

2018-11-29 VIVO Membership Task Force Meeting

3 PM US Eastern Time

Call-in Information

Join from PC, Mac, Linux, iOS or Android: <https://ufl.zoom.us/j/2912662891>

Or iPhone one-tap:

US: +16699006833,,2912662891# or +16465588656,,2912662891#

Or Telephone:

Dial(for higher quality, dial a number based on your current location):

US: +1 669 900 6833 or +1 646 558 8656

Meeting ID: 291 266 2891

International numbers available: <https://zoom.us/u/c9C9CqIT5>

Or an H.323/SIP room system:

H.323:

162.255.37.11 (US West)

162.255.36.11 (US East)

221.122.88.195 (China)

115.114.131.7 (India)

213.19.144.110 (EMEA)

202.177.207.158 (Australia)

209.9.211.110 (Hong Kong)

64.211.144.160 (Brazil)

69.174.57.160 (Canada)

Meeting ID: 291 266 2891

SIP: 2912662891@zoomcrc.com

Or Skype for Business (Lync):

<https://ufl.zoom.us/skype/2912662891>

Attendees

[Mike Conlon](#)

[Ann Beynon](#)

[Virginia \(Ginny\) Pannabecker](#)

[Dong Joon \(DJ\) Lee](#)

Terrie Wheeler

[David Wilcox](#)

Resources

- Shared folder: <https://drive.google.com/drive/u/0/folders/1bruWU6ogsDf77S0M8H6rCpHqK5Fd0THw>
- Prospect tracking is here: <http://bit.ly/2KmUlxF>
- Current members are here: <http://vivoweb.org/community/membership>
- Current Sites are here: https://duraspace.org/registry/?gv_search=&filter_10=VIVO

Agenda

1. Review [prospect email](#)
 - a. Coordinating this message with our own templates and prospect list
2. Review [membership letter templates](#)
3. Review [TAMU marketing materials](#)
4. Review [prospects](#)
 - a. Any updates?
 - b. Starting to fill in missing information
 - c. Assignments for outreach
5. What else should we be working on?

Notes

From Ann Beynon

1-We need to create a benefits matrix specific to VIVO rather than use the Duraspace one. This requires input from the leadership group. This will be finalized in January during the LG meeting. We are holding off on contacting anyone about membership until we have clarity on this.

2- Mike noted we are in good shape regarding our 2018 membership goal, so there isn't a sense of urgency around additional revenue at the moment.

3-We identified three work streams-

- New member acquisition
- Upselling of current members
- Retention of current members

4-Regarding member retention: We are concerned that some members have canceled, e.g. Dartmouth. We want to prevent this going forward. Part of the issue is lack of communication/engagement.

- One key step here is to identify the right contacts at each member organization who is not on the LG. Duraspace uses Zoho for their CRM. Zoho should have at least the billing contact for all VIVO members, but may not have the decision-maker contacts. We are going to try to fill in the missing contact data so we can 1) Send emails to the group to stay in contact and 2) Communicate with these people about maintaining their membership and upselling their level.

- Mike has a seat for Zoho. He will take a screenshot of what information is being tracked there. Mike- Are you able to export the current list of membership contacts with whatever detail is available? That will help us assess what we have and what is missing. It may also give us a place to add additional info if you post it on GoogleDrive. The next time we meet, we will devise the best plan to 1) Determine the contact types we are looking for (e.g. decision-maker, project manager, developer, etc.) 2) Divide these up among the membership group, 3) Collect the new information, and 4) Get that information back into Zoho.

- We will need to agree on a plan to update the member contact information regularly.
- Once we complete the contacts, we can work with Duraspace to send emails to the list.

5-We will continue to add new prospects to this spreadsheet https://docs.google.com/spreadsheets/d/18NzRQJ_Ghhjxf96N0tqOOaDQOEzq61I3-dGF-MnUHso/edit#gid=926382588

Action Items

- Type your task here, using "@" to assign to a user and "/" to select a due date