## Date: February 17, 2017

Subject: Data Aggregation Specifications for AMA Boston Member Retention Analysis

Version: 2.0 Boston

**Boston Event Data Aggregation**

***Files***

“membership analysis file”

“Cross-Event (146 Events) Attendee Summary Report (Excel).xlsx” (only records with a valid MEMBER\_ID and ORDER DATE later than 12/31/2012)

***Audience Selected for the Data Aggregation***

All the members in the “membership analysis file”

***Creation of the Aggregation File***

1. Description of attributes needed for aggregating the data:

MEMBER\_ID

DATE\_PULLED ‘2013-12-31’

:

‘2016-02-29’

ORDER DATE

ORDER TYPE Complimentary

Eventbrite Completed

Free Order

Google Completed

Google Pending

Other

Paid Online Non-PayPal

Paid Online With PayPal

Paid with Cash

Paid with Check

PayPal + Manually Edited

PayPal Completed

PayPal Partially Refunded

ATTENDEE STATUS Attending

Checked In

TOTAL PAID

2. Time periods (as suffix)

|  |  |
| --- | --- |
| **Variable Name Suffix** | **Description** |
| 12mos | ORDER\_DATE within 12 months of DATE\_PULLED |
| 6mos | ORDER\_DATE within 6 months of DATE\_PULLED |

3. Create each variable for specified time periods

|  |  |
| --- | --- |
| **Variable Name** | **Variable Definition** |
| B\_order\_12mos | 12 months number of orders (use !is.na(Order.Date)) |
| B\_order \_6mos | 6 months number of orders |
| B\_order\_ChkIn\_12mos | 12 months number of orders with ATTENDEE STATUS = ‘Checked In’ |
| B\_order\_ChkIn\_6mos | 6 months number of orders with ATTENDEE STATUS = ‘Checked In’ |
| B\_order\_NotChkIn\_12mos | 12 months number of orders with ATTENDEE STATUS = ‘Attending’ |
| B\_order\_ NotChkIn \_6mos | 6 months number of orders with ATTENDEE STATUS = ‘Attending’ |
| B\_amt\_12mos | 12 months sum of TOTAL PAID |
| B\_amt\_6mos | 6 months sum of TOTAL PAID |
| B\_amt\_ChkIn\_12mos | 12 months sum of TOTAL PAID with ATTENDEE STATUS = ‘Checked In’ |
| B\_amt\_ChkIn\_6mos | 6 months sum of TOTAL PAID with ATTENDEE STATUS = ‘Checked In’ |
| B\_amt\_NotChkIn\_12mos | 12 months sum of TOTAL PAID ATTENDEE STATUS = ‘Attending’ |
| B\_amt\_ NotChkIn \_6mos | 6 months sum of TOTAL PAID ATTENDEE STATUS = ‘Attending’ |
| B\_recency | number of days between last ORDER DATE and DATE\_PULLED |
| B\_OdTp\_Free\_12mos | 12 months number of orders with Order.Type= ‘Free Order’ |
| B\_OdTp\_Free\_6mos | 6 months number of orders with Order.Type= ‘Free Order’ |
| B\_OdTp\_PayPal\_12mos | 12 months number of orders with Order.Type= ‘PayPal Completed’ or ‘PayPal Partially Refunded’ |
| B\_OdTp\_PayPal\_6mos | 6 months number of orders with Order.Type= ‘PayPal Completed’ or ‘PayPal Partially Refunded’ |
| B\_OdTp\_Complimentary\_12mos | 12 months number of orders with Order.Type= ‘Complimentary’ |
| B\_OdTp\_Complimentary\_6mos | 6 months number of orders with Order.Type= ‘Complimentary’ |
| B\_OdTp\_Other\_12mos | 12 months number of orders with Order.Type= ‘Other’ or ‘Paid with Check’. |
| B\_OdTp\_Other\_6mos | 6 months number of orders with Order.Type= ‘Other’ or ‘Paid with Check’. |
| B\_TkTp\_AMA\_12mos | 12 months number of Ticket.Type ="AMA Member", "AMA Member Student", "Professional Members and Student Members",  "AMA Members rev", "AMA Members RSVP (will be verified)", "AMA Regular Ticket", "Members (will be verified)", "AMA Member Non-student" |
| B\_TkTp\_AMA\_6mos | 6 months number of Ticket.Type ="AMA Member", "AMA Member Student", "Professional Members and Student Members",  "AMA Members rev", "AMA Members RSVP (will be verified)", "AMA Regular Ticket", "Members (will be verified)", "AMA Member Non-student" |
| B\_TkTp\_AMAEarly\_12mos | 12 month number of Ticket.Type ="AMA Member (Early Bird)", "Early Bird Student AMA Member" |
| B\_TkTp\_AMAEarly\_6mos | 6 month number of Ticket.Type ="AMA Member (Early Bird)", "Early Bird Student AMA Member" |
| B\_TkTp\_NonAMA\_12mos | 12 month number of Ticket.Type ="AMA Non-member", "General Admission" |
| B\_TkTp\_NonAMA\_6mos | 6 month number of Ticket.Type ="AMA Non-member", "General Admission" |

|  |  |
| --- | --- |
| B\_TkTp\_NonAMAEarly\_12mos | 12 month number of Ticket.Type="AMA Non-member (Early Bird)" |
| B\_TkTp\_NonAMAEarly\_6mos | 6 month number of Ticket.Type="AMA Non-member (Early Bird)" |
| B\_TkTp\_Volunteer\_12mos | 12 month number of Ticket.Type="AMA Volunteer", "AMA Boston Volunteer" |
| B\_TkTp\_Volunteer\_6mos | 6 month number of Ticket.Type="AMA Volunteer", "AMA Boston Volunteer" |
| B\_TkTp\_Other\_12mos | 12 month number of Ticket.Type="Attendee", "Yes I'm in!", "One Guest","RSVP", "Social Media/Communication Teams Appreciation Night at Jillians", "Save The Date", "Early Bird Registration", "Paid with Check" |
| B\_TkTp\_Other\_6mos | 6 month number of Ticket.Type="Attendee", "Yes I'm in!", "One Guest","RSVP", "Social Media/Communication Teams Appreciation Night at Jillians", "Save The Date", "Early Bird Registration", "Paid with Check" |
| B\_Hr\_AMAWeb\_12mos | 12 months number of HEAR = “AMA Boston Website”  or “Internet Search” |
| B\_Hr\_AMAWeb\_6mos | 6 months number of HEAR = “AMA Boston Website” or “Internet Search” |
| B\_Hr\_Email\_12mos | 12 months number of HEAR = “AMA Email", "Email", "Nirmal's email!” |
| B\_Hr\_Email\_6mos | 6 months number of HEAR = “AMA Email", "Email", "Nirmal's email!” |
| B\_Hr\_SocialMedia\_12mos | 12 months number of HEAR = “Facebook/Twitter/LinkedIn", "LinkedIn", "Facebook", "Twitter", "Social media" |
| B\_Hr\_SocialMedia\_6mos | 6 months number of HEAR = “Facebook/Twitter/LinkedIn", "LinkedIn", "Facebook", "Twitter", "Social media" |
| B\_Hr\_Friend\_12mos | 12 months number of HEAR = "From family or friends", "Coworker/Friend" |
| B\_Hr\_Friend\_6mos | 6 months number of HEAR = "From family or friends", "Coworker/Friend" |
| B\_Hr\_Other\_12mos | 12 months number of HEAR = "", "Other", "Board member", "AMA Member" |
| B\_Hr\_Other\_6mos | 6 months number of HEAR = "", "Other", "Board member", "AMA Member" |
| B\_Evt\_Party\_12mos | 12 months number of Event.Name ="AMA Boston Holiday Mixer","AMA Boston Holiday Mixer 2015","AMA Boston & NEDMA Epic 2016 Holiday Party!","AMA Boston Summer Celebration","AMA Boston Summer Networking Party! #BOSummer16",  "AMA Boston's Totally '80s Summer Party","AMA Boston's Ugly Sweater Holiday Party","Summer Networking: Here Today, Gone to Maui" |
| B\_Evt\_Party\_6mos | 6 months number of Event.Name ="AMA Boston Holiday Mixer","AMA Boston Holiday Mixer 2015","AMA Boston & NEDMA Epic 2016 Holiday Party!","AMA Boston Summer Celebration","AMA Boston Summer Networking Party! #BOSummer16",  "AMA Boston's Totally '80s Summer Party","AMA Boston's Ugly Sweater Holiday Party","Summer Networking: Here Today, Gone to Maui" |

|  |  |
| --- | --- |
| B\_Evt\_Volunteer\_12mos | 12 months number of Event.Name = "AMA Boston Recruitment Event 2014","AMA Boston Volunteer Information Event 3/10/16","AMA Boston Volunteer Recruitment Event","AMA Boston Volunteer Team Meeting 2014", "AMA Boston Volunteer Thanks - at Jillian's","AMA Boston Winter Volunteer Recruitment Event",  "AMA Volunteer Appreciation Event","AMA Volunteer Onboarding Meeting", "AMA Boston\'s Social Media & Communication Team Appreciation Night out at Jillian's",  "Hang Out At The Harp: AMABoston\'s Social Media + Communications Team Meeting", "AMA Boston Social Team Building and Volunteer Appreciation Event" |
| B\_Evt\_Volunteer\_6mos | 6 months number of Event.Name = "AMA Boston Recruitment Event 2014","AMA Boston Volunteer Information Event 3/10/16","AMA Boston Volunteer Recruitment Event","AMA Boston Volunteer Team Meeting 2014", "AMA Boston Volunteer Thanks - at Jillian's","AMA Boston Winter Volunteer Recruitment Event", "AMA Volunteer Appreciation Event","AMA Volunteer Onboarding Meeting", "AMA Boston\'s Social Media & Communication Team Appreciation Night out at Jillian's", "Hang Out At The Harp: AMABoston\'s Social Media + Communications Team Meeting", "AMA Boston Social Team Building and Volunteer Appreciation Event" |
| B\_Evt\_Strategy\_12mos | 12 months number of Event.Name = "Marketing Attribution Analysis: Lessons From Practitioners", "Be Heard: Brand Engagement Strategies that Deliver Results", "Marketing in 2024: What You Need to Know Today to Prepare for the Future", "Modern Marketing Mashup", "The Marketing Landscape of the Future and Its Impact on Careers", "Sirius Decisions - Research-driven Strategies to Drive Growth #SiriusGrowth", "More than Credits and Debits: Marketing Best Practices in Financial Services", "Innovate, Disrupt, Lead - Cutting-Edge AMA Boston Event | Free to AMA members", "Find Your Golden Thread - Insight Driven Marketing and The Human Condition", "Integrated Marketing: If It Were Easy, Everyone Would Do It", "Customer Conversion Through Funnel", "Customer Experience 20/20: A New Era of Customer-centric Marketing", "NERD Challenge: Content Marketing", "Past, Present and Future of Content Marketing: Impacting Behavioral Change", "Three Steps to Content Marketing Success: Lessons from the Pros", "Content Marketing: Tell Bigger Stories Without Selling", "Mobile in Financial Services Marketing", "Mobile Influence - Business Strategies & Tactics for the Mobile Market", "The Future of Video Media: TV, Cable, Web, Mobile and Beyond", "How Do You Measure Your Social Media ROI?", "Media Convergence: Possibilities and Opportunities For Integrated Marketing", "Are You Getting Digital Right?", "2013 Marketing Leadership Forum", "AMA Boston CMO Roundtable: Authentic Marketing", "Fireside Chat with Career Guru Dan Schawbel: An AMA Mixer Event", "Leadership on Fire - AMA Mid-Year Retreat", "Storytelling: The Art of Moving People" |

|  |  |
| --- | --- |
| B\_Evt\_Strategy\_6mos | 6 months number of Event.Name = "Marketing Attribution Analysis: Lessons From Practitioners", "Be Heard: Brand Engagement Strategies that Deliver Results", "Marketing in 2024: What You Need to Know Today to Prepare for the Future", "Modern Marketing Mashup", "The Marketing Landscape of the Future and Its Impact on Careers", "Sirius Decisions - Research-driven Strategies to Drive Growth #SiriusGrowth", "More than Credits and Debits: Marketing Best Practices in Financial Services", "Innovate, Disrupt, Lead - Cutting-Edge AMA Boston Event | Free to AMA members", "Find Your Golden Thread - Insight Driven Marketing and The Human Condition", "Integrated Marketing: If It Were Easy, Everyone Would Do It", "Customer Conversion Through Funnel", "Customer Experience 20/20: A New Era of Customer-centric Marketing", "NERD Challenge: Content Marketing", "Past, Present and Future of Content Marketing: Impacting Behavioral Change", "Three Steps to Content Marketing Success: Lessons from the Pros", "Content Marketing: Tell Bigger Stories Without Selling", "Mobile in Financial Services Marketing", "Mobile Influence - Business Strategies & Tactics for the Mobile Market", "The Future of Video Media: TV, Cable, Web, Mobile and Beyond", "How Do You Measure Your Social Media ROI?", "Media Convergence: Possibilities and Opportunities For Integrated Marketing", "Are You Getting Digital Right?", "2013 Marketing Leadership Forum", "AMA Boston CMO Roundtable: Authentic Marketing", "Fireside Chat with Career Guru Dan Schawbel: An AMA Mixer Event", "Leadership on Fire - AMA Mid-Year Retreat", "Storytelling: The Art of Moving People" |

4. Final file

The file has one record per unique member\_id. It has member\_id, date\_pulled and all the variables created above in section 3.