DDI Alliance - Marketing and Partnerships Working Group

RE: Response to request for description of short- and long-term plans

The DDI Marketing and Partnerships Group was inaugurated in 2014 by Mary Vardigan to organize promotional and strategic communication efforts among varied stakeholders in the DDI Alliance. Its responsibilities include coordinating marketing activities, establishing a DDI brand, and ensuring consistent messaging about DDI and the Alliance. Its broad goals include promoting DDI in order to increase size of the DDI user community and increase DDI Alliance membership.

The group currently consists of 6 members: Jared Lyle, Steve McEachern, Ron Nakao, Barry Radler (chair), Dan Smith, and Wendy Thomas.

Below is a list of activities that are occurring and may be complemented *in the next year*:

* Issuing press releases and announcements about new products and versions. In the past year we’ve helped managed the release or review of DDI 3.3, SDTL, and CDI. Marketing will continue to promote CDI and other developing products.
* Managing and reorganizing the DDI Alliance website to improve content, layout, and usability. Marketing has been working with Jared and ICPSR web masters, as well as coordinating with other groups to assign responsibility for managing appropriate menus/pages (Training responsible for Learn, Technical Committee responsible for Products, etc., with some overlap and collaboration).
	+ Moving all publications to one page and have search/browse, but that is somewhat outside Marketing’s purview.
	+ Marketing reports on website usage metrics (Google Analytics) at each annual member’s meeting.
* These new products have made us realize that “DDI” is no longer one standard, but rather a suite of products for managing data and metadata. We have begun to adopt such language in our promotional communication. Similarly, we’ve been encouraging the invocation of the FAIR principles when describing DDI in outward-facing communication.
	+ As part of the ‘rebranding’ of DDI as a suite of products, we’ve been working with Training to create separate logos for each product. These will be made available in a variety of formats on the DDI Alliance webpage for general use.

The following major Marketing activities or plans *are longer term*:

* Until the past year, the Marketing group had made attendance at professional conferences a primary vehicle for the direct marketing and promotion of DDI to new audiences. Having DDI representative getting out, spreading the word, and ‘pressing the flesh’ at such events plays an important role in impacting DDI brand awareness and the possible adoption of the standard by different people and organizations. Our outreach efforts in this area took the form of conference sponsorships, staffing booths in exhibition areas, distributing brochures and various promotional gimmicks, and, importantly, making sure that DDI papers and presentations were represented in the conference program. For the past few years the Marketing group has tracked the conferences and their stats on [its wiki](https://ddi-alliance.atlassian.net/wiki/spaces/DDI4/pages/7864367/Marketing%2Band%2BPartnerships%2BGroup).
	+ This past year has seen a stark reduction in this activity due to the pandemic. In the coming years Marketing might consider re-evaluating the conferences list and which ones allow booths, and which ones will be in person again in the next year. Also, Marketing should consider whether there are virtual sponsorship opportunities at any of the conferences we have previously designated.
* Coordination with Training and Technical committee of the following:
	+ Training Resources (aka Training Library)
	+ Promotional videos
	+ Webinars/tutorials
* Dissemination of stakeholder research. Marketing recently completed the soft launch of a research project to gain feedback from a variety of DDI community stake holders. This research took the form of structured interviews (via Zoom) conducted with representatives of five different types of organizations. While producing an executive summary of this initial research project is likely to be accomplished soon-ish (and shared with the EB and other groups as needed), there exists the possibility to adapt and expand the approach to a broader sample of DDI Alliance members and stakeholders. One option is to query a small sample (as was done for the soft launch) of the DDI community each year. Another cheaper option is using traditional survey instruments to gauge feedback, but these have been poorly received in the past. The interviews we did achieve 5/5 completes and have a lot of rich data (which admittedly hasn’t been fully summarized or digested yet). We will likely revisit web surveys as a vehicle before we try interviews again, using the feedback we received on the interview to develop this instrument.

Suggestions for new efforts:

* Develop a formal marketing strategy.  The establishment of a Marketing group in 2014 was a first step, but the following recommendations are from the 2011 Breckenhill report and they still largely hold true: "The DDI Alliance may have an ‘in‐house’ PR problem in need of addressing in that the emergent stakeholders do not see themselves as well served although they very strongly support and need the DDI products and tools.  The broader need for an external/outward‐facing Marketing Plan and implementation strategy to promote even more take‐up of the standards and Alliance membership needs to be addressed.... Beyond reaching the user community there is a need to attract the interest of the vendors of statistical software tools and perhaps – for 3.X in particular – some part of the business intelligence software industry.  Get their attention and a solution to the lack of DDI tools could be on the horizon instead of being somewhat out of sight as is now largely the case, with some notable exceptions. It is beyond the scope of this review to develop a full‐fledged marketing strategy for the DDI standards and the Alliance but a plan and the resources – it will not be inexpensive ‐ to both create and execute it is required if the organization is going to take the next critical steps in its development.  Organizations do not grow linearly; they do so in steps and each step is progressively more demanding in terms of the resources required to take it.  A marketing strategy is one of the key needs – among the others already indicated – to take the Alliance forward."
* Relatedly, address the “Partnerships” aspect of the Marketing and Partnerships group.  From the same report quoted above: "...attract the interest of the vendors of statistical software tools and perhaps – for 3.X in particular – some part of the business intelligence software industry."
	+ There have been previous outreach efforts by the Marketing group to entities such as the AAPOR Transparency Initiative, but there has been little sustained activity or followup. Some new partnerships (e.g., CODATA) are pursued outside of the purview of the Marketing group.
* Add to and refresh the Marketing and Partnership group's membership.  Membership has not appreciably changed since 2015 - new membership will diversify and broaden reach and ideas.