IEEE Member & Geographic Activities 2021

Cecelia Jankowski
Managing Director, MGA

Region 10 Meeting, 6 March 2021
2021 MGA Priority Projects

Priority Projects support MGA strategic areas and Goals

Membership is a core MGA responsibility and strategic focus. These projects build on key member strategies and sustaining operations. They add specific focus due to Covid-19 and particular ad hoc efforts from the IEEE BoD and MGA.

- Evaluating Membership Dues Structure
- Membership recovery/ Covid-19 (includes Collabratec)
- 3-5 Year Dues (SC recommendation)

MGA geographic unit vitality is a competitive advantage of IEEE and MGA’s strategic focus. These projects define new capabilities that are underway or being created to strengthen the resources available to local geo units for engaging members and the public.

- Local Groups
- Section Vitality Automation
- Region Realignment
- Volunteer Engagement
- vAssist Pilot
- Sections Congress

Major IEEE-wide and MGA-led initiatives that will require significant volunteer and staff efforts to achieve successful completion.

- Next Gen Rollout
- Sections Congress Virtual
- Education and Industry Local Engagement (SC Recommendation)

Maintain an inventory and capability/usage assessment of those tools developed and or supported by MGA that are being used to accomplish our strategies and goals.

- Tool inventory including CLE, OU Analytics, vTools, IEEE App, Collabratec, vAssist
Member and Geographic Activities

Member Experience

Volunteer Experience

Geographic Unit Activities

Business Activities

Membership Operations
IEEE Member Experience and Operations
- IEEE Member & membership development, member research, member product portfolio mgmt, IEEE.tv, IEEE Collabratec™
- Manage the annual IEEE membership cycle - processing of membership invoices (join and renew), membership cards, grade elevations and membership programs and MD promotions
- IEEE Support (Member Contact) Center
- IEEE Admission & Advancement (A&A) - Sr. Member elevations, Fellows process support

IEEE Affinity Group Operations & Activities
- IEEE Students, IEEE Women in Engineering, IEEE Young Professionals, IEEE Life Members

GeoUnit Operations & Activities:
- GeoUnit Formations (Sections, Chapters, Affinity Groups, Student Branches); Volunteer Training – Center for Leadership Excellence (CLE), VOLT

Volunteer Tools
- vTools applications, eNotice, geounit web-hosting, OU Analytics, web conferencing

MGA Board/Committee Support
- Governance, operations, N&A, awards
Membership Recovery Efforts

Expand and enhance recruitment and engagement during the pandemic

- Leverage IEEE touchpoints (e.g. Spectrum, Collabratec, IEEE-USA, EA, etc.) to identify prospects, nurture relationships, and recruit for membership

- Launch the new, post-renewal member engagement program, packaging IEEE content and offers based on member interest categories in an automated email series

- Expand marketing mix for recruitment and reinstatement to include digital ads with video, and re-introduce traditional direct mail

- Conducted Section-level volunteer training and marketing plan development to share best practices and help drive better local MD activities

- Pivot promotional efforts to focus more on members, emphasizing their accomplishments during COVID and how IEEE supports them
  - Monthly Member Benefits newsletter
  - Updated monthly SCOOP (volunteer communications)
Center for Leadership Excellence
On Demand Training for Local Leaders

- **Audiences served:**
  - IEEE volunteers (Region, Section, Chapter, Affinity Group, Student Branch, Section-level committees)
  - VoLT Program candidates and students
  - Conference organizers + TA volunteers*

- **Content available**
  - Action Plans for 23 volunteer roles
  - Volunteer role descriptions for 41 positions
  - IEEE 101 courses
  - 80+ recordings on various topics, including professional development, volunteer recruitment, ethics and technology, and more
  - SC2020 Recommendations Event recordings and materials

* Content owned and managed by Volunteer Education & Engagement, IEEE Technical Activities
### 2021 Membership Development

<table>
<thead>
<tr>
<th>Tactic</th>
<th>Retention/Recovery</th>
<th>Recruitment</th>
<th>Reinstatement</th>
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<tbody>
<tr>
<td></td>
<td>• Standard renewal outreach series (Sept-June, paper and e-mail)</td>
<td>• Ongoing direct outreach (internal data sources)</td>
<td>• Annual direct mail and 3-mail series</td>
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<td></td>
<td>• Recent Grad/YP Price Testing (3-year, 5-year stepped and flat dues)</td>
<td>• Increase third-party direct outreach (external data sources)</td>
<td>• FUTURE50 Student Dues Discount initiative</td>
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<tr>
<td></td>
<td>• Elevation Outreaches (SM, Associate to Member)</td>
<td>• Digital advertising (Google, CT, search and display, Spectrum)</td>
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<td></td>
<td>• New member onboarding series (via Marketo)</td>
<td>• Lead gen and lead nurture strategy on IEEE web properties (spectrum, IEEE-USA, etc)</td>
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<tr>
<td></td>
<td>• Engagement efforts: ‘Members Doing Cool Stuff’ series; virtual Honors Ceremony attendance</td>
<td>• FUTURE50 Student Dues Discount initiative</td>
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<td></td>
<td>• Re-targeting ads to members in arrears (Google, Facebook)</td>
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<td></td>
<td>• Promote Auto Renewal Sign Up</td>
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<tr>
<td></td>
<td>• Spectrum Members Only Content strategy</td>
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<td></td>
<td>• Social Media engagement - #IEEExp</td>
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<tr>
<td></td>
<td>• FUTURE50 Student Dues Discount initiative</td>
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New IEEE Member Welcome and Onboarding

New members (both HG and Students) are welcomed and introduced to their benefits through 5 emails over the course of 4 weeks.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Topic</th>
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<tr>
<td>Immediately</td>
<td>Order confirmation</td>
</tr>
<tr>
<td>Within 24 hours</td>
<td>Welcome to IEEE – introduction to member profile</td>
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<tr>
<td>Day 6</td>
<td>Get started – introduction to member benefits by category</td>
</tr>
<tr>
<td>Day 11</td>
<td>Collabratec introduction</td>
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<tr>
<td>Day 16</td>
<td>IEEE Spectrum introduction</td>
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<tr>
<td>Day 21</td>
<td>Member discounts</td>
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**Additional emails to be added will:**
- Introduce members in the United States to IEEE-USA
- Offer discounted ILN courses to those who selected career resources, technical content as a reason for joining
OU Analytics - Member Activity Dashboard Update

Provides details for members and affiliates who are new or moved into your Organizational Unit.
IEEE Collabratec

Registrants increased by 11% in 2020; Engagement up 28% YoY

<table>
<thead>
<tr>
<th>Collabratec Registrants</th>
<th>242,234↑11% YoY</th>
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<tbody>
<tr>
<td>IEEE Members</td>
<td>83,507</td>
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<tr>
<td>Former IEEE Members</td>
<td>54,136</td>
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<tr>
<td>Non-Members</td>
<td>104,591</td>
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Since Launch:
20,969 non-members registered on Collabratec joined IEEE, and 9,024 former IEEE members reinstated their lapsed membership
## IEEE Collabratec

**Delivering 75%+ positive user satisfaction with core features**

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<thead>
<tr>
<th>Service / Feature</th>
<th>Positive Satisfaction</th>
<th>Service / Feature</th>
<th>Positive Satisfaction</th>
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<tbody>
<tr>
<td>Use of integrated authoring tools</td>
<td>88%</td>
<td>Updated technical interests</td>
<td>75%</td>
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<tr>
<td>IEEE Society member certificates, cards</td>
<td>84%</td>
<td>IEEE member certificates, cards</td>
<td>79%</td>
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<tr>
<td>Helped generate ideas for publications</td>
<td>83%</td>
<td>Customized communications settings</td>
<td>76%</td>
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<tr>
<td>Workspaces</td>
<td>82%</td>
<td>Found technical content</td>
<td>75%</td>
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<tr>
<td>IEEE Membership Directory</td>
<td>81%</td>
<td>Engaged in discussion on technical content</td>
<td>75%</td>
</tr>
<tr>
<td>Earned a badge</td>
<td>80%</td>
<td>Updated technical interests</td>
<td>75%</td>
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IEEE Member Contact Center

- During 2020 Serviced 169K inbound inquiries
  - Maintained 78% first call resolution
  - Over 80% satisfaction rate
  - Associates support 24hrs / 5 days a week
- Conducted outbound outreaches to over 78K members
  - Increase member engagement with IEEE
  - Included welcome calls, Collabratec and member recovery
- Self-Serve Knowledgebase web pages supported more than 830K self-service inquiries, providing answers to frequently asked questions
- Proactive Chat was launched on the Join and Renew pages to provide real-time support to more than 5,600 members and potential members.
THANK YOU