

NOTRE DAME ABOA PRESENTATION

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EXECUTIVE SUMMARY

- We will present our findings on the following:
 - What drives Chicago's ABOA success
 - How to jumpstart the ABOA program in new markets
 - Identifying target markets for ABOA chapters
 - Establish a set of expectations and rewards for new cities
 - Strategy impact on the ACS in the mid-to-long term

AGENDA

- Membership Deep Dive
- Drivers of Success
- New Markets
- Recommendation Summary

MEMBERSHIP INFORMATION

MEMBER INFORMATION OVERVIEW



AGE



COMPANY



ROLE



CONNECTION

AGE DEEP DIVE (2020)

Legacy Group

- Ave.Age: 33
- Count: 37

Class of 2019

- Ave.Age: 30
- Count: 52

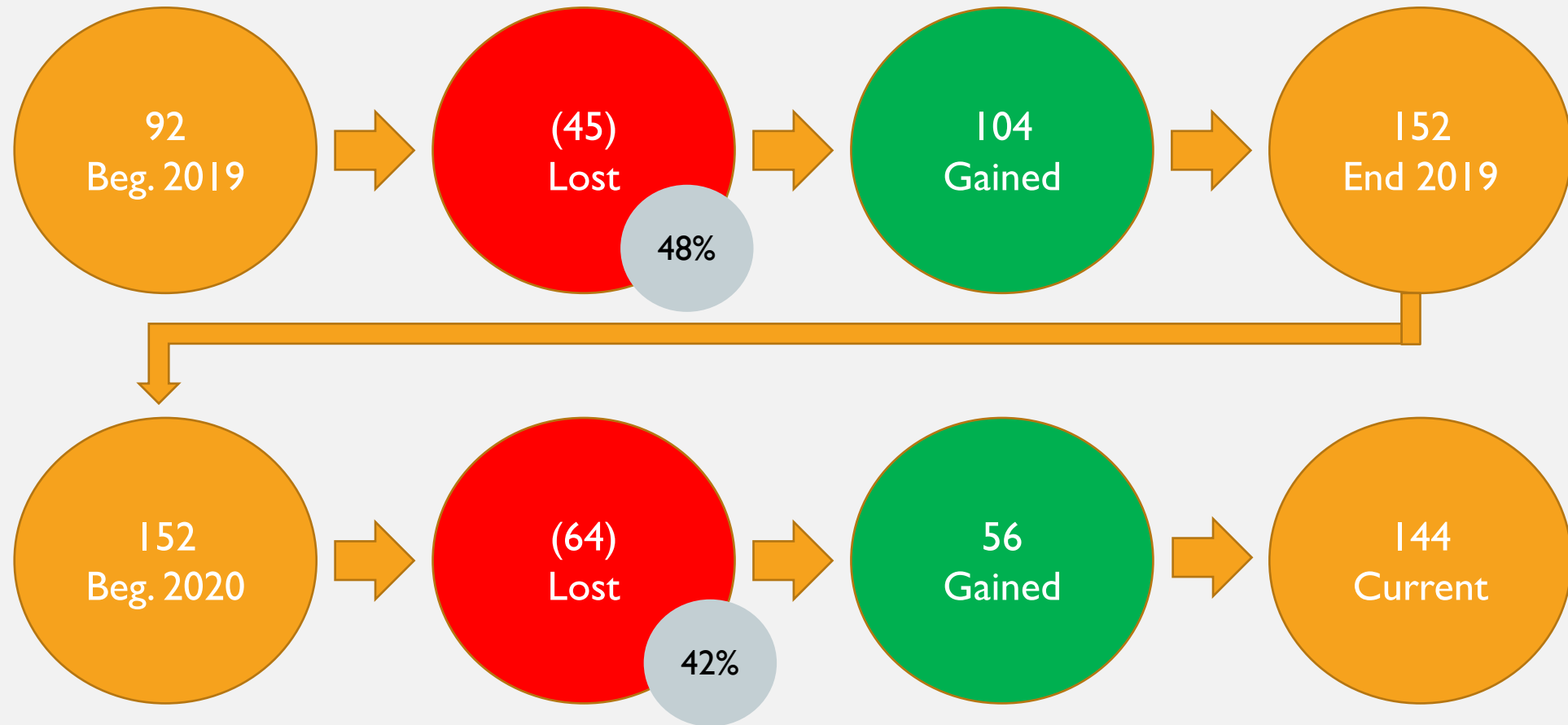
Class of 2020

- Avg.Age: 30
- Count: 55

Total

- Avg.Age: 30
- Count: 144

MEMBERSHIP ATTRITION/GAINS

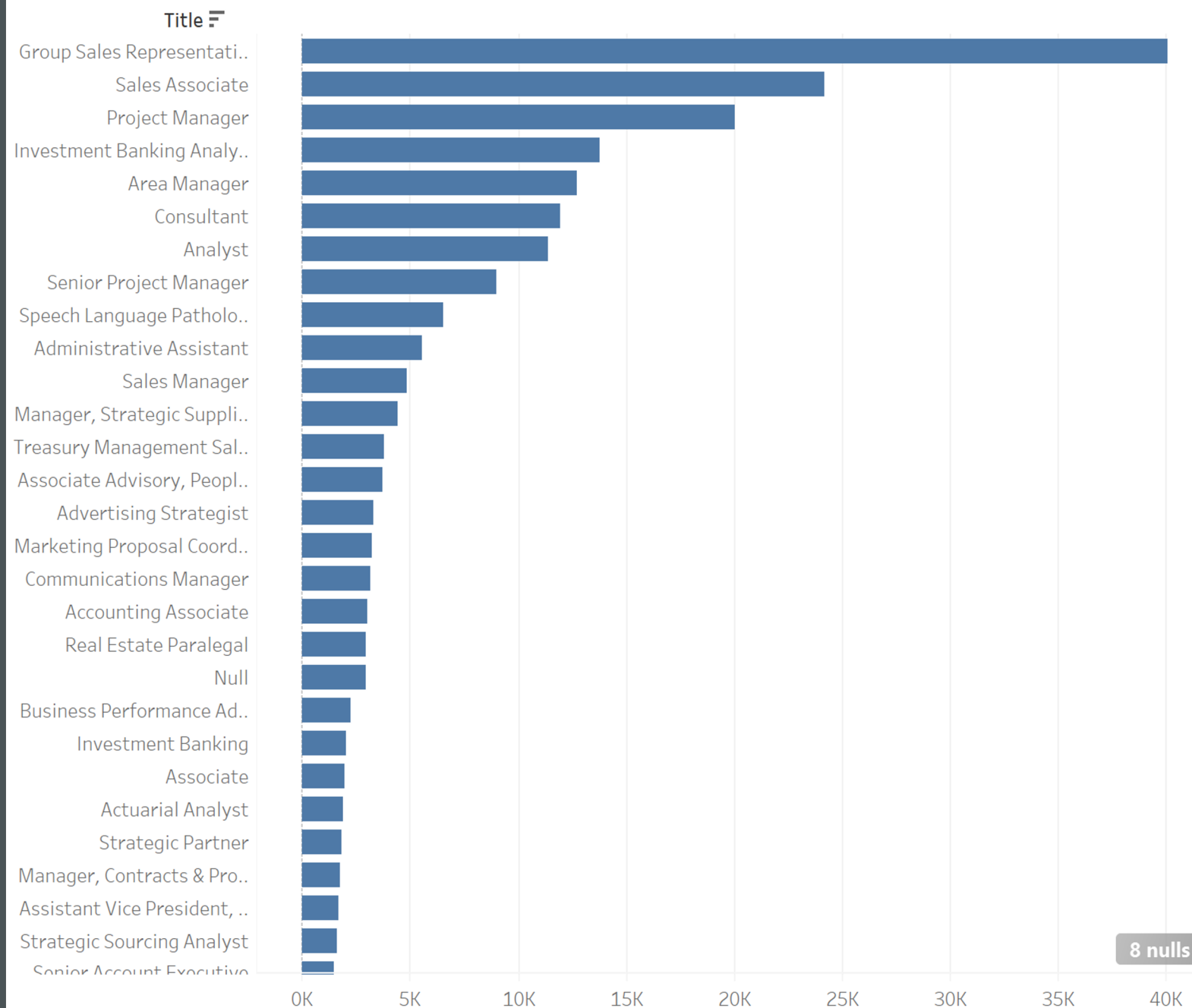


- Roughly 50% of attrition is a result of underperformance.

MEMBER ROLES (2018 DATA)

- 50% of top 10 producers were at a seniority level above manager within their firm.

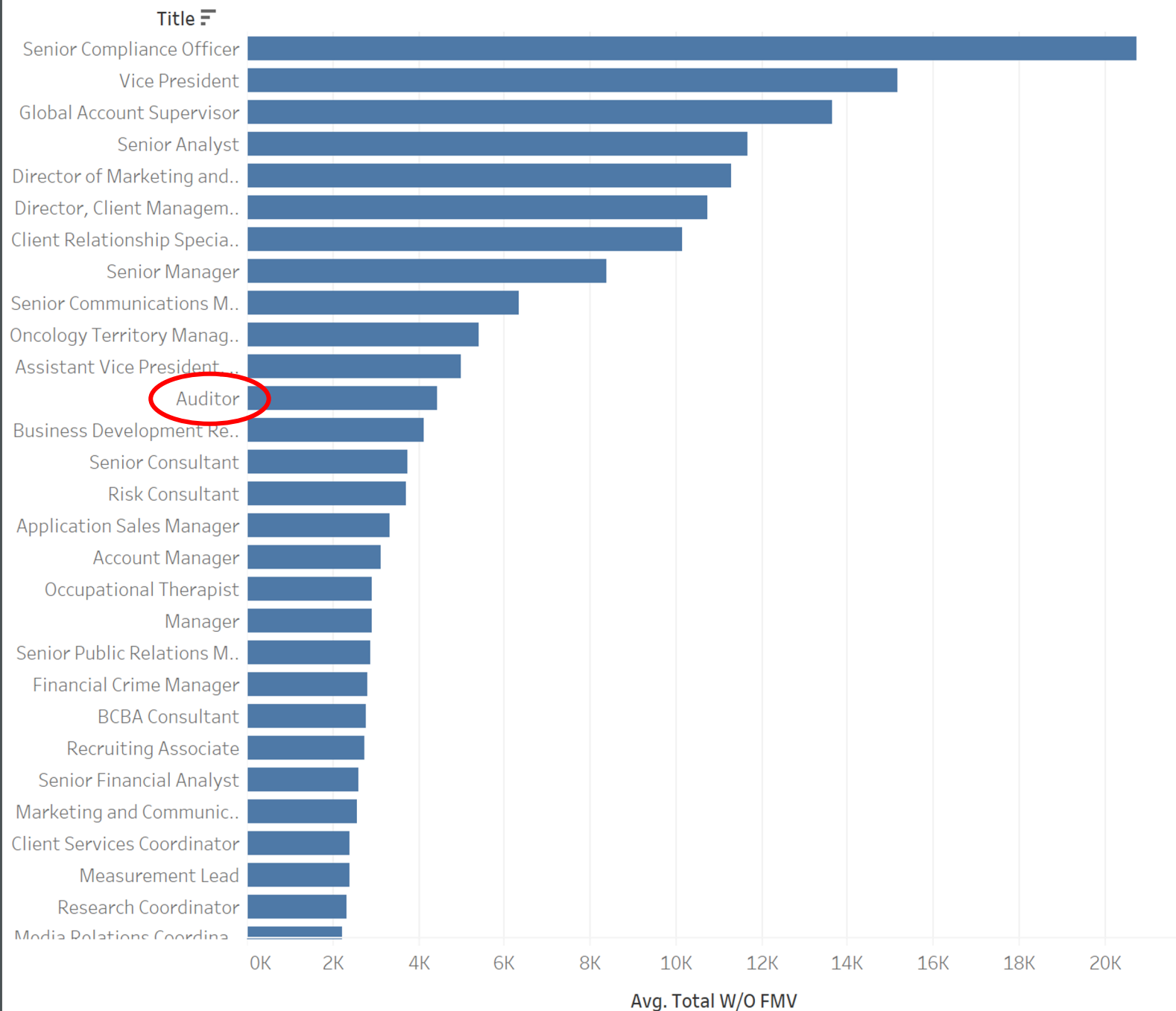
2018 Contribution by Title



MEMBER ROLES (2019 DATA)

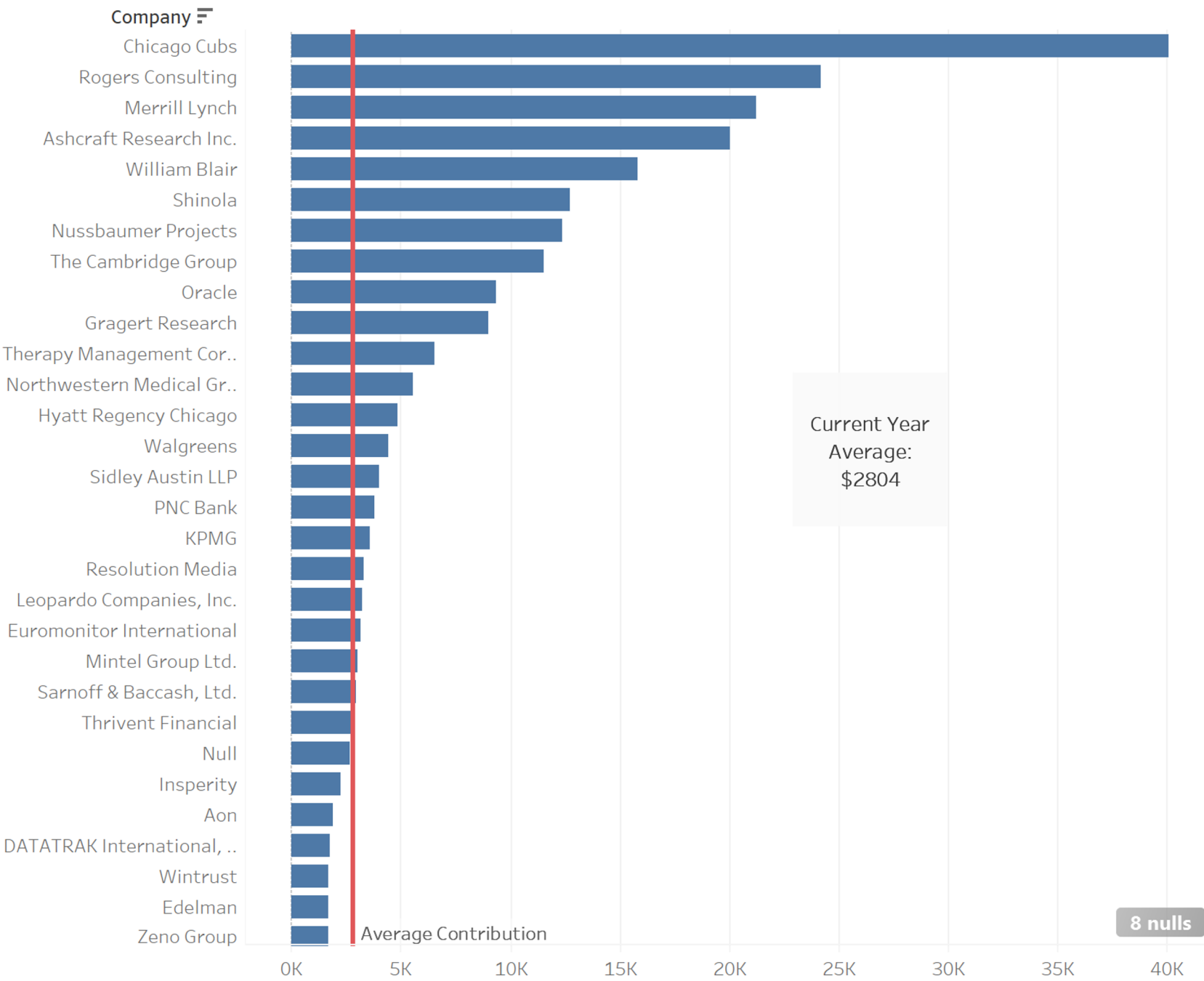
- 90% of top 10 producers were at a seniority level above manager within their firm.

2019 Contribution by Title



COMPANY LEVEL
(2018 DATA)

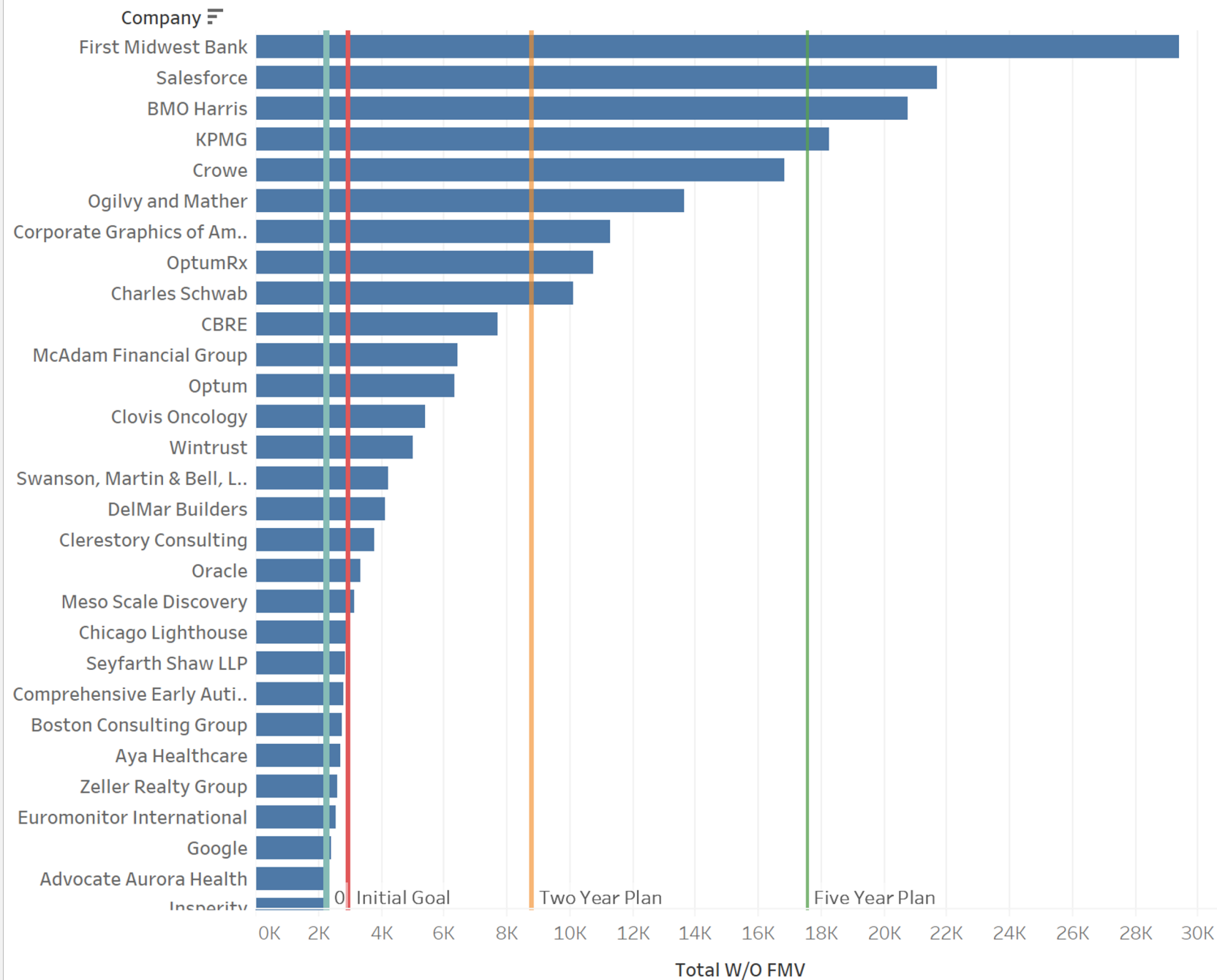
2018 Contribution by Company

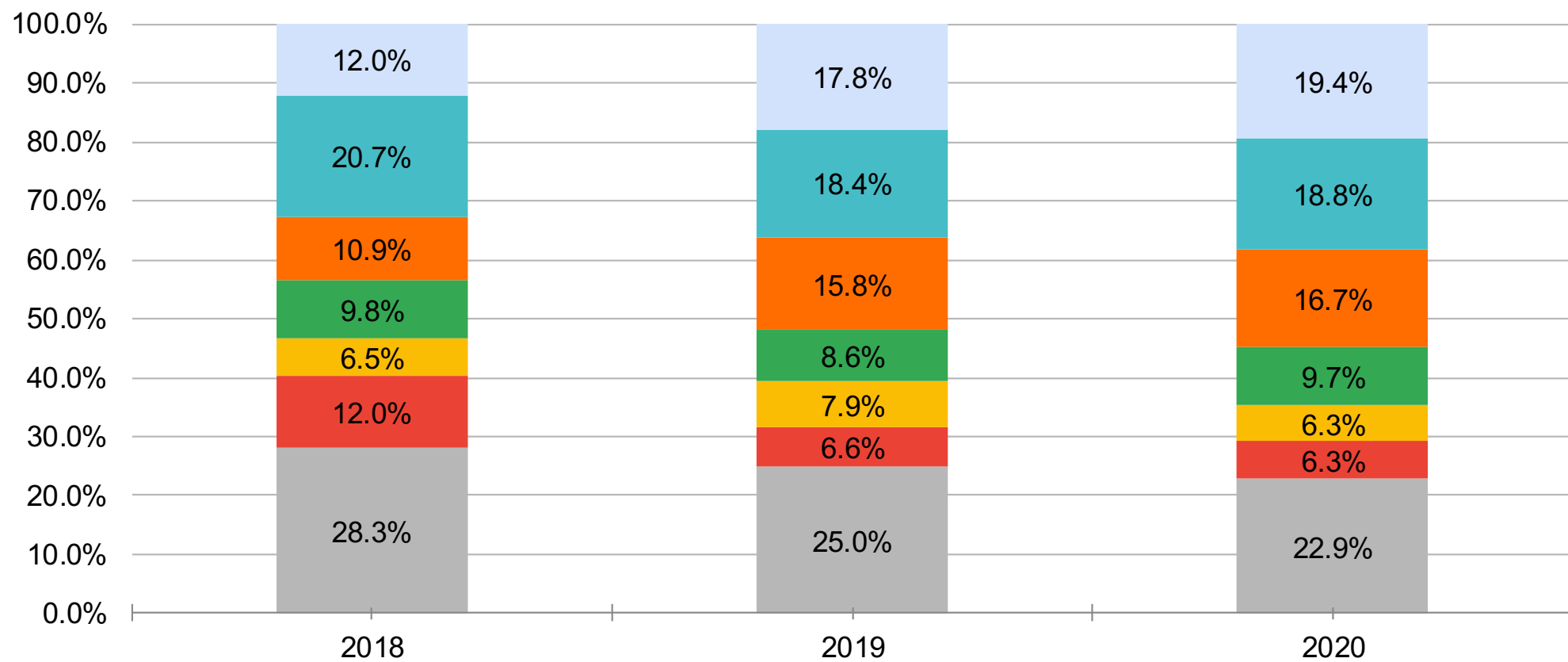


COMPANY LEVEL (2019 DATA)

- 37% YoY growth in average give per company (\$2,804 avg. → \$3,842)
- Initial Sprint: \$5,000 average per company
- Two Year Goal: \$15,000 average per company
- Five Year Goal: \$30,000 average per sponsor

2019 Contribution by Company





■ Other ■ Marketing ■ Non-Profit/Education ■ Tech ■ Health ■ Financial Services ■ Consulting

MEMBERSHIP COUNT BY INDUSTRY TRENDING

DOLLARS GENERATED BY MEMBER INDUSTRY

Members in financial services generated the largest amount of revenue

Top three member industries (52%) generated 62.6% of revenue

“Other” category is not generating appropriate levels of revenue

2019		
Member Industry	% Member Count	\$ Generated
Financial Services	18.4%	30.0%
Consulting	17.8%	17.4%
Health	15.8%	15.2%
Marketing	6.6%	11.0%
Tech	8.6%	10.5%
Other	32.9%	15.9%
Total	100.0%	100.0%

DOLLARS GENERATED BY MEMBER BY COMPANY SIZE

Members in companies with less than 10k employees generated 57% of revenue

Not surprising as that group makes up 56% of the membership base

Opportunity to recruit members from larger organizations

2019		
Members by Company Size (Employees)	Count	Total w/o FMV
100k+	13.8%	9.9%
50-100k	7.2%	5.0%
10-50k	23.0%	28.5%
1-10k	20.4%	30.8%
<1000	35.5%	25.9%
Total	100.0%	100.0%

CONNECTION TO THE MISSION

Currently, the ABOA only tracks if its constituents have had a personal brush with cancer:

- Legacy Class: 1 Cancer Survivor
- 2019: 4 Cancer Survivors
- 2020: 2 Cancer Survivors

Recommendation

- Survey % of people who are associated with cancer

ATTRACTION TO MEMBERSHIP



Personal and
Professional
Development



Leadership
Opportunities



Networking



Worthy Cause

KEY TAKEAWAYS



SET A STANDARD BY KEEPING
UNIFORM DOCUMENTATION



TRANSITION TO THOSE WHO HAVE
DECISION MAKING POWER, WHILE
CULTIVATING OUR GEN2END
INITIATIVE



SET HIGH GOALS AND DON'T MIND
THE NAYSAYERS

SUCCESES

CHICAGO ABOA SUCCESSES DRIVERS OVERVIEW



Culture



Leadership



Recruitment



Process

CHANGES IN LEADERSHIP



Emphasis on active engagement at leadership level



Increased leadership roles



Meritocracy vs. seniority



Increase leadership expectations

EFFECTIVE RECRUITMENT

Redesigned recruitment process



Increased scrutiny of candidates



Leads to higher quality volunteers



High quality referrals from existing membership



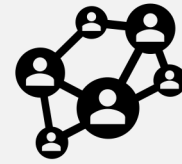
Creates a highly engaged membership base



PROCESS AND EXPECTATIONS

- ABOA becomes a value-add to members (e.g. “Sales Training”)
- Setting higher goals to drive new ideas
- Focus on bigger ticket, higher probability asks
- Development of Incubation lab

SUCCESS DRIVEN BY CULTURE



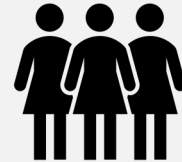
CREATING A SOCIAL ENVIRONMENT



INCREASING ENGAGEMENT AT THE
MEMBER LEVEL



ACCOUNTABILITY TO PEERS



NETWORKING WHILE WORKING
TOWARD A COMMON CAUSE

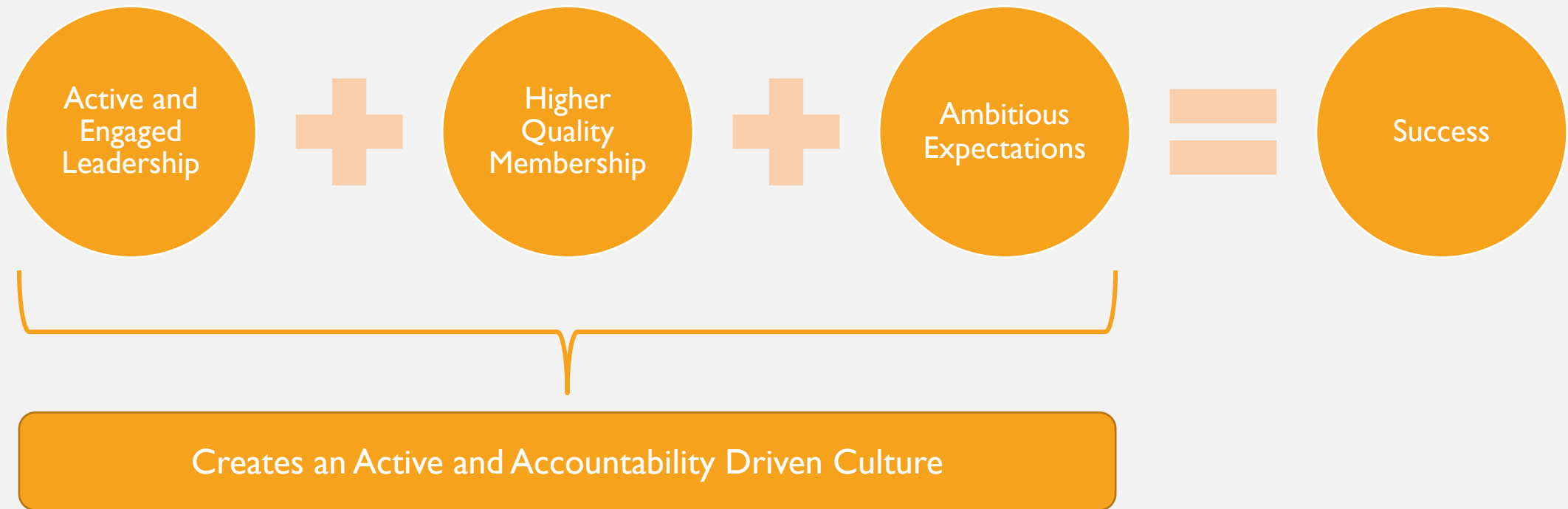


MEMBERSHIP IS NOT ABOUT
DOING THE BARE MINIMUM



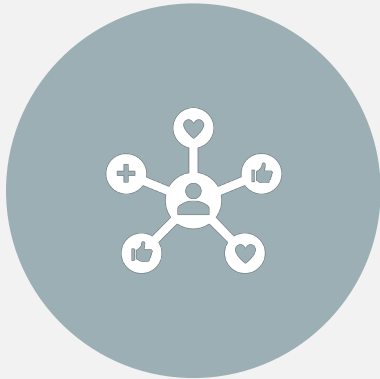
CULLING NON-ACTIVE MEMBERS

KEY TAKEAWAYS



NEW MARKETS

MARKETS OVERVIEW



PLAYBOOK



IDENTIFICATION



EXPECTATIONS

JUMP STARTING ABOA IN NEW MARKETS



IDENTIFYING NEW MARKETS

- Possibly Key Characteristics of Chicago
 - Market Size → Dallas
 - Density → Philly
 - Destination → NY
 - Midwest → MSP
 - Big Businesses → SF
 - Diversity → Seattle
- Some of the Better Comps: Philadelphia, Minneapolis, Dallas

IDENTIFYING NEW MARKETS

- Also consider:
 - Where are former members?
 - Where are existing chapters? How are they performing?
 - Where do other similar board types have foothold (i.e. NO)?
 - Good publicity was a factor → where might we get this again?
 - Where are competitors for young professional members less prevalent?

EXPECTATIONS OF NEW CHAPTERS

- Three-year ramp up to average sponsor commitment of \$3,000
- Ramp-up targets for individual contributions
- Aggressive (but not impossible) goal-setting to spur innovation and growth
- Goal: 1+ long-term partnership per annum
- Annual targeted marketing campaign directed at ERG leaders at locally headquartered companies
- Develop value-add and incentive programs for membership
- Strategic recruitment of 35 – 40-year-old professionals in senior management
- Quarterly review of sponsors compared to prior periods
- Document successes and failures

RECOMMENDATION SUMMARY

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- Build out national level board to oversee individual chapters and drive uniformity in data management and branding
- Continue selectiveness in membership recruitment
- Increase documentation and data tracking on members and sponsors
- Initiate a quarterly review of sponsors compared to prior periods
- Target long-term partnerships with sponsors for sustainable cash flows
- Implement annual marketing campaign targeting ERG leaders in locally headquartered companies
- Create employee positions at ACS level to support city chapter success
- Increase value-add proposition to membership
- Proceed with strategic recruitment of 35-40 demographic
- Keep setting high, but possibly attainable goals to spur innovation
- Test incubation lab concept and document