THE WORLD AWAITS

LOOKING TO GO GLOBAL?
A CONSULTANT CAN GUIDE YOUR INTERNATIONAL JOURNEY. 5

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To take advantage of international opportunities, you may need some help plotting your itinerary around the world. The right consultant can provide specialized knowledge to help associations become global growers.

BY APRYL MOTLEY, CAE

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A good contract forms the basis for your collaboration with a consultant. Follow these do’s and don’ts to improve the likelihood of a good working relationship and results that meet your association’s needs.

**DO SPELL OUT EXPECTATIONS.** Is the consultant providing advice, conducting research, leading a board retreat, designing a website, or planning a conference? The contract should clearly identify what services or products are expected. Don’t forget to include the association’s role—for example, providing background materials, scheduling meetings, or reviewing drafts of reports.

**DO SPECIFY MILESTONES.** These are project components that are to take place or due to be delivered on a certain date. For example: “The first draft of the communications analysis report will be delivered on or before May 1, 2015.” Milestones help to ensure that the project is proceeding on schedule and give you and the consultant the opportunity to identify any open issues or revise the schedule as needed. Identify any dates that you cannot change, such as dates of board meetings where the consultant’s work product will be presented.

**DO IDENTIFY EXPENSES.** Expenses typically passed on to the client include overnight courier charges, conference calls, copying, and online research fees. Include any anticipated travel expenses for the consultant to attend meetings at your association’s office or other locations.

**DO OUTLINE PAYMENT TERMS.** Payments can be tied to milestones or made according to another schedule. Most consultants charge on an hourly basis, although some will complete a project for a flat fee. A good rule of thumb is to pay no more than one-fourth of the total fee upon signing the contract, arrange for some payments midway, and hold back at least one-fourth of the payment until the consultant has completed all work to your satisfaction. If the consultant is charging by the hour, make sure the contract specifies that the final invoice will not be paid until you are satisfied with the work product or service performed. Avoid paying on an hourly basis with payments made the same day as your association’s payroll, as this could lead to the conclusion that the consultant is an employee.

**DO SPECIFY OWNERSHIP OF ANY WORK PRODUCT.** If you hire a consultant to design a new website, be sure that the association owns the domain name and all content. Or if a consultant will design a new media kit, the association should own all rights to its contents so you won’t have to get permission to make changes. Beware of shared copyrights, as either owner may use the work without the other’s permission.

**DO REQUIRE THE CONSULTANT TO OBTAIN RIGHTS FOR ANY THIRD-PARTY INTELLECTUAL PROPERTY USED IN THE PROJECT.** The consultant should turn over the copyright assignments or licenses to the association with the final work product. All rights should be in the association’s name, with the consultant...
acting as an agent for the association.

DON’T AGREE TO PAY ONGOING LICENSING FEES FOR CONTINUED USE OF THE CONSULTANT’S WORK PRODUCT. This requirement is sometimes found in consulting contracts for software development. This practice is not illegal, but it can be costly. Any ongoing licensing rights payment should be included in the total cost of the project.

DON’T AGREE TO AUTOMATIC CONTRACT RENEWALS. If you have a reliable contract management system, then automatic renewals are not a problem. But without such a system, you might have contracts renewing that are no longer of value.

DON’T BE AFRAID TO SUGGEST CHANGES. If the consultant presents you with a proposal, scope of work, or contract terms that aren’t right for your association, work with the consultant to make appropriate revisions. The document you sign should reflect the actual terms of the deal.

DON’T SIGN A CONTRACT BEFORE YOUR ASSOCIATION IS READY TO BEGIN WORK. Consultants schedule their time based on anticipated client needs. If you sign a contract and are not prepared to proceed, the consultant might miss opportunities to take on other projects before your association is ready to move forward.

EILEEN MORGAN JOHNSON is an attorney at Whiteford, Taylor & Preston LLP in Falls Church, Virginia. Email: emjohnson@wtplaw.com

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The consultant who best meets your association’s needs may not be just around the corner, but with good communication, you can establish a harmonious long-distance relationship.

“All of my clients are located a plane ride away,” says Holly Duckworth, CAE, chief executive officer of Leadership Solutions in Denver. Geography shouldn’t be a major factor in selecting a consultant, she says, especially with the technology tools currently available.

Loretta Monterastelli DeLuca, CAE, founder and CEO of DelCor Technology Solutions in Silver Spring, Maryland, uses tech tools regularly to communicate with her clients. Recently, she conducted a debriefing on a strategic technology plan for a client in California via video conference.

“It doesn’t matter where you are,” she says. “You only need to be onsite [with the client] at key times.” In this instance, it didn’t make sense to fly across the country for a 90-minute meeting.

Remote working relationships are quickly becoming the norm. Organizations in search of the best expertise are open to working with consultants remotely, Duckworth says. For a Washington, DC, association, for example, “if the best experience you can get is in California, you’d be foolish to go with someone across the street.”

Certainly, Duckworth and DeLuca value face-to-face time with their clients, but they plan it carefully to maximize its benefits. “We establish upfront that it’s a remote relationship,” DeLuca says. “We specify when we’ll be onsite.” For instance, most of the project management work for a Chicago client’s website was handled remotely, but the DelCor team was there for key milestones.

Engaging in effective communication remains a top priority for Duckworth and DeLuca in all their consulting relationships, local or long distance. But when working with consultants remotely, they suggest that associations give these areas extra attention:

**IDENTIFY YOUR PREFERRED COMMUNICATION CHANNEL.** Perhaps you want a 50-page report, or you might prefer a webinar. “It’s about the client and not the consultant,” Duckworth says. “You should agree upon the communication channels that will be used.”

**BE RESPONSIVE.** It’s as simple as returning phone calls and replying to emails. “Otherwise you lose the ability to communicate,” DeLuca says. “Associations have to be responsive to requests for information.”

**MAXIMIZE INFORMATION EXCHANGE.** It’s better to be sure than to wonder whether you’ve communicated clearly or understood what was communicated to you. “If you’re going to invest in a consultant, respect their expertise,” Duckworth says. “Be willing to ask and answer lots of questions.”

**SCHEDULE ONGOING COMMUNICATION.** By putting a standing meeting (by phone or video) on your calendar, you’ll help keep your project on track. “We have regular project status calls once a week during the implementation phase” of a project, DeLuca says, “so clients don’t feel like they’re out there floating on their own.”

Of course, when the need arises, most consultants will get on a plane and go to the client. It’s that willingness to go those extra miles—literally—that makes long-distance consulting relationships work.

**APRYL MOTLEY, CAE,** is a writer, editor, and communications consultant based in Columbia, Maryland. Email: amotley27@aol.com
To take advantage of international opportunities, you may need some help plotting your itinerary around the world. The right consultant can provide specialized knowledge to help associations become global growers.

BY APRYL MOTLEY, CAE
“WE ARE THE WORLD.”

When Michael Jackson and Lionel Ritchie wrote this simple lyric almost 30 years ago, no one could have anticipated just how prophetic these four words would be. In almost every business sector, global expansion has become essential to maintaining sustained growth, and associations are no different. “U.S. associations have started to feel a plateau in growth in domestic markets,” says Nikki Walker, vice president, global association management and consulting for the MCI Group.

So, many associations are looking abroad for new opportunities. And recent research by the MCI Group and the ASAE Foundation found some common characteristics among organizations that are succeeding internationally.

Associations participating in the “Achieving Global Growth” study were classified into two main groups: growers and nongrowers. In general, growers introduced products into global markets more frequently, and they conducted international meetings and training at significantly higher rates than nongrowers. Overall, they took a more proactive approach to global outreach activities, which led to better financial results.

For associations interested in global expansion, these findings reinforce the importance of developing a strategy for entering international markets. Until now, many associations have operated in the global arena as veritable accidental tourists, attracting people from outside the United States to their meetings or certification programs by chance.

In contrast, Walker notes, “growers are the ones who really have proactive strategy for working internationally that goes beyond letting customers come to them. Instead, they are proactive about pursuing them.”

Often these associations seek outside expertise as they begin their international journey. “A consultant can help with developing a global strategy,” says Susan Newman, executive director of Corporate Facility Advisors International. “If someone inside the association is saying we need to go global, in the beginning it’s helpful to have an outside perspective.”

Consultants offer best practices and a broader view to help associations manage their expectations about going global.

KNOW THYSELF

Is your association ready to expand globally? The answer to this question likely lies in your data. Before making any major decisions or even beginning to work with a consultant, associations need to analyze their data from attendance at meetings or participation in certification programs, for example, to gauge the level of international interest in their products and services.

“The absolute readiness [for going global] is understanding and analyzing your own data,” Walker says. “Until associations have done that, they shouldn’t be talking to anyone.”

Once they have analyzed their data, associations sometimes need guidance about next steps.

“That’s where they often turn to consultants to give them local insights and knowledge,” Walker says. “They may not understand why training products are important in a particular market or why membership products mean very little. A consultant can help them understand those market dynamics.”

Newman notes that consultants can be particularly vital in the early stages of international expansion. “There would likely be a bigger learning curve for a staff person, so the consultant can help jumpstart things and possibly move them along more quickly,” she says.

NO COOKIE CUTTERS

Along with self-awareness about their potential for going global, associations need an outside perspective to better understand how their brands are perceived in international markets. “U.S. associations growing successfully understand that what works in the U.S. is a foundation,” Walker says, “but they can’t cut and paste the same content or pricing and expect to be successful.”

“One size does not fit all,” Newman notes. “A product or service that is well-respected in the U.S. may not be in another country.”  

— NIKKI WALKER
Murat Dogru, community and corporate relations manager for the American Society of Mechanical Engineers (ASME) and an MCI account manager, agrees that associations need to understand their target market before moving forward with a global opportunity.

“Before making a major investment, associations can hire a consultant to conduct voice-of-the-customer interviews for a specific market,” he says. “The aim is to analyze the market before making an investment. A consultant can assist you in monitoring the answers from the market before making decisions about how to move forward.”

In doing so, consultants play an important role in giving associations insight into how their brands are viewed internationally. “We help staff and boards remember that in markets outside the U.S., they are start-up brands,” Walker says. “It will take time to grow and build their brands, and often chief staff executives will want help conveying these messages to their boards.”

It goes back to associations recognizing their core competencies. For example, do they understand how their body of knowledge can be applied to other countries? Do they already have a good approach to risk analysis and market adaptability? “If the answer is no,” Walker says, “they need to bring in consultants with appropriate expertise to assist them in working through these points.”

ON THE GROUND AND GROWING
 Consultants with expertise in specific markets of interest can be an association’s eyes and ears on the ground in those countries. “A consultant may have already developed relationships and have knowledge of the culture and can leverage his or her contacts on your association’s behalf,” Newman says.

After working with ASME for almost four years, Dogru sees himself as a “staff member doing business in Europe.” ASME has more than 130,000 members in 158 countries. The association opened a European office through MCI Brussels in 2005, which serves as the hub for its work to develop a training business in Europe.

ASME conducted a market analysis and then began development of customized courses for the European market. Some ideas come from Dogru, and then courses are designed at ASME headquarters with input from staff there. “It’s a collaboration and a discussion where each party will work together to correctly address the needs of the market,” he says.

Dogru spends lots of time communicating with current clients and prospects in Europe to see if what ASME plans to offer is appropriate. “These interviews need to be ongoing,” he says. “We have to reconnect with them to determine whether our initial offering still meets their needs.”

In this regard, Dogru believes it’s important for associations to work with consultants who “are close to the market and the people.” He attributes the initial success of ASME’s European course offerings to the customer service structure in the Brussels office.

“We can act more quickly” than staff in the U.S. can, Dogru says. “I can monitor a company’s needs and be proactive in suggesting additional training for customers.”

THE LONG HAUL
 Success in the global marketplace certainly doesn’t happen overnight. “Our aim is to be seen as a revenue generator instead of a cost center,” Dogru says. “For that, you need a long-term strategy. The society had to accept the long-term investment up front.”

“Doing things internationally is a long-term commitment,” Newman says, “so setting reasonable goals is important. If a United States association thinks it will double its membership in a year, that’s not realistic.”

Consultants help associations manage their expectations about growing globally by bringing an optimistic but realist perspective to their efforts. “U.S. associations are very well positioned to take advantage of this opportunity,” Walker says, “but the world is a big place. Segmentation is important, and one size does not fit all.”

APRYL MOTLEY, CAE, is a writer, editor, and communications consultant based in Columbia, Maryland. Email: amotley27@aol.com
When you’re considering whether to hire a consultant, what’s the most important question you ask, and why?

MAELANIE L. HERMAN
EXECUTIVE DIRECTOR
NONPROFIT RISK MANAGEMENT CENTER
LEESBURG, VIRGINIA

“Can you provide contact information for two current clients and one former client?” I’m a big advocate of reference checking. It’s the most important due-diligence step prior to hiring a consultant or vendor. And when making reference calls, I always ask, “What advice would you give to someone working with this consultant/vendor for the first time?” The answers to this question will often yield what you need either to avoid a disaster in the making or to make the most of a new relationship.

STEVEN A. BARBATO
EXECUTIVE DIRECTOR AND CEO
INTERNATIONAL TECHNOLOGY AND ENGINEERING EDUCATORS ASSOCIATION
RESTON, VIRGINIA

“What do you typically find to be the most challenging aspects of working with new clients, and how do you address these issues?” I choose this question to see if the consultant has had experiences that are similar to those that will likely be faced in working with our association. This question also elicits their ability to problem-solve creatively on behalf of their client.

JEFFREY SHIELDS, FASAE, CAE
PRESIDENT AND CEO
NATIONAL BUSINESS OFFICERS ASSOCIATION
WASHINGTON, DC

“Do I have the expertise on staff, and if so, does that individual have the bandwidth to do the project?” If the answer is no, then ask yourself if the skills are needed for the long term or short term. If it is a long-term need, a full-time or part-time staff position may be considered versus a consultant. Finally, what are the financial resources that the association has available? Having a consultant could still be more affordable after the association considers salary, benefits, overhead, and taxes for a staff member.

SPENSER VILLWOCK
CEO
INDEPENDENT ELECTRICAL CONTRACTORS ROCKY MOUNTAIN
LOVELAND, COLORADO

I like to ask a potential consultant a very forward and abrupt question toward the end of our initial conversation: “What passion and calling led you to become a consultant?” This question always derails them from sales-mode talk, and the wonky jargon stops there as well. The true person comes out in the sentences that follow, and they help give you data to make an informed decision.
When you’re considering whether to hire a consultant, what’s the most important question you ask, and why?

SYLVIA HENDERSON
FOUNDER AND CEO
SPRINGBOARD TRAINING
OLNEY, MARYLAND

I ask the potential consultant what he or she has done for their own business development or for examples of their work in similar situations. If they don’t invest in their own development, how do they expect me to invest in them for mine? And if they say, for example, they are web developers, yet examples of their own material look bad, why should I expect them to make mine look or perform any better?

KWOK-SZE WONG, CAE
EXECUTIVE DIRECTOR
AMERICAN SCHOOL COUNSELOR ASSOCIATION
ALEXANDRIA, VIRGINIA

The primary question I would ask a prospective consultant is the same question I would ask a prospective staff member: What do you know about our organization? A consultant who hasn’t made the effort to learn everything he or she can about us, beyond just surfing our website, probably wouldn’t make the effort to understand us as an organization and our members and therefore probably wouldn’t provide us with the personalized services we need.

RICHARD POPPA, CAE
PRESIDENT AND CEO
INDEPENDENT INSURANCE AGENTS AND BROKERS OF NEW YORK, INC.
DEWITT, NEW YORK

“What can the consultant do that our staff or volunteers can’t do?” There are many legitimate answers to this, including a deeper or broader expertise, more available time, and access to relationships that you wouldn’t otherwise have. It is very important to set out proper expectations for the consultant, who he or she will be working with, what are the specific deliverables, and what’s the timeline. Why you ask this question is to make sure your needs and expectations are aligned with the consultant’s ability to perform so you don’t waste time, money, and opportunity.

G.A. TAYLOR FERNLEY
PRESIDENT AND CEO
FERNLEY & FERNLEY, INC.
PHILADELPHIA

“How are you going to measure success in our business relationship?” If you and the consultant are not on the same wavelength in terms of evaluating success, it will be a futile effort and a waste of everyone’s time. It is remarkable how many consultants are completely unprepared for such a direct question. If they are lucky enough to “survive” the question, they are added to a short list. Then I perform a deeper dive to identify the best candidate.
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.

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Lee Weinstein, IPA Vice Chair
Syscom Services, Inc
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lweinstein@syscomservices.com

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<th>Consulting Services</th>
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