The Industry Partner Alliance (IPA) Committee is more than a guide for ASAE industry partners. It’s more than a group of companies and organizations that provide services and products to ASAE members. The IPA is a strong committee that listens and responds to the needs of the industry partner community.

Did you know that the IPA:

+ Improves the membership experience and return on investment for industry partners.
+ Works with ASAE and the ASAE Foundation on events and social responsibility programs.
+ Delivers education sessions specifically targeted for industry partners at ASAE meetings.
+ Develops resources for industry partners looking to connect with the association community.

We can’t do it without you. Learn more at AccessAssociations.org

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Industry Partner Alliance

Helping you find direction for more than 20 years.
Every association has different requirements when it comes to technology, but one thing is certain: They all want to be ahead of the curve. The 2015 Tech Toolkit is here to help with tips from companies that have answers to your thorniest technology issues. Whether you’re looking to automate dues collection, develop an inbound marketing strategy, or move to the cloud, this special advertising section is a must-read ahead of your next strategy session.

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**WHAT CAN YOU AUTOMATE? MORE THAN YOU THINK!**

**BY REBECCA MITCHELL**

**Question:** Who coined the word “automation” in 1947?

Imagine life without your cellphone, tablet, or laptop computer. It’s nearly impossible. These technological advances have not only increased our individual and collective efficiency, they’ve also downright changed our lives. And like the saying goes, change is good.

Now, imagine you’re the person responsible for billing and dues processing at your association. (Maybe that is you?) I’m betting that part, if not most, of the work is manual, and takes days or weeks to complete. Just think of all the other things you could do if you automated those manual processes—run reports faster, close the books sooner, and focus more on strategic financial initiatives.

**TACKLE FINANCIAL SYSTEMS FIRST**

Automation shouldn’t be relegated to just the IT department. Implementing tools to streamline your financial-management process (e.g., billing and dues collection) is a great place to start. Here are five things to think about when considering an automated system:

1. **ARE YOU RIPPING OPEN ENVELOPES FROM MEMBERS AND MANUALLY KEYING DUES-PAYMENT INFORMATION INTO YOUR AMS AND ACCOUNTING SOFTWARE? STOP!**

   Automating dues collection improves collection rates, cash flow, and the back-office. Data-entry errors are almost nonexistent, and you enjoy increased security. On average, associations can save up to 1,750 hours per year in manual data entry and record updates with an automated financial-management solution.

2. **ARE YOUR MEMBERS LIMITED ON THE WAYS THEY CAN PAY THEIR DUES?**

   Automated payment-processing software can give your members more options. Let them pay by check, credit card, or electronic funds transfer through the mail, online, or over the phone. Put a payment button

**COMPANY BIO**

Billhighway develops cloud-based software that automates dues, finances, and fundraising for member-based associations and nonprofits. Since 1999, we’ve helped our clients free up internal resources and focus more time on strategic financial activities by increasing revenue, cash flow, and the bottom line. Through a robust, rules-based engine that integrates payment processing, banking, and accounting with existing systems, Billhighway provides a transparent, holistic view of your organization’s finances so you can work smarter, not harder.
on your Facebook page, so members can pay while seeing what their friends are up to.

HOW MUCH TIME DO YOU SPEND PROCESSING MEMBER PAYMENTS?
Associations can achieve off-the-chart efficiency in dues processing with an automated system. Case in point: An organization with more than 100,000 members was spending 216 hours a month (that’s nine days) on dues processing. Now, they spend less than one hour a month on it. Payments show up accurately and quickly within three to five days of receipt.

ARE YOU A NATIONAL ASSOCIATION WITH A CHAPTER STRUCTURE? HOW MUCH VISIBILITY DO YOU HAVE INTO CHAPTER FINANCIALS? IS IT LIKE PULLING TEETH TO GET ACCURATE REPORTS IN A TIMELY MANNER?
An automated, centralized system can allow for configurable, real-time transparency into chapter finances, so you can stop guessing how they’re performing. Individual chapters benefit from auto-routing of funds to virtual bank accounts, can easily provide a snapshot of chapter operations to HQ, and get chapter accounting benefits to boot.

ARE YOU MANUALLY CREATING AR ENTRIES FOR YOUR MEMBERS AND RECONCILING WITH YOUR BANK? STOP!
Automation can do that for you, ensuring your AMS, accounting software, and bank account are all reflecting the same data, at the same time. An added bonus? Elimination of bank fees and manual account reconciliation.

SO WHAT ARE YOU WAITING FOR?
Start looking for ways to automate now. Not only will you transform back-office operations, you’ll free up valuable resources to focus on strategic activities.

Answer: Del Harder of Ford Motor Company
With so many associations to choose from today, what goes into the decision-making process when someone ultimately decides to join? And, after a member joins, what factors determine if he or she will be an actively involved participant or just a passive onlooker? What do highly engaged members look for in an association that not only gets them to join and pay dues but also keeps them involved with the association and other members? What does it really even mean to be engaged, anyway?

If your association hasn’t taken these questions into consideration in the past, now is the time.

Understanding why, how, and to what degree a member engages with an association can make all the difference when it comes to growing a thriving nonprofit. Engagement denotes the relationship between an association and its members and their mutual exchange of value. It is the key to future association success and is all about bringing people in by ways that matter to them and matter to the organization as a whole.

Many people in the association industry have heard and used the word “engagement” in a blanket manner—they know that it is important but aren’t sure what an engaged member really looks like. Do you know who your most engaged members are? How can you tell?

The most effective way to answer these questions is to use a tool that properly scores member engagement. Scoring—or measuring—engagement in an association helps gauge the degree to which members are actively involved and aligned with organizational goals. Engagement scoring tools should provide you with information to understand more about your members and when those relationships might need nurturing or enrichment.

Several engagement products and strategies are available today, and the more effective ones offer association leaders numbers that provide robust insight into just how an association functions and the value it creates for its members.
Engagement data should be so much more than static, quantitative figures that merely describe revenue or member count. Not only is it important for an engagement scoring tool to map out the relationship between your association and its members right now, but it is also vital to gather this information at regular intervals. That way, an accurate snapshot can help you evaluate how your members engage and perform over time. From there, you’ll be able to assess if member engagement is growing or declining.

Moreover, associations are always evolving and changing during their lifecycles, and the needs and strategic goals of an association may shift depending on what’s important to both members and staff at a given period. And not only do goals change over time in a solitary association setting, but desired behaviors also vary between associations, depending on their individual missions and objectives.

The right tools will provide you with the ability to analyze patterns and take into account all of these dynamic factors. Also, these measurements might shed some light on how you tend to engage members based on demographic criteria like geographic location, age, years in profession, and organization size.

In scoring member engagement, you’ll be able to see how your association is viewed in the eyes of key audiences, from those who are heavily committed to those who are completely disengaged. And, with the right data, you'll be able to grow and maintain an active membership that will continually seek to bring your association’s mission to life.
Each year associations launch recruitment and renewal strategies to grow and retain members. Many turn to association management systems to help with basic membership tracking and member service. However, remarkable associations set themselves apart in developing captivating and long-lasting memberships by identifying and acting upon the proper key performance indicators (KPIs). Harvesting this data can provide increased visibility and communication across your association and with your members. Here is how KPIs can help you unlock the door to exceptional membership management:

**MEMBER RETENTION**
KPIs can help track trends, strengths, and pain points in membership renewals. They help you get to know your members better by breaking down member data into detailed demographics, such as geographic location, industry, and job title. For example, if the number of members in Chicago is declining, your association can investigate the reason, such as a competing local association, and focus your efforts on recouping lost members. Once you understand who is renewing and who is not, you are able to target your members more effectively.

**REVENUE GENERATION**
KPIs can also be assigned for both dues and nondues revenue. A successful association understands which of its services are profitable and productive to membership growth. If KPIs indicate your annual conference is generating high revenue, then concentrating your endeavors into advancing it further should prove beneficial to your bottom line. A good understanding of your financial KPIs will reveal which initiatives are worth pursuing and help you better understand trends for forecasting revenue goals.
MEMBER ENGAGEMENT
Email and social media are valuable sources of data that can provide beneficial insight into member interactions. With emails, you need to know if they are being opened and which members are opening them. Track the open rate and your click-through percentage to determine what content is capturing your members’ attention. With a variety of social media platforms, organizations need to determine which one provides the most engagement with members. Track direct responses, such as replies and retweets on Twitter, and gauge the effectiveness of your posts. If you find that you receive more responses on Facebook, then focus more time on that platform. Alternately, some associations have found success containing their member engagement within a community they own and manage.

PERFORMANCE MEASUREMENT
To better understand the value of the data that you gather, KPIs should be leveraged into a report card of your association’s performance, displaying items such as whether goals for member growth or retention were met. Compare your metrics based on internal goals or industry trends. Performance scores allow your association to understand areas that are both successful and require improvements. Association management software typically offers dashboards that will allow you to actively monitor these metrics in real time. The real-time data creates quick progress reports on areas that might need more attention, enabling you to proactively address issues and make smart, data-driven decisions.

Propel your association forward by aligning technology and data with your goals. Use all of the data at your disposal and figure out what your organization needs to successfully execute its business strategies. The key to unlocking outstanding membership management is harvesting trusted data and tracking KPIs. Only then can you gain the insight to build enduring member relationships.

To learn more about how KPIs can provide a whole new level of insight into your association, download our e-book here: http://blog.protechassociates.com/download-ebook-top-key-performance-factors.
For the next 20 years, 10,000 people a day will hit the age of 65, the traditional retirement age. This massive number is trumped only by the even larger millennial generation, which now comprises the majority of our workforce. The generational shifts that are underway have huge implications for every aspect of association business.

To understand the impact of these changes, we commissioned a report to look at the association market and provide statistically valid data. We chose to look through the lens of digital marketing because it is the modern approach and requires a blend of marketing and technology skill sets, expanded budgets, aligned departments and, top-down buy-in to agree that the way in which individuals learn, shop, join, and spend money has fundamentally changed in the last decade.

Some of the critical insights from the report included:

• While email marketing dominates the budget and is the preferred communication channel, few associations have the skills to design, write, send, or measure emails to be consumed on mobile devices. Email marketing was cited as the biggest drain of staff time, and little time existed to correctly target or personalize content to the member.

• Associations sharply lag behind the corporate market in adopting marketing automation to help alleviate the burden of email marketing and to increase response rates. Marketing automation leverages technology to eliminate manual processes—such as membership renewals and joins, as well as exhibitor and event marketing tasks—to free up staff time and provide hyper-personalized content.

• The majority of associations do not budget for anything digital except email. While associations say that they need to grow, they are only communicat-
ing with people who they already know through an email-marketing program. Associations need to expand their mix to include banner ads, paid social media, keywords, and link referrals in order to reach potential new members. The study showed that associations continue to be very weak in their use of social media to reach in and engage prospective members.

- There is organizational misalignment in roles and responsibilities. Digital marketing requires working across marketing, technology, and various business units. The study clearly identifies that associations continue to suffer from departmental silos and have not embraced the marketing-technology or agile-management models that dominate corporations and have radically changed product development, design, and delivery practices.

- Associations are still largely unaware of the inbound marketing movement, which upends traditional promotion and sales practices. Inbound marketing is a methodology that uses content and behavioral insights to lead a prospect from inquiry to conversion without a direct sales pitch. Inbound marketing heavily relies on using content as a way to interact with prospective members, exhibitors, and attendees to lead them down the path of engagement.

- Using a combination of blogs, whitepapers, studies, cases, e-books, and more, inbound marketing allows an association to develop deep insights into an individual, group persona, or population. Inbound marketing not only allows an organization to become predictive in its approach but also creates demand so that potential members join based on true desire and not due to a convenient discount.

If your association recognizes a need to adapt to the new digital normal—always connected, mobile first, social media-centric—then a review of how your organization currently budgets, staffs, and communicates is needed. Associations that have evolved to meet today’s member expectations are using a combination of mobile-ready email, automated newsletters, automated renewal, and event marketing programs to achieve the levels of operational efficiency needed to evolve to an inbound marketing approach.
SUCCESS in today’s digital world means adapt or fail—harsh, but true. The ability to have immediate access to information and services has become essential to association members who are accustomed to electronic availability throughout their personal and professional lives. Are you prepared?

STAY RELEVANT: MOTIVATE MEMBERS THROUGH INTERACTION AND ENGAGEMENT

Members are now expecting to receive your services 24 hours a day, seven days a week, 365 days a year, and if you’re unable to deliver they’ll find a source that can. Further, to remain relevant, associations must recognize that in the digital world everyone is mobile, social, and connected.

A strategic approach to utilizing technology will help to solidify your association’s relevance and increase your value with members—which, in turn, will boost retention, attract new members, generate interaction, and more.

To become the online resource of choice, your organization should use technology to

• enable members to network and connect with other members, crowdsource ideas, and share knowledge.
• give clickthrough access to professional certification and licensure information.
• provide continuing education services.
• create mentoring opportunities between well-established members and those new to their field and in need of professional guidance.
• empower members to find and share knowledge and personal and professional insights.
• consolidate access to industry events, publications, and media.
• link with industry content libraries and relevant external sites.
POSITION AN ONLINE CAREER CENTER AS THE NUMBER-ONE MEMBER CAREER RESOURCE

Nothing is more powerful in creating member loyalty than helping someone advance their career by finding a new or better job. Associations are uniquely positioned to deliver online career center and specialized job board solutions, which makes your organization a valuable partner to members and employers alike seeking the best match for a specific job. Leverage your resources to guide your members to the fulfilling career they seek.

BRING TRUSTED RESOURCES DIRECTLY TO MEMBERS WITH AN INTERACTIVE BUYER’S GUIDE

By taking your buyer’s guide online, designed to deliver the products and services that members want and need, you create a valuable resource that members will visit frequently.

DELIVER PROFESSIONAL EDUCATIONAL PROGRAMS TO MEMBERS ONLINE

Supporting members’ professional education through online learning programs alleviates the need for members to search for or travel to attend training related to their industry—common pains with continuing education. By educating your member base through training, you’ll serve as the thought leader and knowledge provider of your industry.

USE TECHNOLOGY TO MEET EVOLVING MEMBER AND ASSOCIATION PRIORITIES

Recent industry surveys clearly show the top priorities for association leaders in 2015 and beyond:

1. Improving member retention
2. Developing new methods for member engagement
3. Branding and increasing awareness
4. New member acquisition
5. Website enhancements

This list represents the continuing evolution of association priorities and reflects the need to interact with and serve members how, where, and when they desire. By developing a strategy that utilizes the innovative and affordable technology that is available to all associations today, you will be able to transform your organization into an on-demand, 24/7 services provider that will serve your members well into the future.
2015 will be a year of both opportunity and challenge for associations. Those that begin to fully comprehend the demographic shift in our country, understand the power and reach of the internet, and embrace the evolution of technology will position themselves for success. Here are a few key predictions for associations and how you can turn them into real advantages for your organization.

PREDICTION 1: MEMBER AND CUSTOMER ENGAGEMENT
Associations will continue to focus on engagement, but we will see a shift to focusing on both customers and members. Customer retention will become more important than member retention. This will drive diversified revenue streams, micro-volunteerism, and message amplification—three core activities that will ensure success in the future.

As engagement continues to be a priority for associations, the ability to effectively measure engagement will be a necessity. To do this you need to collect data that matters, so you can make informed decisions about practices and programs.

Many associations gather engagement data from multiple sources, and it can be difficult to aggregate into one centralized database for analysis. To make all this data actionable, associations will look to leverage technology—like engagement scoring and data visualization tools—to help pinpoint interactions and services that increase engagement, enhance your association's value, and generate additional revenue.

PREDICTION 2: ALTERNATIVE REVENUE SOURCES
With the proliferation of free education resources across the internet, the need to explore nondues revenue sources and alternative ways to add value to memberships is really less of a prediction and more of a hard reality for associations operating in today’s digital world.
There was a time not long ago when associations were largely funded by annual dues and a big meeting. Today, however, about half of the money processed through Abila netFORUM Enterprise comes from dues, while the remaining half is generated by events, fundraising, product sales, credentialing, and other sources.

Adding nondues revenue sources isn’t one of those “if-you-build-it-they-will-come” scenarios, though. First, you should consider what type of program or initiative will add the most value to your membership. Next, you need to develop and implement a multiyear plan that includes a strong value proposition and aggressive marketing. Most importantly, you have to be prepared, willing, and able to lose money the first year you launch.

So what’s the best alternative revenue source? That’s a question you have to ask yourself, and your answer should be founded in your members’ greatest needs. Personally, I think online continuing education and credentialing could top most associations’ lists. Professional credentials can give your members a strong competitive edge in the marketplace, and it can give you recurring revenue.

PREDICTION 3: CLOUD AND RESPONSIVE DESIGN
The ongoing importance of the cloud will continue into 2015, especially for organizations looking to do more with mobile and social. Additionally, responsive design will be essential to give members, especially younger ones, access to information on websites from any type of device.

When buying new software, first consider whether it has the functionality to truly solve the management issues you face. Then, you need to consider cloud-based versus on-premise. When your software resides in a private cloud, you reduce IT infrastructure needs, implement faster, and get server and data security at the hosted facility. The cloud is best for organizations that don’t have or don’t want to buy, maintain, or staff an IT infrastructure, as well as those who have concerns about disaster preparedness.

And, when it comes to designing and updating your website, consider responsive design. This approach provides an optimal viewing experience across a wide range of devices.
In my basement closet sits my family’s testament to the promises and hopes of modern technology: a giant plastic box containing a collection of wires, power supplies, ethernet cables, old modems, and an untold number of used and multicolored mice (not the mice you usually find in basement closets). Anytime there is a tech problem, I trudge to the basement in hopes of finding the answer in that box. After the usual futile search, during which I find a first-generation TiVo remote and wonder why I keep it, I head out to the store to buy what are undoubtedly more wires for the box.

For many associations, IT departments can start to look a lot like the box in my basement. Things work most of the time, and when something breaks or stops working, they try to patch together a solution out of existing parts (technology and investments). The danger of this approach is that it can leave an organization using and maintaining a number of different and incompatible technologies that will need to be dealt with some day—and that someday comes only when there is a crisis.

Despite an association’s size or budget, the solution to many technology challenges does not lie in technology itself but in key management fundamentals: specifically, a flexible technology governance process that helps the organization prioritize and then make sound technology investments. This process doesn’t need to be complex to be effective, but it must be consistent and disciplined. To develop a basic technology governance process and a more effective, efficient use of technology, begin with the following three steps.

**STEP 1: WHAT ARE YOUR ASSOCIATION’S CORE TECHNOLOGY NEEDS IN ORDER TO SUPPORT YOUR VISION AND MISSION?**

Just like many of us buy more clothes and books than we really need, associations often err on the side of buy-

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**COMPANY BIO**

Sapient is the number-one digital agency in the country, working with the biggest brands in the world. We apply that tech expertise to nonprofits’ needs, working with them to provide the insights and tools that link solutions to their overall strategic context. Specifically, we help associations and member organizations think through the big-picture challenges—like mission and vision, product offerings, and partnerships—that are crucial to their relevance and then recommend and implement the means to meet them.
ing way more IT capability than they really need. This is driven by good intent but often leads the organization to overspending.

To understand your association’s core technology needs, begin by imagining your organization as a startup. What are the absolute basics you need to fulfill your mission? Then explore other areas in which you are using technology that may not be critical but are nonetheless important to delivering on the mission. Ask yourself, are we using this technology to its full potential and getting the maximum value out of the investment? If not, what can we change?

STEP 2: DOES YOUR ASSOCIATION’S CURRENT TECHNOLOGY INVESTMENT ENHANCE OR DETRACT FROM YOUR MEMBERS’ EXPERIENCE?

After working through step one, you may realize that the way you are using technology is actually creating barriers between you and your membership. On this point, the view from headquarters can differ from the view from the field—where your members are.

The solution is simple but follow-up is key. Begin by using one of your association’s events to talk directly with members about your website, social media presence, dues-payment process—all that you are doing online. Member feedback is the guiding star that can direct your association’s technology spend to align with member expectations and overall mission.

STEP 3: REVISIT STEPS ONE AND TWO REGULARLY.

Like exercise, ensuring that technology expenditures support and enhance the member experience is something you have to do regularly to stay in shape. With a commitment to making the most of these investments and the discipline to regularly evaluate how you’re doing and change course when needed, you can get beyond crossed wires and make technology fundamental to your organization’s success.
After watching some of the fantastic Super Bowl XLIX commercials, especially those poking fun at technology, I thought to myself: When did I start using cloud and strategy in the same sentence? Now, that is all you hear about. The funny thing is, what they mean exactly can be sort of foggy. So, let’s first quickly establish what a cloud strategy means and then talk about what its components are.

The strategy that I think we are trying to define is one that gives your association the best possible chance of succeeding, and weathering, all types of challenges. Those challenges are not always just a result of extreme weather that takes power down for days or prevents us from physically going to work, but they can also stem from our transition to becoming a more mobile work force (e.g., geographically dispersed staff and board members).

Having the ability to access services from anywhere is not just a “nice to have” but something that is seen as a “must have” by employers and employees. Having the ability to expand the environment that those services live in has become a critical part of running a modern office. And we need this availability and capacity to come at a price we can afford. So, there you have it: Your cloud strategy is to put together a plan that allows you to house the services and applications that are critical to your business in a reliable, secure, and flexible cloud platform. This allows you to make the most of your existing resources, and it can grow as your business grows and even shrink if your business shrinks.

For example, Microsoft’s Office 365 is fast becoming the norm for running an entire office in the cloud—a go-to office anywhere that is much more than just email. Microsoft Office 365 is not just another licensing change from Microsoft, but a profound change in how you run your operations. It offers compelling benefits of unified communications to a disparate workforce. As an additional advantage, qualify-
ing nonprofit organizations can get Office 365 for free or at reduced rates.

You have no doubt heard all the commotion specifically around Office 365 email, but when it comes to a well-rounded cloud strategy, it just can’t be around a single application, right? Office 365 comes with much more. Lync is an instant-messaging component that displays your availability status automatically, based on your Outlook calendar. SharePoint and One Drive are a place to store files that you can access from anywhere, work on collaboratively with associates, and share with your stakeholders. They all come with most Office 365 licenses and are prebundled to give you everything you need to run your business in the cloud. The Office 365 Business, Business Premium, ProPlus, and Enterprise E3 versions also come with the Office Professional Plus, which includes essentials like Word, PowerPoint, Excel, Access, OneNote, and more.

Contradictory to what you may have heard, Office 365 is also easy to set up and manage over time. Whether you have an internal IT team or plan to work with a technology partner, make sure your organizational needs are clearly defined and addressed. Your association is unique and so will be your pathway to the cloud. A successful cloud strategy will help you avoid costly mistakes and focus on ways to increase user adoption along the way.
