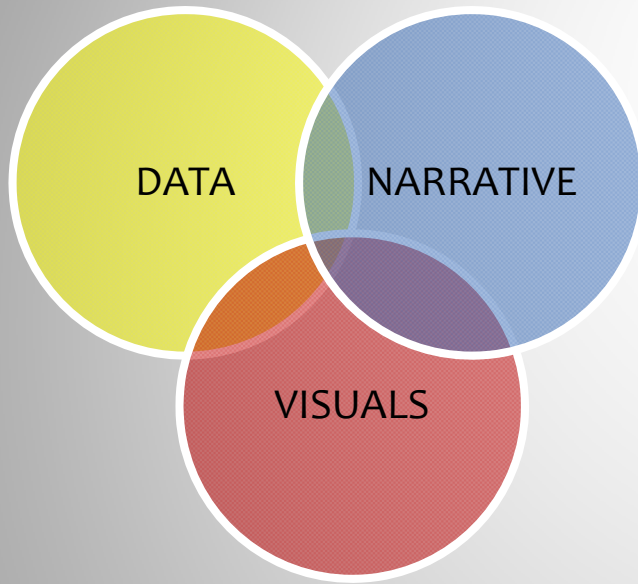


SHOW ME YOUR ANALYTICS...



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# ...AND I'LL TELL YOU A STORY



- KEY ELEMENTS FOR DATA STORYTELLING

- Data – explains
  - Condenses and organizes the facts
- Visuals – enlightens
  - Graphically gives a vision of the future
- Narrative – engages
  - Interactive—ties it all together and helps audience relate



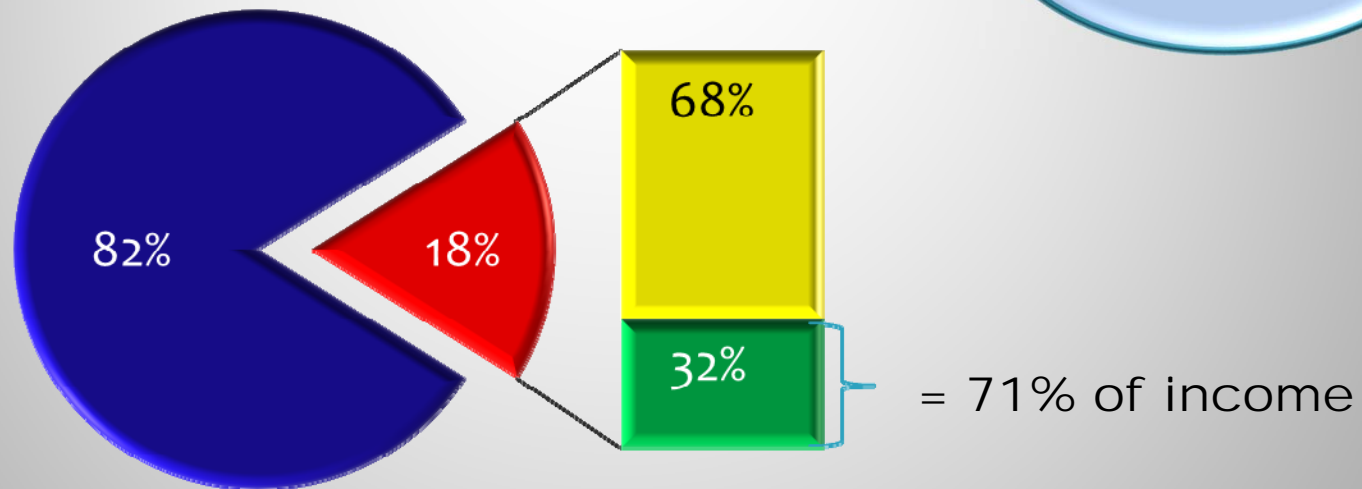
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## MEMBERSHIP STATUS

6018 Eligible Employees

**2016 Cycle  
Receipts  
\$1.2 M**



■ NOT PARTICIPATING ■ REGULAR PAC MEMBERS ■ PRESIDENT CLUB MEMBERS



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# CREATING YOUR STORY



**Define  
Audience**



**Develop  
The  
Story**



**Get Data**



**Explore  
Data**



**Tell  
The  
Story**



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## DEFINE THE AUDIENCE



- *Executive Management*
- *PAC Board*
- *PAC Members*
- *PAC Eligibles*
- *External Presentations*



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## HYPOTHESIS: DEVELOP THE STORY



- **WHAT IS YOUR WHY?** *What story are you trying to tell or sell?*
  - Membership Status
  - Financial Reports
  - Recruiting Targets
  - Resource Justification
- **CHOOSE THE FORMAT**
  - Presentation
  - Infographic
  - Video
  - Annual Report
  - THE LIST GOES ON!



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## GET DATA



- **PRIMARY DATA SOURCES**
  - UDF's
    - *Creating your universe*
  - *Surveys and Focus Groups*
- **SECONDARY DATA SOURCES**
  - *HR Records, Payroll*
  - *IT, Marketing, Customer Service*
- **IMPORTANCE OF DATA ENTRY**
  - *Consequences of bad data*
  - *Be very specific..details details details*



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## SECONDARY DATA

**ENPAC**  
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Select Entity  Search  Share

Home | eAdvocacy | Legislators | Distributions | **Individuals** | Organizations | PAC Orgs | Transactions | Events

Add Individual | Make This My Default View | Individual Home | Save ▼ | Tools

### Search Individuals

**Individuals** | Activity | News | Projects | Organizations | Legislators | Transactions | Options

#### General

Name (Last, First):

ID:

Employer:

Organization:

Type:

Occupation:

Title:

Occupation Code (CO & IN):

Vermont Contrib. ID:

List:

User ID:

Notes:

Last Import Date:  to

Web Signup Date:  to

Status: ☐ Active ☐ Inactive

Individuals that have Legislator Links with:

Link Type: ☐ Home ☐ Work ☐ Personal ☐ Regional ☐ Preferred

#### Geographic

(h) City:

(h) State:

(h) ZIP/Postal Code:

County:

Country:

(h) E-mail:

(h) Phone (xxx) xxx-xxxx:

(w) City:

(w) State:

(w) ZIP/Postal Code:

(w) County:

(w) E-mail:

(w) Phone (xxx) xxx-xxxx:

#### Communication Preferences

Prefs: ☐ Fax ☐ E-mail ☐ Letter

Fax Number: ☐ With ☐ Without

E-mail Address: ☐ With ☐ Without

Opt Out Date:  to

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Select Entity  Search  Share

Home | eAdvocacy | Legislators | Distributions | **Individuals** | Organizations | PAC Orgs | Transactions | Events | Acti

#### Payroll

Deduction Amount:  to

Cycle: ☐ Weekly ☐ Bi-Weekly ☐ S-Monthly ☐ Monthly ☐ Signed-Up

#### PAC Receipts

Grouping: ☒ Single ☐ Aggregate

Date:  to

Amount:  to

Source:

Bank Account:

Payment Method: ☐ Checks ☐ CC's ☐ Cash ☐ P/R ☐ Web ☐ Other

#### Recurring Transactions

Expiration Date (MM/YY):

Frequency: ☐ Annual ☐ Monthly ☐ Monthly Pledge ☐ Quarterly

Status: ☐ Active ☐ Suspended

Next Billing Date:  to

#### Social Media

Twitter Handle: ☐ Yes LinkedIn Profile: ☐ Yes

Facebook Profile: ☐ Yes Website: ☐ Yes

#### PAC Account Balance

Account Balance:  to

#### Pledges

Date:  to

Amount:  to

Balance:  to

Status: ☐ Active ☐ Inactive

#### User Defined Fields

SSN:

Employee Status:

Employee Type:

Company Code:

Company Description:

Department ID:

Department Name:

Location:

Mail Drop:

Job Code:

Position Number:

Pay Group:

Manager Level:

Annual Rate:

CISION INDIVIDUALS TEMPLATE  
HR DATA



Individuals Organizations PAC Orgs Transactions Events Activities

#### User Defined Fields

SSN:

Employee Status:

Employee Type:

Company Code:

Company Description:

Department ID:

Department Name:

Location:

Mail Drop:

Job Code:

Position Number:

Pay Group:

Manager Level:

Annual Rate:

Supervisor Name:

Director Name:

Director Desc:

Individuals Organizations PAC Orgs Transactions Events Activities

Director Name:

Director Desc:

VP Name:

VP Description:

Location PAC ID:

DEDCD:

Incentive Percentage Amt:

Incentive Flat Amt:

ENPAC COMMITTEE:

Deleted Board IDs:

Pac Web Access: ☐ Yes ☐ No

PAC Committee Name:

(DoNotUse):

PAC Committee Desc:

Hire Date:

## PRIMARY DATA

Individuals Organizations PAC Orgs Transactions Events Activities

PAC Committee Desc:

Hire Date:

Birth Date:

Event Coordinator access: ☐ Yes ☐ No

Individual Percent of Pay: ☐ Yes ☐ No

OCE MEMBER:

Short Name:

Presidents Club Member: ☐ Yes ☐ No

test rate:  to

ENPOWER: ☐ Yes ☐ No

Empower Premier Club: ☐ Yes ☐ No

RetiredDate:  to

Voting Member: ☐ Yes ☐ No

2008 Dollars-for-Doers Awarded:

Number of Hours:



DATA YOU COLLECT  
UDF'S



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## GET DATA



- **IMPORTANCE OF DATA ENTRY FOR UDFs**
  - Consequences of bad data
  - Be very specific..details details details
  - Standardize your database
  - Keep one field for one purpose
  - Use automation for accurate data values
  - Block duplicates
  - Automate Data Appending/Updating



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## EXPLORE THE DATA



- *Internal Microtargeting*
  - *Pick your target(s)*
    - Previous givers
    - Management level
    - Location
    - Age
    - Years of service
    - Participation in other company programs (UW, Advocacy, Volunteer)
    - Registered Voter
    - Affinity Groups



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# TELL YOUR STORY



- **MEMBERSHIP SUMMARY**

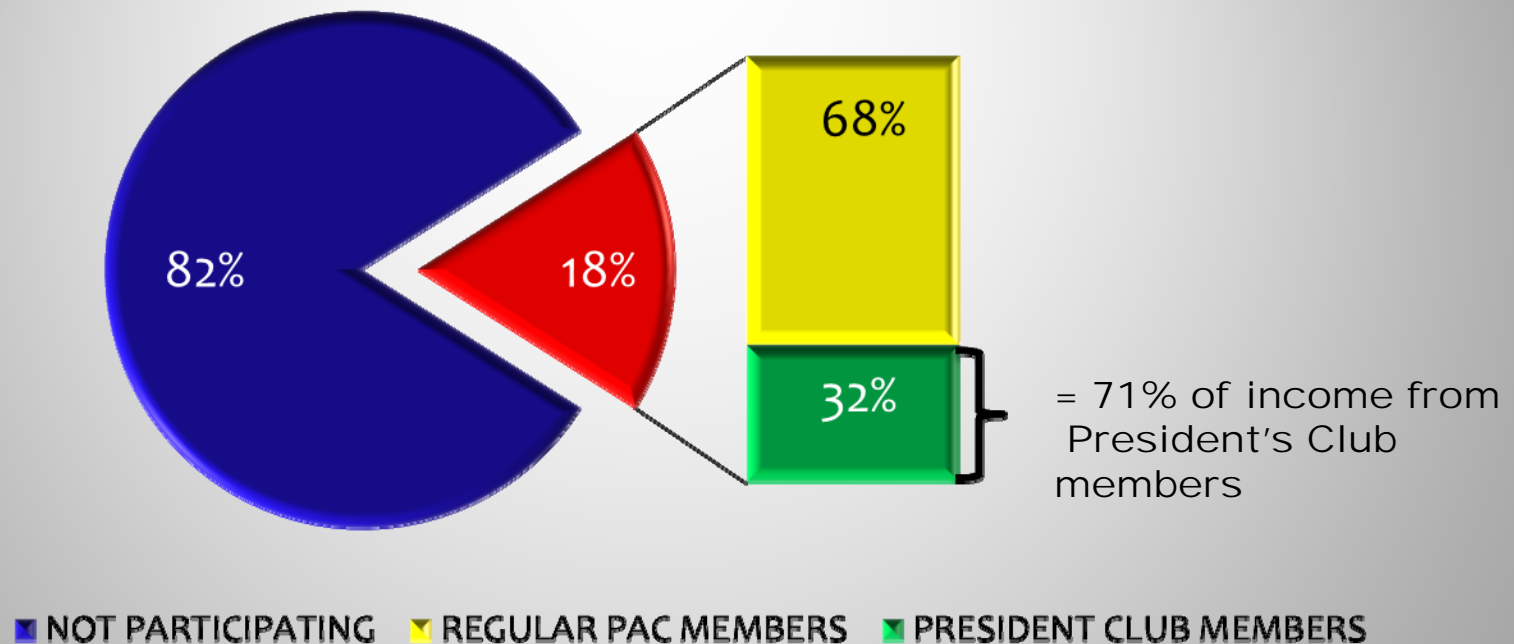
- *Our participation rates is below the industry standard of >20%*
- *Our President's Club members generate 71% of our overall income*
- *Almost half of our President's Club Members are over 54 years old making retirement attrition a challenge*
- *Resources need to focus on groups where there is greater potential*



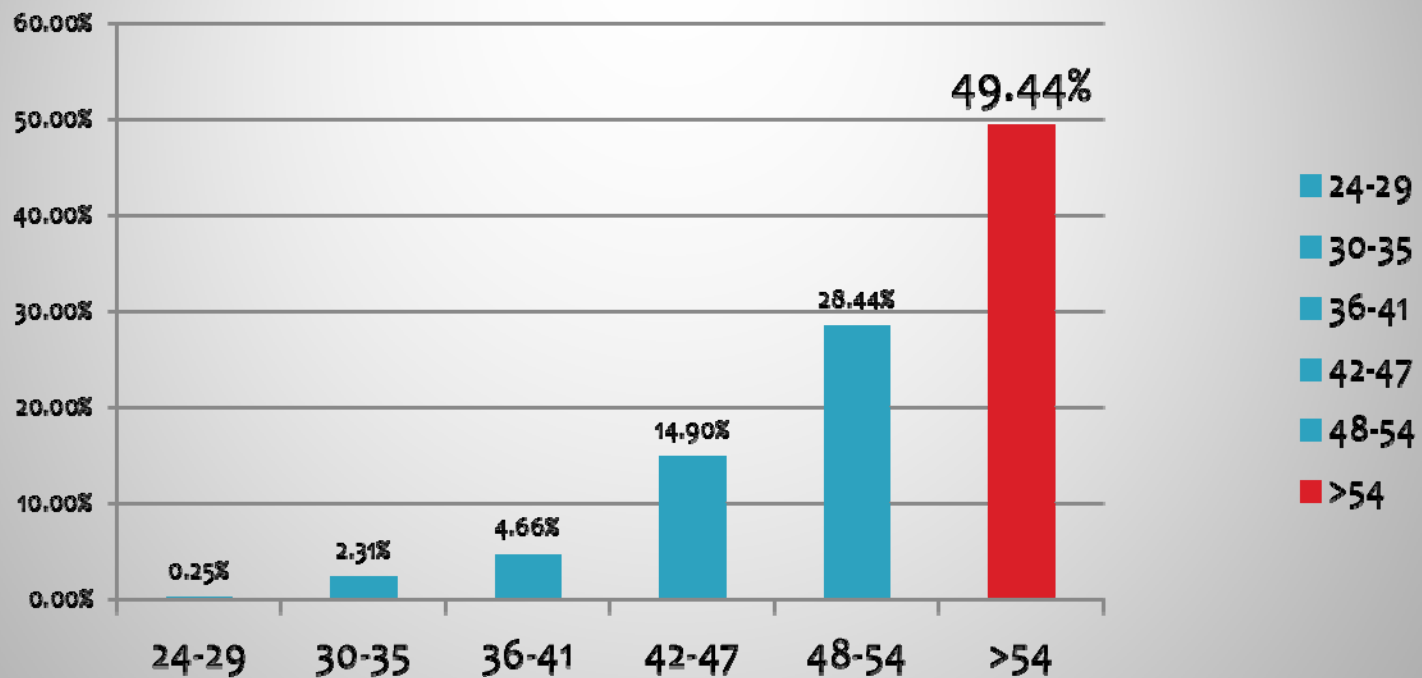
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## MEMBERSHIP STATUS

6018 Eligible Employees – 18% Participating

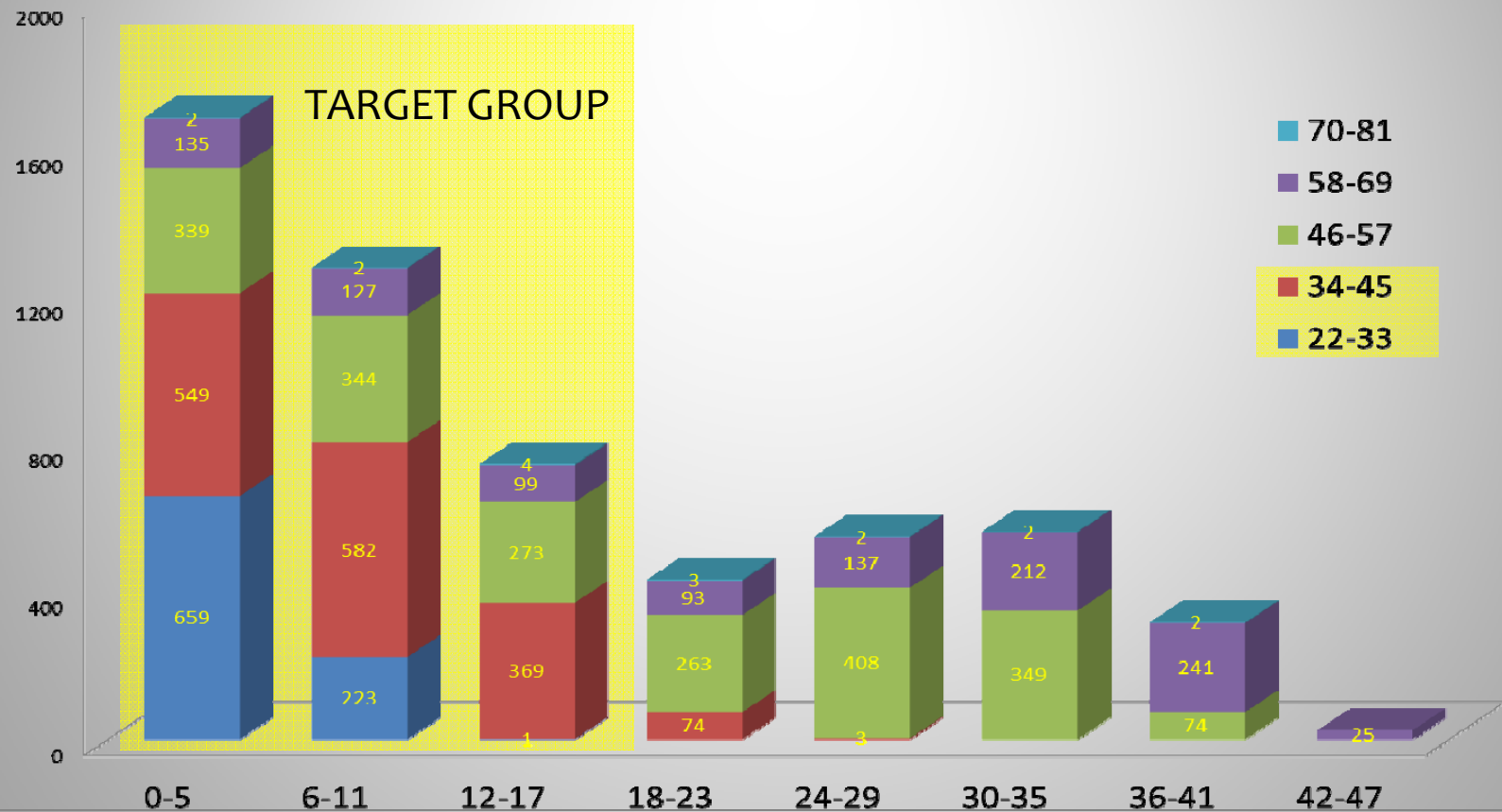


## PRESIDENT'S CLUB PARTICIPATION Income Percentage by Age



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## Not Participating by Age and Years of Service



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# TELL YOUR STORY



- **MEMBERSHIP CAMPAIGN**

- *Message to participating non-President's Club members offering incentives*
- *Overall message to non-participating eligibles reminding them of ENPAC Give\$Back, the PAC match program*
- *Focus Peer Ambassadors on eligible non participants under the age of 45 with less than 17 years of service*
- **Goals**
  - *Offset retirement attrition*
  - *Increase overall participation to 24%*



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# QUESTIONS?

*Kathy Crowder*  
*Manager, Regulatory Affairs*  
*Entergy Services, Inc.*  
*kkeener@entergy.com*



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