

WHARTON CLUB LEADERSHIP CONFERENCE



CLUBx Talks

Led by Kelly Lauersen

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Introduction

Kelly Lauersen, Senior Associate Director, Alumni Relations, Global Clubs

- At this first CLUBx Talks session, inspired by TEDx talks, five clubs will highlight their most innovative ideas and practices through personal storytelling and imagery — a great way to share the creative things we are all doing.
- Each conference attendee will vote for their favorite talk, and the winning club will receive a Wharton-subsidized faculty event. In the future, clubs will be able to apply to have a faculty member visit them.

Talk #1: Wharton Club of Colorado — “Wharton-Breck Connect (2012–16)”

Lauren Mitchell Sveen, WG’90, President

- Colorado living is all about skiing and winter sports, and a sense of community that comes from shared experiences and emotional connections, being vulnerable with new people, and fostering a spirit of belonging.
- The annual Wharton alumni ski trip is national, multigenerational, and multidisciplinary in scope, hosting participants from WG’81 to WG’16. Most participants come not knowing anyone and give feedback on having a fabulous experience: “most fun alumni activity,” “more connected to community in both business and social relationships.”
- Skiing is a strong Wharton student culture. The student ski club has grown from 16 members in 1990 to more than 1,000 students and 400 of their partners on the last MBA ski trip. The Colorado club plans the Breckenridge alumni ski trip to coincide with the student trip biannually to build alumni community. How could this event coincide with or involve alumni class trips as well?
- Marketing and communications is a challenge. When the Wharton Club of Boston sent out an email newsletter specifically about the trip, four Boston alumni signed up; could more club presidents help with publicity? Messaging is important to highlight the multigenerational and multidisciplinary aspect. Could the trip information be posted on all NationBuilder sites simultaneously?
- Another challenge is the small club’s financial risk of making lodging reservations ahead of time.

- Peer institutions: Tuck does an event at Vail (“Carnivail”) with many more attendees; HBS has seven different trips for alumni, which appeal to millennials and older. Many peer institutions do this and the Colorado club would love to see this take hold.

Talk #2: Wharton Club of Charlotte — “Year End Social”

Andy Cohen, WG’86, President

- A few years ago, the club envisioned a capstone end-of-year event with goals of networking, lifelong learning, stewarding speakers from throughout the year, and fun. The club realized this as an annual reception at Total Wine, which is owned by Wharton alumnus David Trone — providing a willing speaker, deep discounts, and amazing wine selection.
- To attract alumni volunteers to help with the event, the club uses descriptive, fun titles (“Social Media Guru,” “Chief Photographer”) when making calls for volunteers.
- A simple event format is the recipe for success: 1) theme of global food and wine, a different origin country each year (South Africa, Argentina, France, Italy, Germany); 2) predictable timing and place, same every year; 3) the event is easy to explain and market on social media. We know this works because the event is always sold out.
- NationBuilder allows you to attach notes and photos on your club website, which makes it quick and easy to document the event.
- There was a discussion about liability insurance, regarding serving wine to the public. The Wharton Club of Charlotte is looking into buying insurance; some clubs have bought one-day event insurance, which is usually inexpensive.

Talk #3: Wharton Club of the United Kingdom — “Guiding Principles”

Dr. Henry Ford, WG’76 GR’78, Co-President

- The club used four guiding principles to rebuild under new leadership: 1) common vision and mission (make this club the go-to for Whartonites seeking professional development, socializing, and networking); 2) learning organization (experimenting and owning mistakes without blame); 3) strengths-based leadership; 4) keep it simple with a “Mr. Lazy” approach, which makes things easy for the membership.
- “Event-in-a-box” is a member benefit that embodies the guiding principles. The club leadership make it easy for members to organize events around their passions. For example, a member wanted to have a credit event; he found speakers and the club handled the venue, ticketing, marketing, and finances. We know that members are interested in these events because they come up with the ideas.
- Using technology to simplify: the club often uses Slack to communicate instead of e-blasts; there will soon be a google form for members to propose and publicize events (right now, they use a paper form that must be scanned and emailed).

- After one year, there are now a range of London networks and events based on members' interests: "My Story" power breakfasts, sports, arts, wine, opera, and Natural History Museum tour. There are higher anecdotal levels of satisfaction.

Talk #4: Society for Alumni Club Leadership — "Engagement Strategies by Generation"

Stacie Hyatt, WG'00, former President, Wharton Club of Dallas/Fort Worth

- Stacie is sharing research for a book on alumni leadership, for which Sam Lundquist is writing the foreword (preorder on website – sacleadership.com).
- Baby Boomers (1946–64), hardworking, religious, value staying connected with friends; 70% of US disposable income; will inherit \$15 trillion over next 20 years. To best engage them: in physical space they want a place to sit and quiet so they can hear; create a special seating area for their class/age group and let them know; consider a paper mailer and SMS text campaigns, they like tech/social media but also often have 2G phones (35% of them have 2G phones); acknowledge their leadership publicly.
- GenXers (1965–77), practical, entrepreneurial, 55% of founders; highest current income, biggest savers; huge family responsibility (75% supporting a parent, 52% supporting adult child). To best engage them: topics oriented around company leadership, health/family-orientation ("Wharton *and* family, not Wharton *or* family"), financial management, elder care; also consider a casual, easy date night event without kids.
- Millennial (1978–95), political and religious independents, most racially diverse (43% nonwhite); 85% give to charity either on impulse or local causes; seek approval of peers but don't trust others. To best engage: use social media with sharing features, ensure there are ample professional networking opportunities (in-person, seeking a job, so they need to see what other club alumni are doing and who to connect with, try speed networking at the start of any event); embrace mobile giving channels (they don't own checkbooks); organize vacation events (millennials value vacation time over any other job benefit).
- For all groups, email is king — 70-80% of all segments want email — but they now read it on mobile phones; social media is important for everyone; make communications brief, get rid of graphics, and use bullet points to cater to short attention span. Ensure that club calendar includes events that speak to each of these groups. To help with this, get someone from each generation on the leadership team of each club.

Talk #5: Wharton Club of New Jersey — "Building Strong Alumni Bonds"

Dushyant Pandit, WG'77, Executive Vice President

- Dushyant began networking clumsily, with a "what's in it for me?" attitude. Over time, he learned some lessons and created a matrix or networking opportunities portfolio [HUGS, TAGS, BIRDS, and ZOO, see diagrams on slides] to 1) assess the type of networking that will happen in a specific context and 2) to evaluate the return on his investment of time in each event he attends.
- "HUGS" to "TAGS" spectrum represents the intimacy level and scale of a given event, from "HUGS" (people know each other well) to "TAGS" (getting to know new people).

- “BIRDS” to “ZOO” spectrum represents the diversity of a given event, from “BIRDS” (common ground, birds of a feather flock together) to “ZOO” (people from different fields meeting together).
- Examples of how to balance portfolio between various types of networking: In a HUGS/BIRDS meeting, you’re in a trusted community and you’ll talk about best practices within your field; in a HUGS/ZOO meeting, there will be a high level of give and take in an intimate group; in a TAGS/ZOO meeting, you’ll need a sense of adventure because of the scale of the meeting, but you’re likely to come away with new leads, as you will get to know people.
- Dushyant allocates two hours per week to invest and measures ROI. He uses the principle of enlightened self-interest, a combination of give and take; for example, how can you help solve someone else’s problem?
- Can club leaders, as providers of networking opportunities, use this matrix to 1) brainstorm and plan events to meet different goals; 2) communicate about a club event so that people understand what they are getting out of it; and 3) evaluate the success of events.
- The Wharton Club of New Jersey is trying out a Speaker’s Bureau approach based on the matrix. They will offer speaking engagements to late-career alumni, and use the club to curate the topic and the speaker, and make these speakers available both to the broader club membership and to other professional networks that intersect with the club.

Planned Presentations from Club Leaders Unable to Attend

- **Wharton Club of Philadelphia — Career and Leadership Programming** (check out their website for professional development workshops)
- **Wharton Club of New York – The Joseph Wharton Dinner** ([Wharton Club Officers](#) website has best practices for running an award dinner)
- **Wharton Club of Boston – Membership Engagement** (on membership expiring, alumni get a phone call and a survey on what they want out of their club as well as where they work and demographics)