



**More Than “Just the Facts, Ma’am”
Purpose-Driven Data Collection & Analysis**

**California Society of
Association Executives**

**Today
Here**

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AMERICAN OSTEOPATHIC ASSOCIATION



Nonprofit Federation



American Indian Relief Council

Learning Objectives

- ◆ How to manage data from multiple sources.
Coherent body of knowledge to apply to problems.
Help association stay true to mission.
- ◆ Learn to use research & planning to make forward-focused decisions.
Facts instead of speculation.
- ◆ Demonstrate how research results contribute:
Development of annual initiatives.
Long term strategic goals.
- ◆ Key principles for data-driven strategies.
Ensure findings are incorporated into
strategic/operational plans.

1:

Managing Data Into a Coherent Body of Knowledge



Theory vs. Reality: First, What Do We Have?

- We do have multiple databases
 - ◆ But focus is often on small/tactical stuff: minute differences or person-specific knowledge (i.e. Outlook contacts vs. AMS CRM)
 - ◆ Some do poor job integrating large files, such as annual outsourced registration file into central database
 - ◆ Most transactional data that is stored is inaccessible
 - If you needed to cross-tab two actions (attended, bought item, published, spoke, renewed) could you do it?
 - ◆ Circumstances often reflect “rational ignorance”
 - If we can't really use the data, why manipulate it?
- Goes to core of who we are as associations:
 - ◆ Complex organisms, developed organically, foci on social networks & decentralized relationships
 - ◆ How can data or research help us in this environment?



Principles of Effective Data Collection

- Constant effort/fieldwork
 - ◆ Use forms/transactions to complement your data
 - ◆ Compliance with new “smart mailing” requirements” means using NCOA (national change of address)
- Use external compiled data resources
 - ◆ Obtain a universe of professionals by title, businesses by NAICS code, all businesses by market
 - ◆ Best sources vary by field:
 - In education, MDR (commercial compiler)
 - In some professions, state licensing agencies
 - Compiled sources (Experian, Acxiom, InfoUSA, many list companies) are more comprehensive
 - ◆ Supplement existing sources of leads with new data
 - ◆ Document your universe so you understand who you attract, who you need to attract, who you’ll never...



Objectives in Database Management

- Most are too familiar with AMS/central database

New ASAE book “Put Your Data to Work”

- “Banish data redundancy--and its ugly aftermath.
- Seek and destroy shadow databases.
- Test early. Test often.
- Pursue success, not perfection.
- Open the database—once and for all.
- Query your database. Use the answers to refine strategy.”

- Represents a good first step

- ◆ Issues become how to feed contents and enhance reporting to become true knowledge management system



Mechanics: Database Hygiene, Tasks

Note: Most of us remain mired in DB as a management task and never fully leverage it

Accuracy

- ◆ Important functions include periodic, systematic sweep & cleanup
- ◆ Old DM finding: people care *most* about how you address them
- ◆ Accuracy, tracking status changes are critical

Completeness: Total Records

- ◆ Your data should focus equally on non-& former members on file with whom you should communicate—avoid “purges”
- ◆ Source of most of your new members/customers: control their first impressions or help them change their minds

Completeness of Each Record

- ◆ Demographic data should be populated, by inference or overlay if necessary for an accurate picture/selects
- ◆ Deliverable emails/residential addresses/other critical contact information should be populated

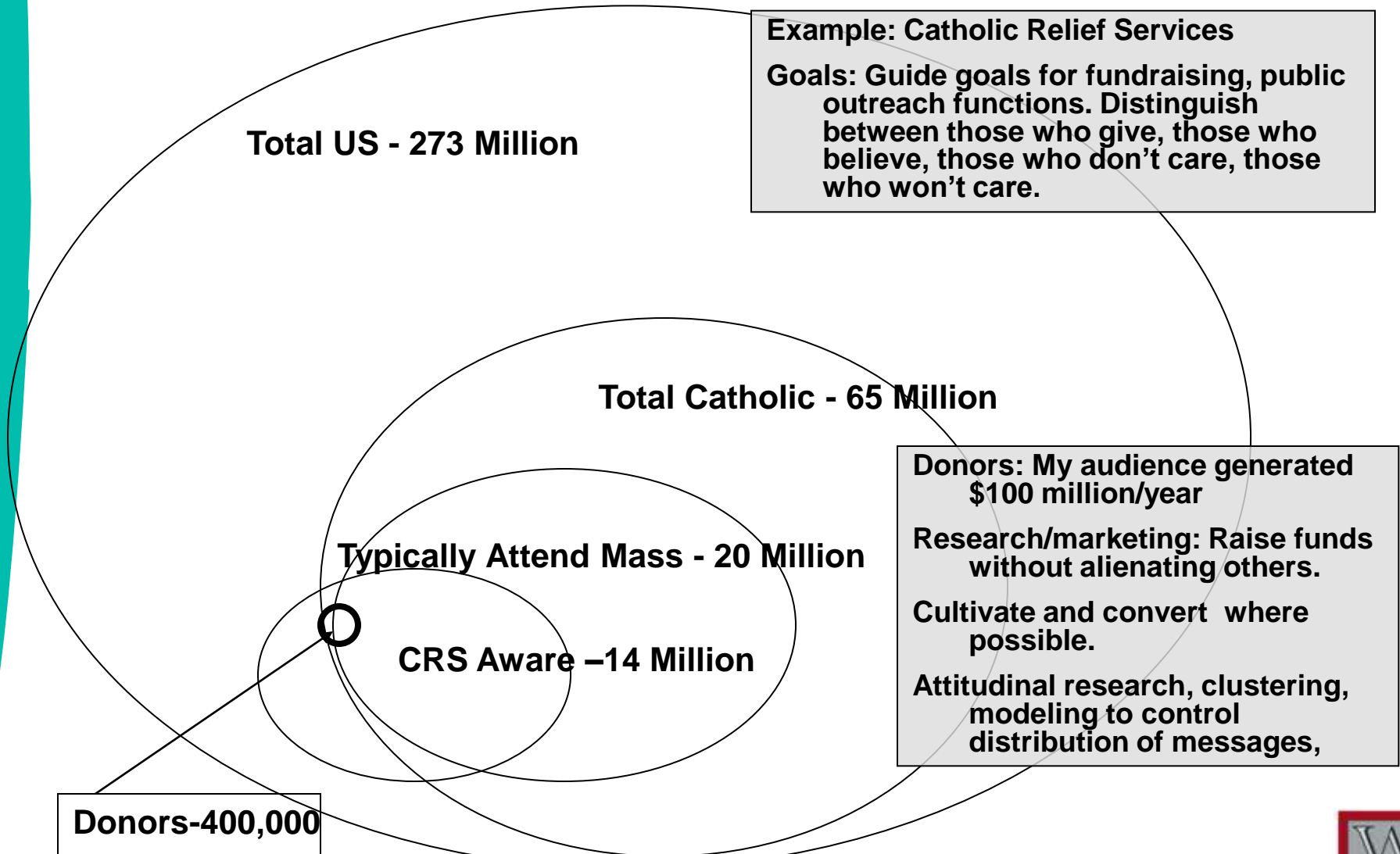


Data Structure/Population Should be Defined

Info Needs: Market Metrics Example

- Key things you should know about your market: membership & customers
 - ◆ What is your feasible universe of members/customers?
 - ◆ What is your market penetration?
 - ◆ What is the profile of your membership (in terms of experience, position, business profile)
 - ◆ How has your profile been changing?
 - ◆ What is your served profile, relative to your market?
 - ◆ Simple formula: $C/U = 1,000 \div 5,000 = 20\%$ penetration
 - ◆ Feasible prospects = 4,000
 - ◆ Apply this to analysis to segments as well
 - Generational, ethnic/racial, industry type, general diversity and measurement of under-representation/weak penetration

Top-Down Perspective: Understand Your Universe, Even if You Can't Track Them



Data Source 1: Application/Registrations



American Society of Appraisers
International Headquarters
P.O. Box 17265 • Washington, DC 20041-0265
Phone: (800) ASA-VALU or (703) 478-2228
Fax: (703) 742-8471 E-Mail: asainfo@apo.com
Internet: www.appraisers.org

Membership Invitation

YES! I accept your invitation to
apply for membership in ASA

CODE 5064

NAME & ADDRESS

(Please type or print clearly with a ballpoint pen)

Name of Applicant (circle preference: Mr./Ms./Dr./ Other _____)

Business Address

Company _____

Address _____

City, State, ZIP, Country _____

Business Phone _____

Fax _____

Web site, Email _____

Social Security # (optional) _____

Birth Date (optional) _____

Alternative Mailing Address

(use only if you don't want mail sent to your work address)

Address _____

City, State, ZIP _____

APPLICATION FEE

A \$100 Candidate Application Fee (nonrefundable)
MUST accompany your completed application form.
DO NOT send any other funds at this time. An invoice
for international and chapter dues will be issued upon
receipt and approval of your application.

PAYMENT METHOD

Check enclosed for \$100 (Payable to ASA)

Charge \$100 to my:

VISA

MasterCard

ACCOUNT # _____

EXP DATE _____

SIGNATURE _____

Complete BOTH SIDES of this form
and mail by June 30, 1998, with
application fee to:
American Society of Appraisers
P.O. Box 1638
Merrifield, VA 22116-9979

FOR OFFICE USE ONLY

Chapter _____

Region _____

Account # _____

Please complete the back side of application.

OVER PLEASE >

8281-D2

MEMBERSHIP APPLICATION

Complete the front side of this application form, and be
sure to sign and date the Membership Agreement below.

Provide three business references

(Addresses and phone numbers must be complete.)

1. _____
NAME OF REFERENCE

PHONE NUMBER

STREET ADDRESS

CITY, STATE, ZIP

2. _____
NAME OF REFERENCE

PHONE NUMBER

STREET ADDRESS

CITY, STATE, ZIP

3. _____
NAME OF REFERENCE

PHONE NUMBER

STREET ADDRESS

CITY, STATE, ZIP

Provide three personal references

(Addresses and phone numbers must be complete.)

1. _____
NAME OF REFERENCE

PHONE NUMBER

STREET ADDRESS

CITY, STATE, ZIP

2. _____
NAME OF REFERENCE

PHONE NUMBER

STREET ADDRESS

CITY, STATE, ZIP

3. _____
NAME OF REFERENCE

PHONE NUMBER

STREET ADDRESS

CITY, STATE, ZIP

Have you ever been convicted of a felony?

APPRAISAL DISCIPLINE

Please check your most significant appraisal discipline.
(Choose only one.)

Appraisal Review & Management

Gems & Jewelry

Personal Property

Business Valuation

Machinery & Technical Specialties

Real Property

ANNUAL DUES

You will receive a prorated dues invoice when your
candidacy has been approved.

Annual U.S. dues are as follows:

Candidate \$305

Accredited Member (AM) \$380

Accredited Senior Appraiser (ASA) \$380

Chapter dues are \$25. In addition, some chapters have
an assessment fee.

MEMBERSHIP AGREEMENT

The undersigned applicant certifies that he/she is
either (1) employed in the appraisal profession or
(2) interested in becoming an appraiser. The applicant
further agrees to take and pass the society's examination
in the *Principles of Appraisal Practice and Code of Ethics*
within one year of acceptance into Candidate
membership. In addition, the applicant agrees to
complete the 15-hour course for the Uniform Standards
of Professional Appraisal Practice (USPAP) within two
years of acceptance into Candidate membership.

I hereby certify that the statements contained herein are
correct and, if elected to membership, I agree to abide
by the *Constitution, Bylaws, and Administrative Rules* of
the society and its *Principles of Appraisal Practice and Code*
of Ethics.

Signature of Applicant _____

Date _____

Complete BOTH SIDES of this form and
mail along with payment to:
American Society of Appraisers
P.O. Box 1638
Merrifield, VA 22116-9979

Yes No

Data Source 2: Regular Surveys

Use a good online tool

Low-end often as good as high-end

- SM: campaign mgt easy segments, filtering/crosstabs

- At \$200/yr, fraction of cost of slightly fancier tools

- Often others generate lower response

- In-house allows serialized studies

- Focus on need & application, not tool or method

SurveyMonkey - My Surveys - Windows Internet Explorer

http://www.surveymonkey.com/MySurveys.aspx

SurveyMonkey.com because knowledge is everything

Logged in as "info@kwhorton.com" Log Off

Home Create Survey My Surveys Address Book My Account Help Center

Current Folder: -- View All Surveys -- Manage Folders Title Search: Search

Survey Title [sort]	Created [sort]	Modified [sort]	Design	Collect	Analyze [sort]	Clear	Delete
CLARB Candidates Final	Tue, 1/13/09 8:09 AM	7 hours ago			305		
CLARB Council Record Holders final	Tue, 1/13/09 8:23 AM	7 hours ago			618		
CLARB MBE	Wed, 12/24/08 8:16 AM	11 hours ago			47		
CLARB Candidates	Wed, 12/24/08 8:42 AM	2 days ago			23		
Short Survey	Wed, 12/31/08 6:58 AM	2 days ago			343		
CLARB Council Record Holders	Wed, 12/24/08 12:40 PM	6 days ago			10		
2007 Health Benefits Survey	Sun, 12/17/06 6:09 PM	9 days ago			826		
State of the Art Evaluation	Tue, 11/4/08 4:28 AM	59 days ago			21		
IPC Member Survey	Fri, 9/26/08 1:48 PM	92 days ago			162		
IPC Non-Member Survey	Fri, 9/26/08 2:14 PM	97 days ago			93		

Data Source 3: External Data

- ◆ The content aggregation role—window on your world
 - Organization=center of its universe for data consumers
 - Businesses need information
 - Contact names and business leads
 - Factors and dynamics that impact local economy
 - Management techniques and philosophies
 - Core skills for self, managers, staff
 - Association members need information
 - Directory contacts, practice standards
 - Tracking info for policy/government affairs
 - Statistics: volume, profitability, workforce
 - Data to facilitate networking & info exchange
 - Qualitative information from networking
 - Data is most useful when you collect & disseminate



Putting It All Together

- ◆ Pursue the necessary work of integrating line by line data
 - Track current transactions real time for financials, CRM
 - Merge/convert historical transactional data in summary format
 - Field AM01=Y if attended, not the gory details
 - Y/N binary values: leader, speaker, ad hoc volunteer, etc.
 - Meta data: running total of events attended past five years
- ◆ Constructively feed this database with new data
 - User-defined variables: profile data such as YOB, practice/industry type, # employees/dollar range
 - Collect data through surveys to create new knowledge, more fully populate existing fields
- ◆ Organize the other data that can't/shouldn't feed
 - Use a wiki, library of survey summaries, repository of detailed cross-tabs and raw data that be re-analyzed
 - Add external quant./qual. data gleaned from the outside world



	C	D	E	F	G	H	I	J	K	L	M	N	O	P	S	T	U	V	W	X	Y
1	Detailed Findings: HRS Workforce Physician Study June 2009			HR Training/Credentials					Board	Age Range					Geographic Area					Mobi	
2		Total	Fellow	AdultCC	PedEP	IBHRE	CredICD	AltPath	Cert.	31-35	36-45	46-55	56-65	>65	N.E.	M.West	South	West	Canada	Unknown	Same
3	Total Respondents	695	37	242	35	107	56	37	436	11	87	166	79	22	118	143	163	91	17	161	144
4	Professional Profile																				
5	1. Which best describes your primary work setting?																				
7	University	32.7%	40.5%	27.7%	62.9%	16.8%	21.4%	16.2%	29%	18%	46%	31%	32%	23%	31%	28%	28%	27%	76%	41%	31%
8	Medical School	19.8%	13.5%	18.2%	60.0%	11.2%	12.5%	13.5%	21%	9%	37%	19%	26%	27%	20%	16%	24%	18%	47%	16%	16%
9	Other Academic Institution	12.3%	18.9%	10.3%	17.1%	9.3%	10.7%	8.1%	11%	27%	17%	10%	9%	18%	17%	17%	4%	8%	6%	16%	15%
10	Solo-Private Practice	5.5%	5.4%	4.1%	2.9%	5.6%	7.1%	5.4%	6%			5%	8%	14%	5%	1%	10%	3%	6%	6%	6%
11	Group-Private Practice	37.2%	32.4%	44.6%	14.3%	54.2%	57.1%	64.9%	43%	55%	32%	40%	37%	23%	44%	35%	47%	49%	18%	20%	40%
12	Multi-specialty Practice	9.1%	5.4%	8.3%	14.3%	11.2%	16.1%	13.5%	9%		7%	11%	10%	14%	6%	14%	6%	8%	6%	12%	8%
13	Health Maintenance Organization (HMO)	2.0%		1.2%		0.9%	1.8%	2.7%	1%			2%	1%	5%		1%		4%		6%	2%
14	Veterans Administration (VA)	3.5%	5.4%	5.4%	2.9%	7.5%	7.1%	2.7%	4%		5%	2%	6%	3%	3%	4%	4%	7%		1%	5%
15	Industry (Employee or Consultant)	1.2%	2.7%	0.4%		0.9%		5.4%	0%			1%	1%	5%	1%			1%	1%		3%
16	Other	2.6%	8.1%	2.9%	2.9%	4.7%	3.6%	5.4%	3%		2%	1%	3%	5%	3%	3%	1%	3%	6%	3%	3%
17	2. Do you believe that your work setting might change over the next 3 to 5 years?																				
18	Yes	46.3%	44.4%	46.4%	20.0%	37.7%	33.3%	27.0%	42%	36%	47%	41%	35%	55%	38%	49%	44%	47%	24%	55%	36%
19	No	53.7%	55.6%	53.6%	80.0%	62.3%	66.7%	73.0%	58%	64%	53%	59%	65%	45%	62%	51%	56%	53%	76%	45%	64%
20	3. With which of the following areas are you most closely affiliated?																				
21	Clinical Electrophysiology	82.8%	94.6%	98.8%	74.3%	75.7%	67.9%	43.2%	86%	73%	94%	89%	78%	59%	82%	85%	79%	85%	82%	84%	86%
22	Clinical Cardiology	36.6%	40.5%	26.9%	22.9%	38.3%	46.4%	67.6%	33%	27%	21%	32%	42%	41%	36%	28%	31%	40%	41%	48%	31%
23	Heart Failure	19.4%	40.5%	15.3%	2.9%	23.4%	32.1%	45.9%	19%	9%	8%	17%	28%	14%	14%	23%	13%	20%	24%	26%	19%
24	Interventional Cardiology	8.8%	13.5%	2.5%	11.4%	9.3%	14.3%	16.2%	5%		3%	6%	9%		7%	4%	7%	4%		20%	4%
25	Pediatrics	6.4%		1.2%	82.9%	5.6%	7.1%		8%		13%	7%	9%	14%	3%	10%	8%	10%	6%	3%	5%
26	Surgery	2.5%		0.4%		5.6%	5.4%	2.7%	2%	9%		1%	6%	9%	1%	3%	4%	2%		3%	1%
27	Clinical Research Science	15.0%	21.6%	11.6%	17.1%	12.1%	14.3%	13.5%	13%	18%	13%	18%	18%	9%	14%	12%	15%	8%	35%	20%	11%
28	Basic Research Science	3.6%	2.7%	1.7%		0.9%			3%	9%	2%	2%	3%	9%	2%	4%	3%	2%	18%	4%	3%
29	Translational Research Science	3.0%	2.7%	2.5%	8.6%	0.9%			3%		2%	4%	3%	5%	5%	4%	2%	2%	6%	1%	3%
30	Other	2.3%	2.7%	0.8%	2.9%	1.9%	3.6%	2.7%	3%		1%	1%	4%	18%	3%	2%	3%	2%	6%	1%	2%
31	4. How does your practice's current workload compare to its capacity?																				
32	Devices																				
33	Workload is more than our capacity	13.6%	11%	10%	6%	8%	7%	6%	11%	9%	12%	11%	8%	6%	9%	7%	11%	9%	50%	23%	8%
34	Workload is consistent with our capacity	50.0%	56%	47%	53%	52%	51%	56%	49%	55%	48%	52%	55%	59%	49%	54%	49%	45%	44%	52%	55%
35	Workload is lower than our capacity	36.4%	33%	43%	41%	40%	42%	39%	40%	36%	41%	36%	38%	35%	42%	38%	39%	46%	6%	25%	38%
36	Ablations																				
37	Workload is more than our capacity	18.4%	14%	14%	9%	17%	25%	27%	16%	10%	16%	13%	18%	6%	12%	13%	15%	15%	60%	28%	17%
38	Workload is consistent with our capacity	41.8%	46%	41%	44%	43%	34%	27%	41%	80%	42%	40%	46%	41%	43%	44%	38%	46%	27%	42%	43%
39	Workload is lower than our capacity	39.7%	40%	46%	47%	40%	41%	46%	43%	10%	42%	47%	37%	53%	44%	43%	47%	39%	13%	30%	40%
40	5. How much competition for patients are you noticing in your local area?																				
41	A great deal	36.9%	38%	40%	11%	46%	36%	41%	39%	36%	34%	36%	42%	37%	50%	37%	40%	42%		24%	44%
42	Some	44.0%	43%	44%	37%	36%	41%	35%	42%	55%	40%	46%	44%	32%	35%	45%	41%	43%	44%	54%	39%
43	Relatively little	14.2%	14%	13%	49%	14%	16%	16%	15%	9%	15%	15%	12%	26%	13%	14%	16%	9%	25%	16%	13%
44	None	5.0%	5%	3%	3%	4%	7%	8%	4%		10%	2%	3%	5%	2%	4%	3%	7%	31%	6%	3%
45	Median Score (4-pt scale)	3.20	3.22	3.27	2.47	3.38	3.15	3.23	3.24	3.25	3.11	3.20	3.32	3.08	3.50	3.21	3.25	3.31	2.25	3.02	3.36
46	Current Work Profile																				
48	1. Approximately how many hours do you work in an average week?																				
49	Under 30	0.8%	3%	1%					1%											1%	4%
50	30-40	4.0%	5%	3%		1%		3%	3%	13%		5%	8%	12%	2%	3%	3%	1%	14%	10%	3%
51	41-50	13.9%	16%	16%	6%	15%	13%	14%	14%	38%	17%	11%	11%	53%	18%	8%	10%	20%	14%	18%	21%
52	51-60	41.4%	35%	38%	54%	40%	46%	46%	40%		41%	39%	36%	6%	40%	43%	43%	30%	20%	46%	36%

2:

Using Research & Planning for Forward-Focused Decisions



Feeding Forward-Focused Decisions

- We need to use knowledge management effectively
 - ◆ To feed our existing decision-making processes
 - ◆ To help supplement existing sources of decision support:
 - Board, committee, staff reactions “on the fly”
 - Efficient, but not effective process of making decisions without data
 - Often we deliberate and delay but don’t add knowledge as an input into the process

- In this section we focus more on how to purposefully conduct, report and manage knowledge
 - ◆ Involves methodologies, planning, and avoiding mistakes
 - ◆ Applying structure to program with flexibility in projects
 - ◆ Defining your audience
 - ◆ Framing actual findings so they do “face the future” and “see around corners”



Developing A Data Collection/Research Agenda

- Structure: number/types of methods you integrate
 - Surveys, focus groups, interviews, secondary analysis
 - User groups, planning sessions, “town halls,” Delphis
- Define your knowledge goals:
 - Opinions, perceptions, trends, differences across segments, externalities (competition/issues)
 - Desired outcomes: decision support, feasibility, simple data collection (incidence/prevalence), profiling
- Determine frequency
 - Relate it to timeliness of need, respondent fatigue
 - Avoid proxy for action (study instead of acting!)
 - Convert into a relationship tool
 - Demonstrate transparency, guide program launches
 - Integrate with membership/communications strategy



Avoiding Common Data Collection Mistakes

- 1) **Wrong focus**: Too much emphasis on the periodic, global “needs assessment,” not regular work, specific applications.
- 2) **Fieldwork**: Populist Census rather than a sample. Undifferentiated forms/surveys by audience. Inadequate campaign management.
- 3) **Response management**: Unclear thought on (in)tangible incentives. Accepting chronic low participation.
- 4) **Communications**: Not sharing results in a transparent manner. “What’s in it for the respondent” is being part of the process.
- 5) **Surface level analysis**: Weak conclusions err on side of being “objective”/looking at trees, not forest. Little consideration of bias.
- 6) **Interpretation**: Be receptive to bad news. Focus on actionability. Internal approach to mine details or reject counterintuitive findings.
- 7) **Shelf life**: Insufficient use of the study after first presentation: not retaining data for ongoing application, foundation for new studies.

Choosing the Right Methodologies

- Secondary research
 - ◆ Understanding the association & membership through their promotions, sales, history, old studies
- Qualitative research
 - ◆ Focus groups, personal interviews, face-to-face
- Quantitative surveys
 - ◆ Samples vs. census
 - ◆ Formats: online, print, telephone
 - ◆ Sequence of mailings/reminders
 - ◆ Testing for bias:
 - unrepresentative results
 - ◆ Premiums/incentives for response
 - ◆ Length/format of instrument



Key Steps in Qualitative Research

Plan

- Define objectives: identify unmet information needs, collect dangling hypotheses, poll stakeholders.

Guide

- Draft series of core questions, sub-questions or probes, ground rules and introductory language. Review guide for completeness, reasonableness, flexibility and length. Vary by audience.

Sample

- Identify a pool of appropriate participants. Ensure a mix for interviews, in terms of demographics and engagement profile (leaders and rank-and-file). Ensure homogeneity for focus groups when helpful to encourage candid conversation.

Recruit

- Draft invitations, record confirmations, do reminders/other followup with desirable non-respondents to yield representative group.

Conduct

- At scheduled interview time or focus group time/location, manage the session. Interviews are often 30 minutes, focus groups 90.

Analyze

- Transcribe the sessions if possible, then categorize by primary themes, pull call-out quotes. Seek to explain some findings in terms of demographics, other causal factors.

Report

- Write a report/presentation that summarizes overall findings including additional questions that inevitably arise.



Key Steps in Data Collection/Surveying

Plan

- Define objectives: Clarify unmet information needs, prioritize hypotheses to test, reconfirm with stakeholders.

Draft

- Hire or assign task: write questions and response items, compile and prioritize vis a vis final objectives.

Design

- Once reviewed, select software, convert questions to its format.

Pre-test

- Draft invitation and reminder language, and administer with small, randomly-selected group selected from your sample or census.

Administer

- Once any appropriate improvements have been made, load address book and transmit personalized invitations and reminders on a set 7-10 day schedule.

Download

- Run some statistics from the survey software, then download all data including closed ended data for coding/cleaning and open-text responses to convert to a document.

Analyze

- Run cross-tabulations on values such as institutional characteristics (size, type), demographics, predicted behaviors, source, satisfaction level & related attitudes.

Report

- Write a report that summarizes overall findings, discusses meaningful differences by segment, embeds graphics, categorized comments and cross-tabulations.



Determining Themes/Applications for Research Projects

Each new data collection process is a conscious decision:

- Member satisfaction
- Member needs assessment
- Non-member/ customer needs
- Educational assessment/ evaluation
- Readership surveys
- Compensation surveys
- Consumer surveys
- Diversity studies
- Meeting evaluations
- Industry specific studies
- Pricing
- Product development
- Operating/financial operations
- Employee/staff satisfaction
- Web usage

Consider whether new data collected should be a module or standalone project with a distinct audience ... prioritize and determine when current data is sufficient without more work.



Audience: Deciding Who/What to Ask

Who resides in your database(s): records that could be analyzed, profiled, “fed” with additional research/appends and better understanding through confidential opinion/behavioral research.

<u>5-Year Member History</u>	Y1	Y2	Y3	Y4	Y5	Now	<u>Today's Sample</u>
Members: start of year	10,000	10,000	10,000	10,000	10,000	7,500	A. Continuous members
Members lost: 80% retention	2,000	2,000	2,000	2,000	2,000	7,500	B. Former members
New members, no history	1,500	1,500	1,500	1,500	1,500	1,500	C. Current new members
Reinstates (recapture)	500	500	500	500	500	1,000	D. Oscillating/"at risk" mem.

Logical Areas of Inquiry

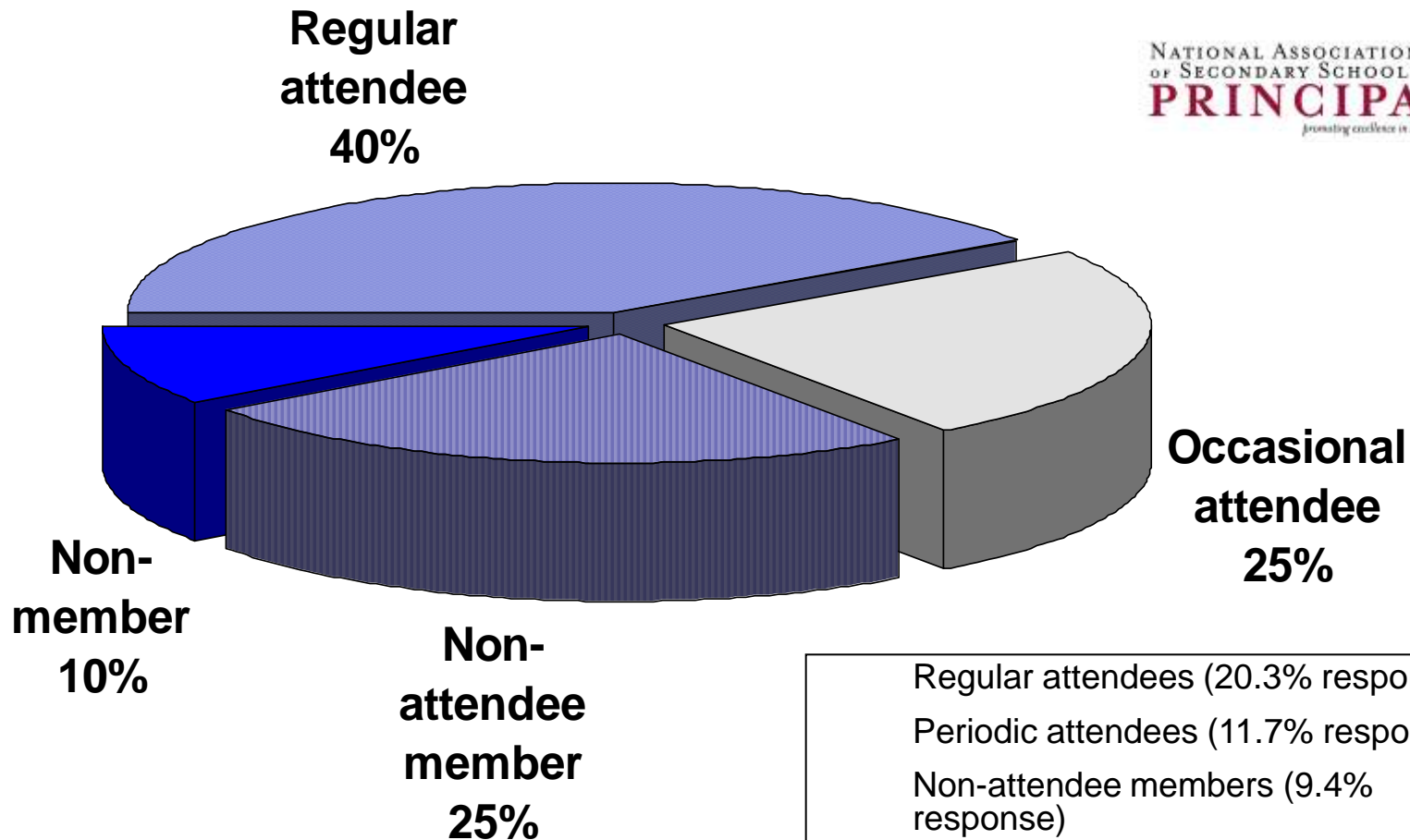
- A. Loyalty/how to increase? How to clone? Common profile characteristics (psych/practice/demographics).
- B. How well are needs met today? Impact of competition, externalities.
- C. What are their expectations? How does profile differ? Attitudes for/against future cultivation/enhanced engagement, loyalty.
- D. Future intentions? Internal cultural factors causing status Δ ?



Choose Carefully Where to Look/Whom to Ask

Example: NASSP Conference Research

Goals: To understand factors influencing attendance, project future trends, guide program development and marketing.



Regular attendees (20.3% response)
Periodic attendees (11.7% response)
Non-attendee members (9.4% response)
Non-member past attendees (3.1% response)



Distinction: Forward Focused vs. Historical Industry vs. Market Data

- ◆ ASAE Research produces a high volume of serial studies: industry research
 - Financial ratios, common operational practices, large scale “*Decision to*” (*Join, Volunteer, and soon Donate* studies: panels of association members
 - Other studies: compensation, special studies (economic outlook)
- ◆ Think about the challenge: applying this knowledge to efficient internal operations

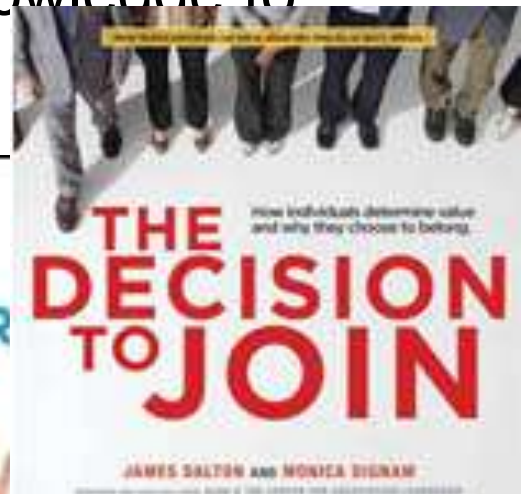
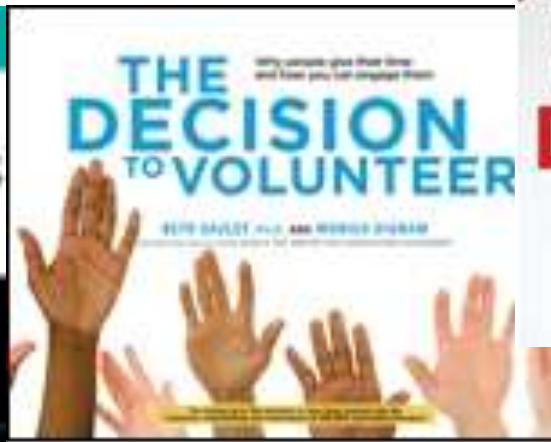
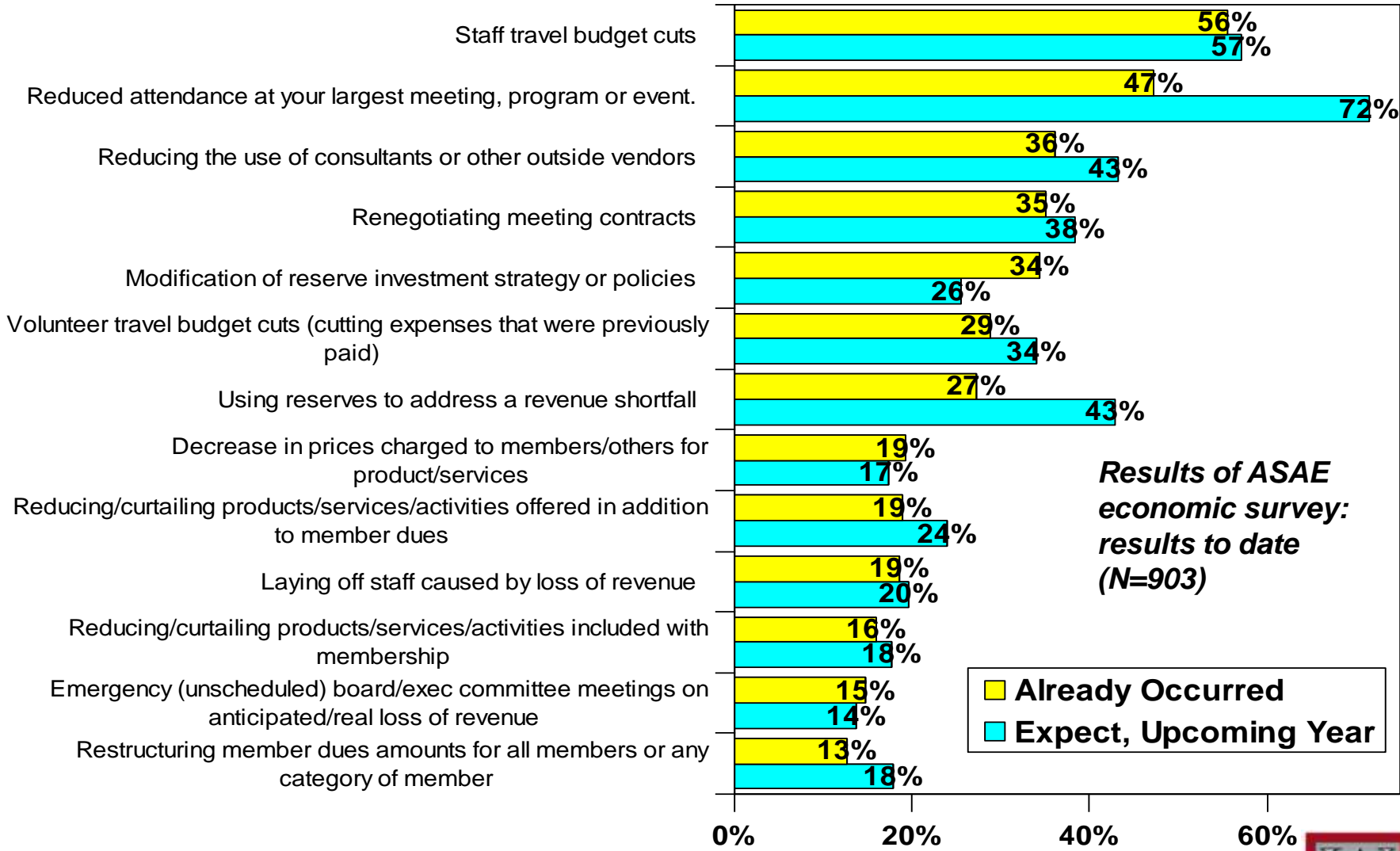


Illustration: Balancing History with Expectations in the Same Study, Report



Results of ASAE economic survey: results to date (N=903)

■ **Already Occurred**
■ **Expect, Upcoming Year**



Illustration of Drill-Downs: Specific Areas of Revenue Change, Past Year

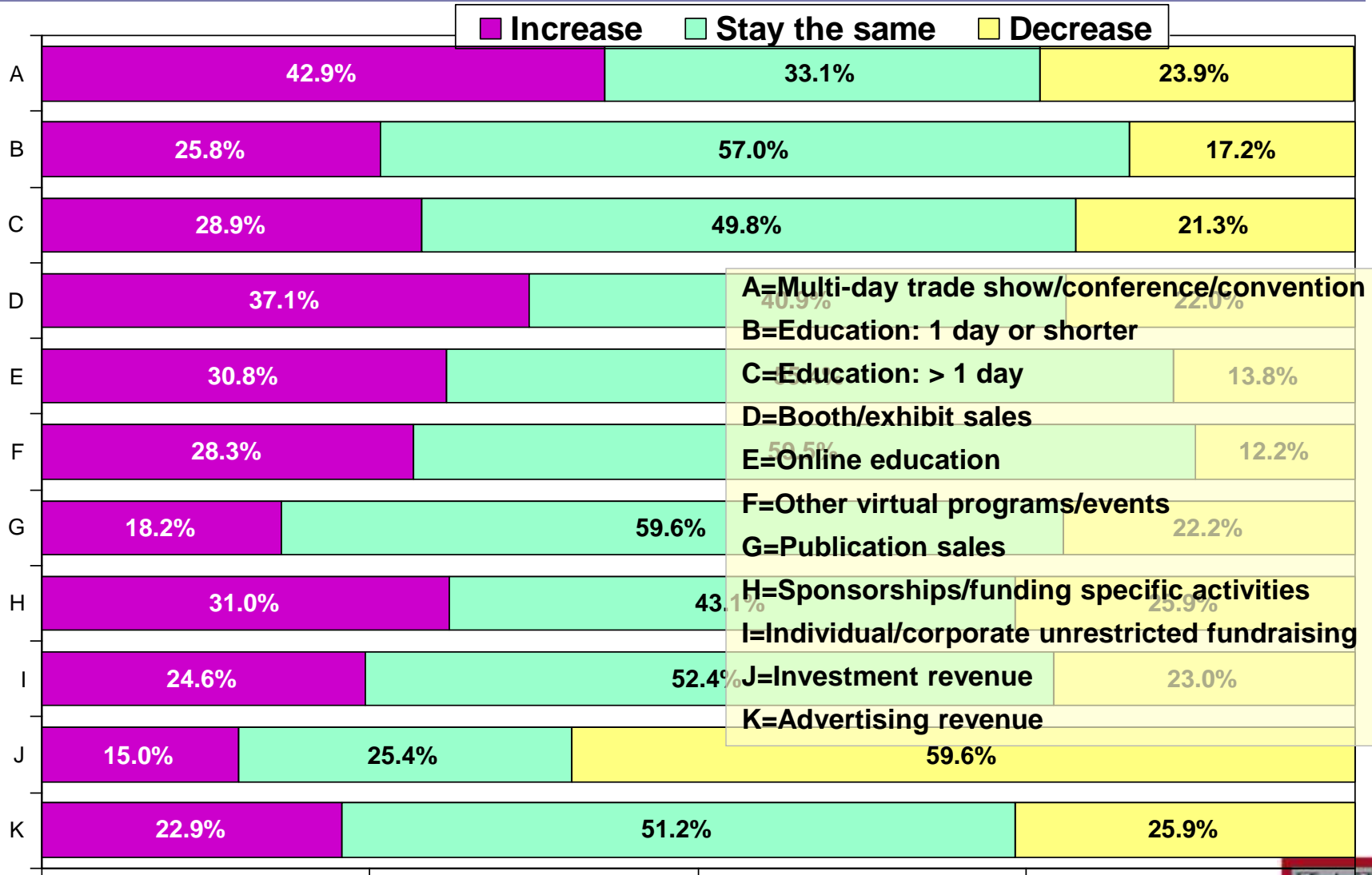
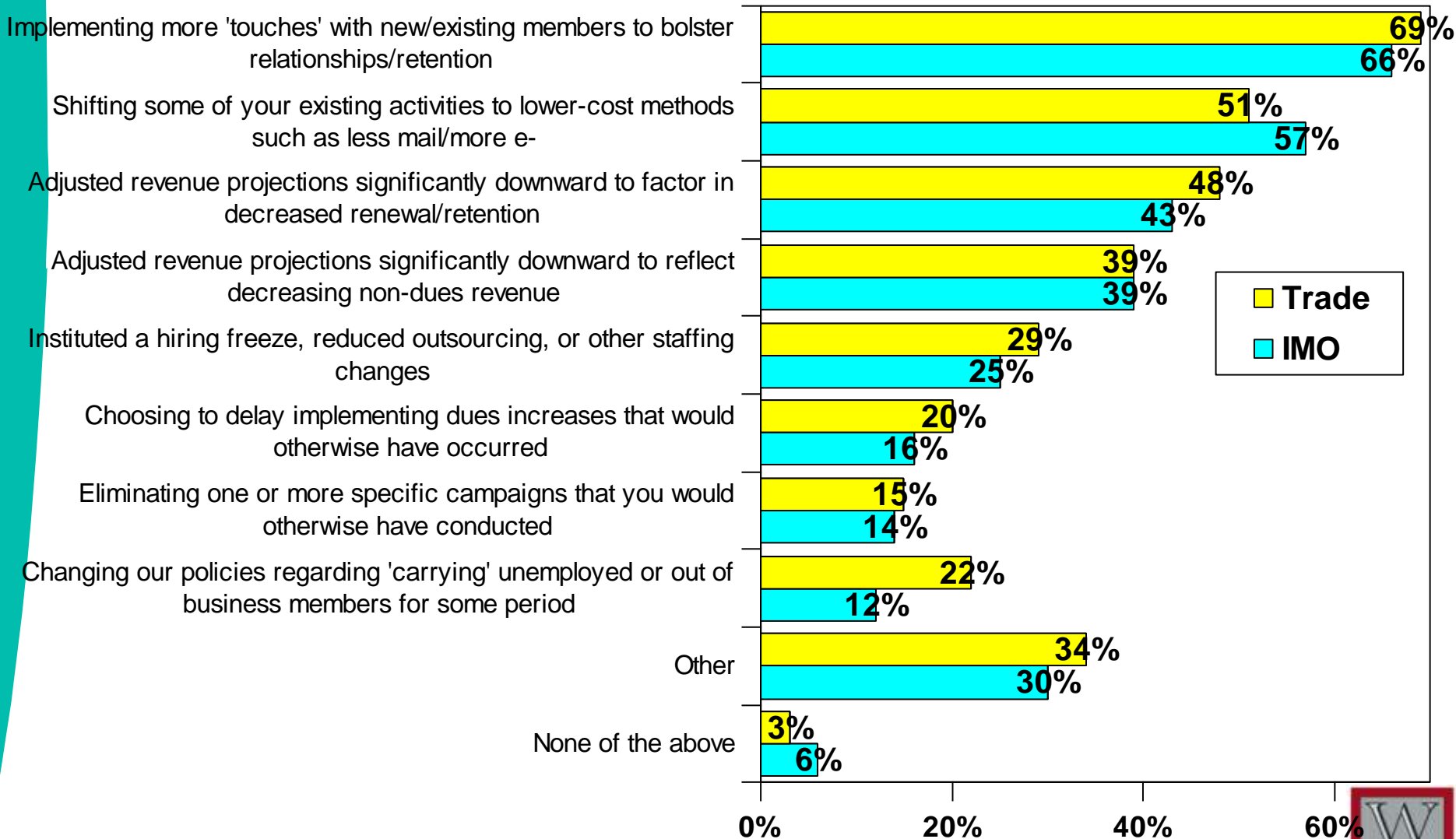


Illustration: Consensus on Actions Taken or Planning to Take to Address Environment



Other Aspect of Planning: Competitive Intelligence to Learn and Drive Strategy

- ◆ In addition to “generic” benchmarking, collect data you identify from other organizations, publishers
 - Relevant to your operating environment
 - Stories that stick with staff/boards: tracking friends and foes over time
 - Seek to understand the “what” and the “why”
 - Borrow ideas, but know *why* and *if* they’re working...
- ◆ Things I look for in audits/comparative studies:
 - What are they charging for things?
 - What are their current/historic financials?
 - How do they communicate?
 - What do our members think about them? (membership/leadership overlaps)
- ◆ Digestion of what we learn:
 - What truly applies to our organization?
 - What object lessons can we learn:
 - Mistakes to avoid; positioning ourselves (positively/negatively)



Putting it All Together

Sound data collection offers a solid basis for enhancing value in a variety of applications:

- ◆ Specific Products: Compensation, operations, profit & loss, economic conditions studies.
 - ◆ Program Support: Documenting common business or professional practices & impediments for advocacy programs, issue identification.
 - ◆ Decision Support: Helping Boards make right, fact based decisions on program launches, sunsets, dues levels, etc.
 - ◆ Background: Documenting membership profile, populating demographic database, supporting trend analysis.
- The key is to make the best of what knowledge you have.
 - Supply creates its own demand over time as staff/leader confidence grows in asking for and using data.



3/4:

**Linking to
Annual Initiatives/
LT Strategic Goals
Strategic &
Operational Plans**



Decisions that Need Data

Many areas ...

- Staff: up/down
- Programs: more/less
- Do something new/
drop something old
- Take a position or do nothing
- Evaluate programs:
sunset or expand
- Assess new services

Applications: plans/initiatives

- Alter the bundle of member services
- Change focus, justify actions with less member/leader fallout
- Become more tailored
- Address underserved markets
- Cut budgets/reprogram resources
- Demonstrate responsiveness, be dynamic in the face of change
- Optimize “the business of the association”



Examples of Specific Projects/Applications

Membership Audit: Relocated, 4 years' new E.D., great turnaround.

- Key Questions: What is our image today? How much and how should we spend over time on membership marketing? How should we spend now, given the economy?
- Methods: Stakeholder interviews with staff. Review materials.
- Outcomes: Adjust budget/spending levels. Adjust forecasts of performance. Encourage strong outreach to help announce “we have arrived” to non-members.



Strategic Planning: State IMO needs to “data-feed” its strategic plan.

- Issues: Maintain/improve relevance. Grow market penetration. Translate successful tradition of service delivery into greater value.
- Key Questions: Determining key sources of value. Identifying who belongs to national AICPA, local chapters. How do members define expectations on each level?
- Methods: Personal interviews with top leaders, some rank-and-file, all senior staff. Conduct online/print surveys among sample of members & non-members.



More Examples

Member Census: Society merges chapters 5 years ago: assess quality/challenge

Educational Needs: Measure preferences, interests, needs, plans and impediments

- Issues: Sacramento, Los Angeles, San Diego, San Francisco distinct markets
How are members/vendors served in this environment?
- Key Questions: How to get members to participate and attend? How to build community across the state?
- Methods: Online member/non-member primary/associate members surveys, interviews.
- Outcomes: Survey findings overall, by region, member status and type. Also element of “teach us to fish” that helps ensure future in-house, efficient data collection.



Readership/Media: Trade association determines # of members “going digital.”

- Issues: Needs assessment for Board review: several very specific, excellent questions.
- Key Questions: How many have substituted electronic for print professional resources in recent past? How many plan to shift some learning from face to face to distance learning (CD/online)?
- Methods: Online/print surveys of members/non-members. Just a few questions in a much larger study. Modules provide opportunity to measure targeted information.
- Outcomes: Showed that RBMA, others are “training” members away from print, many non-members resistant. Far fewer plan to migrate to newer education formats.



Examples: Federation & an IMO

National/Chapter Report Card: Assess membership, apprenticeship, other programs in 90-chapter federation.

- Issues: Local associations collect dues, dominate the member relationship, repurpose national content. How to assess/improve value?
- Key Questions: How and why members value each level?
- Methods: Survey local staff/officers, current/never-members: “report card” on services at both levels.
- Outcomes: Long survey with spectacular response. Provides basis for identifying “strong/weak” (i.e. supportive) local assns.



Conference Planning: Why non-attendees avoid major event.



- Issues: ACR Annual Scientific Meeting draws well but some never attend.
- Key Questions: Why don't they attend; what can be done to draw them?
- Methods: Identify and invite select group to attend (free travel and registration) who wouldn't have otherwise. Conduct focus group and secondary analysis of past educational needs survey.
- Outcomes: Impediments vary by basic scientists & clinicians; culture/community; new features and copy/messaging.



Illustration: CTAM (ASAE Archives)

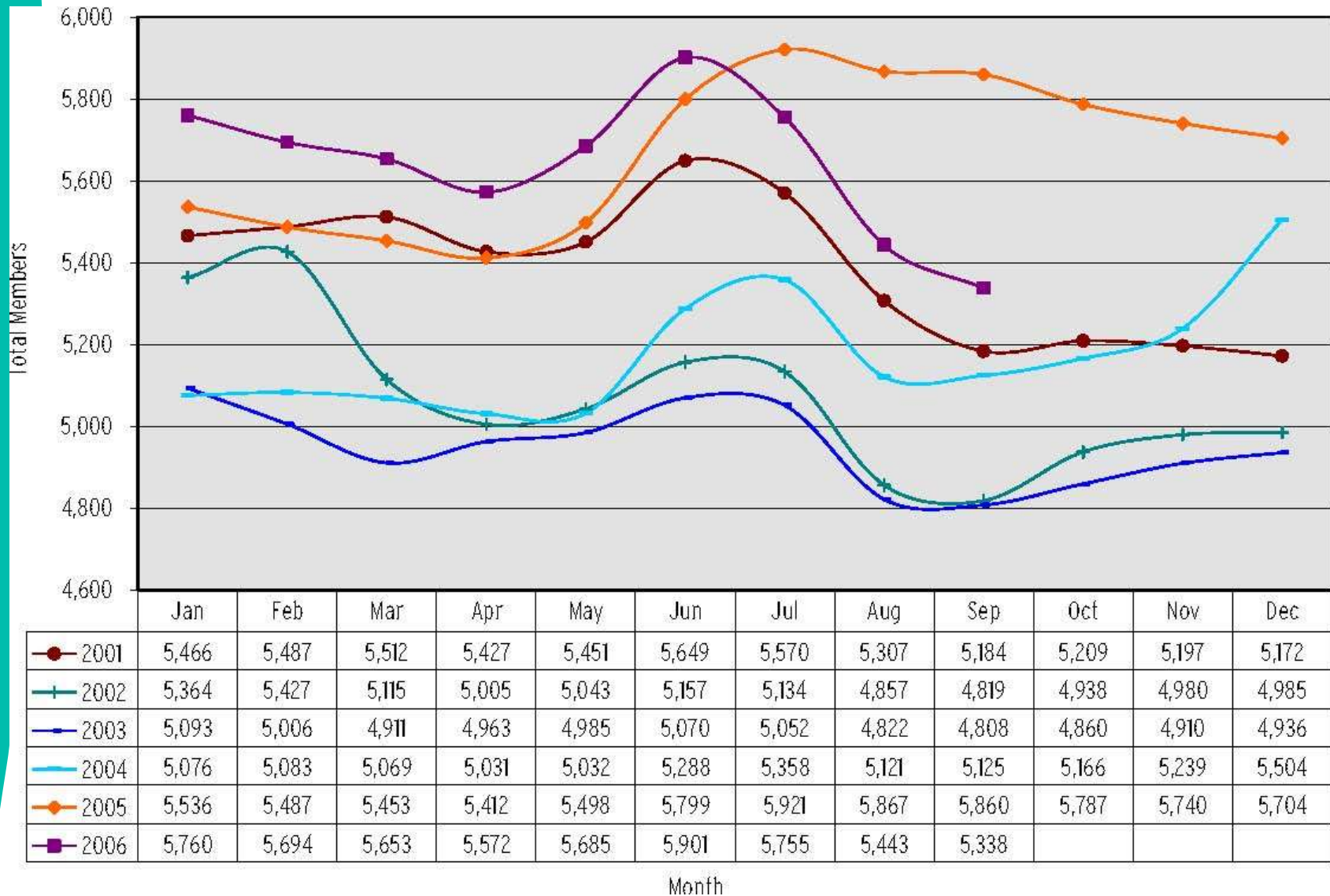


Illustration: Excerpts from CTAM Membership Plan

1. Economic/Industry Trends Affecting Membership

Not only are there fewer prospects (both cable companies and content providers), but industry consolidation creates an atmosphere of uncertainty which may delay the decision to join. There are more people vying for fewer jobs, making CTAM an even more important resource for networking and career advancement.

2. Social/Cultural Trends Affecting Membership and Volunteerism

People are spending more time at work but are striving to achieve a balance between work and home life, which affects the time they have to volunteer and attend association meetings. People have increased expectations regarding availability of information and the channels by which they prefer to receive it.



Linking to Operational Plans

3. CTAM Specific Issues

- Companies are continuing to cut-back on travel which could mean less participation in CTAM meetings. CTAM has pared back conferences and some products.
- In order to continue to grow membership, CTAM needs to continue to develop and market non-conference benefits to people who do not attend the Summit. The value of CTAM membership must be demonstrated to the senior executives who control the purse strings.
- There is confusion among some chapter-only members who believe they are entitled to national membership benefits. Industry consolidation coupled with the highly mobile nature of the cable business presents a challenge in keeping the database up-to-date.
- Identifying new prospects is difficult at best as purchased lists are not as accurate as our own data and other industry associations are reluctant to share lists for anything more than a one-time mailing.
- As competition from satellite and telcos intensifies, MSOs want CTAM closed, MSO-only committees and meetings; will avoid publicly sharing information at conferences.
- As consolidation continues, ownership positions may cross traditional segments, making it difficult to interpret/enforce the membership eligibility criteria.



What Data Would We Collect?

To support, reject, validate, monitor, and operationalize ...

Some top of mind observations:

- Measure attitudes among diverse stakeholder audiences
 - Senior managers
 - Non-members
- Monitor industry trends in observed areas of impact
 - Degree of cutback in travel budgets
 - Track net changes in staffing
 - Look for areas where new impact may occur
- Conduct research with distinct audiences/purposes
 - Chapter-centric research—stronger brand/clearer distinctions
 - Assess feasibility of new education offerings
- Continue tracking broad societal/industry trends
 - Heavy reliance on secondary data sources—press, Wall Street



Conclusion/Thank You!

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