STRATEGIC ALIGNMENT
TODAY’S TECHNOLOGY SOLUTIONS CAN HELP MATCH YOUR STRATEGY WITH THE VALUE YOUR MEMBERS ARE LOOKING FOR
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
In today’s digital age, associations need to rely on technology to support their missions and create value for their members. The 2019 Tech Toolkit can help you select companies that can provide and implement the technology solutions you’re looking for. From digital marketing and data-collection systems to event management and membership software, these providers will help you execute on your technology strategy today and in the years ahead.

TABLE OF CONTENTS

AdvantageCS..........................................................2
Beaconfire RED ..................................................4
CE21 LLC ...............................................................6
CIMATRI .................................................................8
Community Brands ................................................10
Fonteva .................................................................12
MemberClicks .........................................................14
MemberSuite ..........................................................16
Pathable Event Apps .................................................18
Protech Associates, Inc.................................20
WizeHive .................................................................22
WBT Systems Limited ...........................................24
7 STEPS TO GUARANTEED FAILURE WHEN SHOPPING FOR A NEW MAJOR SOFTWARE APPLICATION

BY DAN HEFFERNAN

Over the decades, we have heard horror stories of organizations who have chosen the wrong system or application to accomplish some major task (e.g., association management, CRM, sales order processing, subscription management). So, we’ve honed a list of the steps, which, when strung together, can guarantee failure. That is, the wrong system will be chosen, which will cost your organization lots of money and years of wasted time. Now, it is possible that failure will occur by simply executing any of the seven failure steps! So, if it’s failure you’re chasing after, you could be closer to it than you think.

1. Make sure you are unclear about your requirements, so you can’t communicate them to the software vendor. After all, if you’re clear, you might slip in your communications and let the vendors know what you really need. This could be the first step in your path toward nonfailure, which would, in itself, be a failure. Right?

2. Automatically flock to the latest, shiny, and bright new system that seems too good to be true, regardless of its ability to meet your requirements. See number one above—if you aren’t clear about your requirements, then this will be easy. Just concentrate on the flocking and ignore what the application actually does. There are those catchall software names that cause people to stop asking questions. If anyone in a meeting asks how you are going to accomplish such and such, just respond, “We’ll

COMPANY BIO

AdvantageCS is the developer of Members Advantage—membership, subscription management, and product fulfillment software for membership organizations, publishers, and information providers. Leading organizations rely on Members Advantage to manage their membership and donations, conferences and events, digital subscriptions, entitlements, magazines, bundles, e-products, continuity programs, product orders, payments, and customer service. Members Advantage also offers a comprehensive self-service member portal; eCommerce platform; high availability, sophisticated business intelligence tools; multi-currency; and multi-local taxation.

A privately held corporation, AdvantageCS has developed software since 1979.
do that in SellPower” (or whatever trendy software you’re going to be using), and the questioner will stop asking questions. It really works like magic to do this.

Don’t talk with experts, consultants, and colleagues in the industry to find out who they recommend. If you do speak with them, you might get actual solution providers, instead of vendors, who may promise to provide whatever solution you ask for without actually checking to see if it will meet your needs.

Do not, under any circumstances, ask for references. But if you do, make sure you don’t talk with those references. After all, why would you want true experience to confuse your decision-making? Choosing is hard enough.

Shop for price only; all the solutions must be the same, right? So, the cheapest must be just as good as all the others.

Do not consider working with solid, established companies, because they have experience that might guarantee success. Also, they might be around years from now when you still need them. Instead, go for the lean and inexperienced startups with no track record of success. They’ll make up for their shortcomings with boundless energy (and billable hours).

Don’t pay close attention during software demonstrations. Don’t ask how the software will do something. Stay out of the weeds. Just imagine that cool new software being used by your organization, and life will be good.

Now that we’ve given you the top steps to failure, let’s just add that an attitude of limitless optimism, no matter what fiascos occur, will further solidify your results. Don’t be realistic … just trust that everything will work out. And it won’t. Guaranteed!
Personalization shapes and tailors the majority of digital consumer experiences. The business world uses personalization services to sell and upsell to consumers more efficiently and to give visitors news and information that interests them.

When an association asks us for personalization on their website, they often have visions of a fully personalized Amazon-like product experience or a news feed personalized like Facebook or Twitter. These types of personalized web experiences are expensive and require mountains of personal information, yet they deliver less value when compared to the cost and the alternatives.

So, what can associations do to get the benefits of personalization for priority experiences that matter to their audiences, without breaking the bank? Here are six practical recommendations for making the most of your personalization dollars:

1. **Ensure you have a self-service member portal.** At a minimum, leverage your AMS to allow members to see their profile, update their information, view their purchase history, and easily access discounts and membership benefits.

2. **Focus on personalized communications.** Email is still the primary means of communicating with your members. It’s important to invest in quality email and marketing automation solutions that can personalize your messaging, segment your members by audience, and automate the management of interest and delivery preferences. For example, use personalized email to send early career topics to your student members or send legislative updates to those with interests in your lobbying work.

Providing personalized content in email newsletters or as notifications from online community topics is far cheaper than web personalization. One client replaced web notifications in favor of personalized digest emails and achieved an impressive 25 percent weekly open rate. Personalized
advertising or other outbound marketing activities are also more cost-effective than web personalization efforts.

3. **Use group or audience personalization.** Sitewide one-to-one personalization like Amazon can be costly and overkill. Start with large groups (member versus nonmember), then drill deeper into personalizing by member type or other subsegments, prioritizing where messaging varies the most. This type of personalization requires some knowledge of your visitors and also having content tagged to each audience or segment type. Otherwise, there will be limits to the granularity of personalization.

4. **Site trends.** Use the aggregate behavior of your site visitors, not just the site editor’s choices, to prioritize content on key pages or in search results. While not exactly personalized, elevating the most commented articles, the most downloaded files, or the most shared information does generate some of the same engagement benefits for users.

5. **Behavior-based personalization.** This can be extended to visitors or members who took the same actions, offering them recommendations for similar content. You can use learning algorithms to do this and avoid manually tagging people and content. However, an algorithm requires a ton of content and high traffic numbers to make its recommendations.

6. **Personalized content recommendations.** Ultimately, matching the right content to each visitor is the best representation of personalization. This approach requires lots of tagged content and requires your members to specify (and you to capture) their interests, both of which are difficult to achieve at a high percentage. Therefore, most large-scale personalization efforts use behavioral tracking and learning algorithms and also allow for additional user feedback to guide or override the algorithms. But, this complexity comes at a high cost.

Where to start? Employing just tactics one through four can drive member value for fractions of the cost. If you’ve got the budget, add behavior-based personalization for the ultimate engagement.
There is no question that technology has become a powerful and essential tool for transforming how people access learning—especially continuing education and professional development. It can enhance the relationship between education providers and learners, ultimately producing a rich environment where organizations can create new approaches to learning and collaboration and potentially removing equity and accessibility gaps—all while delivering an experience that meets the real needs of learners.

The evolution of modern learning technologies has provided member-based organizations access to solutions that uniquely support professional development for the constituents they serve. Associations are no longer forced to adapt their continuing education programs to technology that was designed and targeted for corporate or academic use. No more trying to fit a square peg into a round hole with less than desirable results.

Utilizing the technology available in today’s learning management software solutions, associations are able to competitively position themselves as leaders for professional development in their profession or industry.

An LMS enables associations to effectively tap into their wealth of subject-matter experts and convert that industry expertise and knowledge into digital content that is cost-effective to produce and easy for members and other learning customers to access. Whether it be for certification or licensure, many associations are experiencing revenue growth through the sale of accredited online continuing-education content that is eclipsing income from traditional revenue kings like annual and regional meetings.

That is not to say that online education events are on track to bring about the demise of live events. Personal connections through face-to-face networking are too integral to the DNA of associations to be replaced by an online-only...
approach. However, these traditional education events can no longer thrive while excluding a large percentage of an association’s constituency due to geographic, financial, or time restrictions.

A 2017 ASAE Foundation research project noted a gap existing between association staff perceptions and member perceptions of member interests in technology. Thirty-six percent of the 5,000 IT decision makers and association members identified themselves as early adopters who were optimistic about new technology.

Generational shifts in the makeup of associations will affect the tech needs of members based on their perceptions and life experiences. Baby boomers tend to be the most satisfied with the technology their associations provide, while millennials are more likely to express some dissatisfaction with their association’s technology, feeling that it should be expanded to meet their changing needs.

Looking at these shifts, a mobile-first approach has become a best practice as more members are looking to consume the content they seek, both informational and educational, on their device of choice. Schedules and lifestyle choices make it important to have these services available whenever and wherever desired.

An LMS with robust social-learning capabilities will have an advantage in helping bridge the social interactions not only between members but also with the association as well. The need for associations to take advantage of the strong social culture of their membership within the LMS they use is key to staying ahead of commercial continuing-education providers who lack that social connection.

Associations will need to come to grips with the evolving needs and changing attitudes of members, especially regarding continuing education and how it is delivered. Digital disruption thrives in the continuing-education space, with associations facing competition coming at from multiple directions. Organizations can no longer afford to operate continuing-education programs with a nonprofit mentality and expect to maintain success. The good news is today’s LMS solutions can go a long way to helping level the playing field.
For several decades, technology strategy for associations has been a function of automating everything in sight. We installed an association management system for membership records, implemented a learning management system for professional development, and utilized a content management system to create dazzling online member experiences.

And now, precisely because we automate everything, the world has changed. Not only did technology become a lot more prevalent, but it also got a lot smarter. Technology that now permeates our personal and professional space is creating massive quantities of “digital exhaust” or metadata. This byproduct of our push to automate has created a rich source of information that can be leveraged to better understand your members.

Do you ever wonder how Amazon knows what new tech toys you were browsing recently, or how OpenTable knows which restaurants are near you? Our metadata has become the fuel of new business models that are engaging, convenient, and personalized.

As our members engage on these platforms powered by metadata, their expectations for associations have also changed. Members expect us to employ these same data-driven technologies to deliver highly personalized products and services based on their preferences and patterns of engagement.

To address this need, it’s no longer enough to automate the back office. It is now possible to use deep analytics, artificial intelligence, and personalization technologies to design highly customized member experiences. Personalization is a core value proposition of digital transformation.

THE POWER OF PERSONALIZATION: LEVERAGING YOUR DATA AND METADATA TO REKINDLE ENGAGEMENT

By Rick Bawcum
for associations.

This aspect of digital transformation requires that we embrace new types of innovation and creativity. We must go well beyond enhancing back-office systems and re-engineering old business processes. Associations must develop or acquire new core competencies in strategic planning, data sciences, and service design. The good news is that the behemoths of the data-driven business models (e.g., Amazon, IBM, Microsoft, and others) are now deploying their technologies to the masses.

We can borrow concepts from lean entrepreneurship to create a digital strategy, buy off-the-shelf artificial intelligence tools to probe data and metadata, and rapidly deploy applications in the cloud. It is growing increasingly more cost-effective and efficient for associations to utilize these tools to power campaigns, enable personalization on digital apps, and deliver products and services to members at the time, place, and price point of their choosing.

Here are a few tips to get started:

**Take inventory.** Understand your “IQ,” or innovation quotient. How tuned in are you to your customers? How well does your culture handle change? How clear is your mission? What is your process for pursuing new initiatives?

Toss out the old strategic planning process. It’s probably too slow and doesn’t respond to rapidly changing forces. Embrace lean principles for strategic planning, project prioritization, and program execution.

**Fail fast.** Run many experiments and diligently listen to your members about what works and what doesn’t. Success is not about the big fish eating the small fish. It’s about the fast fish eating the slow fish.

**Change your technology adoption mindset.** It’s no longer safe to be a late adopter. Your members will move on to other options before you can fulfill their needs if you wait. Use lean strategy and agile development techniques to manage risks and deliver solutions more rapidly.

**Acknowledge where technology fits in your portfolio.** The prevalence of smartphones, apps, and beacon sensors define technology as a core component of the member experience. Be realistic about budgeting and implementing new technology solutions, particularly in areas of data and analytics.

And, finally, don’t go it alone. Find experts who can help.
FRAGMENTED TECHNOLOGY?
CONNECT YOUR MEMBERS
AND YOUR TECHNOLOGY TO WHAT MATTERS MOST

BY JEAN-PAUL (JP) GUILBAULT

Connection.

In theory, a simple concept; new applications, tools, and programs are developed daily to connect your members to the world around them. However, very few talk about fragmentation as a byproduct of a technology-driven society. An environment driven by mass production of technological tools for every aspect of our daily routine inevitably creates a highly broken experience.

The association community falls victim to the negative side effect of highly fragmented technology by relying on disconnected point solutions to manage member databases, engagement, learning systems, and revenue streams. These solutions are typically quick to implement and serve a singular function. The disjointed nature of transferring data from one system to another isolates information, resulting in a loss of meaningful records and membership efficiencies. However, streamlining operations or automating work within an association is often difficult to achieve due to the surplus of technology solutions or lack of integrations, which results in a significant amount of agonizing spreadsheet work for association staff.

In 2018, a research study done by Pegasystems found employees switch between 35 applications more than 1,100 times per day. They also found that employees only spend 28 percent of their workday inside of structured applications, suggesting that the technology we use isn’t adequate or appropriately sharing data. According to ASAE, the average association spends $74,000-plus annually on software tools. A significant expense for tools that create a siloed approach to running an organization and roadblocks efficiency.

Further complicating things, associations are also faced with new challenges from the outside. For-profit organiza-
tions, digital transformation, and other macro-level trends around how people work, live, and interact are driving new member expectations. Having a personalized and seamless experience is no longer a nice to-have, but a necessity in designing today’s membership model and required to remain relevant.

With recent mergers and acquisitions activity in the marketplace, the landscape and fragmented technology associations experience is soon to change. Top-notch product suites are creating a unified and uninterrupted member experience through product integrations. By adopting a fully integrated suite of products, organizations can manage memberships, career centers, learning, accounting, mobile giving, donors, and events in one centralized location from one vendor. The power to connect, cross-promote, and add member value is mightier than ever before. With a connected technology suite, associations can focus more time on members’ needs, personalized messages, and their mission.
MEMBER EXPECTATIONS VERSUS EXPERIENCE: THE WIDENING GAP FOR ASSOCIATION SOFTWARE

BY JAKE FABBRI

The focus of association management software has long been for the basic management of members. Keeping track of contact information, membership level, and other data certainly requires a management tool to support the maintenance of current and accurate data, but what if more was possible?

Increasingly, members expect a completely personalized experience with your association. Transforming your association’s member experience begins with a platform software solution.

BLOCKBUSTER OR NETFLIX?
Consider the difference between Blockbuster and Netflix: Blockbuster’s model was based on renting individual movies after browsing in-store options, while Netflix developed a platform allowing you to instantly browse movies with artificial intelligence-powered suggestions, tailored to you, for a monthly cost not much more than renting a couple of movies under the original industry model.

Of course, Blockbuster has been out of business for years, and we now take Netflix’s superb customer experience for granted. Given the choice, which approach makes more sense for the member experience you deliver? If association software has staff spending all of their time managing members, there’s less time to consider the bigger picture—optimizing the member experience.

The gap between member expectations and what’s possible to deliver with outdated legacy association software is widening. The best companies in the world aren’t using the customer relationship management systems they had 20 years ago. More often than not, high-performing companies

COMPANY BIO
Fonteva is a Salesforce Premier Partner and the leading provider of membership solutions built on the Salesforce platform. Associations choose Fonteva to enable digital transformation that empowers them to create and deliver a modern member experience. Fonteva’s Association Software Platform can easily scale and adapt to meet evolving member expectations. By harnessing the power of Salesforce, Fonteva delivers the number-one CRM purpose fit for associations, supporting any currency and language, to customers operating anywhere in the world.
are choosing the leading platform solution. In fact, 83 percent of Fortune 500 companies use Salesforce because they recognize there’s an innumerable amount of functionality not developed in legacy systems first released more than two decades ago.

Specifically, here are two powerful benefits to look for in a platform solution:

**Artificial intelligence.** In its simplest forms, AI extends what you’re able to accomplish by automating simple and repetitive tasks. By 2020, Gartner estimates that 85 percent of all customer service interactions will be handled by AI. Automation can also eliminate the need for manual data entry and analysis by automatically updating contact information, reporting key performance indicators, and identifying trends. Aside from skyrocketing productivity, the time freed up by AI-powered automation can be used to focus on improving the member experience. Staff can spend less time managing members and more time creating an experience that resonates deeply.

**Diverse ecosystem and third-party integrations.** With the right platform solution, you get access to an entire ecosystem of additional applications designed to work with a core system. This means you are able to use any application built for the platform from anywhere via the cloud. For instance, the Salesforce AppExchange has more than 3,500 applications that can be leveraged for almost anything—from project management to marketing automation tools and more.

**FIND A TRUE CRM**

A true CRM is one that can optimize the member experience at every point of connection—from email newsletters to online communities. It’s more than a tool to manage membership, it’s a platform that empowers staff to analyze, plan, and implement strategies with easy-to-use self-service functionality. With the right software platform, your association can bridge the gap between member expectations and the experience your members deserve.
FOUR TIPS TO ENCOURAGE HESITANT STAFF TO ADOPT NEW TECHNOLOGY

BY CALLIE WALKER

You may be at the point where you know you need new software in place, and maybe your staff and board are in agreement, but admitting you need something versus actually using it are two very different things.

Association professionals often find themselves in the following situation: They purchase a technology system, get up and running on it, but then no other staff members seem to actually utilize it. They stick with their old ways. Talk about discouraging. To get hesitant staff members to actually utilize new technology, consider the following tips:

Emphasize (and reemphasize) the why. When it comes to “selling” technology to your staff, you must continuously emphasize the why. With change often comes discomfort, so you need to state why that short—and emphasize short—period of discomfort will be worth it.

Will it provide your members with more value, thus boosting engagement and retention? Will it help keep your association relevant in continuously evolving times? Will it help you adapt to changes at a quicker pace? Those are all benefits that need to be communicated.

Get buy-in and action from the top. To purchase new technology, you likely need to get buy-in from the higher-ups within your organization. But now that you have it, are these individuals actually using the technology too? If you want all staff to utilize something, then the influencers within your organization must also be using it. And socializing it—talking about how they’re enjoying the technology and receiving value from it. If this becomes a standard topic of conversation, other staff members will feel the need to pursue adoption.

Hold short, incremental training sessions. One of the biggest reasons people avoid new technology is the learning curve that comes with it. Learning something new takes time, and that’s one thing many association professionals
don’t have. To make the process less overwhelming, consider hosting short, incremental training sessions. Maybe you do it once or twice per week. Each time focus the training on one specific feature of the technology. If you do this as a group, rather than leaving it up to individuals to learn on their own, you’ll likely see much higher adoption rates.

**Celebrate your wins.** Learning new software takes time and patience. Let your staff members know that you understand that, and when they use the technology to complete something new or cool, celebrate that as a win. Did they successfully use the system to pull a report that would’ve previously taken weeks to complete? Were they able to add a new widget to your website? Let others know so they’ll be encouraged to use the software as well. Everyone wants a little praise.
CHANGING YOUR VIEW OF THE MEMBER JOURNEY CAN DELIVER A MORE RELEVANT MEMBER EXPERIENCE

BY NATALIE CHENEY

Your members are constantly online and have come to expect an experience that’s both personalized and relevant. However, many associations choose to take a more linear approach to the member experience. This traditional approach assumes that all members have the same level of experience with the association and are moving along the same path, leading associations to send the same, one-size-fits-all communications to their members.

By contrast, when you target messaging to a specific member segment, it attracts higher attention and interest because the message is relevant and resonates with those members. It’s imperative that associations adopt an approach to the member experience that aligns with their members’ unique expectations.

Segmentation traditionally focuses on demographic characteristics, such as member type, age, or geography. However, it’s time to take this a step further by adding the stage your members and prospects are at in their journey with your association. We define these stages as follows:

- Recruiting—considering membership
- Onboarding—new members
- Maintaining—active members
- Renewing—members close to their renewal date

Because the membership journey is an ongoing process, we suggest that associations view the journey as cyclical rather than linear. Cyclicity acknowledges that this is an ongoing process and recognizes that at any time, associations will have members and prospects at each of the stages. Consider three members with varying tenure: new member in their second month, two-year member, and nine-year member.

COMPANY BIO

MemberSuite is the premier software and services provider of association management software and business intelligence solutions for member-based organizations of all sizes. MemberSuite harnesses the power of the cloud to deliver enterprise systems that enable modern organizations to accomplish every activity they need to serve their constituents. With dozens of modules, a fully customizable platform, and a dedicated professional services team, MemberSuite is changing the way modern associations do business. For more information, visit www.membersuite.com.
Each has different levels of experience with your association and would appreciate interactions aligned to their stage. Content should focus on the things they care about at this point in their membership.

MAPPING THE MEMBER JOURNEY
The first step in adopting this new approach is to identify the stages specific to each member segment. For each stage, document how your staff should interact based on a member’s expectations, needs, and wants. Consider their emotional and functional needs to uncover member pain points—areas where you can improve programs, processes, and practices. For example, during onboarding, a new member may feel overwhelmed by information and not know where to start on your website. Or, they may feel like an outsider when attending an event for the first time. Ask yourself: What information can we provide to orient them to our member portal and website? How can we help them meet fellow members?

TOOLS AND MEASUREMENTS
Regardless of the technology, associations can adopt this new method for engaging members. Even with Word docs and Excel spreadsheets, you can leverage the data to provide a more relevant, satisfying experience at each stage of a member's journey. Technology turbo-charges this strategy. Whether you have a simple database or a more sophisticated AMS with a wide range of solutions, you can collect data that will help you better understand your members and their engagement during each stage of their journey.

NEXT STEPS
An engagement strategy informed by data segmentation is the key to delivering a more relevant and satisfying member experience. As a next step to implementing a similar strategy for your organization, start with the following:

• Identify the member journey stages that are specific to your organization
• Determine messaging that’s appropriate for each segment of the journey
• Inventory your tech stack and assess how existing tools can help you gather segmented member data

Once you understand the behavior, needs, and interests, you will be able to provide a more personalized and transformative experience.
THREE REASONS IT MIGHT BE TIME TO UPGRADE YOUR MOBILE EVENT APP

BY LINDSAY MARTIN-BILBREY

Though it seems like every attendee has a mobile device or tablet in their hand, we hear from many event managers that their mobile event app adoption remains low, with average attendee usage ranging from 48.5 to 57 percent.

That’s just crazy. In any other space, that statistic would be unacceptable. Why should your association settle for less? It might be time to find a solution that encourages and engages your membership to stay connected and community-focused before, during, and after your events. But what crucial questions should your team be asking? Here are three:

HOW DOES THIS MOBILE EVENT APP HELP MY ASSOCIATION ENGAGE MEMBERS TO STAY CONNECTED BEFORE, DURING, AND AFTER OUR FACE-TO-FACE EVENTS?

If the sales team can’t give you a few good examples, plus a reference to call, start looking elsewhere. American Association of Critical-Care Nurses’ Conference Business Manager Laura Rednour echoes this and encourages finding an event app where members can’t help but connect.

“It didn’t take long for conversations to start organically [in our app],” Rednour says. “Seasoned alumni were sharing tips with first-timers, and discussions have extended well beyond the conference, with attendees posting information and sharing knowledge and best practices. By also allowing members to network with experts, you’re giving them something they’ve never had before. It’s very valuable.”

A great mobile event app allows for a private social network, as well as year-round engagement through an online network that is bonded together from being at the face-to-face event. Before, during, or after, it allows you to reach out and send personalized, real-time messages that let you focus attention on individual members as they become part of your event experience.
It should also let attendees upload and share photos, collaborate in streams of conversation, and access information valuable to their jobs. And the best part is you can get quantifiable data on how your engagement and connection campaigns are working through easy-to-access and user-friendly spreadsheets.

**HOW CAN THIS MOBILE EVENT APP BRING IN EXTRA NONDUES REVENUE?**

Baked into all conference apps should be help for your exhibitors and sponsors to be effective marketers, as well as help for your association to increase its revenue line through monetizing the show floor.

Look for features that give exhibitors trackable ROI. This could include sponsored ads, targeted SMS messaging, logo placement and information about their product, featured in-app interactive booths where attendees can view and download collateral pre-show, and the ability to easily schedule one-on-one appointments with leads or capture leads without having to rent extra equipment.

**DOES THIS MOBILE EVENT APP SEAMLESSLY INTEGRATE WITH MY AMS TO TRACK MEMBER ENGAGEMENT?**

Many associations rely on CEU programs as nondues revenue generators and to track membership engagement. But how do you verify if an attendee really went to the session? A great event app. Look for partners who are integrated with not just one but many AMS platforms, and ask for examples. The event app companies who’ve taken the time to build in quality AMS integrations are also the ones who are most focused on making members happy.
A n association’s member portal is among the most underappreciated tools in the organization’s member engagement arsenal.

I’m not talking about public-facing association homepages, but rather the members-only portals that are sometimes neglected in favor of the public-facing side. This oversight is troubling when you consider that 38 percent of people will stop engaging with a website if the layout is unattractive.

While first impressions (like your homepage) set the stage for visitors, an association’s member portal deserves a share of the spotlight. The portal is where members spend much of their time with an association. If the user experience is poor, they’ll get frustrated; but if it’s great, they’ll likely take it for granted.

Ironically, being taken for granted is exactly what you want! It means that everything is working properly and giving members exactly what they need.

Here are four ways to make sure you’re providing a great online experience for members:

**Focus on user experience.** User experience and member engagement go hand in hand. And it shows in the data. Forrester Research found that a well-designed user interface can raise conversion rates by as much as 200 percent. That translates to greater annual meeting attendance, a higher renewal rate, more journals purchased, or additional webinar attendees.

The first step of the process is to simplify the sign-in page, removing all unnecessary barriers to entry.

**Make sure it’s mobile-responsive.** A mobile-responsive site should be a no-brainer at this point, but many websites are still designed for desktop viewing.

It’s worth noting that the percentage of web traffic on mobile devices worldwide has risen from 0.7 percent in 2009 to 52.2 percent in 2018. If members expect responsive web pages on their mobile devices when they look up the menus at their favorite restaurants, they will surely expect...
the same from the member portal for their associations.

So what can you do? W3Schools is a great resource for learning how to automatically resize your site for any device. Or find a technology partner who’s already using these methods.

Remove or update old content. Do you have old events still sitting on your website? Start an inventory, then tear down and refresh as needed. This process also provides the perfect opportunity to consider all aspects of the member experience.

If enough content is past its prime, think about a transition to a dedicated member portal that exists separately from your content management system. That way, you can completely update your CMS and public-facing site at any time without any negative impact on members.

Fill in the blanks. Like businesses, associations now have the opportunity to use customizable templates when building out new pages of their websites and member portals. Ready-to-go meeting registration pages are one example.

Think of these as “plug and play” pages, which can save significant time in rebuilding an outdated member portal. If you go this route, find a solution that offers easily customized pages to match its CMS.

If an association wants to be instantly recognizable within its industry, consistent branding is essential. Color can improve brand recognition by as much as 80 percent. So if a portal exists in its own dedicated space, it important to be consistent with the branding in your CMS.

Here are a few other things to ponder:
- Are pages easy to navigate?
- Are all pages purpose-driven?
- Do other websites have ideas you’d like to incorporate?

It doesn’t take a major shift in business processes to enhance the member experience. To learn more about improving the member experience, download the e-book Association Experts Share the Hidden Truths to Member Engagement at www.protechassociates.com/member-engagement-guide.
ATTRACT YOUNG MEMBERS WITH SMARTER SCHOLARSHIP TECH

BY MELISSA GREINER

While building and showcasing your membership value proposition is certainly part of your strategy this year, if you are like most associations, you will be paying special attention to people in your field who are just starting their careers. By recruiting them as active members of your association at the get-go, you can help them get to their goals—and they can help you stay relevant.

Millennials and members of Gen Z are prime prospects for association membership. At the very start of their careers—either as students entering the field or recent graduates looking to make their name—they are likely to see appeal in some of the most frequently touted advantages of association membership, like networking, online training, and job boards.

Yet recent research from Naylor’s Association Communications Benchmarking Survey suggests that more than half (56 percent) of associations admit they have trouble engaging young professionals.

The next generation is a group focused intently on learning. They want to be challenged, to push limits, to gain new skills. So conferences, roundtables, and even online courses will probably sound appealing but might not be enough for them to plunk down the membership fee.

Undergraduate and continuing-education scholarships, however, can draw their attention. If, in exchange for your membership fee, they have the potential to get thousands in college funding, membership may look like a deal.

Another thing younger would-be members will be interested in is a seamless online experience. An outdated website design, clunky interface, or confusing navigation will have them bouncing, literally. So offering scholarships, or any other application-based program like a fellowship or grant, isn’t enough. The process you put your member through to apply needs to be easy and painless.

COMPANY BIO

WizeHive helps you streamline and simplify your application process with ZengineTM, a cloud-based platform designed to simplify collection, review, management, and reporting for grants, scholarships, fellowships, and countless other programs. Currently favored by more than 750 organizations, our robust yet simple-to-use platform:

• allows you to effortlessly customize forms, workflows, and reports to fit your process
• is designed to deploy quickly and adapt and extend to your needs over time
• integrates with your AMS—and more than 1,000 cloud-based programs—to further simplify your process
• offers best-in-class security and data privacy protection.
Yet according to the National Scholarship Providers Association’s 2017 Membership Survey, 34 percent of scholarship applications are still not online. Hard-copy applications are difficult to follow, require more work to complete, and can often lead to incomplete applications as your members try to rush through or misunderstand instructions.

Even if you have a web form, it’s still a headache. Attachments—think transcripts or letters of recommendation—must be emailed or snail-mailed separately and then are often misplaced. And if a member needs to stop during the application process, unsaved work could be lost completely.

The need for a clearer, simpler, more streamlined application management process is obvious. And in the past few years, technology has come on the market that allows associations to upgrade.

Scholarship management software provides one seamless platform that manages the full lifecycle for a scholarship, from application to review, administration, awarding, and feedback. These programs can be integrated into your AMS and software as well.

With a quality application management system, your members can enjoy single sign-on, a clean submission portal experience, saving as you go, uploading of files, and status check after submission. It doesn’t hurt that your internal team will enjoy the benefits of streamlining, too.

To stay competitive and approachable, it may be time to upgrade your member experience and your technology stack with an application management system.
Everything is changing, including jobs, professions, and industries. Digital transformation has turned “business as usual” into an exciting mix of challenges and opportunities for employers, professionals, students, and associations.

Your association can help members take control of their future by providing opportunities to increase their skills and knowledge, widen their professional network, and become lifelong learners.

**WHAT SKILLS DOES YOUR INDUSTRY NEED TO SUCCEED?**

Digital transformation is creating skill shortages in many industries. Soft skills are getting more attention now because they’re in short supply. In the PricewaterhouseCoopers’ CEO Survey, 77 percent of respondents believed the biggest threat to their businesses stems from underdeveloped soft skills. The 2018 Workplace Learning Report from LinkedIn said the top priority for talent-development teams is training employees in leadership, communication, and collaboration—all human skills.

Some audiences especially need training in human skills. Among them: professionals who have traditionally spent more time working with equipment, hardware, data, and numbers than with people. When their jobs become more automated, they’ll have to use their expertise in more strategic ways and spend more time interacting with clients and colleagues. As they move from cubicles, labs, and server rooms to conference and meeting rooms, they’ll need to develop better communication and leadership skills.

Recent graduates also lack the human skills needed to be successful in the workforce, according to a Bloomberg Next study. Colleges and universities are starting to offer more classes in these essential skills, but many young professionals still enter the workforce without them.

Human skills aren’t usually a part of an association’s...
certification or licensing curriculum, but they’re necessary for career advancement—and this type of training fits your mission.

**PARTNER WITH EMPLOYERS TO PROVIDE TRAINING IN HUMAN SKILLS**

Employers need your association’s help in training prospective employees and reskilling their existing workforce. You can help member companies and other industry employers fill their skills gaps and leadership pipelines—and yours—by extending your education offerings to incorporate human skills. Start by determining the skills and competencies most in demand and in need of improvement in your industry.

A digital badge program in industry-specific human skills will help your association bridge gaps, strengthen relationships with industry employers, and give members visual proof that they have the skills required to succeed. Involve member companies in the design of new educational programs, learning pathways, and credentials.

**CREATE A MEMBERSHIP CULTURE OF LIFELONG LEARNING**

Your members would agree that lifelong learning is critical for advancing their careers and remaining employable. Associations have the opportunity to build a membership culture that encourages the pursuit and support of lifelong learning.

You’re not only an education provider to your industry but also a provider of other resources and services, such as career centers and job boards, news and information, research and standards, and advocacy.

Associations are communities of integrity and value. Historically, these communities were based on face-to-face interactions and formal and informal mentoring programs, but now relationships are built online too with supportive peer networks in online communities. When all these offerings are integrated and delivered centrally through your learning management system, learning becomes a critical part of the membership experience.

Everyone in your industry or profession needs to become a lifelong learner. Remain laser-focused on your mission to provide education and skills that help them reach their professional goals.