

## **NATIONAL SOCIETY OF PROFESSIONAL ENGINEERS**

### **MEMORANDUM**

Membership Marketing, Market Segmentation & Incentives Task Force

**September 26, 2012 – Progress Report**

#### **Participants:**

F. Stanton, S. Bassett, L. Cox, R. Buchanan, D. Hendrickson, D. Howe, T. Johnson, J. Mancilla, K. Skinger, M. Detloff, M. Williams, G. Latreille, S. Wadas, A. Lin, K. Skinger, B. Bailey, T. Austin, H. Hnatiuk, D. Wittliff, K. Granados, M. Detloff, D. Hendrickson, P. Staffeld

#### **Executive Summary**

As an outcome of the San Diego NSPE Board approving the Race for Relevance task forces, the marketing task force was formed. The task force was charged with the mission stated below and started with reviewing existing information and materials.

The Marketing Task Force (MTF) met via three conference calls on August 16<sup>th</sup>, 29<sup>th</sup> and September 17<sup>th</sup> 2012. Sample messages were created for student, young, mid-career and senior engineers, and several survey questions were created to help guide a national marketing effort. Two recruitment efforts were already underway, and are being tracked for results. Finally, the MTF made recommendations to move the process along. Messages and Survey samples are included at the end of this report.

Members of the MTF brought with them assumptions when they joined the task force. These assumptions are included for reference.

#### **The Charge**

Develop 3-tier marketing program with the states to

- 1) jointly promote State and NSPE benefits and membership and
- 2) develop a marketing program to assist and transition State-only members to three-tier members.

Undertake research to determine the current number of licensed, resident professional engineers in each state compared to historical records to determine the percentage of market penetration in each individual state. (Previously completed by NSPE and reported to HoD – See Survey)

Identify target areas where the greatest efficacy can be realized for expended resources.

Identify possible recruitment and retention activities.

Coordinate with the other membership task forces.

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#### The Review

Prior to the first teleconference call existing marketing materials were collected and placed in dropbox for MTF members review.

The materials used by NSPE promote service benefits to prospective members to join NSPE. These items typically include 15 Free PDHs, Career Advancement, Networking Opportunities, News of the Profession, Continuing Education, Advocacy & Outreach, and Benefit Partners: FedEx, UPS, Car Rentals, etc.

#### Inherent Assumptions & Findings

These assumptions were expressed during conversations with the task force members or other members, and reflect a bias of members. The findings are based on the best information available.

Assumption: Promoting benefits of NSPE is the correct message to recruit and retain members.

Findings: The service benefits to NSPE members are not unique to NSPE and are offered by State Societies as well as ASME, IEEE, AIChE, ASCE and even our local churches, schools, and community service organizations. MTF members agreed that PE's do not join NSPE to obtain services. They are nice but it is not the reason.

Assumption: There is a NSPE Marketing Plan.

Finding: There is no evidence of a marketing plan for the organization either informal or formally stated within the organization. There are existing marketing materials.

Assumption: NSPE has existing marketing and membership recruitment materials

Finding:

1. MTF members believed the message only has to be tweaked to create new marketing materials.
2. There is uncertainty as to what materials exist and the messages being presented.
3. The NSPE Deliverables to States does NOT provide for marketing and recruitment as part of the agreement with State Societies. (This is a big eye opener)

Assumption: NSPE is marketing to non-member PEs within ALL states.

Finding: NSPE is developing "customized" marketing materials only when States request NSPE to assist with marketing.

Assumption: NSPE is continuously recruiting new members.

Finding: NSPE is not recruiting new members, and only gets involved in recruiting new members when the States request their assistance. This is handled on a first come, first served, basis.

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Assumption: NSPE has been actively developing membership.

Findings: NSPE has not been focusing on developing membership by taking leadership action.

While it may be true that NSPE cares about membership, there is no evidence that NSPE has been taking any specific action to increase membership over the past several years. Rather, NSPE has been concentrating more efforts on other sources of revenue, perhaps because these sources now out-perform dues income by a sizable margin.

Assumption: NSPE staff would participate in the TF meetings.

Findings: NSPE staff was directed not to participate in TF meetings, but their opinions were solicited and proved to be valuable to the TF.

## Messages

Two test markets, Georgia and Pennsylvania, have been identified. Letters have been sent out and results are being determined, reviewed, etc.

- Georgia : 7065 pcs mailed, 36 new members
- Pennsylvania: 3000 pcs mailed, 15 new members
- NSPE Statistics: It takes 7 mailings to obtain 1 new member, per John Wanner, SSEC Past President.
- Messages for 4 initial market segments: both members and non-members. Sample messages are attached.
  - Student Engineer– Undergraduate and Post-Graduate working towards a higher degree
  - Young Engineers- Under 35 years of age
  - Mid-Career Engineers – Over 35 years of age up to 50 years of age (\*)
  - Senior Engineers – Over 50 years of age (\*)
  - (\*) 50 years of age is assumed at this time
- Staff commented that the messages coming out of committee have already changed from their previous messages. The existing messages are more about Services (credit cards, retirement insurance, FedEx discounts, Free PDHs) versus committee messages about Membership Value (improve skills, make a contribution to the society, associate with like minded people, giving back to the profession, making a difference)
- NSPE should promote and communicate the "approved" agenda such as the Industrial Exemption, Licensure for Federal Engineers, Licensure for Educators in Engineering, etc. to gain support and enthusiasm and identify issues for non-members to get behind and join.

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#### Survey

Survey questions were created to help focus the marketing messages for members and non-members. Survey questions are attached.

"Statistically valid" ..... says we need to aim for a response rate between 700-1000 of our nearly 34,000 members. The survey could be sent to a random sampling of 3,000 participants. (roughly 10% of membership) expecting a response rate of around 3%. We could however say go up to 5,000 and then if we at least clear a response rate of 1.5% we'd be valid.

The Charge.... Undertake research to determine the current number of licensed, resident professional engineers in each state compared to historical records to determine the percentage of market penetration in each individual state.

NSPE previously completed this survey and reported to the 2012 HoD in San Diego. However, the survey assumes the market is ALL registered PEs, and this assumption is not challenged. Is the market those PEs who are in responsible charge, in leadership positions, and those who use their licenses? Is the market those who work for consulting firms and those in responsible charge in industry and government? With exemptions in Industry, Education and Government, only Consultants need to be licensed. If we consider consultants as the market, what is our market penetration? To be considered for future work.

#### Recommendations

1. NSPE should consider performing the marketing effort and not leave it to the States and Chapters, especially since most States and Chapters never received the message that NSPE stopped marketing and recruiting new members. NSPE should market to recruit new members in ALL States, and this should be a deliverable listed in the Deliverables to States with the coordination, knowledge and input from the State and local Chapters.
2. NSPE should develop a marketing plan that sets priorities and strategies. A marketing plan will provide the following:
  - a) define the market focus (consulting firms, educators, industry, government)
  - b) an overall strategy for three tier marketing
  - c) consistent messaging in identified markets segments (Student, Young Engineer, Mid-Career, Senior Engineer)
  - d) priorities for staff and streamline activities
3. NSPE should form a standing Marketing Committee to help staff develop messages, survey members, and to develop a focused marketing plan.

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- a. The Marketing Committee should be composed of staff and state society volunteers with a clear method of retaining some members year after year while also rotating in new members.
- b. The Committee should estimate the size of the market segments for Student, Young Engineer, Mid-Career, and Senior Engineer
- c. The Committee should create a resource list of information that can be viewed on the website for use for Chapter and State marketing efforts.
- d. The Committee should catalog the many messages, reviewing and seeing what sticks. It would be helpful if done perhaps in 4 segments.

#### Additional Recommendations:

- Marketing costs should be included in the budget, and be aligned with the NSPE Strategic Plan.
- Existing marketing material at NSPE headquarters should be reviewed, and selected for future use, or discarded.
- Create a resource list of information that can be viewed on the website for use for Chapter and State marketing efforts.
- Cataloging the many messages, reviewing and seeing what sticks would be helpful if done perhaps in the four segments.
- NSPE should promote and communicate the "approved" agenda such as the Industrial Exemption, Licensure for Federal Engineers, Licensure for Educators in Engineering, etc. to gain support and enthusiasm and identify issues for non-members to get behind and join.
- *Strategies for Member Retention and Attraction* was developed through the efforts of the NSPE/PEPP 2002-03 Young Engineers Advisory Council. This document provides a good source of messages that NSPE should follow, and may provide the basis of a marketing plan.
- Marketing via letter mailings are commonly used because there are no email addresses from the licensing boards, thus marketing on professional networks like LinkedIn can be more cost effective rather than mass mailings. Alternative methods of communication should be used and is being addressed by another Task Force committee.

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## MESSAGES

### Market Segmentation by Career

Student Engineer– Undergraduate and Post-Graduate working towards a higher degree

Young Engineers- Under 35 years of age

Mid-Career Engineers – Over 35 years of age up to 50 years of age (\*)

Senior Engineers – Over 50 years of age (\*)

(\*) 50 years of age is assumed at this time

### Market Segmentation by Practice Area (messages were not created for these markets)

Education

Government

Industry

Private Practice (Consultancy)

Credibility builds with the PE license. (from conference call discussion)

Try to find a visual image – disaster to tie in professional engineering oversight. Visually show the difference of having a PE on staff and not having a PE. Disaster vs Peace. Smooth running project versus chaos shown with S-Curves for projects?

An example of how contractor modifications without PE approval lead to disaster?

NSPE should promote and communicate the "approved" agenda/issues such as the Industrial Exemption, Licensure for Federal Engineers, Licensure for Educators in Engineering, etc. to gain support and enthusiasm and identify issues for non-members to get behind and join.

## Student

Let NSPE help you "stand-out" in a crowded field of engineering applicants, pass the FE in your Junior year, show that you are member of NSPE, and obtain practical experience in your field of study. Network with principals in firms and department heads for employment opportunities.

Credibility builds with the PE license.

Engineers "outreach" with young people in MATHCOUNTS

Key message for younger members regarding NSPE benefits

- a. Gaining a network

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- b. Professional/leadership skills development
- c. Broad based perspective

Messages will only resonate if we deliver the goods to younger members. Mostly, they seemed to gravitate towards more interaction between senior professionals and students/EIs through a variety of means (mentoring, speakers, and events).

### Young Engineers

The State and National Societies form a unique team and we are the only engineering society that promotes and defends the interests of Professional Engineers.

Credibility builds with the PE license. (from conference call discussion)

**Network** – Meet Professional Engineers in your community by attending chapter meetings and helping with MATHCOUNTS.

**Leadership** – Learn to build your career so that you are a leader in engineering. Take advantage of mentoring.

**Professionalism** – Build your career by preparing yourself; have the best credentials, making you more valuable to your employer and future employers.

**Ethics** – Learn and prepare yourself for difficult ethical questions for your chosen profession. See how others have dealt with similar situations.

**Giving back** – Participate in engineering expos, volunteer for MATHCOUNTS and other local events.

### Mid-Career

**Network** – Build your connections with a diverse cross-section of experience and disciplines.

**Leadership** – Take on new challenges of leading groups and practice public speaking. Work on effective communication and team building.

**Legislative Activates** – Make a difference in the profession by meeting with State and Local legislatures about engineering issues that affect the professional engineer.

**Professionalism** – Understand and promote proper Standard of Care exercised in your work. You are the engineer that people think of in their mind's eye.

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**Ethics** – Share your experiences and how you dealt with them. Lead by example.

**Giving back** – Participate in school career days, MATHCOUNTS, leadership in volunteer events, mentoring of students and new engineers.

**Chapters** offer local **opportunities to meet PDH** hours for license renewal.

Our societies are **multi-discipline forums** that foster cross communication to address inter-discipline issues common to the professional engineer.

**Skills** development for the professional engineer that aid in career advancement or professional practice.

**Compliance** with regulations - Don't run afoul of professional registration laws, use the resources of members, and attend registration law seminars to become familiar with complying with the registration laws in your State.

Meet members of the Registration Board, as they are often members of the State and National Societies, and attend meetings frequently.

### **Sr. Engineers**

**Network** – Share your network and experiences with upcoming leaders in engineering by being a mentor. Build your connections with a diverse cross-section of experience and disciplines.

**Leadership** – Share your experienced perspective to influence regulatory proposals.

**Professionalism** – Work to understand the changes to the profession and lead the way to show how the old and new can work together symbiotically for the betterment of all engineers. Help redefine and promote engineering.

**Legislative Activates** – Make a difference in the profession by meeting with State and Local legislatures about engineering issues that affect the professional engineer.

**Giving back** – You see the big picture, share it with others, whether you are leading or the workhorse, you are providing stability to everything you participate in.

**Opportunities** share your experiences and to provide Chapters with presentations to **meet PDH** hours for license renewal.



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**Skills** development for the professional engineer that aid in career advancement or professional practice.

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## SURVEY

### Existing Members

- ☐ Do you perceive value in your membership commensurate with the dues you are paying?
  - ☐ At the National level?
  - ☐ At the State level?
  - ☐ At the Chapter level?
- ☐ What can NSPE do to enhance your membership?
- ☐ Would an increase in dues (no more than 10%) influence your decision to remain a member?

#### Why did you join NSPE?

- ☐ Free first 6 mo. period
- ☐ Network with other engineers
- ☐ Looks good on resume
- ☐ Was asked by colleague
- ☐ Suggested by Boss
- ☐ Invitation from NSPE when received PE
- ☐ Responded to NSPE mailer
- ☐ Other (open comment)

#### How did you first find out about NSPE?

- ☐ Facebook
- ☐ Letter Mail
- ☐ Conference
- ☐ LinkedIn
- ☐ Professional Associate

#### How active are you in chapter

- ☐ Attend meetings
- ☐ Serve on committees
- ☐ Officer
- ☐ Volunteer for MATHCOUNTS or other events
- ☐ Not active
- ☐ A Dinner Program Speaker for PDHs

#### How active are you at the State Level

- ☐ Attend meetings
- ☐ Serve on committees
- ☐ Officer
- ☐ MATHCOUNTS

#### How active are you at the National Level

- ☐ Attend meetings
- ☐ Serve on committees

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\_\_\_\_\_ Officer

\_\_\_\_\_ MATHCOUNTS

Would you like to be more active

What type of programs would interest you the most?

\_\_\_\_\_ Educational opportunities

\_\_\_\_\_ Career Development

\_\_\_\_\_ Leadership skills

\_\_\_\_\_ Virtual meetings

\_\_\_\_\_ Legislative/ regulatory influence

\_\_\_\_\_ Licensure requirements

### Non-Members

Did you know that there is a organization for Professional Engineers whose mission is to protect and defend the interests of Professional Engineers? (Yes / No)

Are you aware of the National Society of Professional Engineers (NSPE)? (Yes/No)

Are you aware that NSPE is affiliated with your local State Professional Engineering Society? (Yes/No)

Did you know that each State Professional Engineering Society has local Chapters? (Yes/No)

Do you believe it is beneficial to join a society that is active for the PE on the National , State and Local levels? (Yes/No)

Would it be beneficial to you to limit your membership to the National or State or Local Chapter levels ONLY? (Yes/No)?

What can a Professional Engineering Society provide that is most valuable to you?

\_\_\_\_\_ Educational opportunities

\_\_\_\_\_ Career Development

\_\_\_\_\_ Leadership skills

\_\_\_\_\_ Virtual meetings

\_\_\_\_\_ Legislative/ regulatory influence

\_\_\_\_\_ Licensure requirements

\_\_\_\_\_ Networking Opportunities

\_\_\_\_\_ Multi-Discipline Resources

\_\_\_\_\_ A PE Online Directory

Why haven't you joined NSPE yet?

\_\_\_\_\_ Not Familiar with NSPE

\_\_\_\_\_ Don't know how to join

\_\_\_\_\_ Always wanted to but always put it off

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\_\_\_\_\_ Not interested

\_\_\_\_\_ I am interested, how do I join?

What would convince you to join NSPE?

What is your impression of NSPE members?

Professional \_\_\_\_\_ Yes/No

Competent \_\_\_\_\_ Yes/No

A group of Old Men? \_\_\_\_\_ True/False

A social group who likes to play golf? \_\_\_\_\_ True/False

Leaders in the profession. \_\_\_\_\_ True/False

I don't know any members of NSPE to form an impression \_\_\_\_\_ True/False

Have you been asked to join NSPE? \_\_\_\_\_ Yes \_\_\_\_\_ No

If so, Why did you not join?

\_\_\_\_\_ Not enough Value for money

\_\_\_\_\_ Couldn't afford dues

\_\_\_\_\_ No active chapter available

\_\_\_\_\_ Other

What would entice you to join NSPE?

\_\_\_\_\_ Lower Dues

\_\_\_\_\_ Local/State/National Networking

\_\_\_\_\_ Continuing Education Opportunities

\_\_\_\_\_ Ability to support the profession

\_\_\_\_\_ Continuing Education Benefits

\_\_\_\_\_ Support of the Profession

\_\_\_\_\_ Networking at the Local/State/National level

What do you want from a Society of Engineers?