

# **The Membership Project**

**Report to the major Boards  
IEEE Meeting Series  
Plenary session**

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# Agenda

- **What is the Membership Project?**
- **Corporate Partnership**
- **Segment Initiative**
- **Country Initiative**
- **Membership titles and grade qualifications**
  - **Including student membership**

# What is the Membership Project?

- A major strategic effort
- The key question: how do we want IEEE membership to evolve in the next 20 years?
- Who will be “the IEEE member” in 2025?
  - Individuals/corporations/schools
  - Demographics
    - Geographical location
    - Employment patterns
    - Professional disciplines
    - Educational background
  - Relationship of the member to IEEE
    - Main reasons why a person would like to become a member
    - Impact on the organizational structure
- How many members do we want/need/foresee?
- How to achieve our membership goals?

# Why are we concerned?

- **IEEE membership has been stagnant or declining in the last few years**
- **Growth 2003 to 2004 was 1.2%**
  - **Groups that pay high level of dues are 'flat'**
    - **Higher Grade Membership is flat (-153)**
    - **Steady decline in Higher Grade Membership in the US (-4013)**
  - **Steady decline in Society Memberships**
    - **-4.6% 2003 to 2004**
  - **Steady decline in fraction of IEEE members who come from industry**
    - **55% to 51%**

# Why are we concerned?

- **Our “market share” is low**
  - ... and probably getting lower
  - We are not reaching large groups of ECE engineers in some countries
    - Examples: Spain, Italy, China
- **Entry into new technical areas is slow**
  - New professions are created in IEEE fields of interest without their members joining IEEE
    - Think about aspects of IT or Genomics
  - Organizations that are more nimble are establishing significant footholds in new areas
    - Think about ACM and BMES

# Focus Areas of the Membership Project

- **Primary**
  - **Corporate Partnership**
  - **Segment Outreach**
- **Secondary**
  - **Country Initiative**
  - **Membership titles and grade qualifications**
    - **Including student membership**

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  - Including student membership
- **Relations to other initiatives/OUs**

# Corporate partnership blueprint

- **We seek to develop meaningful corporate partnership agreements**
  - **Identify common goals for IEEE and the ECE Industry**
    - **Examples:**
      - Education about IEEE standards
      - Pre-college engineering education programs
    - **Develop joint projects**
      - **Examples:**
        - Develop a workshop on an IEEE standard for delivery on company's site
        - Develop a Teacher-in-training campaign for schools in the company's locale
  - **Stay away from discounting and rebate programs**

## What have we done since November? (2)

- **Participated in several SPG interviews**
- **Reviewed outcomes with SPG**
  - Internal interviews are complete
  - External interviews are ongoing
- **Started discussions on potential MOUs with two corporations**
  - Both in Region 8
  - Opportunities developed during the interview phase

# What did SPG report from the internal interviews? (1)

- The value proposition of an IEEE membership to an individual is different than the value proposition of an IEEE relationship to a corporation
  - “Companies are concerned with ROI, brand, reputation, costs, revenue...this stuff is not being measured by an employee’s membership with IEEE.”
- There is inconsistency in the understanding of the current relationship between IEEE and corporations
  - “Companies (who buy IEL) seem to already feel as though they have a formal relationship with IEEE.”

## Internal interviews (2)

- **Corporations currently see IEEE individual membership as a cost versus an opportunity**
- **“There is no immediate short-range benefit for anybody in management area to have employees belong to IEEE.”**
- **IEEE’s publications are seen as too theoretical to the practitioner**
- **“A large portion of IEEE intellectual property is driven by academics, except for Standards. Gearing IP more towards industry is something that corporate partners could help foster.”**
- **"The stuff IEEE produces is not really that useful, or it takes a lot of work to be useful."**

# What did SPG report from the external interviews? (1)

The most cited areas of IEEE value to a corporation **in that order** are:

- **Strategic Value**
  - **Standards**
  - **IEL/ Publications/ Research**
  
- **Operational Value**
  - **Professional Development**
  - **Information Exchange/ networking**

- “The Standards Association gave a legitimacy to IEEE as an organization and was important to selling the IEEE brand within our company”
- "If you go to industry and you want to open a door, you start speaking standards....because everyone uses standards and they cannot live without standards".

# External interviews (2)

- The **whole of IEEE** is critical to the value proposition for a corporate partner
  - Offering a partnership to a corporation will require an **integrated strategy** across relevant parts of IEEE
  - IEEE **does not typically communicate value** to the people within corporations
- **Companies are puzzled by our structure**
  - ...and lack understanding of how different units can offer different services that are relevant to the corporation's need

## External interviews (3)

- Buy-in and understanding **at a senior level of a corporation** is critical to the acceptance and success of a corporate partnership
- **“Corporate relationships with IEEE should start with CEOs first.”**

# External interviews (4)

- A corporate partnership program must **distinguish itself from an individual membership**
- **“IEEE needs to make sure there is no reason for an individual member to stop being a member relative to a corporate partnership.”**
- The ability to **track users and usage** of products and services is important to a corporation as well as to IEEE
- **“If I could identify the users and level of usage by user of the IEL, I could more easily secure the budget dollars to pay for it.”**

# External interviews (5)

- IEEE's journals and publications are currently more academically focused than practitioner-oriented
  - The **inability to contribute** was cited as an issue
- Training and professional development is a key area of opportunity for IEEE to meet corporate needs
  - "Training by IEEE gives the impression that it is **impartial and effective.**"
  - "Companies are very concerned about the quality of their future workforce and are **investing millions of dollars in education.**"

## External interviews (6)

- Discounts on individual memberships is **not** a critical selling factor in a corporate partnership model
- The **different sales models** of the IEL between Europe and the US impact the customer experience
  - Agents vs. salespersons who work for IEEE

- **“IEEE should see me as a valuable partner who can help them sell their product into the company, not just a bank who is able to provide them with several thousands of dollars.” (Europe)**
- **“ I feel more like a customer than a partner.” (Europe)**
- **“ There is nothing I would change about the relationship with IEEE. IEEE worked with us to understand our needs. They should carbon copy this approach with other organizations.” (U.S.)**

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# Segment initiative

- **Objective: identify how we can cooperate with non-IEEE groups and individuals who operate in our fields of interest**
  - **Fields of interest for 2005**
    - **Healthcare (instrumentation and IT)**
    - **Multimedia and entertainment**
- **We started with IT professionals in Healthcare**
  - **Worked closely with the Biotech Council and EMBS**
- **First contact: HIMSS (Healthcare Information and Management Systems Society)**
  - **15,000 members and 220 corporations**
- **We hired Tecker Consultants to conduct focus groups at HIMSS annual convention**

# Segment Initiative – the next steps

- **Analyze HIMSS focus group outcomes**
  - Is this the model we should follow?
- **Conduct focus groups at the March 2005 meeting of the American College of Cardiology**
  - We have 600 papers “in common”
- **Expand effort to Multimedia and Entertainment**
  - Work closely with the Broadcasting Technology Society

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- **Country Initiative: the case for an outreach effort in Spain**
  - Initial analysis will be presented to MDC and the TC
- **Membership titles and grade qualifications**
  - Discussion of the new Graduate Student Member grade will take place in meetings of RAB and MDC

# Questions and Comments?

# Back-up Slides

# Core Team

Name	Organization	Role
Moshe Kam	IEEE Volunteer	
Parviz Famouri	IEEE Volunteer	
Elena Gerstmann	IEEE Staff	Day to Day Project Manager
Mike Binder	IEEE Staff	
Cecelia Jankowski	IEEE Staff	
Suzie Murphy	SPG	Day to Day Project Manager
Kevin McCabe	SPG	Subject Matter Expert
Kate Vitale	SPG	Project Associate
John Magovern	SPG	Consultant / Impact Model

**Note:** the IEEE Membership Development Committee (MDC) acts as the Steering Committee to this project

# Internal/ Volunteer Interviews Conducted

Name	Title/ Role
Steve M. Mills	IEEE Standards
Dan Benigni	IEEE Standards
Harris Zebrowitz	IEEE Volunteer / Customer
Mark Soffa	IEEE Volunteer / Customer
Maurice Papo	IEEE Volunteer
Bruce A. Eisenstein	IEEE Volunteer
Joe Kalasky	IEEE Volunteer
Gene Hoffnagle	IEEE Volunteer
Michael Lightner	IEEE Volunteer
Cecelia Jankowski	IEEE Staff - Regional Activities
Judy Gorman	IEEE Staff - Standards
Jon Dahl	IEEE Staff - Marketing
Matt Loeb	IEEE Staff - Corporate Communications & Strategy
Karen Hawkins	IEEE Staff - Marketing

# Customer Interviews Conducted

Name	Title/ Role	Company	Location
Mr. Will Stewart	Former Chief Scientist	Marconi	UK
Mr. Sandeep Sirur	HRD Recruitment	Infosys Technologies Ltd.	India
Dr. Theo Classen	Management Team, Technology/Strategy	Phillips Semiconductors	The Netherlands
Mr. John Estey	President/ CEO	S&C Electric Company	Chicago
Mr. Scott Donnelly	Director, Technology and Research Lab	GE	New York
Mr. Kah Yee	CEO/ President	Palette Multimediate Pte Ltd	Singapore

# Customer Interviews Conducted

Name	Title/ Role	Company	Location
Mr. Tom Clark	Librarian	Sun Microsystems	Massachusetts
Dr. Frank Toolenaar	Head of Library and Documentation	Philips Semiconductors	The Netherlands
Mr. Jeff Bergenthal	Director, Advanced Technology	Lockheed Martin	Florida
Mr. Ken Zdunek	CTO	Motorola	Illinois
Mr. Peter van de Mortel		Phillips Semiconductors	The Netherlands

# Impact Modeling: Introduction

- **Purpose**
  - To identify the relative importance of IEEE decisions and marketplace uncertainties and estimate their implied impact and risk for IEEE's strategic goals.
  - To identify opportunities for IEEE to favorably influence its environment.
  - To align strategy across areas of IEEE's control and its ability to favorably influence its environment based on the potential for greatest impact on strategic goals.

# Impact Modeling: Introduction

- **Methodology**

1. Determine and list IEEE's Strategic Goal(s).
2. Determine and list appropriate Metrics for IEEE's Strategic Goals.
3. Construct an Influence Diagram of factors (IEEE Decisions, Market Environment and Macroeconomic Conditions) on IEEE's Strategic Goal(s) to determine correlation among decisions and uncertainties and link uncertainties to the influence of IEEE actions and behaviors.
4. Estimate the *ceteris paribus* Impact Range of factors on IEEE's Strategic Goal(s).
5. Conduct Scenarios to estimate impact of multiple factors on IEEE's Strategic Goal(s)
6. Set Strategy to maximize return while minimizing risk.

# Impact Modeling: Introduction

- **Steps**
  - **Joint IEEE/SPG discussion of Strategic Goal(s) and Metrics.**
  - **SPG to brainstorm Influence Diagram for IEEE test and review.**
  - **SPG to conduct IEEE interviews to work with internal subject matter experts to estimate the range of impact of decisions and uncertainties (high value, low value, most likely value) across three scenarios (best case, base case, worst case).**
  - **SPG to develop a dynamic Excel based tool to model impact of recommendation structure that can be continually updated to reflect changing marketplace conditions.**

# Depth Interviewing

# What is a Depth Interview?

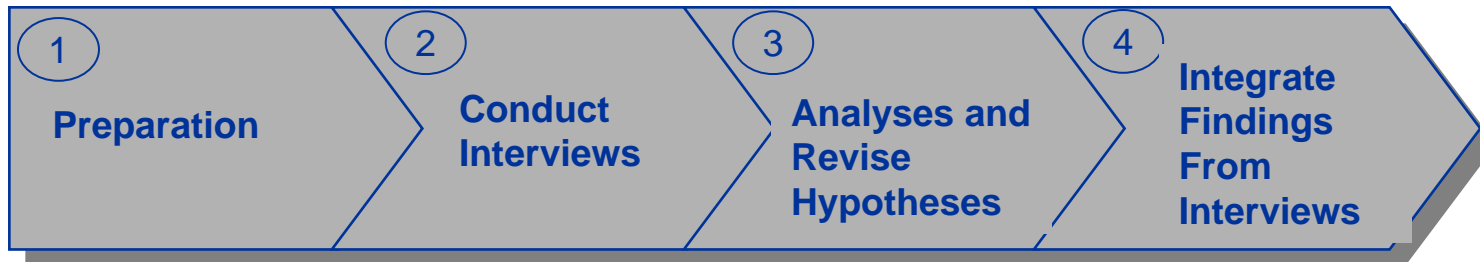
- Focused discussion
- Exploratory in nature
- Research tool that provides insight
- May not always lead to immediate actions (set this expectation prior to the interview with the customer)

# Why Conduct Depth Interviews?

- **Expose concerns, attitudes**
- **Reveal our preconceptions of customer's needs**
- **Force you and your customers to understand their position and value drivers**
- **Set stage for future value-based marketing efforts**
- **Reveal future opportunities in the marketplace**
- **Build open relationships that most customers want**



# In-Depth Interview Process: Art, not science



## Four Steps for In-Depth Interviews

- 1. Preparation:** this step centers on identifying target customers to interview, developing survey instrument based on initial hypotheses discussed, recruiting customers and ensuring the interviewing team is ready.
- 2. Conduct Interview:** this step centers on effectively executing customer interviews, refining interview guide and capturing the necessary insights.
- 3. Analyses:** this step centers on reviewing the findings from the interviews, uncovering customer economics, competitive reference, and differential performance data.
- 4. Integration:** this step centers on providing the essential outputs to support value quantification, value communications and support development of the pricing capture structure.

# Depth Interviewing Format

- **Initial interviews are done in-person or over the phone.**
- **Topics and purpose are communicated ahead of interview.**
- **A focused interview guide is developed to facilitate the discussion.**
- **Questions are:**
  - **Brief and to the point - no “wind-up”**
  - **Open-ended - no “leading” questions**



# Customer Interview Guide

- **The interview guide is a list of interview objectives and unstructured questions.**
- **The interview objectives for data collection may include:**
  - **Understand the customer's business model (cost structure, revenue streams)**
  - **Identify the purchase criteria and the relevant competitive options**
  - **Understand current market trends driving buyer behavior**
  - **Quantify how your products and services add value, above and beyond the competition, to a customer's organization**
- **Interview guides will vary depending on the industry and what is already known about the customer and their business.**

# Overview of Customer Interview Questions

**Key Objective: Leading with customer needs, test sources of value**

## **Introduction:**

- Does your company have corporate memberships/ partnerships with other professional societies? Why or why not

## **Product/Value:**

- What products and services do you use from IEEE?
- How do you ( your company) use IEEE products and services? Why are they important to your organization?
- What other products and services does your company use that are similar to IEEE offerings?
- How do IEEE products and services link to key business issues?

## **Purchasing Decision**

- Who, within your organization, would use the products and services IEEE offers?
- Who would influence the decision to partner with IEEE?
- Why/how would your company derive value in a more formal relationship with IEEE? How would you measure the effectiveness of such a partnership? What are the principal areas where your company may want to see cooperation with IEEE?

## **Closing:**

- What should we have asked you, but did not?

# Benefits of Depth Interviewing

A depth interview is a “semi-structured” research method that is used to elicit responses from customers on how they use products and services, and the needs that the products and services address. The process often uncovers ways that suppliers can enhance their current product or service offering, and in doing so, provide the basis for creating a more differentiated product. It also exposes who in the buying organization has goals that are likely to benefit from the purchase of the product.

Survey/Quantitative	Depth Interview
<p><b>PROS:</b></p> <ul style="list-style-type: none"><li>• Capture data from a wide range of respondents</li><li>• Statistically significant results and recommendations</li><li>• Ability to directly compare and contrast findings</li><li>• Facilitates the development of a broad information base</li></ul>	<p><b>PROS:</b></p> <ul style="list-style-type: none"><li>• Responses are deeper than top-of-mind responses</li><li>• Convergence of ideas is critical in the development of supporting evidence</li><li>• Enables moving beyond the core product to understand how different services and support elements can create incremental value for a user</li><li>• Exploratory in nature: Interviewer can probe more deeply through open ended questioning vs. bound responses</li><li>• Allows for flexibility in approach real-time and throughout the process</li></ul>
<p><b>CONS:</b></p> <ul style="list-style-type: none"><li>• Very dependent on sample selection</li><li>• Inflexibility in approach requires precise survey design</li><li>• Cannot capture critical learnings and insights beyond outlined script</li></ul>	<p><b>CONS:</b></p> <ul style="list-style-type: none"><li>• Quality of data dependant on openness of participant</li><li>• Time consuming</li><li>• Small sample size: However, in B2B market research the quality of information obtained through depth interviews with regard to customer value often yield much more fruitful insights and analysis</li></ul>

# Customer Interview: Profile

- The profile of the type of person SPG should talk to includes someone who owns P&L responsibility around engineering resources. While titles may be different across companies, this may include the head of a business unit or lab focused on development work or R&D, a Director of Operations, etc.
- Good candidates for SPG to interview could include companies who have approached IEEE in the past, or shown interest, in a more formal relationship.
- A preexisting relationship is critical to the success of getting an interview and facilitating a meeting in a timely manner.