Situational Engagement …

Membership Development
Best Practices for Growing Membership

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IEEE Member & Geographic Activities
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IEEE Region 9 Committee Meeting
Punta Cana, Dominican Republic
25 May 2010
Today’s Presentation

- Strategy Transformation
- Situation & Guidance
  - Case Study: Region 9

Appendix
- Developing *your* MD Strategy
Strategy Transformation
## Membership Development Support & Evolution

**Remaking the Collateral** > **Building a Volunteer “Field Team”** > **Optimizing the Campaigns** > **Synthesis & Engagement**

<table>
<thead>
<tr>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>365,500 members</td>
<td>367,400 members</td>
<td>374,800 members</td>
<td>382,400 members</td>
<td>397,000 members</td>
</tr>
</tbody>
</table>

**Key Strategies and Tools**:  
- MD portal  
- MD Kits  
- MD webcasts  
- Integrated MD strategy & plan  
- First-year member experience  
- Integrated MD reporting  
- Message testing  
- Putting a face on membership promotion  
- On-demand Kit ordering  
- MD virtual community  
- MD Manual  
- MGM business cards  
- integrated multimedia  
- Membership presentation  

**Notes**:  
- BMS transition  
- ‘Great Recession’  
- renewal alerts integrated into next-gen products
MD Strategy w/ Full Volunteer Integration

- Volunteer ‘Field-Team’
- Messaging / Collateral
- Membership Development
- Advertising / Branding
- Direct Outreach

MD Volunteer “Platform”

- Reporting / Evaluation
- Peer-to-Peer Collaboration
- Tools & Resources
MD Situation & Guidance
Membership Year Begins
Full-year dues enacted
Renewal opens
Key month for launching new or upgraded benefits
From Sep thru Dec, revenue deferred to next year

Calendar Year Concludes
Year-end membership statistics determined

Active-Status Terminator
Past-due members placed into arrears

Membership Mid-Year
½-Year Dues-Cycle Begins
Arrears-Recovery Begins
Key month for launching new or upgraded benefits

Membership Year Concludes
Member retention rates determined
Business fiscal performance determined
½-year dues cycle concludes
Scatter Plot Analysis
(higher-grade members)

Key

X-axis = present year retention
Y-axis = Year-over-year recruitment
Recommended MD Emphasis

Year-over-Year Recruitment %

<table>
<thead>
<tr>
<th>X-axis</th>
<th>Y-axis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Present year retention %</td>
<td>Year-over-year recruitment %</td>
</tr>
</tbody>
</table>

- **100% on retention**
- **75% on retention, 25% on recruitment**
- **15% on retention, 85% on recruitment**
- **15% on retention, 85% on recruitment**

**Key**

- X-axis = present year retention %
- Y-axis = Year-over-year recruitment %

Great Job!

Rethink / Develop MD Strategy
**All IEEE Regions – through 27 Feb 2010**

(higher-grade members)

**Recruitment**
(15 Aug through 30 Jan)

- **Total Retention to Date:**
  - **R9:** 60%
  - **All 10 Regions:** 71%

---

**Retention**

- **0%**
- **40.0%**
- **80.0%**
- **-40.0%**
- **-20.0%**
- **-30.0%**
- **-10.0%**
- **0.0%**
- **10.0%**
- **20.0%**
- **30.0%**
- **40.0%**
- **50.0%**

**Year-over-Year Recruitment %**

- **All Regions through 27 Feb 2010**
  - **Recruitment (%)**
    - R1, R2, R3, R4, R5, R6, R7, R8
    - R9: 60%
    - All 10 Regions: 71%
Region 9 by Section – through 27 Feb 2010
(higher-grade members)

Total Retention to Date – Feb 2010
R9: 60%  All 10 Regions: 71%
Special Focus - March through May

Total Retention to Date – Feb 2010

R9: 60%  All 10 Regions: 71%
Special Focus – June through December

Year-over-Year Recruitment

Retention

Total Retention to Date – Feb 2010

Averages R9: 60%

IEEE: 71%
<table>
<thead>
<tr>
<th>Recommended / Situational Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SAMIEE queries for non-renewed members</strong></td>
</tr>
<tr>
<td>Renewal Outreach Templates</td>
</tr>
<tr>
<td>1st-Year Member Guide</td>
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<tr>
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<tr>
<td>STEP Program</td>
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<tr>
<td><strong>MD Strategy &amp; Plan Template</strong></td>
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<tr>
<td>MD Manual</td>
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</table>
In Summary...

- MD Volunteer Mobilization
  - Resources, tools, peer-to-peer support readily available

- Region 9’s MD challenge is member retention
  - Member engagement increases likelihood of retention

- MD issues and tactics are situational
  - Different strategies for existing and prospective members
    (see Appendix for templates)
  - Developing Nations / e-Membership offering
    (2011 membership year)
thank you
questions?
Appendix

Developing *Your* MD Strategy
## Differentiate Audiences – Different Expectations

<table>
<thead>
<tr>
<th>Constituencies</th>
<th>Technical Development</th>
<th>Professional Development</th>
<th>Community Development</th>
<th>Cost Savings / Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Members</td>
<td>... their needs change throughout a career</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospective Members</td>
<td>... they are everywhere. When we do recruit them, 50%+ attrition rate (first-year member strategy)</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
**Template A: Opportunities for Engaging Existing Members**

<table>
<thead>
<tr>
<th>IEEE Entity</th>
<th>Communications</th>
<th>Events</th>
<th>Recognition</th>
<th>Evaluation Considerations</th>
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</thead>
<tbody>
<tr>
<td>ABC Section</td>
<td>• Tactic A</td>
<td>• Tactic A</td>
<td>• Tactic A</td>
<td>• Event Participation</td>
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<tr>
<td></td>
<td>• Tactic B</td>
<td>• Tactic B</td>
<td>• Tactic B</td>
<td>• Volunteer Recruitment</td>
</tr>
<tr>
<td></td>
<td>• Tactic C</td>
<td>• Tactic C</td>
<td>• Tactic C</td>
<td>• Student Branch Vitality</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Member Retention</td>
</tr>
</tbody>
</table>
**Template B: Activity Mapping of Members**

<table>
<thead>
<tr>
<th>Engagement Venues &amp; Frequency*</th>
<th>1Q (Jan – Mar)</th>
<th>2Q (Apr – Jun)</th>
<th>3Q (Jul – Sep)</th>
<th>4Q (Oct – Dec)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communications</strong></td>
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<td></td>
<td></td>
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<tr>
<td>Tactic A</td>
<td></td>
<td></td>
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<tr>
<td>Tactic B</td>
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<td></td>
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<td></td>
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<tr>
<td>Tactic C</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Events</strong></td>
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<td></td>
</tr>
<tr>
<td>Tactic A</td>
<td></td>
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<td>Tactic B</td>
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<tr>
<td>Tactic C</td>
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</tr>
<tr>
<td><strong>Recognition</strong></td>
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<tr>
<td>Tactic A</td>
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<tr>
<td>Tactic C</td>
<td></td>
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</tr>
</tbody>
</table>

* Frequency Examples: Weekly, Monthly, Quarterly, Bi-Annually, Annually. See next slide for example for how complete template
## Example – Activity Mapping

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<tr>
<td>Tactic A</td>
<td>Monthly</td>
<td>Monthly</td>
<td>Monthly</td>
<td>Monthly</td>
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<tr>
<td>Tactic B</td>
<td>Bi-Annually</td>
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<td>Bi-Annually</td>
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</tr>
<tr>
<td>Tactic C</td>
<td>Quarterly</td>
<td>Quarterly</td>
<td>Quarterly</td>
<td>Quarterly</td>
</tr>
<tr>
<td><strong>Events</strong></td>
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<td>Tactic A</td>
<td>Weekly</td>
<td>Weekly</td>
<td>Weekly</td>
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<tr>
<td>Tactic B</td>
<td>Quarterly</td>
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<td>Quarterly</td>
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<td>Quarterly</td>
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</tr>
<tr>
<td>Tactic B</td>
<td>Annually</td>
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