

# Engaging Section Leaders

**Cecelia Jankowski**  
**Member and Geographic Activities**

**Region 8 Meeting**  
**Riga, Latvia**  
**7 May 2010**

# Strategies to Achieve MGA Goals

- Increase the value of IEEE membership
  - Utilize member life cycle concept
  - Provide a simple, consistent interface
  - Track member involvement and development
  - Make process of joining and maintaining membership simple and straightforward
  - Facilitate member collaboration
  - Become more transnational in look, feel
  - Strengthen the relevancy of IEEE membership to industry
- 
- Increase member engagement
  - Improve relationships with and between members
  - Increase operational efficiency and effectiveness
  - Enhance collaboration with other OUs
  - Increase membership
  - Increase collaboration and cooperation between Geographical Units
  - Enhance the membership-related information available to the member and Geographical Units

# IEEE Member & Geographic Activities Staff

- Focus on the Member – engagement, lifecycle, “professional home”, 360-degree view of the Member
  - Geographic Unit Experience – revitalize Sections and Regions, engage volunteer leaders
  - International strategy and business infrastructure – Need for closer integration of IEEE organizational decisions and geographic unit operations
- Development, engagement

# MGA Operational Considerations

- **Focus on the Member - continuous engagement throughout the lifecycle**
  - Develop an IEEE-wide Member Strategy
  - Member data acquisition, management and protection; relevant products/services and coordinated communications
- **Focus on responsiveness to member inquiries**
  - Improve the ability to self serve
  - Enhanced service and response, personalization
- **Geographic Unit Experience – efforts already initiated to engage Sections and Regions**
  - Engagement & relationship development for volunteer leaders
  - Increase opportunities for new activities & programs
  - Simplify operational requirements for volunteers
- **Geographic activities – doing IEEE business globally**
  - Understand impact of government and legal requirements on OU and Geo Unit decisions and operations; closer integration of GeoUnit operations with IEEE organizational decisions; increasing overlaps of OU efforts world-wide
- **Developing & acquiring skills within the MGA staff**
  - Relationship development & management; project and process management; business analysis and development; enhanced international experience; metrics/benchmarking

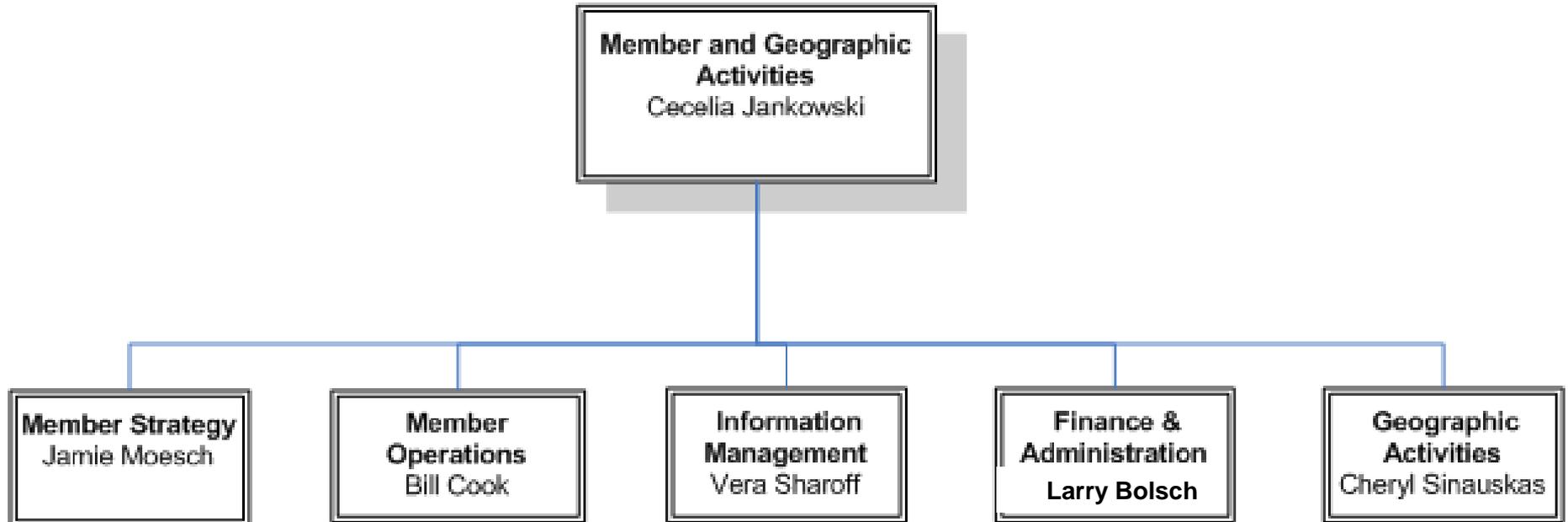
# Section Operations

- Assess SAMIeee data
- Measure impact of events
- Need content of Best Practices
  - What types of events:
  - How do I structure the Section
  - Setup Student Branches
- Linkages with surrounding areas facing similar challenges
- Basic soft skills training in management/leadership– officers with opportunities for members
- Information about the vision and strategies of IEEE. Where does the Section fit?

# *Quick Start Training*

- <http://www.ieee.org/mga>
- Key information and links to make it easier for new volunteers to get started and for continuing volunteers to easily locate resources

# IEEE MGA - Staff Organization



# Member Strategy Team

Director, Member Strategy

***Jamie Moesch***

Member Data  
and Research

- Membership Statistics
- Member Satisfaction
- Member Studies
- Measuring Engagement
- Alternate Models
- Dashboards

Membership  
Development

- MD Materials
- MD Support
- Membership Promotion
- Student Programs
- Affinity Groups
- Benefit Promotion
- Campaign Coordination
- Marketing Operations

Product  
Management

- myIEEE
- memberNet
- IEEE.tv
- Mentoring Connection
- Benefit Portfolio Mgmt
- New Benefit Process
- Financial Mgmt

# Areas of Focus for Member Strategy

## Improving Value

- Next Generation Benefits
  - myIEEE, IEEE.tv, MemberNet
  - Spectrum digital delivery
- Member Engagement
- Alternative Membership Model
- Targeted Programs
  - STEP
  - Engaging New Members
  - Students and Affinity Groups

## Membership and Benefit Marketing

- Direct Outreach
  - Renewal, recruitment, reinstatement
  - Benefit utilization
- Field Support
  - Field support for MD volunteers
  - Member-get-Member program
- Advertising
  - Benefit awareness

## Partnering

- Member Services
- Volunteer Leadership
- Data and Process Mgmt
- Societies and TAB
- Sales and Marketing
- IT
- Corporate Activities/Strat/Rcsh
- Publications

## Data and Research

- Member Experience
- Member Satisfaction
- Membership Dashboards
- Member Surveys
- Product Performance
- Cost of New Member Acquisition
- Lifetime Value of a Member

# Member Operations Team

Staff Director, Member Operations

***Bill Cook***

Member Processing

- Join
- Renew
- Add societies

- Add Publications
- Change address
- Update profile

Contact Center

- Member Questions
- Computer access
- Recover password

- Order products
- Payment Resolution
- Magazine Replacement

Administration

- Project Management
- Budgeting
- Financial forecast
- Process Management

- Work flow
- Results measurement
- Productivity

# Admission & Advancement

## Areas of Focus

- Grade Elevations –  
Associate to Member and Senior Member
- Life Member eligibility determination
- Admission and Advancement Committee Support

## Key Projects

- Update Admission and Advancement Operations Manual
- Automate Senior Member Process
- Develop Senior Member Promotional Kit
- Associate to Member Outreach
- Senior Member Web Pages

# Areas of Focus for the Information Management Staff - *Vera Sharoff*

## Improving Value

- ┌ Move existing tools to the next generation
  - ┌ SAMIEEE
  - ┌ eNotice
  - ┌ EWH

## Support IEEE BMS & BMS Re-architecture

- ┌ Members
- ┌ Volunteers
- ┌ Staff
- ┌ Redesign Process (Renew for 2009, Join 2010)
- ┌ Release Planning
- ┌ Defect Triage

## IT Enterprise

- ┌ Web Presence, Content Management

## Develop New Tools

- ┌ Support vTools
  - ┌ Meetings, eVoting, WebinABox, Finance, Student Branch Reporting, Demographics
- ┌ Enable Credit Card Processing

## Partnering

- ┌ All MGA
- ┌ IT
- ┌ Data and Process Mgmt
- ┌ Technical Activities
- ┌ Corporate Strategy & Research
  - ┌ Web Presence
- ┌ Volunteer Leadership

# Finance and Administration Team

Director, Finance and Administration

***Larry Bolsch***

Finance

- Planning
- Forecasting
- Budgets

- Financial Analysis
- Business Models
- Monthly Reporting

Geo Unit Reporting

- L50 Reports
- Tracking
- Internal Controls

- Compliance

Banking Transactions

- Region Financial Transactions
- Advise and support Section Treasurers

- Monthly Assessment Summaries
- Custody Accounts

# Geographic Activities Team

Director, Geographic Activities

***Cheryl Sinauskas***

Geo Unit  
Operations

- Regulatory
- Compliance

- Section Operations
- Volunteer Training
- Processes

Geo Unit  
Administration

- Volunteer Inquiries
- Section Rebates
- Historical Research

- Meeting Reports
- Recognition Products
- Geo Unit Formations

Governance

- Policy Management
- MGA Board Operations
- Committee Support

- Volunteer Development
- Volunteer Recognition

# Areas of Focus for Geographic Activities Staff

## **Geo Unit Experience**

- ▣ Sections Congress
- ▣ Engagement and relationship development
- ▣ - Linking opportunities (e.g. local conferences)
- ▣ Activities and Programs

## **Geo Unit Operations & Processes**

- ▣ Section Operations
- ▣ Geo Unit Formations
- ▣ Metrics and tracking
- ▣ vTools
- ▣ Geo Unit scan
- ▣ Historical Research

## **Volunteer Experience**

- ▣ IEEE Center for Leadership Excellence  
Volunteer development and training

## **Governance**

- ▣ MGA Board
- ▣ Select Committees
  - Award & Recognition
  - Life Member
  - Geo Unit Operations
- ▣ Policy and By-Laws
- ▣ MGA Operations Manual

## **Compliance and Regulatory**

- ▣ Registration requirements and process
- ▣ Compliance Issues
- ▣ Section activities and operations

# MGA

- Engagement
- Commitment
- Lifecycle
- Professional home

# Thank You!