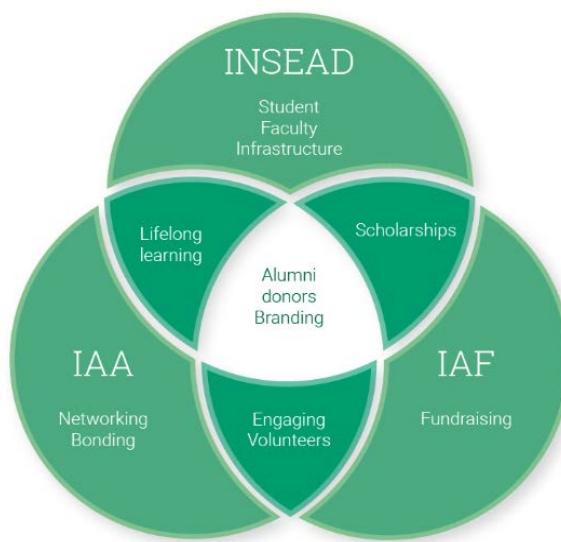




## Case Study

# The INSEAD Alumni Association: Beyond 2020



05/2021-6660

This case study was written by Indira Pant, case writer, under the supervision of Peter Zemsky, Deputy Dean and Dean of Innovation at INSEAD, in collaboration with the INSEAD Alumni Association (IAA). It is intended to be used as a basis for class discussion rather than to illustrate either effective or ineffective handling of an administrative situation.

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In May 2020, Sadia Khan, President of the INSEAD Alumni Association (IAA) – the umbrella organisation for alumni of the global business school – was preparing for an Executive Committee (ExCo) meeting with a single item on the agenda: to develop a framework for the next IAA-INSEAD collaboration agreement.

She reflected on the extraordinary organisation she had led for the past five years. The IAA was managed almost exclusively by alumni volunteers – a diverse community of successful business leaders who were deeply committed and worked closely with the school to co-create multiple initiatives that benefitted them both. Its achievements were particularly impressive given the challenges weathered. For most of its 60-year history it had struggled to forge a productive relationship between the school and its alumni. At the start of Khan's term as president there was a widely-held perception among alumni of being underappreciated by the school, and therefore a sense of mistrust. Having adopted an independent self-supporting model for alumni relations, success hinged on having a large motivated membership, but that was hard to sustain if the value of the IAA was uncertain.

Khan's initial focus was to reinvigorate the IAA with a meaningful, well-articulated vision. With the support of a talented and experienced ExCo, she made progress strengthening the association's reach and impact. She also invested in building a collaborative relationship with INSEAD Dean, Ilian Mihov, Associate Dean of Advancement, Nida Januskis, and Director of Alumni Relations, Austin Tomlinson. Her efforts bore fruit: the school began to acknowledge its alumni as valuable partners in advancing its mission.

With one year left to serve, Khan felt the time was right to re-examine the IAA's direction, its functioning and its relationship with the school. Disruption caused in the first half of 2020 by the Covid-19 pandemic heightened the need for a bold vision. She felt a surge of pride at what her team had achieved but wondered if their accomplishments would stand the test of time. The resilience of a volunteer-led alumni association would be severely tested in the coming years. In particular, she worried that the collaborative bonds forged with the school could be disrupted by underlying tensions that remained unaddressed. Inevitably there would be occasions when the IAA's priorities and perspective would diverge from that of the school and threaten the still-fragile relationship.

Despite these concerns, she logged on to the virtual ExCo meeting with a sense of optimism, confident that the ExCo members shared her determination to ensure the IAA would survive and thrive, with the next version of the IAA-INSEAD collaboration agreement as a vital first step.

## A Rich but Turbulent History

It was Georges Doriot, the first Frenchman to study and subsequently teach at Harvard Business School, who had the vision for a pan-European institution of management education, and in 1957, the Paris Chamber of Commerce resolved to make it happen. INSEAD's first cohort of 52 students from 14 countries graduated in 1960.

Sixty years on, INSEAD had established itself as the “Business School for the World” with campuses in Fontainebleau, Singapore and Abu Dhabi, and a newly-launched San Francisco Hub for Business Innovation. The school had a diverse, successful and increasingly active community of over 60,000 alumni from 175 countries (Exhibit 1).

From its inception in 1961, the IAA was an independent, volunteer-led organisation. Jean-Marie d'Arjuzon, a graduate of the first MBA intake, created the *Association des Anciens* and

voluteered to be its first president. Renamed the INSEAD Alumni Association, it soon went beyond its original purpose of enabling alumni to remain connected. Members began interviewing prospective MBA students and offering career support to each other. The success of the IAA was evident in the rapid growth in membership. When the first alumni newsletter was launched in 1964, it revealed a network that spanned the Americas, the Middle East, Asia and Europe.

As the IAA gained credibility, it sought to represent members' interests in its dialogue with the school, but being younger and less experienced than the school's leadership, it made little headway and there was sporadic confrontation. A major issue was the decision to admit women – only after years of heated did the school agree to make the change. It took 10 years for the IAA president to be given a seat on the INSEAD board. Even then, alumni continued to feel overlooked. The IAA leadership recognised that in order to be heard and respected they would have to expand globally and get organised.

In 1976, the IAA established the INSEAD Alumni Fund (IAF) to raise funds for the school, a clear indication of the growing professional and financial clout of its members. A few years later, the IAA was reincorporated in Luxembourg, marking its growing independence from the school. As alumni membership grew, national committees were created that later became semi-autonomous National Alumni Associations (NAAs). A professionally published alumni address book generated much-needed advertising revenue. The IAA took over the campus shop that had been started by alumnus Martin Flash. It relaunched its newsletter as the *Salamander Magazine*, which would become a vehicle to share information and best practice, and for integrating IAA members.



Figure 1: The IAA's Salamander logo

Despite organisational improvements, there were pain points through the 80s. Finances were a persistent concern. Revenues from advertising in the address book, the campus shop and membership subscriptions barely covered costs of the newsletter and the annual Alumni Volunteers Meeting (AVM). There were managerial challenges as well, largely driven by the rapidly proliferating NAAs. It became clear in the 90s that operations were too complex to be run by geographically-dispersed overworked volunteers.

In contrast, the school's Alumni Relations team grew stronger, organising alumni reunion events and attending AVMs. Faced with a growing possibility that INSEAD would take over the association, the IAA leadership was determined to preserve its independence. Following protracted negotiations, the IAA sold the campus shop to INSEAD and handed over the newsletter's printing and distribution functions. The IAA also dismantled its Luxembourg structure and reincorporated in France, consolidating its multi-pronged Fontainebleau operations into a single campus office.

Reflecting the growing diversity of its members, the IAA was a vocal advocate for the internationalisation of the school. In 2000, when INSEAD ventured into Asia, four alumni were founding partners of the new campus in Singapore. One was IAA President, Michael Roskothen. He subsequently commissioned a McKinsey study that revealed that an alarming 60% of alumni were dissatisfied with the services and activities of the IAA. To tackle this deficiency, Roskothen believed that the association must be more participatory, more responsive, and more respected by the school.

As a consequence, the IAA entered into a Partnership Agreement with the school in December 2003, with a supervisory partnership board consisting of representatives of the association and the school. The agreement led to several administrative improvements, including the establishment of the IAA's first Code of Conduct.

However, the information technology (IT) function was neglected. For global organisations like INSEAD and the IAA, remaining connected was imperative, yet little was done to harness the networking potential of smartphones and social media. The IT woes deepened when a French company stole and published the alumni address list. Henceforth IT was a recurring source of strain in the IAA-INSEAD relationship.

The association's internal functioning and its interactions with the school improved as INSEAD's leadership became more diverse. Until the mid-90s, despite growing diversity in the student body, the school's (and the IAA's) European male identity remained strong. In 2004, over four decades after it was formed, the association had its first female president, Claire Gouzouli, who was succeeded in 2007 by a Canadian, Daniel Labrecque, the first non-European president. Gouzouli focused on professionalising the IAA, organizing AVMS in Fontainebleau to induct new NAAs and share best practice. Labrecque worked with Dean Frank Brown on several initiatives that brought the school and its alumni closer together. For example, during the global financial crisis of 2008, the IAA raised funds for the school via the IAF. In 2009, the IAA celebrated INSEAD's 50<sup>th</sup> anniversary by setting up the INSEAD Alumni Scholarship Fund and organising birthday parties all over the world.

However, the collaborative nature of the relationship with the school soured as technology shortcomings resurfaced. Sven Kado, appointed IAA President in 2011, recognised that the association had to harness technology to remain relevant for younger graduates. Yet the alumni portal did not find favour with target users and growing acrimony in the IAA's dealings with the school spilled over to the NAAs. Frustrated at the lack of IT support, some set up their own alternative platforms with functionality better suited to their members' needs. A few larger NAAs even threatened to withdraw from the IAA, which destabilised and demotivated other members.

In 2013, Kado handed David Mair – then president of the Australia-New Zealand Association – the daunting task of steering the IAA through troubled waters. Mair quickly established a cross-stakeholder taskforce that included alumni, faculty, staff and IT professionals. After months of consultation, the school agreed to a substantial investment in a new platform, *My INSEAD*, which would serve the entire INSEAD community during their life-long association with the school – from programme applicants through to alumni bequests. Using best-in-breed third-party applications, the taskforce's recommendation looked like a promising solution to a longstanding pain point between the IAA and INSEAD, but the mistrust and underlying tensions still simmered. It was against this highly charged backdrop that Khan assumed the presidency in 2015.

## Sadia Khan

Born and raised in Karachi, Khan read Economics at Cambridge University, and followed with a master's degree from Yale. After two years as an investment banker on Wall Street, she decided to pursue an MBA:

*Having had grad-school experience, I wanted a one-year programme. I was also keen to return to Europe, perhaps learn another language. I got into both IMD<sup>1</sup> and INSEAD, but felt INSEAD would be a better fit because of the way the programme was rolled out. Also, the student body was diverse and about my age. So I came to Fontainebleau, did a 14 week pre-INSEAD French course, and the rest, as they say, is history.*

Khan's association with the IAA started soon after she graduated – she interviewed MBA candidates in Manila where she worked with the Asian Development Bank. Four years later, in 2000, she returned to Pakistan and worked for several years with the Securities and Exchange Commission as well as the State Bank of Pakistan. In 2006, Khan joined the family business in Karachi and almost immediately sought the IAA's permission to set up an NAA for Pakistan. Her proposal was approved in April 2007, but getting it off the ground was an uphill task, as she recalled:

*Initially I didn't have much support because the few alumni who were around didn't think there was enough momentum. It was even difficult to put an ExCo together – often I was the only one at our meetings.*

Undeterred, Khan enrolled the help of non-INSEADers and organised several successful events, including conferences and a Salamander ball, which raised the profile of the school in the community. She soon had a strong ExCo and a growing group of enthusiastic alumni members. The Pakistan NAA got a further boost when INSEAD opened its Singapore campus, attracting applicants from all over Asia, including Pakistan.

Khan's success in Pakistan did not go unnoticed. In 2012, she was invited by IAA President Sven Kado to join the IAA ExCo and lead the Asian region as VP Asia and Communications. She set to work building ties with the NAAs in her jurisdiction. With her ability to lead apparent in the first year, the ExCo entrusted her with a new visibility initiative – *Global INSEAD Day*. An extract from *The IAA History Book* describes the event:

*The plan was for a single celebration to take place in multiple locations with multiple organisers to jointly celebrate the spirit and values of INSEAD. The party would take the form of a global relay race across the time zones – beginning in Australia and ending in San Francisco. And the chosen day was 12 September to coincide with the anniversary of the first opening ceremony in 1959.*

On 12 September 2013, Khan organised the first ever *Global INSEAD Day*, bringing together alumni from all over the world. It was a complex and challenging event, yet a resounding success, and became a highlight of the INSEAD calendar as the year's largest worldwide gathering of alumni, faculty and current students.

The flourishing Pakistan NAA was a bright spot in an increasingly troubled landscape where the IAA was struggling both internally and with the school. Growing internal dissent hobbled its efforts to represent the alumni effectively. When Sven Kado's term as president was coming to an end and the ExCo initiated a search for his successor, IAF chairman Leonidas Los approached Khan to consider the position. She declined.

*I remember sitting at Karachi airport when Lenny called to ask if I was interested in being president. It was a shock. I didn't think I could fill Sven's shoes for a number of reasons. Firstly, I hadn't actually thought about the role at all. Also, given*

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<sup>1</sup> The Institute for Management Development (IMD) is a business school based in Lausanne, Switzerland and Singapore

*all that was happening at the IAA, I felt we needed someone located close to Fontainebleau and I was in Karachi. Lastly, at the AVMs I'd only seen white, male, European presidents and ExCo members. Imagining myself in that role was difficult - possibly a self-limiting bias. So I said no.*

Three months later, the search committee chair, Bart Blommers, reiterated the request and again Khan declined. This time, however, she gave it serious thought. A few weeks before the spring 2015 AVM in Fontainebleau, when asked for the third time, she accepted:

*The pressure was mounting. The next AVM was just a month away and it was clear that Sven's term would not be extended yet again. A leadership vacuum would undo all the effort that had been put into alumni relations in the past. I also thought an Asian female President would send a positive signal. I still didn't know how I was going to do it, but jumping into the deep end is my forte.*

In May 2015, Sadia Khan became the IAA's first President of Asian origin.

## Becoming the Voice of the Alumni

As the umbrella organisation of the INSEAD alumni community, the IAA brings together a worldwide network of NAAs and Global Clubs (Exhibit 2). Led by a president and a carefully selected ExCo, is General Assembly comprises all NAA presidents, who vote on resolutions put forward by the ExCo. Graduates of INSEAD's degree programmes and participants of select executive education programmes automatically qualify for life-long alumni status, but to become members of the alumni association they must pay an annual membership fee. This volunteer-run, membership-based model allowed the IAA to be significantly more independent than its counterparts in other business schools where alumni volunteers were coordinated by an alumni office.

As membership numbers increased, countries started their own NAAs – independent, legal bodies governed by an elected team of volunteers. By May 2020 there were 49 NAAs representing 50 countries (Exhibit 3). In countries without an NAA, alumni subscribed directly to the IAA. Alumni also formed Global Clubs that organised events to focus on a diverse range of interests including energy, entrepreneurship, healthcare and private equity. By May 2020 there were 8 Global Clubs with thousands of active members (Exhibit 4).

After a smooth handover at the spring 2015 AVM, Khan realised the magnitude and complexity of the task ahead. The alumni community was so geographically dispersed, it was a challenge to establish sustained contact; engagement levels varied widely. There were pockets of discontent, driven by concerns about poor governance within the association, exemplified a year before her appointment when Graham Hastie, President of NAA (UK), had stepped down and threatened take the NAA out of the IAA. One of Khan's first actions as President was to reach out to Hastie's successor, Paul Skipworth to salvage the situation. Drawing comfort from Khan's governance expertise, he deferred the decision for six months (until the fall 2015 AVM) to see if the situation improved.

Although she had bought herself a little time, Khan knew she could not stabilise the IAA alone, and focused on assembling a strong ExCo (Exhibit 5):

*It was obvious that there was widespread demotivation. I could sense this even within the ExCo – those near the end of their tenure wanted to step off. Fortunately, David Mair, who had joined a year before, agreed to stay. For treasurer, I wanted*

*somebody based in France, conversant with French accounting rules, so I quickly co-opted Jean Philippe Grosmaire for the position. To maintain continuity, I also persuaded Roland Stapper and Pontus Bergdhal to stay on until the fall AVM.*

With a core group in place, Khan searched for new members to fill the remaining seats. To diversify the talent pool, she approached three alumni, all stars in their respective NAAs: Joaquim Paiva-Chaves from Portugal, Marina El Hajj from Lebanon, and Peter Schuh from Germany. With their acceptances, Khan felt she was off to a good start:

*I was very lucky to get a group of exceptional former presidents as part of my ExCo. They had diverse perspectives because they represented both large, established NAAs as well as small ones. A strong, dedicated ExCo means half the work is done. With a good team you're on track for a much better journey.*

Early in their deliberations, the ExCo recognised that they had to re-examine the IAA's vision and way of functioning. Simultaneously, they acknowledged that gaining the trust and support of the alumni community was critical for change to succeed. This was a daunting task because the AVMs – the principle platform for volunteer engagement – had become combative, expensive affairs that few alumni attended. They were therefore one of the ExCo's early targets for change.

Khan stipulated that AVMs be held at one of the school's three campuses, rather than in far-flung exotic locations: the spring AVM in Fontainebleau and the fall AVM in either Singapore or Abu Dhabi. This would not only significantly reduce AVM costs, a key demand of the NAA (UK), but boost attendance. Khan was certain that alumni would welcome the opportunity to relive the much-loved INSEAD experience at a fun-filled, campus-based event.

But getting volunteers to attend the AVM was just the first step; the more difficult but pressing task was to change the conversation. The ExCo's next goal, therefore, was to create an environment conducive to inclusive, transparent decision-making, thereby allaying the governance fears that had plagued the IAA in the past. With a concrete plan to reengage the alumni productively, Khan turned her attention to building bridges with a critical enabler – the school.

## Aligning with the School

At the heart of Khan's vision for the IAA lay a collaborative relationship between the alumni and the school. Currently, the relationship was in tatters because of a longstanding perception among the alumni that the school did not adequately support them or engage them in key decisions. The absence of regular and meaningful interaction between the alumni and faculty was both a cause and a result. The IAA had hoped that the Partnership Agreement of 2003 would conclusively address these concerns but its formal contractual nature triggered conflict and sometimes heated confrontation. Matters came to a head in 2013 when the IAA threatened legal action against the school on IT-related grounds.

Khan realised that the IT conflict was symptomatic of a deeper disconnect. Without a shared vision the two could not build a successful and enduring relationship.

She knew it must begin with alignment between herself and the Dean. Despite a lingering wariness from prior conflicts, Ilian Mihov prioritised alumni relations and acknowledged that INSEAD was far behind other leading business schools in terms of alumni engagement, a deficiency he committed to correcting:

*Having been a professor with INSEAD for many years, I understood the school and its extended community quite well. I recognised that our alumni play an important role in advancing the mission of the school. In fact, I believe that the alumni network is one of our most valuable assets and collaborating more closely with the IAA to increase alumni engagement would benefit both the IAA and INSEAD*

Khan kicked off her efforts to reboot the IAA-INSEAD relationship in an unusual way, roping in Mihov and IAF chair Leonidas Los to enliven her first Partnership Board meeting as IAA president:

*I commissioned a poster of Ilian, Lenny and myself dressed as The Three Musketeers (see Exhibit 6). While this injected a little humour into an otherwise sour relationship, what was really important to me was the Three Musketeers' motto "All for one and one for all." We had to be willing to tie our fortunes together as partners...we either swim or sink together. I told them, "This is my philosophy. This is the basis of the relationship that I want from now on." Fortunately, it went down very well.*

The levity of the Three Musketeers episode served a deeper purpose. It signalled a sincere desire on the part of the IAA to re-establish a productive relationship with the school. This set

the stage for Khan to share what would become the centrepiece of her vision for the alumni-school relationship – the *Khan Venn Diagram*:

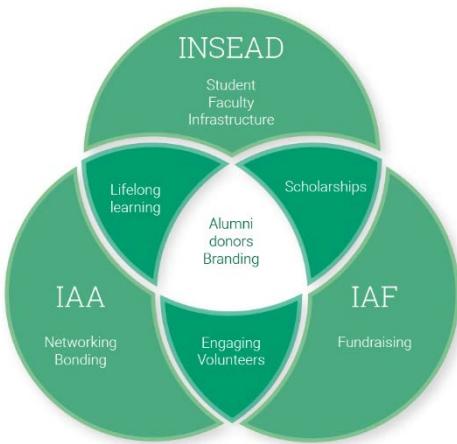


Figure 2: The Khan Venn Diagram

*What really got traction in the relationship was (and I love to claim ownership of it) the Khan Venn diagram. It acknowledged that we were independent, with our own mandates and priorities, some of which were conflicting. At the same time, we were closely aligned in certain areas – to maintain a healthy collaboration we would focus on those areas. Simultaneously, we would take our own individual agendas forward while respecting each other's mandates.*

Dean Mihov reacted positively to this new framing:

*I looked forward to working with a president who also believed in the importance of collaboration and mutual support. I began to personally invest in this relationship by attending alumni events and engaging with the IAA and NAA leadership with greater frequency.*

Khan also strengthened ties with the school's Alumni Relations team by reaching out to Joanne Shoveller, Associate Dean of Advancement. They soon established an understanding of their respective priorities, evident in Shoveller's reaction to the *Khan Venn Diagram*, which Khan recounted: "We knew that these different bubbles existed, but they were often floating around and colliding with each other rather than being anchored by common interests."

Tomlinson, who assumed the role of Director of Alumni Relations in April 2016, shared Khan's collaborative approach. Shortly after being appointed, he flew to Pakistan and spent a few days to understand her vision for alumni engagement, while communicating his own:

*Providing strategic guidance and administrative support to the IAA is a central function of the Alumni Relations team. However, INSEAD cannot take a reactive approach – we can't just show up and let things happen. Nor should we take over the IAA's role because volunteers are best led by their peers. The amount of time so many of our volunteers give to INSEAD is amazing. The National Alumni Associations and Clubs are super engaged mainly because they have a sense of ownership: "This is our association; its independent; it's up to us to do this." So, we have to balance being proactive with respecting their independence. The way to do this is for the school to drive alumni engagement in partnership with an independent, flourishing IAA.*

As the dialogue between IAA and the school grew more positive, and their strategies more aligned, the leadership of both organisations felt the need to articulate a new vision for their relationship. Deputy Dean, Peter Zemsky described the shift in the school's perception of the IAA:

*Over the years there had been several periods of tension between the IAA and the school. Conflict related to IT systems had been particularly intense. However, I was optimistic that real progress was possible under the IAA's new leadership. There was a clear commitment to collaboration, which would enable us to resolve old problems such as rolling out a new IT infrastructure as well as investing in new initiatives that would benefit the alumni community.*

IAA Secretary-General David Mair, Shoveller and Tomlinson jointly drafted a new collaboration agreement – *INSEAD Alumni: Vision 2020*, which was signed by Khan, Dean Mihov and Andreas Jacobs, chair of the board of directors (Exhibit 7). Unlike its predecessor, the Partnership Agreement of 2003, this was not a set of legally binding terms and conditions. Instead, it identified common beliefs and goals that reflected their intertwined fortunes, based on a shared awareness that INSEAD alumni were central to the school's reputation and uniqueness, and that the IAA's long-term viability in turn depended on the competitiveness of the school. *INSEAD Alumni: Vision 2020* was conceived in 2015 as part of a comprehensive strategic planning exercise undertaken by the ExCo within the first six months of Khan's tenure.

## Moving Forward Together

Historically, the IAA operated on the basis of an evolving roadmap of projects rather than a formal strategy. However, Khan believed that the magnitude and complexity of the task ahead required meticulous planning. She recalled how the newly energised ExCo had kicked off the strategy formulation process at its first meeting in September 2015:

*We shut ourselves off for a whole day in a room on the Abu Dhabi campus. We began by internalising our own roles and then spoke from the heart about what we wanted to do and the changes we wanted to implement. We asked ourselves: What is our mandate and how do we deliver on it? It was an extremely positive experience of brainstorming and listening to each other's point of view. There was no major disagreement, even though we came from diverse backgrounds; in fact, the diversity enriched the discussion. These were all great people with valuable experience leading successful NAAs. It helped that we had a couple of consultants in the room – by the end of the day we had a concrete direction for a strategy.*

Two months later, at the November 2015 AVM, the IAA refined its strategy, drawing on inputs from NAA presidents, alumni volunteers, as well as representatives from its Khan Venn

*Diagram* partners – the school and the IAF. Working groups, with members nominated by NAA presidents from all over the world, developed detailed strategy implementation plans. The IAA's *2015-18 Strategic Plan* (Exhibit 8) became the guiding direction for its transformation into a dynamic yet stable institution.

## New Global Initiatives

Arguably the most visible achievement of this planned approach was the launch of several ambitious global initiatives. The idea was to build on the IAA's track record of impactful initiatives such as the *Salamander Magazine* and the creation of the IAF. Khan had personal experience, having executed the inaugural *Global INSEAD Day* with great success. Capitalising on its ability to act as a catalyst, the IAA, with support and guidance from INSEAD, launched a series of new initiatives that were both valuable to IAA members and aligned with the school's priorities.

## Lifelong Learning

Until the 1990s the IAA's most compelling membership benefit was the alumni address book, which kept members connected. The digital revolution changed everything. MBAs graduated with their own social media networks, no longer needing the address book to stay in touch with each other. To remain relevant, the IAA had to expand and enrich its membership value-proposition.

Lifelong learning, an obvious benefit that the IAA could provide to members, had been on the ExCo's agenda for a considerable period of time but despite numerous studies, task forces and benchmarking exercises, the IAA could not find common ground with the school. It took a fresh approach and the support of Deputy Dean Peter Zemsky to finally get this off the ground, as David Mair, Secretary-General of IAA, explained:

*When I was tasked with finding a way through, it appeared to me that we were overwhelming the school – a considerable outlay of time and resources for very small demonstrable return in the short term. I took a different tack when I met with Peter on the topic for the first time. What if we adopted a start-up approach, tailored some of our existing resources and “just try stuff to see what works?” If it needs modifying, or throwing out and starting all over, then we aren’t too much out of pocket or too far off our timeline.*

*Our working group of NAA volunteers validated our thinking. Peter, and in short order the school, enthusiastically agreed. In 2016, our modest proposal of a single online course was heavily oversubscribed. With 75 pioneers from more than 20 countries and representing more than 20 different industries, the inaugural participants ensured INSEAD’s reputation for quality and diversity would be maintained as we launched our “fourth campus”.*

Four years later, in 2020, over 30,000 alumni participated in at least one programme on the *INSEAD Alumni Lifelong Learning* platform over the course of a single year, with an entire department in the Alumni Relations Office dedicated to ensuring programme excellence.

## Salamander Challenge and INSEAD Giving Day

Reflecting the ExCo's avowed spirit of collaboration, the IAA supported several programmatic priorities of the school that were also aligned with its own vision. Several exciting initiatives, mostly related to awareness building and fund raising, arose from this new collaborative

energy. They were executed by teams of alumni volunteers led by ExCo members, all of whom worked long hours despite their busy careers. A standout success was the *INSEAD Giving Day* initiative launched in 2017 in partnership with the IAF and the school. Marina El Hajj, former IAA vice president and ExCo member, recalled how the hallmark event was born:

*Shortly after two alumni came up with the idea of a salamander mascot travelling the globe to raise awareness about giving back to the School, a working group of people from the IAA, NAAs, the IAF and INSEAD made “The Salamander Challenge” happen in 2017. Over the course of 37 days, four mascots – Sami, Sally, Lenny and Sadie – visited 6 continents, 33 countries and 50 cities in a collaborative effort to raise awareness about fundraising that incorporated fun, interaction and networking. There was also healthy competition for the most-liked picture of the mascot and countries with the highest donor participation rate. Accompanied by extensive social media coverage, the global INSEAD community came closer with happiness, gratefulness, and creativity, while celebrating shared values of diversity, tolerance, and building bridges. The first INSEAD Giving Day on February 21st, 2017 was the last day of the Salamander Challenge.*

Over a period of two weeks, these events raised €323,000 and had 312,000 shares on social media. Following the spectacular success, the IAA, the IAF and the school decided to make it an annual fundraising campaign. After two years of exponential growth, the 2019 *INSEAD Giving Day* raised €1,233,144 from 2,273 donors in 79 countries to support the school's goals (Exhibit 9).

This spurt in alumni involvement was warmly welcomed by INSEAD leadership, who were increasingly focused on capitalizing on the enormous potential of the alumni, many of whom occupied leadership positions in business and government. Associate Dean of Advancement, Nida Januskis, described how the alumni became central to the school's advancement efforts:

*The timing of Sadia's appointment was perfect because the school was undergoing its most ambitious fund-raising campaign ever: raising €250 million with a 50% participation goal. Collaborating closely with the IAA would play a key role in the campaign's success and the stars had never been better aligned. INSEAD Giving Day was particularly significant – it played an important role in establishing a culture of philanthropy within the alumni community.*

## Alumni Recognition Awards

Supporting the school's entrepreneurship focus, the IAA and INSEAD jointly presented the first *INSEAD Global Entrepreneurship Award* in 2017 to recognise alumni who had founded companies with substantial global impact. The awards programme was actively championed by IAA Vice President and ExCo member, Joaquim Paiva-Chaves, who described how it was conceived:

*The idea started a long time ago during a dinner with past Dean Antonio Borges. At the final stage we discussed what we as alumni could do to help our new colleagues. Someone suggested we could help them find jobs. Antonio Borges, in his very assertive style, immediately said “No” – as privileged INSEAD graduates, we had the obligation to create jobs! This led to the idea of fostering entrepreneurship and the first INSEAD Entrepreneurship Award was created. Eventually, a number of other awards were created. INSEAD alumni are world*

*leaders, they lead organisations, they change lives, they are a real force for good and they deserve to be recognized.*

With a selection committee that represented all three spheres of the *Khan Venn Diagram*, the awards were greatly appreciated by the alumni community, and NAAs responded by initiating new awards. By 2019, a slate of six awards recognised exceptional alumni achievements in diverse areas such as business as a force for good, entrepreneurship and volunteerism (Exhibit 10).

While these initiatives significantly improved relations between the association and the school, a few friction points remained. One was related to the IAA's cherished salamander emblem. For alumni, it symbolised their connection to the school and they took a dim view of the school's attempt to "modernise" the logo as part of its rebranding effort. The friction was indicative of a deeper concern the IAA had about safeguarding control over its newly launched initiatives. It had been frustrating to see earlier initiatives like the *Salamander Magazine* and the Alumni Forums progressively taken over by the school as they grew more elaborate and complex. The school stepped in with administrative help, but this diminished the alumni's role and created governance tensions.

Despite these concerns, the new initiatives had several positive consequences. Firstly, they invigorated the alumni community, providing a worthwhile, exciting cause to rally round. Equally important, they spurred the school to acknowledge the IAA as the voice of the alumni. Lastly, their success strengthened both the INSEAD and IAA brands, another strategic priority of the IAA.

## Global Branding

The ExCo recognised that their ambitious plans to mobilise alumni and launch new initiatives would be easier to implement and deliver better results if accompanied by an effective branding strategy. A stronger, better known brand would boost alumni participation which was central to achieving the IAA's goals. As Khan explained, this meant working closely with the school as the respective brands were intertwined:

*An active alumni association not only helps to keep the alumni energised and engaged but also contributes tremendously to the positive branding of INSEAD. The success of the alumni boosts the reputation of the school, while in turn the success of the school enables the alumni to bask in its reflected glory.*

In January 2016, the *Financial Times* ranked INSEAD's MBA programme #1 in the world, giving a significant fillip to the school's brand-building effort. Taking advantage of the school's visibility, the IAA took several initiatives to strengthen its own brand by facilitating alumni-led activities and publicising member achievements. Khan personally supervised the production of *The IAA History Book* to commemorate its 50<sup>th</sup> anniversary:

*I wanted to document all the good work that had been done in the past. The IAA History Book would provide continuity, give credit where it was due and be an enduring source of pride for alumni. It would enable them to see what they had helped create and the amazing community they belonged to. It would help improve branding in jurisdictions where INSEAD was not well recognised and so propel more people to join the school and then return as alumni. The history book surpassed our expectations and will be updated this year for the 60<sup>th</sup> anniversary.*

To provide a consistent framework for NAAs to build their own brands, the IAA, along with the school, developed a range of resources in line with a newly formalised communication policy. These included a bimonthly e-newsletter covering alumni events and achievements, active accounts on Facebook, Instagram, LinkedIn and Twitter that boosted the IAA's social media presence, a digital toolkit to facilitate alumni participation in marketing events, and a template for NAAs to publish *Alumni Perspectives* – a digital book showcasing their country and alumni insights.

## Strengthening the NAAs and GCs

Khan readily acknowledged that the most critical ingredient for the success of the IAA's ambitious strategic plan was the extraordinary alumni volunteers:

*The passion, commitment and drive that our alumni volunteers exhibit is unparalleled. You could attribute this to the particular attachment formed during the work-hard-play-hard ethos of campus life; or perhaps we are just fortunate to have a very strong culture, reinforced by alumni interviews of potential candidates (which reinforces a certain bias in student selection). I don't really know. But this is our strength. It is why our projects are driven by some very committed ExCo members and volunteers.*

To nurture this advantage, the ExCo focused on making the operations of the IAA, as well as the NAAs and GCs, efficient and sustainable.

## Greater Internal Collaboration

The 2015-18 strategy prioritised greater collaboration between GCs, NAAs and local clubs as an efficient way to jumpstart the capacity-building process. The scale of operations of the NAAs and GCs varied widely – some had thousands of members, employed paid staff and organised a busy calendar of events. Others had limited resources and relied on a few dedicated volunteers. Collectively, the NAAs and GCs represented a pool of talented individuals scattered across the alumni network, yet the skills and experience acquired by volunteers during their 3-5 year terms was lost after they stepped down as there was no way system to store and transfer their accumulated knowledge.

The ExCo believed that a culture of collaboration was essential to address this weakness, and the AVM was the ideal place to foster it. Khan transformed the AVM experience from a poorly attended, occasionally rancorous event to one that alumni flew across the world to attend:

*It was important for alumni to enjoy the AVMs and return rejuvenated, so we did three things. First, to relive part of the reason we signed up for INSEAD – the academic edge, we organised lectures where faculty shared their latest research or book. Next, to draw closer as a group, we introduced an outward-bound activity in Fontainebleau forest (see Exhibit 11). They were childish games, but you'd be surprised how competitive everybody got. Then followed yoga, mindfulness, dancing lessons – to let our hair down. Finally, successful NAAs conducted best practice sessions to facilitate information sharing.*

The restructured AVMs were a huge success – 90% of NAA and GC presidents attended the November 2019 meeting. Over the course of a weekend, alumni volunteers bonded as a community and reaped the support offered by fellow members. AVMs became a way to

onboard incoming NAA presidents as well as share best practice on relevant topics of mutual interest.

The school contributed actively to making the AVMs a success. Working closely with the IAA, Tomlinson's team were a valuable on-site resource. With the active encouragement of Dean Mihov, the Alumni Relations Office arranged faculty lectures which were soon a popular feature of NAA-organised events worldwide.

The collaborative culture fostered at AVMs was part of a broader strategy to actively support early-stage NAAs and help establish new GCs. Khan was particularly proud of the support the IAA provided to establish the 8<sup>th</sup> GC – the *INSEAD Women in Business Global Club* – created to promote gender equality and support women alumni in their careers. Sophie Bertin, inducted to the ExCo in 2017 to look after the interests of Global Clubs in 2017, played an instrumental role in its establishment.

### Operational and Governance Improvements

A crucial component of the IAA's plan to strengthen the NAAs was the introduction of KPIs. Peter Schuh, IAA Vice President and ExCo member described the rationale and approach taken by the ExCo for this important yet delicate task:

*The ExCo believed that a key success factor for an alumni association was its ability to provide value to its members. We wanted to make sure that we create transparency on where we stand in this crucial dimension and to a) know how we as NAAs and the IAA perform, b) see where some NAAs do better and what others can learn from them, and c) ensure sustainability. However, in a volunteer organisation, KPIs are a delicate matter – we do this in our spare time and not everyone appreciates being in a grid of performance indicators while doing so. Thus it was crucial that what gets measured is agreed by everyone, participation remains voluntary, with group dynamics doing its magic. Also, at INSEAD we can rely on a healthy appetite of competitiveness to engage everyone, thereby improving the value we jointly bring to the community!*

Following a fruitful discussion among the NAAs facilitated by the IAA, a narrow set of KPIs was developed covering three areas: membership; value-addition and sustainability (Exhibit 12). Their adoption enabled the IAA and NAAs to measure and improve their operational efficiency, governance standards and sustainability.

In 2017, IAA operations benefited from second pillar of support when the school upgraded its IT capability, thereby addressing a recurring source of alumni dissatisfaction. Carlos Montemayor, IAA Vice President and ExCo member, described the *MyINSEAD* platform, the centrepiece of the revamped IT infrastructure:

*INSEAD's alumni portal MyINSEAD is a community platform that alumni use to interact and engage with other alumni. Among other features, the site provides access to the alumni directory and enables alumni to learn about and sign up for alumni events worldwide. The IAA was instrumental in advocating for the transformation of an inefficient platform to an integrated platform with best-of-breed commercial products such as Mailchimp and Eventbrite. A mentorship platform that will allow alumni to create mentor/mentee relationships with other alumni will soon be added. We worked together with INSEAD to incorporate feedback and ideas to improve MyINSEAD's functionality and reliability. The end result is that the platform*

*is now used by more alumni with better results in terms of user satisfaction and engagement.*

With a comprehensive, user-friendly suite of digital tools to engage and empower the alumni community, the redesigned portal addressed the changing needs and circumstances of alumni at each stage of their INSEAD journey – from admission to milestone reunions. The school was a key driver of the IT infrastructure overhaul, providing both financial support and technical expertise, and refining the platform in consultation with alumni and conducting training workshops.

As the IAA's efforts to empower the NAAs and GCs gained traction, Khan observed a unexpected, yet promising development:

*Traditionally, the IAA conceptualised and operationalised global initiatives. More recently, however, we see an encouraging trend of NAAs or individual alumni spearheading successful initiatives locally and we help them replicate it worldwide. For example, the UK NAA launched a successful mentoring programme, which eventually inspired the IAA and the school to implement something similar on a global scale.*

## Institutionalisation

The IAA's activities were guided by statutes originally drawn up in 1962. Although revised in 2012, shortcomings remained. Drawing on her corporate governance expertise, Khan took responsibility for streamlining and documenting standard operating procedures (SOP):

*To sustain the momentum, we had to first put our own house in order. I wanted a governance document not just for my tenure but for posterity, so everybody after me could govern using principles and procedures that had been developed over a period of time and could be improved upon going forward. I did not have to look far to find the expertise we needed to professionalise the IAA's operations; after all, INSEAD alumni are graduates of one of the best business schools in the world. But being volunteers we couldn't do it all. While we had institutional memory residing with former presidents and volunteers, we needed the school's help to put this together. Austin (Tomlinson) and his team played a crucial role in helping prepare this document.*

Tomlinson recalled the scale of the task in creating a robust system that would ensure best practices were consistently and comprehensively applied:

*A lot of my first year as Director of Alumni Relations went into putting the alumni association's SOPs together and developing our strategy for how best to engage with alumni. My team spent countless hours pulling out every surviving document to see how decisions had been taken in the past and, if they still made sense, we put it in the SOPs. It was a mundane, painstaking process that led to a pretty hefty document.*

To fortify the legal framework for its operations, the IAA introduced a unified code of conduct. The statutes included an enforcement section with procedures for tackling violations.

The final component of the institutionalisation strategy was an effective management information system. The IAA Annual Report was redesigned to provide information that

supported decision-making, data management systems were set up to track membership numbers, member data and key documents were organised to facilitate retrieval.

## Financial Sustainability

The financial worries that first appeared in the 80s resurfaced intermittently. With little cushioning in the annual budget, Khan and the ExCo resolved to deepen the association's financial resilience by shoring up revenues and tightening expenditure.

### Boosting Membership Revenues

Until the 1990s, the alumni address book was central to the IAA's finances – with advertising the principle source of revenue. In the digital age, as the address book lost its significance, the IAA became dependent on membership revenues, in particular, transfers from the NAAs. Alumni paid an annual membership fee to the respective NAA, which in turn paid dues to the IAA. Where no NAA existed, alumni paid directly to the IAA. The NAAs paid dues to the IAA based on *all* alumni residing in their jurisdiction, including those who chose not to sign up.

To remain financially robust, the IAA and NAAs had to work together to increase membership numbers. The school's Alumni Relations team partnered with the IAA to launch programmes to drive alumni membership. Tomlinson described a particularly successful initiative launched in 2018 for MBA students:

*Together with the IAA's leadership, we managed to convince all NAA presidents to agree to a special programme called the Young Alumni Global Membership Programme. MBAs would receive discounted membership if they subscribed before graduating. The programme was a great success because it targeted the MBAs when they were still excited and enthusiastic students. The percentage of recent graduates who became alumni association members increased from 11% in 2018 to 90% in 2020.*

Another potential pool of members were participants of INSEAD's Executive Education programmes (EDP). Once again, the school was eager to expand this membership pool, but this time the IAA had reservations, as Khan explained:

*The school feels frustrated by the IAA having an input on which programme graduates get alumni status. It is an added bonus for the school's marketing team to promise alumni status for new EDP alumni. But the alumni feel strongly that including everyone passing through campus will dilute membership. To retain a strong feeling of 'belonging' within their community, they believe that only graduates who have had sufficient time on campus and been able to imbibe the INSEAD ethos be given alumni status.*

Despite these differences, the school developed a mechanism to expand EDP alumni membership: a subsidy that allowed the IAA to offer one year of free membership to every eligible EDP graduate. However, the NAAs had difficulty retaining these members once the subsidy ended. Jean Philippe Grosmaire, Treasurer of the IAA and ExCo member, described an innovative scheme to reduce attrition:

*It was obvious to us that there was absolutely no correlation between the subsidy going to the NAAs and their success in retaining their EDPs beyond the first year of free subscription. So in the interest of good governance, we defined measures*

*of success before funnelling the subsidy to the NAAs. In the first year the IAA would retain 50% of the subsidy and give 50% to the NAAs. In subsequent years, based on their success in retaining EDPs, we would transfer the balance based on a formula. This accountability measurement got the NAAs thinking about how to retain the EDP alumni. We asked NAAs with high EDP membership penetration to share their experiences, even collaborate, with less successful NAAs. Withholding a part of the subsidy also provided the IAA a much needed cushion to implement some of its global programmes.*

**Optimising costs:** To meet its financial sustainability goals, the IAA supplemented its revenue-raising efforts by reducing costs. Some outlays were essential and could not be cut. For example, the IAA needed funds to strengthen global alumni engagement and subsidise small NAAs or new GCs until they were self-sufficient. The ExCo therefore targeted other ways to reign in expenses, and “do more with less”. Campus-based AVMs and virtual workshops yielded significant cost savings. To support the NAA’s own cost-cutting efforts, the IAA froze membership dues and devised a more efficient way to collect them.

### Sustaining Deep Impact

In 2018, the ExCo began developing the IAA’s next 3-year plan. So much had changed since 2015. Supported by robust operating systems and excellent relations with the school, the IAA was now a powerful voice for the increasingly influential alumni community. Reflecting this evolution, Khan and the ExCo adopted a different approach for the second strategic plan. Whereas the 2015-18 strategy had been broad in scope, the IAA leadership focused on a few substantive initiatives with wider impact.

The strategy formulation process was also different—more inclusive and transparent. Instead of being crafted by the ExCo, the entire AVM alumni community contributed to the framework. At the Fall AVM 2018 in Singapore, participants identified three strategic focus areas: networking and technology, lifelong learning, and career services.

By mid-2020, as the IAA began its 60<sup>th</sup> year, considerable progress had been made. In the networking and technology focus area, the school had enhanced its capacity to measure alumni engagement through event attendance. With its support, the IAA intensified its efforts to provide a comprehensive suite of lifelong learning initiatives to span the entire post-INSEAD career of alumni. Finally, to augment career services, a platform was developed to provide alumni access to mentoring and peer-to-peer advisory services.

Perhaps the most significant achievement was that the *Khan Venn Diagram* was no longer a static concept but a ‘virtuous spiral’. As the IAA grew more effective and its programmes more impactful, it gained credibility with all stakeholders, allowing stronger collaboration with the IAF and INSEAD, and better outcomes – all three wheels spinning in harmony.

### The ExCo Meeting

As Khan’s ExCo colleagues signed on for the meeting, she was conscious that the new collaboration agreement would be one of her last steps as president. A robust relationship with the school would safeguard the volunteer-led alumni relations model that the IAA had painstakingly built over the past 60 years. While it had improved significantly in the past five years, with alumni occupying 17 of 21 seats on the INSEAD board, tensions flared whenever their respective organisational visions differed and there were still occasions when the IAA felt it was being bypassed by the school as the representative body of the alumni.

Khan was certain that the only way to protect the relationship was to focus on the intersecting components of the *Khan Venn Diagram* and the new collaboration agreement was the perfect place to start this process. Above all, it had to preserve the IAA's unique feature – its independence – by meeting the expectations of its most valuable asset – loyal, hardworking and accomplished alumni of an exceptional institution.

### Discussion Question

Has the IAA leadership succeeded in institutionalising its vision so that it will survive the test of time and personalities?

## Exhibit 1

### *INSEAD and its Alumni Community*

#### The INSEAD Alumni Community



## Exhibit 2

### *The IAA's National Alumni Associations and National Alumni Clubs*

Argentina  
Australia & New Zealand  
Austria  
Belgium  
Brazil  
Bulgaria  
Canada  
Chile  
China  
Colombia  
Croatia & Slovenia  
Cyprus  
Czech Rep. & Slovakia  
Denmark  
Egypt  
Finland  
France  
Germany  
Greece  
Hong Kong  
Hungary  
India  
Indonesia  
Israel  
Italy  
Japan  
Republic of Korea  
Lebanon  
Luxembourg  
Malaysia  
Mexico  
Monaco  
Netherlands  
Nigeria  
Norway  
Pakistan  
Poland  
Portugal  
Peru  
Philippines  
Romania  
Russia  
Saudi Arabia  
Serbia  
Singapore  
South Africa  
Spain  
Sweden  
Switzerland  
Thailand  
Turkey

## Exhibit 4

### *The IAA's Global Clubs*

Energy
Entrepreneurship
INSEAD Directors Network
Technology, Media and Telecommunications
INSEAD Global Impact Network
Healthcare Network
INSEAD Private Equity Club
INSEAD Women in Business Club

## Exhibit 5

### *The IAA's Executive Committee (ExCo)*

Name	Functional Responsibilities	Country Responsibilities
Sadia Khan	<ul style="list-style-type: none"> <li>President of the IAA</li> <li>Strategy</li> <li>SOPs</li> <li>2020 History Book</li> <li>AVMs</li> <li>Alumni Survey</li> </ul>	
Jean-Philippe Grosmaire	<ul style="list-style-type: none"> <li>Treasurer</li> <li>Budget</li> <li>Sponsorship</li> </ul>	Belgium, Bulgaria, Denmark, Finland, France, Monaco, Netherland, Norway, Sweden, UK
Marina El Hajj	<ul style="list-style-type: none"> <li>Giving Day</li> <li>Communications/Salamander magazine</li> </ul>	Egypt, Lebanon, Nigeria, Pakistan, Saudi Arabia, South Africa, Turkey, UAE
Joaquim Paiva-Chaves	<ul style="list-style-type: none"> <li>Alumni Awards</li> <li>EDP membership</li> </ul>	Cyprus, Greece, Italy, Israel, Luxembourg, Portugal, Spain
Carlos Montemayor	<ul style="list-style-type: none"> <li>IT</li> <li>Career Development</li> <li>Global INSEAD Day</li> </ul>	Argentina, Brazil, Canada, Chile, Colombia, Mexico, Peru, USA
Peter Schuh,	<ul style="list-style-type: none"> <li>Branding</li> <li>Membership</li> <li>KPIs</li> </ul>	Austria, Croatia, Czech republic, Germany, Hungary, Poland, Romania, Russia, Serbia, Switzerland
Sophie Bertin	<ul style="list-style-type: none"> <li>Global Clubs</li> </ul>	
David Mair	<ul style="list-style-type: none"> <li>Secretary General</li> <li>Value Addition Services</li> <li>Life Long Learning</li> </ul>	Australia, China, Hong Kong, India, Indonesia, Japan, Korea, Malaysia, New Zealand, Philippines, Singapore, Thailand

### Exhibit 6

*The Three Musketeers at the 2015 Partnership Board meeting*



L to R: Sadia Khan (President IAA), Ilian Mihov (Dean of INSEAD), and Leonidas Los (Chair, IAF)

### Exhibit 7

*Vision 2020 Signing Ceremony*



L to R: Ilian Mihov, Sadia Khan and Andreas Jacobs (Chair, INSEAD Board of Directors)

**Exhibit 8**  
**The IAA's 2015-18 Strategic Plan Outline**

## Strategic Plan Outline

INSEAD  
 Alumni Association



Understand the world. Expand your world.

## Exhibit 9

### Scenes from INSEAD Giving Day



2019



INSEAD mascots Sally and Sami travel the world attending alumni events



2020





## **Exhibit 10**

### *Alumni Recognition Awards*

INSEAD Alumni Force for Good Award to recognise individuals who achieve exemplary impact on a global scale in their professional or community work in any domain including environmental, economic, biodiversity and social impact

INSEAD Alumni Global Entrepreneurship Award to recognise outstanding and entrepreneurial alumni for positive impact to business and society, particularly impact that exemplifies innovation and diversity

INSEAD Alumni Emerging Entrepreneur Award presented to individuals who demonstrate exceptional entrepreneurship in two age categories – ventures that are less and greater than five years old

INSEAD Alumni Achievement Award to acknowledge exceptional achievements of alumni in their professional and community work

INSEAD Young Alumni Achievement Award to recognise exceptional achievements of young alumni (within 5 years or less of graduation) in their professional and community work

INSEAD Alumni Volunteer Leader Award to recognise exemplary volunteer service to INSEAD, the IAA, the IAF or any other volunteer group affiliated with INSEAD

## Exhibit 11

### *Team Building at the AVM*



Khan with participants of the May 2017 AVM at an outward bound experience in the Fontainebleau forest

## Exhibit 12

### *NAA KPIs*

#### Three dimensions for NAA KPIs

