## Date: March 17, 2017

Subject: Data Aggregation Specifications for AMA Boston Member Retention Analysis

1.Time periods (as suffix)

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

2. Create each variable for specified time periods

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| **Variable Name** | **Variable Definition** |
| B\_order\_12mos | 12 months number of orders (Question: do we use quantity or not?) |
| 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" |

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| 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" |

3. Final file

The file has one record per unique member\_id. It has member\_id, date\_pulled, Renew and all the variables created above in section 2.