SIOP Task Force to Identify Core Audiences and Build Personas
June 6, 2023

Historically, SIOP served a narrow audience: Ph.D.-trained, mostly White male scientist-practitioners interested in connecting with each other to stay up to date on current science and practice and to build interpersonal networks within this group.

As SIOP has grown over the last 40 years, the I-O community has changed dramatically. In some cases, the audience has split, such as as reflected in the current perceived distinction between "primarily academic" and "primarily practitioner" groups. In others, the audience has grown, such as increased gender, racial and ethnic diversity, the addition of those with IO master's degrees, and the recently recognized interest from those with no IO degree at all.

At this point, the only uniting factor between all current SIOP members is an interest in IO psychology. This lack of a unified audience of focus has made it challenging for the Executive Board to reasonably allocate resources in ways that grow the organization and best serve the membership. Discussions about proposals and resource allocation often slow or halt in the face of competing priorities, those priorities often themselves not clearly defined.

The consequence of this lack of focus on who is and should be served by SIOP has both short- and long-term implications. In the short term, subgroups within SIOP often report feeling ignored by leadership and by policy, and the Board struggles to meaningfully allocate resources to address these perceptions. In the long term, SIOP's membership growth has slowed relative to the rate of new IO graduate degrees, which in the long-term, threatens the health of the organization through decreased available revenue to address its strategic goals, especially those related to the profession as a whole.

Given these challenges, the primary goals of the present task force are to:
1) Conduct audience segmentation research to define major audiences of SIOP, both those served currently and those who could be served within the next five years
2) Evaluate ideal resource prioritization among identified audience segments
3) Develop personas to represent the highest-priority audience segments

Overall Approach

The work of the task force will be driven by recommendations across three books:

Dibb, S., & Simkin, L. (2008). *Market segmentation success: Making it happen!* Routledge.
Kotler, P. & Keller, K. L. (2016). *Marketing management.* Pearson.
Pruitt, J., & Adlin, T. (2010). *The persona lifecycle: Keeping people in mind throughout product design.* Elsevier.

Generally speaking, audience segmentation involves a combination of qualitative and quantitative social scientific research methods. As explained by Dibb and Simkin (2008), there

are three dominant strategies: 1) quantitative survey-based, 2) historical customer classifications, and 3) qualitative focus-group and interview research. Because SIOP has few historical classifications beyond simple demographic comparisons (e.g., by member type), we will combine approaches 1 and 3.

The goal of both of these approaches is to identify segments with several characteristics, as defined by Keller and Kotler (2016):
- **Measurable.** If we cannot define and quantify key characteristics of the segment, it should not be a segment.
- **Substantial.** Segments should be large enough to justify expending resources on supporting them as a cohesive group.
- **Accessible.** Segments should be reachable.
- **Differentiable.** Segments should be meaningfully distinguishable from one another in terms of behaviors or needs.
- **Actionable.** SIOP must have some reasonable means to provide services to the segment given known resource constraints.

Some of this information may be discovered relatively late in the research process, but at all stages, these principles should be kept in mind as a tool to create, combine, or eliminate proposed segments.

Once a final list of audience segments have been identified, personas will be developed to help realize the nature of the segment. Personas are fictional but realistically constructed depictions of key audiences. For example, "John" might be defined as a White, older academic in a research institution who has been affiliated with SIOP as a Member or Fellow for over a decade and regularly attends the annual conference. This level of specificity, including a name and image, is designed to make market segments more human-understandable via prototypical representatives. For example, instead

of imagining what resources "White academic long-term members of SIOP" might want out of their membership, discussions instead focus on "What would John want?" and "What would allocating additional resources to meet John's wants accomplish in terms of organizational strategic goals?" An example of a persona can be seen here.
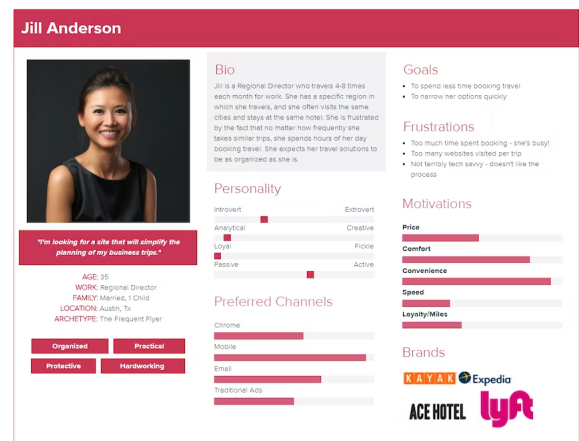
By creating personas for SIOP's core audiences, and by the Board and committee chairs referencing these personas, SIOP can target specific initiatives to specific audiences with the least confusion and disagreement. Instead of arguing "is this good for SIOP?" about a proposed initiative, we instead discuss "who is this intended to serve?" Subsequently, an answer of "John" and "Kesha" focuses further discussion on the needs of those specific personas, thus reducing

team process loss during heated discussion. Well-crafted personas can also be used to focus the work of committee chairs.

Timeline

Task Force members will be asked to complete the following tasks:

1. **Between Mid-June and Mid-July**
   a. Review statistical analysis of member demographics and behavioral data
   b. Meet to brainstorm and discuss draft of audience segments
   c. Attend focus group training for those who have never run a focus group before
2. **Between Mid-July and end of August**
   a. Run focus groups and write a short report on findings (1-3 focus groups per task force member, 1-2 pages written on each focus group/audience)
3. **Between End of September and End of October**
   a. Review and provide feedback on audience segment and persona drafts
   b. Share drafts with focus groups for their feedback
   c. Provide recommendations for final changes

These tasks are embedded in the broader timeline that follows, to be managed by the Chair.

1. **End of May 2023**: Collect empirical member data potentially relevant to persona formation (data from membership - ideally every bit of data we have, e.g., demographics, AC/LEC conference attendance info, Whova interests, stated interests in profiles - literally whatever behavioral and/or identity data are available)
2. **Mid-June:** Latent profile analysis (LPA) of membership data to identify meaningful behavioral/identity clusters as far such data exist and clusters clearly emerge
3. **Mid-June:** Develop standardized focus group/interview procedures for focus groups
4. **End of June:** Convene task force to brainstorm initial audience segment definitions using LPA results (if possible) combined with strategic internal discussion/brainstorming *(Task Force Members Meet as a Group)*
5. **Mid-July:** Basic focus group facilitator training for task force members without experience in this area *(Task Force Members Attend Training if Needed)*
6. **Mid-July:** Task force members recruit and send out requests to representatives of each identified audience segment given existing membership data, with goal of each task force member overseeing 1-3 focus groups
7. **Mid-August:** Convene and hold all focus groups; identify if additional audience splits are needed *(Task Force Members Hold Focus Groups)*
8. **End of August:** Convene and hold any additional needed focus groups to address audience splits or combinations
9. **End of September:** Draft audience segment definitions and personas (i.e., name, generated image, sample background, key characteristics, goals, challenges, values, and motivation with quotes from focus groups)
10. **End of October:** Share developed personas back with focus group members for feedback *(Task Force Members Get Feedback from Focus Groups)*

11. **End of October:** Task force and/or Board rates audience segments/personas for key strategic variables, including quality of current service, size of audience, current and anticipated growth rate, investment required to serve better, and moral imperative *(Task Force Members and/or Board Provide Ratings)*
12. **End of November:** Produce persona guide with summary report of strategic considerations, shared with Board
13. **End of Year or early 2024:** Ideally/optionally, submit these findings to IOP or other appropriate outlet for further reflection from the IO community

Task Force Members

Task force members were selected to reflect a diverse set of identities related to IO and SIOP, with the intent of roughly matching major existing identities to focus groups and anticipated audience segments.

Task Force Role(s)	Name	SIOP Role(s)	Salient IO Identities
Chair	Richard Landers	Instruction and Education Portfolio Officer	academic, research institution; private consulting, PhD
Staff Liaison	Amber Stark	Marketing and Communications Manager	SIOP staff
Membership Analytics Liaison	Steven Zhou	Student Member, Membership Analytics Subcommittee Member	PhD student
Membership Expansion Task Force Liaison	Jolene Skinner	Former Lead for Membership Expansion Subcommittee (new Affiliate Membership)	practitioner, internal, corporate; PhD
Visibility Committee Liaison	Chris Rotolo	Visibility Committee Chair	practitioner, internal, corporate; PhD
Member	Nikki Blacksmith	External Affairs Portfolio Officer	practitioner, external, small business; adjunct professor; PhD
Member	Liberty Munson	Communications Portfolio Officer	practitioner, internal, corporate; PhD
Member	Tiffany Poeppelman	Membership Services Portfolio Officer	practitioner, internal, corporate; MS

Task Force Role(s)	Name	SIOP Role(s)	Salient IO Identities
Member	Krystyn Ramdial	Visibility Committee Chair-in-Training	practitioner, internal, corporate; PhD
Member	Lindsay Dhanani	CEMA Chair-in-Training	academic, business school; PhD
Member	Rob Schmieder	Career and Professional Development for Practitioners Committee Chair	practitioner, external, small business; PhD
Member	Shannon Cheng	Member	practitioner, external, consultancy, PhD; leader of Asians in I/O
Member	Tonya Baker	Member	practitioner, external, consultancy; MA; focus group expert
Member	Xin Wei Ong	Student Member	PhD student, MS
Member	Cam Dunson	Student Member	PhD student
Member	Esther Boluwatife Oladiran	Student Member	MA student, soon-to-be graduate
Member	TBD	TBD	academic, teaching institution, MS or PhD
Ex Officio	Tara Behrend	President	academic, research institution, PhD
Ex Officio	Alexis Fink	President-Elect	practitioner, internal, corporate, PhD