

Proposal for IEEE Industry Relations Platform

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Challenge

Problem Statement



OUR PARTNERS

WHO MADE THE JOURNEY OF INSL A REALITY!



Platinum Partner



Golden Partner



Silver Partner



Patroit Partner



Venue Partner



Gift Partner



Outreach Partner



IEEE PARTNERS

Why?

Why IRP Is needed

- ▶ Easily identify any past engagements
- ▶ Reduce conflicts
- ▶ Bird's eye view
- ▶ Track activities related to a partnership
- ▶ Manage local contacts of entities
- ▶ Reduce repetitive work

[1] IEEE Industry Engagement Guidelines
(<https://www.ieee.org/about/corporate/industry-engagement-resource-guidelines.html>)



What?

IEEE Industry Relations Platform is a centralized web application for IEEE organizational units and committee members to manage all aspects of external entity partnerships, their contacts and related activities.

CRM for IEEE OUs

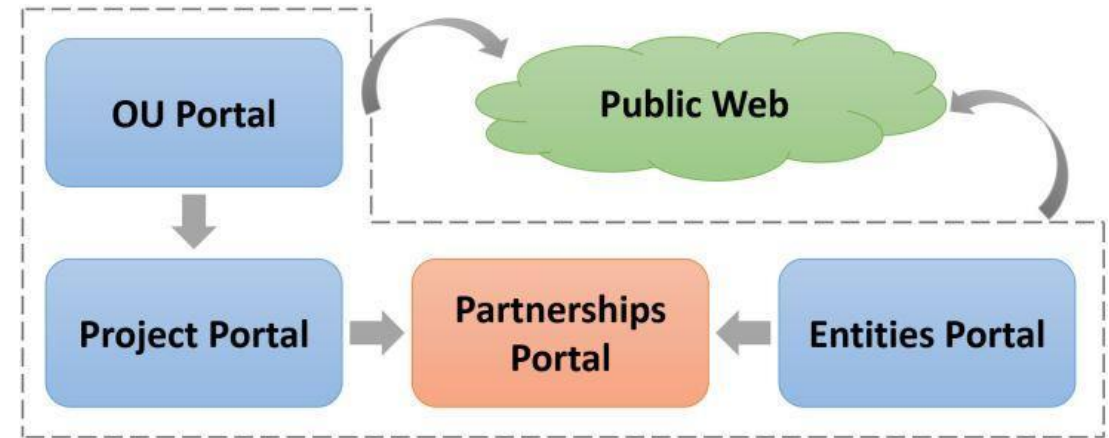


How?

Overview

Two main components

- ▶ A web backend to be used by registered users to manage operations. It consists of four main portals (as indicated by the dotted line) users can input data in.
- ▶ A public web to recognize all entities (companies, other IEEE OUs, etc.) that partner with IEEE OUs and Projects



How?

4 main portals and their tasks

1. OU Portal

- Create and maintain IEEE operational units

2. Project Portal

- Create and maintain projects organized by each IEEE OU

3. Entities Portal

- Create and maintain profiles for partnering organizations

4. Partnerships Portal

- Connect projects and entities when entities partner for a project/OU



Case Study

A scenarios on how this will be used and possible outcomes



Metrics

How the impact will be measured

- ▶ **Feedback at the end of the trial from users**
- ▶ **Industry satisfaction survey results about partnering with IEEE**
- ▶ **Industry engagement statistics**

Progress

- ▶ Submitted to NIC last year. Received comments:
 - Re-submit as a seed grant to pilot the concept
 - Get support from other IEEE OUs (letters mentioning that they are willing to try it once developed)
 - Get feedback from IEEE IT about budget and timeline.
 - Budget: < \$40K and timeline for development < 1 year.
- ▶ Presented the idea to IEEE Industry Engagement Committee (IEEE Corporate Activities) and they agreed to be the OU sponsor.
- ▶ Industry engagement committee believes that this can be one piece of the industry engagement strategy going forward.
- ▶ Had a discussion with IEEE IT and they agreed to give inputs (consultancy role) during development.



Thank You!

Questions?



Proposed Motion

***Region 3 ExCom endorses the
New Initiatives Committee proposal titled
"IEEE Industry Relations Platform"***

IEEE Industry Relations Platform

IEEE Industry Relations Platform is a centralized web application for IEEE organizational units and committee members to manage all aspects of external entity partnerships, their contacts, and related activities. This document gives details about the motivation behind the IEEE Industry Relations Platform and elaborates on the proposed features in the project.

1. Goals

Follow best practices for industry engagement as mentioned by [IEEE Industry Engagement Guidelines](#) as follows.

1. **Bird's Eye View:** Organizational Unit (OU) committee members can see an overview of project partnerships and external entities that they have partnered with
2. **Track activities related to a partnership:** Maintain partnership status, comments/feedback, Memorandum of understanding (MOU), after reports, etc.
3. **Easily identify any past engagements:** identify any past engagements with a given entity (names and contact information, type of engagement, outcomes, pain points, and best practices, etc.). Quoting from the IEEE Industry Engagement guidelines;
"Better understand the IEEE-wide engagements with the entity (Do they have any subscriptions to IEEE Electronic Library (IEL), or other products/services? Are they an SA (Standards Association) Corporate Member? Have they sponsored an IEEE Award or Conference in the past?). It is vitally important that our engagement is not perceived to be unorganized and uncoordinated."
4. **Reduce conflicts:** Reduce conflicting situations where two IEEE OUs (or two projects of same OU) approach the same external entity without knowing another
5. **Manage local contacts of entities:** Maintain contact information of relevant external organizations representatives
6. **Reduce repetitive work:** All EXCOMs, project committees create company contact lists every time by their own without knowing what previous teams have done (as not everything is transferred correctly)

The [IEEE Sections Congress 2017 Recommendations](#) outlined the following;

- Strengthen and recognize Industry/Academia/Government Collaboration/Partnerships

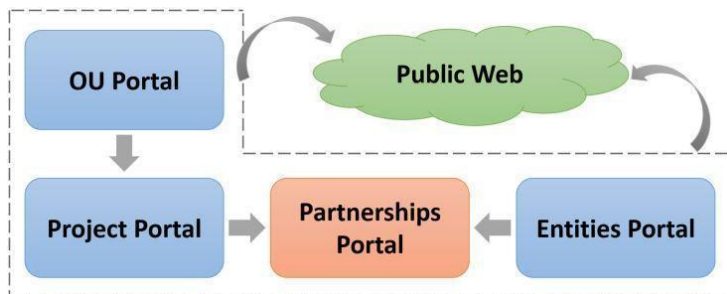
- Create a Section Award for Industry/Academia/Volunteer collaboration
- Organize multidisciplinary Industry/Academia/Government events focused on 'hot' issues.
- Develop a public communications platform to develop projects and share results.
- Create a 'dating' platform to communicate industry issues searching for solutions and possible 'applications' of research results.

2. Specifications / Components

2.1 Overview

The figure below shows an overview of the web application. It has two major components;

1. A dashboard to be used by registered users to manage operations. It consists of four main portals (enclosed by the dotted line) users can input data in.
2. A public web to recognize all entities (companies, other IEEE OUs, etc.) that partner with IEEE OUs and Projects.



The following sections describe each of the components in detail together with user privileges.

Three main types of users are discussed in the proposal;

1. Super Admin - Used to create OU Admins and license instances of the industry relations platform to any OU requesting the service.
2. OU Admin - Administrator of the Industry Relations Platform for that OU appointed by the OU ex-com. (e.g., in a section, this can be the industry relations chair)
3. Project Manager - Administrator of all partnerships between a project and entities.

2.2 OU Portal

- IEEE OUs can be created in a hierarchical manner
- Each OU has one or more IEEE member(s) who are considered as **OU admin(s)**
- Two different types of entries will come under each OU
 - **Projects** organized by OUs. (e.g., SYW congress of a section is a project organized by the Section)
 - **Child OUs** are OUs under the parent OU (e.g., a student branch is a child OU of the section)
- Admin(s) of an OU has visibility to all projects of that OU as well as child OUs and their projects. (e.g., the section can check partnerships of student branches)

2.3 Projects Portal

- A **Project** is an IEEE event organized by an OU.
- At the beginning of the project, the executive committee of the OU appoints a **project manager**, who is most probably the project chair.
- The project manager is responsible for keeping all partnerships between the project and entities up to date on the platform.
- An external entity partnering with a project is a **partnership** (e.g., if a company sponsors an IEEE event organized by a certain OU, it is considered a partnership).
- A project can have multiple partnerships with multiple external entities.
- The sponsorship proposal of a project and other relevant documents can be attached to the project portal for future reference.

2.4 Entities (Companies) Portal

- Project managers can create external entity profiles in the portal. Once the project manager submits the entity profile, the OU admin will review and approve/merge to avoid any duplicates/conflicts.
- Entity profile contains information such as entity name, logo, website, address, the business sector (eg: software, robotics, manufacturing, banking, IT, etc.) and frequency of engagement.
- An entity will have one or more **representatives** (points of contact) to manage partnerships from their side. The platform will keep records of their details (Name, Job Role/ Position, Email, Phone number, Is (s)he Past IEEE member?, etc.) [One person cannot be a point of contact in two companies].
- Ability to manage (list, add, update, delete) the contact information of relevant external organizations/representatives.
- An entity may engage with multiple projects of multiple OUs. However, the IEEE project manager has to avoid possible conflicts by checking the public web or consulting with the OU admin.

2.5 Partnerships Portal

- Used to track all activities related to a partnership.
- Assigned to a Project/ OU and has a project manager who is responsible for updating the entire lifecycle of a partnership.
- A partnership contains the following

- Unique partnership number
- IEEE OU
- Project
- Entity
- Entity Representative(s)
- IEEE Partnership Manager(s)
- Date Started
- Type of Engagement: [Financial, Goodies, Venue]
- Partnership Status: [Ongoing, Closed]
- Comments about partnership development (partnership log)
- Memorandum of understanding (MOU): What IEEE OU & Entity provide
- Reports
- Feedback
- Date Closed
- Partnership logs (which contains all the changes that have been done)

2.6 Public Web

Sections 2.2 through 2.5 described portals in the dashboard used by volunteers to keep track of partnerships. In addition to this, a public website will be developed that automatically populates itself from data inputted by volunteers. The public web will have the following features;

- Home page with a logo collage of all entities that ever partnered with the OU.
- Ability to filter partnerships by OU (e.g., Section, Student Branch, Technical Chapter).
- Clicking on each logo will show the projects that particular entity partnered with.
- Maintain a page for each company listing all the partnerships between that company and IEEE OUs. (<https://aiesec.org/partner/348369>)
- A page for each project listing its partners there. An overview of project details will be listed here.

3. Possible Future Enhancements

- Link with IEEE.org (Collabratec/myIEEE) account to sign in to IRP.
- Link with vTools so that current OU chairs can take control and continue the services; also from system we can send them follow-up reminder emails.
- Use the portal for sponsorship hunts as well to keep track of partnership status (e.g., open, approved, rejected, waiting for approval).
- An industry engagement toolkit to be used by the IEEE OUs (e.g., a repository of email templates for partnership management, report templates, letter templates, etc.)

References

1. Industry Engagement Resource Guidelines (<https://www.ieee.org/about/corporate/industry-engagement-resource-guidelines.html>)
2. IEEE Sections Congress 2017 Recommendations (http://sections-congress.ieee.org/wp-content/uploads/2017/09/SC2017_Final3-Recommendations.pdf)
3. IEEE Sri Lanka Industry Engagement Toolkit (<https://sites.google.com/view/ieee-sl-industry-engagement>)