

Sharing Our Success (SOS) Submission Form

Chapter Name: Arizona

Chapter Membership Size: Medium (101-299)

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Chapter Board Position: President

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Submission Title: High-Touch Member Survey: Calls, Clicks, and AI Insights

What did you do? (a 2-3 sentence summary of your effort): Our Arizona Chapter transformed our annual Member survey from a low-engagement email-linked survey into a high-touch listening strategy that combined a concise online survey, personal outreach calls from Board Members, and AI-enabled analysis. Board Members used a shared call list and conversation guide to complete surveys live over the phone, then used Google Gemini within our secure Google Workspace to synthesize both call notes and online responses into clear themes for the Board.

Who benefitted from this effort (Target Audience) Check all that apply:

- Chapter Members
- Board Members
- Chapter Volunteers
- Potential Chapter Members
- Other: This initiative strengthened relationships with current Members, re-engaged less-active Members, and gave the Board and volunteers clearer, data-driven insight into how to design programs and engagement that reflect real Member needs.

Why did you do it? What chapter needs were addressed?

In previous years, our annual Member survey produced barely modest response rates and limited qualitative feedback, which made it challenging to align programming, locations, and communication with what Members actually wanted. Our Board wanted a more relational, "voice of the Member" approach that would increase participation, reach Members who were not responding to email, and demonstrate that Chapter leaders are listening and acting on feedback. At the same time, we wanted to begin integrating AI into our Board practices by using Google Gemini to help synthesize open-ended responses into actionable themes without losing the human nuance in Members' stories.

What were the measurable outcomes? (May include data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)

-The 2025 survey collected 87% more responses compared to our 2024 survey.
-Of all responses, 48% were completed via phone conversations and 52% via the online form, meaning nearly half of all input came from live conversations with Members.
-We picked 1 brand new volunteer during a phone conversation and we were able to renew 3 almost-lapsing memberships within a week of the phone calls.
-Our analysis (supported by Gemini) surfaced clear themes: mixed attendance driven largely by schedule conflicts; strong interest in AI, networking, measurement/ROI, and change management; and requests for more West Valley and Tucson events, more informal networking, and stronger communication about Member benefits.
-Using Gemini within Google Workspace significantly reduced manual synthesis time for the Board and allowed more time to focus on prioritizing actions for programming, locations, and communication. This also helped our Board start to experiment with Gemini within our secure Google Workspace; for example, we were not putting Chapter information into a public or unpaid GPT.
-Through the phone conversations, we also verified current Member information in Wild Apricot. This led us to make at least 1 update (of outdated information) for nearly 70% of Members we spoke with directly; we had old addresses, emails or company/role information. Along the way, it also helped us capture if phone numbers on file were office phones and/or if they were no longer active or associated with the Member.

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)

- Designed the survey using ATD National's Annual Membership Survey template, adapting seven core questions into a Google Form branded for ATD Arizona.
- Built a centralized Member Call List in a shared spreadsheet, assigning Members to Board callers, including contact details, and tracking call outcomes such as "Spoke & Completed Survey," "Left Voicemail," "No Phone Listed," and "Asked for Email Survey."
- Created a Phone Conversation Guide with opening and closing scripts, question wording aligned to the online survey, tips for conversational listening, and prepared responses to common Member questions.
- Allowed Board Members to complete the same online while having the phone conversation. All information was then centralized into 1 place whether it was a phone conversation or an email-linked survey response. This also made sure all information was anonymized (Board leaders only captured if they spoke to someone, but this information this identifying-information was not included in their survey submission).
- Ran the survey for almost 6 weeks, supported by 3 email invitations and 2 Slack posts (in private Membership Slack community), while Board Members simultaneously called their assigned Members and entered responses directly into the Google Form during live conversations.[]
- Consolidated open-ended survey responses and Board call notes into a shared document, then used Google Gemini (via our Google Workspace/Gemini Pro subscription) to generate thematic summaries, which the Board reviewed, validated, and refined into clear recommendations.
- Shared results and recommended actions with the Board for programming, scheduling, communication, and regional outreach (e.g., West Valley and Tucson), and planned follow-up communications to Members highlighting "you said, we're doing."

Is there anything you would do differently?

Our Board learned that starting calls earlier in the survey window and scheduling specific "call nights" would help reach even more Members and avoid end-of-deadline rush. It also let us leave messages that a survey would be coming via email soon. In future cycles, we plan to further streamline data capture by standardizing how Board Members record qualitative notes and to use Gemini earlier in the process. For example, to produce quick interim summaries that can guide mid-survey adjustments and communication. We also plan to test short follow-up emails or texts after calls to reinforce that we heard Members' input and to close the loop on how their feedback is shaping Chapter decisions.

When did you start working on this effort?	Aug 05, 2025
When did this effort go live?	Sep 03, 2025
Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	19
What resources did you use? Check all that apply:	Board Members ATD Resources Other: Google Workspace
Which board positions were involved in the effort?	All Board Leaders made calls - a true team effort!
Select the ATD resources you used. Select all that apply:	Toolkits Other: Membership Survey Template
Do you have any additional insights to share with other chapters implementing this effort?	Any Chapter can replicate this by pairing a short online survey using or adapting the ATD Membership Survey Template resource with a simple call script, assigning call lists to Board Members, and using an AI tool (such as Gemini in Google Workspace) to cluster themes while maintaining human review. This approach not only increases responses, but also signals to Members that the Board leaders are willing to pick up the phone, listen, and act.
Please attach any documents that help support this submission. It is highly encouraged to submit editable files (ex. Word, Excel, etc): (additional documents and documents over 2MB should be sent to sos@td.org)	https://www.formstack.com/admin/download/file/18977027640
additional supporting documents:	https://www.formstack.com/admin/download/file/18977027641
additional supporting documents:	https://www.formstack.com/admin/download/file/18977027642

How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply: Chapter Leader
ATD Chapter Leaders Conference (ALC)
National Advisors for Chapters (NAC)
NAC Area Call
Leader Connection Newsletter (LCN)
Chapter Relations Manager (CRM)

Would you be willing to apply to present on this submission at the ATD Chapter Leaders Conference (ALC)? *Request for Proposals (RFPs) open in May of each year at td.org/alc. Selected session facilitators receive complimentary registration. Yes

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