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Considerations for Creating an In-House SAS® User Group in a Geographically Disbursed Organization

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ABSTRACT

This paper reviews considerations for creating in-house SAS® user groups in geographically disbursed organizations, in which in-person user group meetings are not cost-effective or not feasible, but for which an in-house SAS user group would still be beneficial. It defines in-house SAS user groups, and overviews the resources available from SAS for starting and continuing an in-house SAS user group. It discusses benefits and challenges of starting and maintaining an in-house SAS user group, options for organizational structures of in-house SAS user groups, and unique needs for a group of this nature to be successful in national and global organizations. It also reviews technologies that could be beneficial for bridging the communication gap in a user group of this type.

INTRODUCTION

This paper focuses specifically on in-house SAS® user groups within an individual organization, with particular consideration for in-house SAS user groups in organizations that are spread across cities, states, or even continents. A brief definition of an in-house SAS user group is provided, as well as an introduction to starting an in-house SAS user group. High-level structural options for an in-house SAS user group are then presented. A few potential issues and challenges, and possible solutions to them, are given next, followed by identification of useful technologies for in-house SAS user groups.

WHAT IS AN IN-HOUSE SAS® USER GROUP AND WHAT WILL IT DO FOR ME?

An in-house SAS® user group is simply an internal version of a SAS user group, and it brings with it the same benefits of participation in any other SAS user group, in addition to the ability to more freely share techniques, code, datasets, etc, since all of the information is kept internal to the company. All of the same support and assistance that is available from SAS for local or regional SAS user groups are also available to in-house SAS user groups. A summary of resources available for user groups can be found on SAS's User Group website (SAS, n.d. b). These include, but are not limited to, assistance with setting up Webex meetings and recording them, providing speakers, free and discounted SAS books, and assistance with finding and surveying SAS users at your organization.

STARTING AN IN-HOUSE SAS® USER GROUP

It is extremely easy to start an in-house SAS® user group! SAS provides a detailed guide for starting a user group on their user group website (SAS, n.d. a). When you are ready to register your user group, you can do so on SAS's User Group website (SAS, n.d. c), and a representative from SAS will be assigned to assist you. SAS has an excellent customer loyalty group whose job is to help their customers with user groups, with maximizing the products they have licensed, learning about new products and techniques, and anything else the customer may need. They ensure that you have the resources you need in order for your in-house SAS user group to succeed, to find presenters, and set up meetings, and will do anything they can to answer questions and help you in anyway necessary.

OPTIONS FOR STRUCTURING YOUR IN-HOUSE SAS® USER GROUP

There are options for structuring your in-house SAS® user group are endless. The best option for your specific in-house SAS user group will depend on how your organization's SAS users are disbursed among offices, homes, states, countries, etc., as well as they types of SAS users that are in your organization. Three simple options for structuring your in-house SAS user group include a single, main in-house SAS user group only, a single, main in-house SAS user group with smaller, local sub-groups, a single, main in-house SAS user group with smaller, functional sub-groups.

ONE MAIN IN-HOUSE USER GROUP

If your organization is a completely virtual one (in other words, if everyone works out of their home office), then it may make the most sense to simply keep one main user group and not necessarily worry about creating local or functional sub-groups. This is also true if most everyone in your organization works in a single office location.

ONE MAIN IN-HOUSE USER GROUP WITH SMALLER LOCAL SUB-GROUPS

If your organization is spread out among a few, or even several, larger offices, to gain the benefit of in-person socialization, it may be beneficial to split the users out by office location, so that they may come together in a conference room or office at that location to join the in-house user group meeting or so that they may hold additional local user group meetings in-person, or both.

ONE MAIN IN-HOUSE USER GROUP WITH SMALLER FUNCTIONAL SUB-GROUPS

If your organization has several different types of users (developers, analysts, statisticians, etc.), it may be useful to split the users out by function, so that meetings and presentations can be tailored to the function or user type (for example, advanced programming presentations for developers or statistical product presentations for statisticians). Another way of handling a broad range of user types in a large in-house user group could be to rotate presentation topics (one month, choose a topic that appeals to developers, the next month, choose a topic that appeals to analysts, and so on).

ISSUES AND CHALLENGES

Some issues or challenges that might arise when starting (or maintaining) an in-house SAS® user group in an organization where not everyone is in the same office, state, or even country, include:

- Finding the SAS users in your organization
- Getting (and keeping) the SAS users interested in your user group
- Communication with (and among) your user group members

These potential issues or challenges, as well as some potential solutions, are addressed individually below.

FINDING THE SAS® USERS IN YOUR ORGANIZATION

If your organization is like most others, there are a couple of SAS users in this department or office, and a few over there, and a few more over in another city or country, and so on. So, how do you find them all? Where do you begin? A few options for finding the SAS users in your organization include:

- Contacting your SAS site/server administrators or Information Security group (they will likely have access to tell you who has access to the servers that SAS is installed on)
- Contacting your organization's desktop support group (they will likely have access to tell you who has PC SAS licensed for their machine, who has SAS Enterprise Guide installed on their machine, etc.)
- Sending an email to coworkers and managers who you know use SAS or manage those who use SAS with information about your in-house SAS user group, and ask them to forward it to anyone they know that uses SAS in the organization. (You would be amazed how well this "viral"/word-of-mouth method works!)
- Asking the user group representative from SAS that is assigned to your user group, your SAS representative and/or your SAS account executive for help (they have access to lists of who from your organization has a profile on SAS's support site, who has taken courses from SAS's training department, who has attended SAS Global Forum, etc.)

GETTING AND KEEPING THEM INTERESTED

In order to get your user group members interested, start out strong by choosing an interesting and relevant topic for your first user group meeting and motivate them to come by holding a drawing with all attendees for the free books and marketing items from SAS. There are many ways to get them interested, so be creative! One big key is to give them a reason that attending your in-house user group meeting is worth the investment. They should be able to justify to their manager why spending the time attending the in-house user group meeting is well worth it, and a good use of their time (and the company's money). Remember, you are competing for their time and attention with revenue-producing activities, so make sure you clearly outline how this will help the attendees. Don't assume that they will automatically be able to justify their attendance to their manager.

Once you get them interested initially, keep their interest by making everything as simple and as efficient with their time as possible. Instead of sending an announcement (or with the announcement) for meetings, send a meeting request, so they don't have to physically enter the date and time into their calendar. Make sure that the phone number and any URL and login information is included in the meeting request, so that they do not have to go searching for it when they are trying to join the meeting. Keep communications helpful and useful, but clear and concise, as well.

COMMUNICATION AND SHARING

Communication and sharing of best-practices, techniques, code samples, etc. are fundamental to the success of any user group. Communication and sharing methods can be broken into two distinct categories: synchronous (same-time/live) and asynchronous (where group members can communicate and share at a time that is convenient for them). For synchronous communication and sharing, virtual meetings are the location-independent equivalent to the in-person user group meetings held by other user groups. For groups that have members spanning several time zones, remember to keep this in mind when scheduling the user group meetings. Keep in mind, as well, that if your organization is global, it may not be possible to schedule a single meeting that all members can attend. If this is the case, recording the session (which is often useful anyway), and sharing it with those who could not attend, so that they can watch it at a time that is more convenient for them, is often a reasonable alternative.

Because virtual meetings lack the face-time that in-person meetings provide, additional effort needs to be put into asynchronous communication methods to build relationships among the user group members and provide a way to share and help each other outside of the scheduled virtual meetings. Collaboration tools, blogs, wikis, and various other applications can help fill the need for asynchronous communication methods. These will be covered in more detail in the useful technology section below.

USEFUL TECHNOLOGIES FOR YOUR IN-HOUSE SAS® USER GROUP

Technologies that may be useful to in-house SAS® user group can be separated into synchronous and asynchronous technologies. Synchronous technologies are useful for virtual user group meetings, for group members helping each other in real-time, etc. Asynchronous technologies are useful for sharing meeting details, sharing archives or recordings of meetings, providing a place for group members to submit questions to the group and for others to answer the submitted questions, and simply for sharing code examples or other tips and tricks.

SYNCHRONOUS TECHNOLOGIES

Synchronous technologies include online meeting services, conference lines, instant message applications, and screen sharing applications. Online meeting services and conference lines are necessary for holding virtual user group meetings and presentations. Instant messaging and screen sharing applications are helpful for promoting sharing of best-practices and tips and tricks by group members with other members in real-time, as well as group members helping each other out with questions or issues in real-time.

Check to see what online meeting or conference vendor your organization uses, but common ones include WebEx®, Microsoft LiveMeeting®, and GoToMeeting®, but there are also lesser-know (and sometimes cheaper) other options, as well. Some of these are integrated with conference calling and some allow participants to listen to the conference over their computer speakers. Be sure to research and test whatever option(s) you choose before your first meeting, to minimize technical glitches during the first virtual user group meeting. Also, remember to watch your meeting request to ensure that your list of attendees does not exceed the capacity of your web conferencing or conference calling option(s).

Many organizations now use instant messaging programs like Microsoft Communicator®, which also allows screen sharing. If you do not have an instant messaging program, or are unaware of whether your organization uses one or not, contact your desktop support organization and ask them what instant messaging and screen sharing applications they support and are approved/purchased by your organization. Getting users guides and help documentation for these technologies, and sharing them with your user group members will help promote real-time collaboration between group members.

ASYNCHRONOUS TECHNOLOGIES

Asynchronous technologies include blogs, wikis, websites, and email. Hobson (2011) gives an excellent overview of considerations when building a site or portal to share best practices, tips, tricks and other SAS® content with a user group or other group or organization of SAS users. Creating a portal like this allows the sharing of recorded meetings and presentations, materials from the presentations, best-practice documentation, sample code and datasets, etc. It can take the form of a blog, a wiki, a website, or even just a simple document storage area (a Microsoft SharePoint® site or even simply a folder to which the entire user community has access). Like Hobson noted, allowing collaboration, content notification, customization and social media options (like rating of posts and documents, individual profile sites, and web feeds, for example) also add to the potential collaboration and communication options for your user group members (pp. 4-5).

Email is an obvious asynchronous communication tool that many overlook, and some even overuse or misuse. When used appropriately and respectfully, email can be an extremely useful communication tool. Use these tips to keep your email communication to your user group helpful and beneficial:

- Keep the number of emails minimized as much as possible (send one email that announces your first meeting, for example, and include the meeting request in that email, versus sending several separate emails)
- Keep the content relevant and short and to-the-point (bullet point when possible, instead of run-on sentences or lengthy paragraphs)
- Make the content interesting and visually appealing, but keep it professional (add formatting, images, etc., but don't go overboard)
- Allow the group members a way to "unsubscribe" if their job no longer requires the use of SAS, or they, for some other reason, no longer wish to be involved in the in-house user group
- Automate as much as possible (to minimize the effort required on your part, create the distribution list in your email client and edit it there, instead of copying and pasting email addresses in each time you send an email to the group; make templates for the user group meeting requests, follow-up emails after the meetings with the link to presentation materials and the meeting recording, and announcements about new features and functionality available on your user group portal)

CONCLUSION

Creating an in-house SAS® user group can be beneficial to both the individuals participating and the organization as a whole. Identifying and communicating these benefits, keeping the presentation topics relevant and providing means of communication and sharing are all fundamental to the success of an in-house SAS user group. Utilize SAS's Customer Loyalty group and user group support team(s) as much as possible, as they are experts in creating and maintaining user groups and can assist with anything from finding the SAS users in your organization and ways to contact them to finding presenters for your user group meetings to setting up the virtual meeting itself. Minimize the overhead and effort required to create and maintain an in-house user group for your organization and maximize the benefits of participation (to user group members individually and to the organization as a whole) using the tips and tricks provided in this paper, and you will likely see a great return on your investment. User groups are a great way to make everyone's jobs easier by sharing best practices, learning new techniques, and even just learning how to take advantage and better utilize the SAS software products you already pay for.

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