270-4308		USA	whitneyrainey@gmail.com					Professional Network;	R3
		Dale W Schmidt	19-Mar-2015	Member	IEEE Membership Traditional	135 Cornell Ln		Hampstead	NC	28443-7134		USA	dale.whitchurch@gmail.com					Technical Information; Professional Network; Career Opportunities;	R3
		Alexander Lea Poyaris Wilfrans	05-Feb-2015	Graduate Student Member	IEEE Membership Traditional	5416 Westham Blvd Apt 1022		Jacksonville	NC	28546-6038		USA	megilp33@gmail.com					IEEE C446	Technical Information; Professional Network; Career Opportunities; Local Activities; Humanitarian Programs

Rows 1 - 25

Analyze - Refresh - Print - Export

- PDF
- Excel
 - Excel 2003
 - Excel 2007+
- Powerpoint
- Web Archive (.mht) 4341
- Data

Export

3-First contact with the new members

1.5 What you can do with that information.

- Send a welcome letter. A phone call is always better.
- Invite them to section activities (technical, administrative, professional and social).
- Invite them to be volunteers.
- Follow up the section's recruitment goals.
- Run membership reports.

4-Interest/Goal Collection and Action

- At first meeting of year, hand out index cards and ask attendees to write down a professional goal, and what they want from IEEE. Explain what sorts of goals and wants they might specify – expanding their network, a new job/promotion, giving back to the community, learning a new skill, leadership experience, STEM outreach, mentoring, etc.
- This exercise will get them thinking about the value of their membership, and give the Section leadership an idea of what sort of activities to provide.
- Other items that could go on the card:
 - Senior Member qualified and interested
 - IEEE volunteer experience
 - Interest in Mentor or Mentee match?

5-Incorporate First Year Member Engagement in Planning Activities

- Identify new members at Section meetings with special name tag, or dots, and encourage existing members to introduce themselves. Encourage Chapter and AG meeting organizers to do the same.
- Plan an event that addresses the goals/wants of First Year/ New Members of your section. It could be a social/training event where you provide an IEEE-generated training presentation and a meal.
- Ask them to volunteer for a task that supports their goal/want.

The Human Touch

- ▶ Using service organizations as a benchmark, develop a local Section / Chapter team that can,
 - Immediately welcome new members with a local phone call and invitation to the next meeting. Begin building the relationship with the new member.
 - Assume they know nothing about the IEEE and begin their education. Leverage Staff supported communications.
 - Find out what their interests are
 - At the next meeting, introduce the new member to members that can “set an example” and share similar interests
 - Find them a volunteer role
 - Stay in touch and ask what can we do better

Summary – The First Year Member Experience Team

- ▶ Build the local team and leverage its power
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 - Bill Williams, billwill@triad.rr.com
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