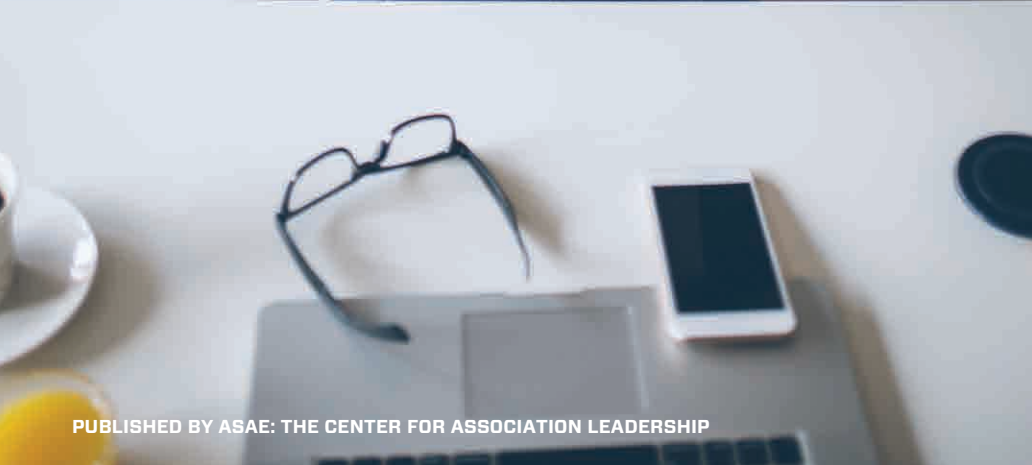


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TECH TOOLKIT

Next to a great staff, nothing has the power to transform your association and what you can accomplish for your members the way technology can. The *2020 Tech Toolkit* presents companies that know the unique needs of associations and can provide and implement technology solutions designed to enhance your mission-critical initiatives. Read on for practical tips and insights on how innovative technologies can make a world of difference in your operations.

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KEY CONSIDERATIONS FOR EVALUATING A NEW AMS SYSTEM

BY ARJ DEVADAS

If your organization is considering a new association management system, you'll need to do your homework. Today, the AMS industry can seem saturated and unstable and has experienced enormous change over the past few years. Besides from a wave of acquisitions by private-equity firms pouring into the marketplace, dozens of new software companies have entered the already crowded space. A quick Google search for "association management software" returns a result of 30 to 40 vendors.

As the technology backbone of most organizations, association management software was designed and optimized for professional societies and trade associations. Although associations have many of the same basic business needs as for-profit companies, their operational needs differ in business function and complexity and consist of unique requirements. As such, association management systems are designed to centralize data and organize and track processes critical to the nature of member-based organizations.

WHAT SHOULD ASSOCIATIONS EVALUATE?

An AMS should function as the single source of truth for an organization and act as the system of record for members and constituents. Users need the ability to manage, track, and easily access a comprehensive view of an individual or a company's engagement. When strategizing, associations may seek to review records and analyze membership duration, event attendance, online purchases, or certification status. An AMS keeps all this data in one place.

An AMS should offer fully configurable applications or "modules" to address a range of functional needs related to membership, meetings, marketing, product purchases, accounting, fundraising, and more. Cloud-based systems allow customers to implement modules in phases. Associations can address their highest business priorities and seek the greatest return on investment by focusing on implementing a core set of modules first.

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ACGI Software was founded in 1996 and is a leading developer of innovative enterprise association management software and credentialing solutions. Our product lines, Association Anywhere® and Certelligence™, have helped associations and credentialing bodies to digitally transform their organizations by centralizing data, automating processes, and integrating systems. For more information, please visit www.acgisoftware.com.

INTEGRATION WITH APPS

To augment existing functionality, your AMS should accommodate integrations with best-in-class systems such as web content management, e-learning, online communities, and marketing automation. It is imperative to understand compatibility for reliable integrations, what the process entails, and what data is being exchanged between the two systems. AMS vendors have a responsibility to provide well-documented APIs for establishing integration. The goal is to centralize data and build a comprehensive record regardless of where information originates.

EXPERIENCE

Consider including a shortlist of thoroughly evaluated vendors in the selection process. Be sure to ask a lot of questions: What is their implementation experience? Have they done similar projects? What is their approach and methodology for implementation, data conversion, and go-live support? What systems are available for customer support?

Request to interview the project team that would handle implementation. Much like building a house, inquire about the vendor's current workload of projects and determine their ability to complete your project on time.

CHOOSE A LONG-TERM PARTNER

A strong partnership with your vendor, built on business alignment and mutual trust, is key for long-term success with your AMS. An organization's strategic planning may be influenced by the capabilities of the AMS vendor. While you can't predict your vendor's future, you can certainly ask them to explain their five-year plan.

PLATFORM EXTENSIBILITY AND SCALABILITY

A platform is the technology environment on which software applications are built and operate. While a sound platform is important, it is critical that the software applications address an organization's requirements through configuration and extensible features. Be mindful of technology platforms that are locked down, as is often the case with popular CRM systems. Limited functionality can force customers down the path of costly customizations.

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WHY LIVE PRESENCE IS AN ESSENTIAL FEATURE TO A MODERN COMMUNITY

BY BENJAMIN MUSCOLINO

Associations trying to increase engagement often turn to online communities, forums, or some sort of communication tool to get their members talking. However, according to a 2017 study reported on by *Associations Now*, only 36 percent of associations report increased engagement, which was down from the previous year. This led us to ask why this was happening and what could be done better? We believe that the lack of modern features, including live presence, in online communities could be a major factor in real meaningful engagement.

So, what does live presence mean? Live presence is an application's ability to show you what is happening currently within the system, right now! If you're asking why this is important, there are a few things you should consider:

1 Overstimulation in the world we live in now. Smart phones, social media, piles of emails, and high-speed internet that can be accessed virtually anywhere are all things that were introduced in the last 10 to 15 years. According to *Time* magazine, a person now generally loses concentration after eight seconds, one second less than the attention span of a goldfish. In 2000, that number was 12 seconds, so it's clear that this decreased concentration can be attributed to the highly digitalized and visually stimulating world we now live in. With attention spans being so slim, the need for instant communication and interaction has never been more important when interacting with your members.

2 Change must be embraced and influence how you operate. An extensive study by Avenue M Group, *Innovation in Membership Engagement*, studied

COMPANY BIO

An online community is defined by the knowledge it generates and the engagement it creates. Breezio has delivered the next generation of private online community software by allowing users to discover what is beyond discussion boards and bring a rich ecosystem of curated content to the people who care about it. Breezio's proprietary software enables the ability to have real-time collaboration, community growth through learning, and hosted in-portal events where the people in the community are the focal point. We measurably increase engagement and translate that into increased revenue for associations of all types.

14 associations that had sustainable membership models and tried to figure out what they were doing differently. One of their conclusions was that “organizations must anticipate change if they wish to expand their base and engage members.” They went on to say:

“TO BUILD A SUSTAINABLE MEMBERSHIP MODEL AND ENGAGE FUTURE GENERATIONS OF MEMBERS, ORGANIZATIONS CANNOT SIMPLY RESPOND TO CHANGE, THEY MUST ANTICIPATE IT. MANY ORGANIZATIONS STRUGGLE TO DEMONSTRATE TO A YOUNGER GENERATION OF MEMBERS THE VALUE OF BELONGING TO AN ASSOCIATION.”

The study is slightly outdated for 2020, but the point still stands that if you want to keep up with member engagement you need to embrace and be proactive about change, and Breezio’s real-time engagement tools embrace this with innovative technology built for tomorrow. Live presence and real-time engagement can already be seen in the world around us, so in order to be a modern community, Breezio must incorporate it for the use of customers and their members.

3 Adding live presence makes communication and engagement more meaningful. If increasing communication and engagement is your goal for your online community, then this should resonate the hardest with you. Having the ability to instantly connect with members inside your online community is what will make users feel more connected to one another.

With engagement being at the front of associations’ wish lists, it’s no surprise online communities are as common as they are. However, in a world where there is so much competition for people’s attention online, having a community that’s different from the others can be the difference maker when trying to engage people, and we believe portal-wide live presence tools makes a community different and content and the people in that content much more accessible.

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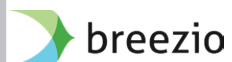
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HOW ONE ASSOCIATION USES ROOM CHECK-IN TO INCREASE THE NUMBER OF COMPLETED SESSION EVALUATIONS

BY MICHAEL DOANE

The National Association of Enrolled Agents (NAEA) has just under 11,000 members and 38 affiliates representing 43 states. It has been headquartered in Washington, DC, since 1981, and the location has helped it exceed expectations in its level of advocacy and government relations activities on Capitol Hill. Their annual conference in Las Vegas showcases leading-edge and timely topics affecting tax professionals and provides opportunities for professionals to connect with subject-matter experts for the exchange of ideas.

At their annual conference, NAEA encountered a challenge many associations face: ensuring that attendees complete their session evaluations. Attendees also struggled with knowing how to access credits for the sessions they attended.

NAEA solved this problem by using a combination of CadmiumCD's eventScribe App and Survey Magnet. When attendees entered a session room, they were required to scan a QR code for that session with the app. This self check-in process allowed NAEA to be hands-off during the process, which also saved valuable staff resources.

Attendees were incentivized to check-in because this process was tied directly to their access to continuing-education credits. For every session in which they used self check-in, they received an email reminding them to complete the evaluations and earn their credits. They could also complete these evaluations directly within the app. After completing all their evaluations, they could access a complete transcript that listed the sessions they attended and credits they earned from each session. This certificate could be printed out or accessed online as a PDF file.

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CadmiumCD is an event management software company with more than 15 years of experience providing solutions for meeting planners, exhibition organizers, education directors, and attendees. The company's award-winning platform is trusted by more than 3,500 meeting professionals worldwide to collect, manage, and share content to all event stakeholders.

This process resulted in more attendees completing their evaluations and less questions for conference staff. Here are the results:

- 2,335 completed session evaluations that started from 3,408 self check-in scans.
- Additional 960 completed evaluations that did not start with a self check-in.

Here's a closer look at the three steps of the room check-in process for continuing education:

1 Scan attendees or have attendees scan a QR Code (self check-in). This helps track attendance at sessions, ensures access to correct evaluations, and results in increased compliance.

2 Attendees complete session evaluations. To ensure attendance through the check-in process, attendees will receive an evaluation code at the end of the session. They can then complete evaluations and quizzes in the event app or on their laptop/PC. Attendees only get credit when they've completed the surveys.

3 Attendees access certificates and transcripts. Once attendees complete their quizzes and evaluations, the credits they earned will show up instantly. At this point, they'll be able to print a transcript or certificate. This also benefits organizers because they have access to this data as well, and as a result, a documented process for reaccreditation.

Ultimately, providing a simple process to your attendees allows them to access credits and prove knowledge more efficiently.

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Bring Your Event Together

THE RIGHT TECHNOLOGY CAN LEVEL THE CONTINUING-EDUCATION PLAYING FIELD

BY RICK RUTHERFORD

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 creating a rich environment where organizations can create new approaches to learning and collaboration, potentially removing equity and accessibility gaps, while delivering an experience that meets the growing 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 (LMS) solutions, associations can competitively position their organizations as leaders for professional development in their profession or industry.

Today's LMS allows 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

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CE21 is a technology and services company that provides associations, association management companies, and education providers with the tools to efficiently manage, customize, and deliver high-quality professional education and membership management solutions. CE21 Lighthouse is our cloud-based platform, providing LMS + AMS is one system. It's a better user experience for your members and your staff. For more information, visit www.ce21.com.

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, there is little doubt 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.

One ASAE Research Foundation 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 impact 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 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 CE providers that 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 increasing competition coming at them 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 help level the playing field.

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

BY RICK BAWCUM

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 for associations.

COMPANY BIO

CIMATRI is a specialty consulting firm focused on delivering strategic digital solutions for associations. Our principal consultants average 30-plus years of experience. Practice areas include strategic planning, technology assessment, data and analytics, interim/virtual C-suite, learning and development, and culture and communications. Professional certifications include the certified association executive, certified information systems security professional, LEANSTACK coach, and project management professional. CIMATRI is independent of any software or platform solution provider. Our consultants serve association clients from coast-to-coast.

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.

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CIMATRI

IS SHADOW IT BAD?

BY MIKE GUERRIERI, CAE

In the old days, IT controlled all technology because it was expensive and required specialized technical skills to manage. This was widely accepted because the non-IT parts of business generally lacked the requisite technical expertise. They became accustomed to waiting in line for their technology projects. However, as demand for technology surged, IT departments began to accumulate years of work in their project backlogs and this model began to fray.

As the prevalence of Software as a Service (SaaS) and user experience (UX) expectations increased, line-of-business owners and tech-savvy non-IT staff grew impatient with IT, and often against policy, acquired technology on their own that they felt would improve customer experience and optimize business process efficiency. As a result, technology management was unofficially dispersed throughout organizations. This became known as “shadow IT.”

WHAT NOW?

So, what are IT leaders supposed to do? Should they attempt to assert themselves and desperately hold on to the systems that IT still controls? Or should they throw up their hands and reminisce about the good old days when they were needed for their technical prowess? Neither option is the right choice for an organization interested in improving its IT maturity.

Without IT involvement or any kind of enterprise architecture plan, systems proliferate like weeds, data is partitioned and siloed, and user experience becomes inconsistent. It becomes harder for cross-functional teams to perform while navigating multiple solutions that perform the same task. Ultimately, the customer is forced to engage with multiple disparate systems with different UX—that often require separate sign-ins. The result of an abdication of IT involvement is technology anarchy.

The rest of the business still needs IT as a partner to bring order to the chaos or, even better, prevent it from happening in the first place. Here are some tips to become that

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DelCor is an award-winning independent technology consultant and managed services provider for associations and nonprofits worldwide. Propelled by our IT Maturity Model, DelCor leverages technical expertise, market intelligence, and association acumen to help associations and nonprofits achieve their mission, vision, and business goals.

Consider us your strategic partner for IT leadership as we help you achieve progress with technology assessments, digital strategy, system selection and project management, CIO as a service, managed IT services, cloud migration and hosting, and cybersecurity. DelCor is proud to be an ASAE Alliance Partner.

valued and trusted partner:

IT governance. Create a technology steering team made up of staff representing a cross-section of business units. This will help align IT with the rest of the business and give IT clearer insight into business challenges and opportunities.

IT product and service catalog for staff. Shadow IT can sometimes be the result of a lack of awareness about what IT is already available. Develop a simple catalog that contains basic information about each service, as well as how to request access to the service.

Agile enterprise architecture. Use enterprise standards to make it easier to integrate systems. A CRM/AMS with an open API makes it easier to select best-of-need systems without siloing your data. Integration standards can be included in your functional requirements when considering new systems.

IT execution improvement. Use disciplined project management to get IT projects done more quickly and effectively. Getting things done will make IT an attractive partner.

Non-IT staff empowerment. Create opportunities for non-IT staff to learn about emerging technology. Design experiments to test the viability of a new solution before committing to it fully.

Inclusive language. IT should have a service orientation, but calling fellow staff “customers” is an example of us vs. them thinking. They are colleagues, not customers.

Non-IT staff participation. When rolling out enterprise tools, including non-IT staff in the process will lead to better adoption and broaden team perspective.

Shadow IT can certainly be a problem in an organization that doesn't value IT as a partner. If you can help line-of-business owners meet their needs, while adhering to enterprise standards that focus on the benefit to the whole organization, you will make shadow IT an opportunity, not a problem.

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MEMBER 360: THE KEY TO KEEPING MEMBERS AT THE CENTER OF YOUR DIGITAL TRANSFORMATION

BY JAKE FABBRI

Digital transformation can initially be an intimidating concept for associations to wrap their mind around, let alone successfully implement. With constant chatter about the “right” way to lean into innovative technology, it’s important to avoid losing sight of the big picture. Your mission is about serving your members, so expanding your digital capabilities with a member-first mindset is your ticket to success, regardless of how consumer behavior continues to evolve.

YOUR MEMBERS’ EXPECTATIONS ARE GROWING. CAN YOUR SOFTWARE KEEP UP?

While your association may be diligent about providing reliable services, it’s critical to never underestimate the power of a great experience. In fact, 84 percent of people believe that the experience an organization provides is just as important as its services, according to Salesforce’s *State of the Connected Customer* report. And with new platforms and technology creating more convenient and connected experiences across various industries, your members have similar expectations for the experience your association provides. With the right technology in place, your association can successfully meet these heightened expectations and continuously deliver the modern experience your members expect.

360-DEGREE VIEW OF MEMBER ENGAGEMENT

Legacy technology systems and processes are an impediment as associations strive to create a better member experience. Without a complete real-time view of your members and their full engagement, it’s nearly impossible to give members what they want when they expect it. Delivering a member-centered experience begins with a 360-degree view of member engagement. Understanding how to

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Fonteva, a Salesforce Premier Partner, is a leading provider of membership, events, and eCommerce solutions built on the Salesforce platform. At the heart of everything Fonteva does is its quest to equip and empower its customers to meet the unique needs of their communities. By harnessing the power of the Salesforce platform for membership and event management, Fonteva delivers highly configurable solutions that grow and strengthen the relationships that organizations are built on. Visit Fonteva at www.fonteva.com.

develop insights based on each and every member interaction will enable you to create stronger strategies that get to the root of your members' specific needs and preferences. With a reliable baseline in place, you can analyze and determine whether current offerings are effectively supporting member expectations, or if they may be in need of a refresh.

You may even find it's time to make a strategic shift at the organizational level. Consider the digital evolution journey of the Healthcare Financial Management Association. With the help of Fonteva and Salesforce, HFMA was able to completely realign their business model using simplicity as their goal for an enhanced member experience. This involved a shift from a membership with a la carte offerings to a subscription model that allowed unlimited consumption. Response from members to this change was overwhelming as HFMA's member acquisition grew 20 percent year-over-year and member attrition decreased by 5 percent. With the member experience truly at the center of their strategy, HFMA now has the technology and focus to continually refine its offerings based on the continuous feedback of member behavior.

FUTURE-PROOF YOUR ASSOCIATION

If your legacy technology is outdated and limiting, the idea of digital transformation may seem like a one-time step to success. However, over time, the most successful organizations will be those who reframe and view the effort of upgrading your capabilities as digital evolution: a continual journey of expanding your ability to keep your members at the center of everything you do. After all, it's impossible to predict all of your members' future needs. That's why it's critical to have a scalable association software platform that grows with you and empowers you to evolve the member experience as technology continues to advance. This enables you to keep your members at the center of your continuous digital evolution. Digital transformation is a step in the right direction, and an ongoing member 360 mindset ensures that your association stays ready for whatever comes next.

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THE DEMAND FOR PROFESSIONAL QUALIFICATION: DOES YOUR TECHNOLOGY NEED AN UPGRADE?

BY CHRISTOPHER BUTCHER AND ALI NEAL

In June 2019, the U.S. Bureau of Labor Statistics reported that more than 43 million people hold a license or certification. That study showed three salient points for associations: the number of credential holders has been growing over the past 50 years; the numbers are especially strong in rapidly changing fields; and employment rates are higher for those who hold a credential.

Associations who align themselves with credentialing trends promote a virtuous cycle of relevance: credentials require targeted education; targeted education facilitates credentialing. The easier it is to obtain the training necessary to pursue a credential, the more demand for the credential. The more credential seekers and holders, the more demand for training.

As representatives of professional and occupational communities, associations are uniquely positioned to participate in credentialing ecosystems in a number of roles:

- As educators, promote quality continuing education.
- As assessors, evaluate individual achievements.
- As integrators, bring employers and employees together.

As you contemplate your role in these processes, you quickly learn that traditional technologies like your AMS and LMS aren't going to give you what you need.

PROMOTE QUALITY CONTINUING EDUCATION

Quality education is more than holding yourself to high standards of instructional design. In a credentialing ecosystem, education includes:

- Learning content aligned to a credential's content blueprint

COMPANY BIO

Heuristic Solutions has led both technical and credentialing communities for the past 20 years. Their flagship credentialing management software, LearningBuilder, incorporates powerful workflow management tools that enable organizations to optimize the entire credentialing lifecycle. More than just initial applications and tracking CE, LearningBuilder's competency modeling, assessment, and eLearning capabilities allow you monitor to your community's continuing education and career aspirations with an all-in-one solution delivered in under 90 days.

- Curated third-party materials evaluated for quality and relevance
- A feedback loop to promote effective learning
- Centralized activity tracking for a one-stop-shop
- Automated attendance reporting to minimize manual effort
- Reporting to certification and licensure organizations to verify achievement

PROVIDE INDEPENDENT ASSESSMENT

Employers seek out credentials because they offer independent assessment. As an association, you can support this demand in several ways:

- Become the assessor by creating your own certification or assessment-based certificate program.
- Incorporate assessments into your educational content to validate learning.
- Offer “certification-readiness” feedback through more formative interactions between the learner and competency expectations.

CREATE CAREER PATHWAYS

The ascendance of credentials reveals that the paths people take to find their careers are becoming increasingly complex. Traditional four-year colleges are becoming increasingly costly and distant from occupation needs. Associations are better-positioned to offer aspiring workers a playbook that leads them to develop their skills competency by competency. The right pathways will meet people where they are, show them what they need to accomplish to meet their goals, and connect them with the educational stepping stones.

NEW SYSTEM CONCEPT: THE CREDENTIALING MANAGEMENT SYSTEM

The traditional LMS and AMS are not designed to support the full potential of a credentialing ecosystem. A newer class of technologies is available to meet this need: the credentialing management system. These systems are designed to handle the complex interactions among standards-setters, content developers, assessors, employers, and regulatory boards. Are you ready to build a virtuous cycle that builds a qualified workforce? Start by ensuring that your technologies are aligned with your goals.

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USING AI TO ENGAGE YOUR MEMBERSHIP

BY CHRIS ADAMS

Artificial intelligence (AI) has been a hot topic in technology for a while now, and subsequently, it's become the latest thing in the association space.

The question is, should you be rushing to get on board? How do you separate the hype from reality?

To answer these questions, you need to understand what AI *really* is.

WHAT IS AI?

AI as a term has been abused by tech media to explain anything automated. For example, programmatic advertising—which determines how long an ad displays in certain slots on your page based on number of clicks, views, or applications—may seem intelligent, but there's no intelligence there. The system automates rules, which means there is no understanding, self-learning, or self-rule creation. This isn't AI, and anyone who tries selling you this as such is misleading.

Intelligence comes from the ability to make predictions—being able to look over data, identify patterns, understand drivers of those patterns, then use the information to make predictions through which similar data presented back can be categorized.

Predictions like these are where AI starts coming into play with the use of machine learning (ML).

ML is a set of technology and math that can process a data set, spot and learn patterns, then create models from which a computer can predict the likelihood that a new data set matches previously learned patterns.

Now that you know what true AI is, you'll need to know what makes *good* AI.

WHAT MAKES GOOD AI?

The basis of all ML is data. But in order to build good models, a machine needs good data—a large amount of it.

ML can be thrown at any data set, but that doesn't mean you'll get good results or predictions back. Feeding an ML

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Madgex is the global leader in career center solutions for professional associations. Through market-leading technology, built with *true* artificial intelligence and machine learning, Madgex is able to deliver world-class, comprehensive expertise in online recruitment. This enables our clients to operate a high-performing career center platform that delivers intuitive UX, in-depth data reporting, the most robust sales suite on the market, and much more!

Trusted by 500-plus industry leading brands in 14 countries and 11 languages, Madgex helps associations worldwide become the go-to career destination for their community.

algorithm a full set of *Harry Potter* novels can be fun but doesn't mean you get anything useful.

If you've already gone through a Big Data strategy, then you're likely to already have a good set of centralized data. Be careful though, small data sets, incomplete or un-representational data may introduce bias or embed existing biases that you're hoping ML will remove. AI is not a silver bullet, and to expect it to be can lead to costly mistakes.

FINAL THOUGHTS: DOES YOUR ASSOCIATION NEED AI?

So, should you be rushing head-strong into the AI stream and employing data scientists?

The answer is, it really depends. It's an exciting area that has big potential benefits. The key is identifying clear business problems, whether with internal processes or in the member experience, that need to be resolved.

For example, a survey from Wiley found that 32 percent of members stated that access to relevant job opportunities was highly valued in their decision to join an association.

Yet in our own Global Jobseeker Survey, members listed irrelevant job ads (34 percent) and search results (21 percent) as recurring pain points when engaging with their association's career center. AI can significantly help improve this member experience.

If you have a clear business problem to solve and a good set of data, then you're probably in a good position to start using ML.

If not, then starting now to identify a strategy for AI and ML is essential. Identify issues that can be made more efficient and streamlined, work out what data sets are needed, and then put in place processes to capture that data.

If you can't capture that data yourself, identify partners who can provide you access to that data, especially a wider data set that will increase the quality of generated AI.

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THE NEW ASSOCIATION

BY MARK SEDGLEY

What was once old is new again. It's amazing the pendulum swings we see in society, business, and life. And associations, like many, regularly feel the effects of those swings.

Over the last decade, associations have had to rethink and reshape themselves to better compete in the age of information accessibility. "Content is king" is no longer a calling card that resonates with associations.

... Or does it?

"The New Association" — the association of today's age — now has to deal with unlimited and unfiltered access to content, primarily because of the great abyss that is the internet. And not only that, but because of the organic nature of social media (and the technology that allows for that), associations also have to deal with more touchpoints as it relates to competitive content.

Despite those trends, associations are in a prime position to grow. Why? Well, associations have two incredibly valued assets in today's world: curated content and a highly qualified database. The question is, will associations adapt fast enough to fully leverage those two incredible differentiators?

Fortunately, more and more technologies are coming into place to equip the association executives of today. In fact, below are three examples of how associations can leverage technologies to harness the power of their content and equip their members in the ever-growing demands of today's workforce:

JOB SPECIALIZATION

Nowadays, people are looking to specialize more and more. They want (and often need) the skills necessary to excel at a certain task.

Associations are in a unique position to fill that want and meet that need. They have the offerings— the education and training—necessary for job specialization. And as long as association executives can identify what their members' special interests are (which they can with a proper database

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MemberClicks provides integrated software solutions for small to mid-sized member-based organizations. Founded in 1998, MemberClicks currently works with 3,000 organizations throughout North America. The company has offices in Atlanta, Indianapolis, and Vancouver.

management tool in place), they can tailor their communications and deliver what's necessary to help their members thrive.

CONTINUED EDUCATION

Continued education is becoming almost a requirement for those in today's workforce. Even if it's not explicitly stated anywhere, professional development is needed to obtain and maintain a competitive edge.

Again, this is where associations are in a solid position to help. They have libraries of content (from white papers to webinars) needed to help their members learn. And thanks to learning management solutions, they can tailor their content and track activity (e.g., course completion) to meet those modern demands.

Being able to help members learn, thus opening the door for more career opportunities, is a true value-add.

CAREER ADVANCEMENT

And speaking of generating more career opportunities, that's another area where associations can help. With tools like job board technology, associations can directly connect their talented and highly qualified members with employers in need. Rather than members having to scour the internet for relevant job matches, the association can curate that content (or rather, the technology can), saving the member time (and quite possibly, a headache).

Again, a major value-add.

The value in job specialization ...

The value in continued education ...

The value in career advancement ...

There's nothing really new about those ideas, rather just new technology to make it all possible.

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IS YOUR CONFERENCE A CATALYST FOR ATTENDEE CONNECTIONS?

BY RYAN COSTELLO

Give yourself a pat on the back. Your event agenda features the most interesting and entertaining keynotes your association can afford. The schedule includes a finely tuned selection of speakers and sessions covering the topics needed by attendees of all career stages and specialties—and providing the CEUs they need too.

This focus on educational content is business as usual for associations. However, attendees want and expect more than good content.

WHAT ATTENDEES REALLY WANT FROM YOUR CONFERENCE

Attendees make the effort to travel to your conference because they want to be around other people. They come for conversations, connections, and inspiration—not just CE credits.

They want to hang out with industry peers who “get” them. Attendees hope to meet the person they’ve always admired from afar so they can give them a compliment or get an introduction to their circle of friends. And, they’d love the chance to give advice to a young professional and maybe even hear a new perspective from them.

Conversations and connections have emotional impact. Attendees remember these moments long after the conference is over. Connections reverberate with new ideas, relationships, and a sense of belonging to a community. Attendees go back to work feeling good about their career and themselves—that feeling is a priceless value-add you can and should provide for your members.

HOW TO ENCOURAGE CONVERSATIONS AND CONNECTIONS

Build purposeful breaks into your agenda so attendees aren’t just rushing from one session to another. Make time for hallway conversations with friends and new acquaintances.

COMPANY BIO

MemberSuite is the premier software and services provider of association management solutions that enable organizations to accomplish every activity they need to serve their constituents. Through our acquisition of Event Farm, an event engagement platform, you now have access to powerful event marketing and engagement tools to engage attendees before, during, and after your events.

tances. Many attendees won't find anything to do during these breaks, so give them a destination. Ask companies to sponsor social hallway experiences, such as 10-minute yoga sessions, chocolate or cheese tastings, or group activities related to your industry.

Provide structured networking for attendees who aren't fans of traditional networking events. Even extroverts have a tough time when everyone clings to people they already know. Consider introducing groups of attendees to each other in advance of your event via email. Make suggestions for team interaction before, during, and after the event. They could simply enjoy a pre-event virtual meetup or stick together as an accountability group throughout the conference. You might be surprised how quickly deep connections are made when you proactively break the ice for your attendees.

Set aside break tables for conversations on specific topics or for specific positions or geographic locations. Create a lounge area or "real world chatroom" for scheduled and impromptu discussions that anyone can drop in and join and brand it as such.

Require interactive learning activities, not just Q&A. Things like real-time polling are very effective engagement tactics. Table exercises or "active workshops" can be more effective than a lecture for making learning sticky, plus they provide another opportunity for conversation.

Think of your event app as a conversation and connection catalyst. Encourage attendees to complete their app profile. Plan to have staff and volunteers seed conversations in the forums.

Leverage engagement technology as a powerful ice-breaker. Split attendees in random four-person teams and create activity-based challenges for the teams. Gamify it with viewable leaderboards.

Provide opportunities for attendees to create their own user-generated content. Photo booths, filters, hashtags, quotable moments, session content, and so forth.

Lastly, just remember, if your attendees leave feeling "connected," you've created real value for them, your community and your association. Good luck!

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EMPOWER YOUR FUTURE

THE VALUE OF MOBILE TECHNOLOGY IN ASSOCIATION MANAGEMENT

BY TOM DEBACCO

Many associations are facing challenges cutting through the noise to engage their busy members. Those having the most success overcoming these challenges have all shifted their approach and embraced quality mobile apps as their go-to strategy for year-round member engagement. These apps deliver current, routine, and relevant information and engagement opportunities for members in intuitive, easy-to-consume formats.

According to a recent Gartner study, mobile apps will be the lynchpin technology impacting business success in coming years. The total number of app downloads is expected to top 258 billion by 2022 as mobile devices continue to dominate all other tech devices.

Mobile is ideal for engaging with your busy members because it offers an “always available” experience. Your members can interact, share, learn, and stay informed on their own timeline, not yours, without the frustration of having to log into and try to interact with websites that aren’t designed for touchscreens on mobile devices.

WHAT CAN A CUSTOM-BRANDED MOBILE APP DO FOR YOUR ASSOCIATION?

The more your members know about and feel connected to your association, the more invested they’ll be. The more you know about your members, the easier it is to deliver the information they want.

MEMBER BENEFITS

1. Content and important information are delivered 24/7 in one easy-to-find place.
2. Communication and networking tools help establish connections with other members.
3. Receive relevant and timely notifications from chap-

COMPANY BIO

MobileUp Software builds mobile technology solutions that help associations forge strong, lasting connections throughout their communities with highly configurable, cost-effective, SaaS-based mobile apps.

We have a unique platform that associations can use to quickly and affordably create a totally customized mobile app that helps them manage every aspect of audience engagement without needing dedicated IT support, a programmer, or a big budget.

Whether it’s events, organizational resources, networking, targeted communication, commerce, chapter and committee involvement, web content, data management, feedback and more, our technology helps organizations forge connections year-round.

ters, committees, and association leadership.

4. Paperless information is accessible anytime from anywhere 365 days a year.

STAFF BENEFITS

1. A self-managing digital platform with all your engagement in one place
2. Overall cost and time savings with a far better member experience
3. Easy integration between your technology systems (AMS, CMS, LMS, etc.)
4. Less time and cost in managing member retention and engagement by getting timely feedback

WHAT IS IT COSTING YOUR ASSOCIATION TO LIVE WITHOUT AN APP?

1. Conventional direct mail, marketing programs, and event management are too expensive and not engaging enough.
2. Phone campaigns require many human resources. Let's face it, your members don't love getting these calls, and your staff and volunteers don't enjoy making them.
3. Web portals are on the decline and the inbox is dying. Members expect a personalized, contextual experience each time they interact with you.
4. Existing member engagement methods are taking focus and valuable time away from more valuable member experience activities.

Your association staff is best at administration, programs, strategic plans, fundraising, events, membership management, marketing, community outreach, board communication, and so much more.

A quality mobile app solution should support the areas critical to your association's success:

1. Membership communication, engagement, and retention
2. Chapter, group, and committee management
3. Event/conference management and experience

Look for something that doesn't require a lot of custom development so that it's easy to set up and maintain, cost-effective, and helps your association maintain a year-round connection with your members.

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WHY EXPECTING YOUR AMS TO DO EVERYTHING IS SETTING UP YOUR ASSOCIATION FOR DISAPPOINTMENT

BY JORDAN VOLPE

Over the past year, we've had the opportunity to go to a lot of AMS user conferences, and when the discussion turns to AMS platforms, I have noticed that two distinct groups exist.

On one hand, we have a group of people who advocate for the "one system" approach. This group pursues the idea that their association should have an AMS platform that handles all of their technological needs. They believe that there is always another AMS around the corner that will be the one-stop shop they have long desired.

On the other hand, we have a group called the "integrators." This group is of the mindset that their AMS should be able to handle a few fundamental technology needs really well, but unlike the "one system" group, they acknowledge the limitations of their AMS. These associations adapt their technology stack as their needs evolve by integrating an AMS with specialized software vendors.

So, who's right?

Although I see the perspective of the "one system" group, given the rapid changing environment of digital technology, it is an unfair burden to expect any AMS provider to be a jack of all trades. For instance, would you go to your primary care physician and ask them to fill a cavity? And if they offered to fill it, what would that say about them?

We see this scenario play out every few months running our own company, OpenWater. For instance, in a perfect world, SalesForce could be our one-stop shop for sales and marketing: it could run our website, send all our emails, and measure all our marketing activities. The reality is that we would be continually stuck, and increasingly frustrated, putting this limitation on our internal team.

COMPANY BIO

OpenWater is based in Washington, DC. Associations of all sizes use our platform to manage awards, grants, scholarships, fellowships, and more. We pride ourselves on offering clients more than software. We guide them every step of the way, from planning and initial system buildout to the industry's only Truly Unlimited Customer Support pledge. The result? Customized online solutions that allow association staff to focus on core competencies, increase nondues revenue, and improve membership value.

So, as an association, how do you decide which route to take? Ultimately, it comes down to the importance of what you are trying to accomplish. For instance, if you are running a prestigious award program that includes hundreds of members, a complex judging process, and a submission deadline that places a high demand on a server, these requirements are often out of bounds for a typical AMS. On the other hand, if you are receiving a dozen applications for an award program that is of little importance to your members, your AMS might do the trick until that program grows.

If 2020 is your association's year to switch or shop for an AMS provider, consider the possibility that no single platform can master the evolving digital needs of your association.

To future-proof your AMS, ask about their partnerships and track record of integrating with other best-in-class solutions. Finally, be careful about pushing your AMS provider to be something that they are not—it will likely backfire in the long term.

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TELL A STORY WITH YOUR DATA

BY BRIAN BRUFFEY

Association professionals have been plagued by a common problem for years. How to turn an organization's tangled web of member data into a clean, clear report that informs your board or other leadership, and when appropriate, persuades them to take action.

In both the for-profit and nonprofit worlds, it's common for business processes not to change over time. Regardless of technological advancements or variations in association management philosophies, member-based organizations often create the same reports and dashboards they always have.

However, between the comments on how reporting works or the "that's how it's always been done" philosophy, there is an incredible opportunity to change the way you think about association analytics.

With interactive charts and dashboards, your leadership can track trends, visualize the organization's path forward, and determine how to take action. But the key to navigating your data successfully is tying it to a story that gives it context and relevance.

SET YOUR GOALS

If you are using basic charts or infographics to convey information to your executive director or board, you may be selling yourself short. Before presenting the information in your next meeting, take a minute to ask yourself what you are trying to accomplish.

If you are creating a specific report because your board asked you to, try thinking about that data differently to see if there is a greater story to tell. How does this data inform decisions? Could it be presented in a new way?

Make sure all reports and dashboards that your association creates are actionable. If you are on the events team, this can be achieved by including overall cancellations, event registrations, or session attendance to better understand which events your members value the most. It also gives you the ability to drill down to specific details to show the progress or success of each meeting.

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Protech is the number-one Microsoft-powered association management software (AMS). Built specifically for Microsoft Dynamics 365 and the Power Platform, the easy-to-use membership management platform is certified for Microsoft AppSource.

A Microsoft Gold Partner, Protech leverages the depth and breadth of the Microsoft ecosystem, Azure Trusted Cloud, and thousands of standard connectors to deliver a familiar, intuitive, secure, and extendable solution. Fueled by Microsoft Power BI, Protech enables association leadership to streamline operations, empower employees, engage members, and make data-driven, intelligent decisions.

DETERMINE HOW YOUR REPORTS WILL BE USED

According to a study by Bain & Company, early adopters of big data and analytics are five times as likely to make decisions faster than their market peers and twice as likely to use data to make those decisions. To try this out yourself, you'll need to know what story you want to tell, how the data will be consumed, and who your audience is.

If you think about how the report will be consumed—presented directly to the group or shared electronically one-on-one—it becomes clear that certain characteristics and features are “must haves,” while others are optional.

If you are sharing metrics in person, you can answer any questions that arise and have more leeway to drill down into specific datasets. For reports meant as status updates that paint a high-level picture of the association's overall health and performance, simpler reports will suffice.

Also, when building reports, work from left to right. This replicates the natural reading motion, making it easier for your audience to understand the information you are sharing. While design is not of the utmost importance, a visually appealing dashboard will have a far greater impact on your audience.

FOCUS ON OUTCOMES, NOT STATISTICS

Numbers rarely tell the whole story. This is why data must be presented with context, relevance, and a focus on outcomes. By fully customizing reports, you can focus on the outcomes, successes, and areas to improve that mean the most to your organization.

Data is only as useful as the story it tells. By tying data to a narrative to explain the information with real-world scenarios, your team can paint a full picture for your board and leadership that clearly outlines the association's path to the future.

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PROTECH

THE EXCITING IMPACT OF DIGITAL TRANSFORMATION ON PROFESSIONAL DEVELOPMENT

BY MICHELLE BRIEN

How do you become an association that's capable of identifying, designing, and delivering the education and credentialing needed by people in your market today and the ones who will enter it in the future?

Digital transformation is not just about implementing new technology—although that can happen. It's about connecting and leveraging your data and technology to deliver more value to members and customers.

It's not an IT project, or a one-and-done project. It's a continual cross-departmental process. It's a strategic philosophy that may likely transform your business model.

WHY PROFESSIONAL DEVELOPMENT AND CREDENTIALING NEED DIGITAL TRANSFORMATION

Should you think differently about professional development and credentialing programs in the age of digital transformation? Yes, indeed. Online learning is no longer the junior varsity version of conferences and other in-person events. In the future, if not already, more people will access learning online than they do face to face.

Credentialing programs will take on even more importance because people will need to acquire and prove their mastery of new skills. In this quickly changing workplace, your association can't wait five years to review the competencies required for credentials. You need to keep up with changing job skills requirements.

DIGITAL TRANSFORMATION OF PROFESSIONAL DEVELOPMENT

Let's get aspirational. How would digital transformation affect professional development? For starters, your associa-

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TopClass LMS by WBT Systems is an award-winning learning system that delivers impactful professional-development experiences for association education and certification programs. Our focus is to support associations in using integrated learning technology to help drive your digital transformation and become the preferred education provider in your market, delivering value to learners at every stage of their working life. We believe in truly understanding your challenges and partnering with you to ensure success. Celebrating 25 years of your learning, your way in 2020, our customers value our experienced team and flexibility in all we do.

tion would have a good understanding of the educational needs of members and the rest of your market. You'd have ongoing discussions with industry employers about skills gaps and their customers' needs.

Your association would respond nimbly to change and disruption. You'd assess and prioritize market needs and bring new products to market in a timely manner.

You take a coordinated, cross-departmental approach to content. An integrated education and content strategy drives content for conferences and in-person educational events, online learning, webinars, publications, websites, and other digital channels. If someone wants to learn more about topic X, they can easily find articles, workshops, recorded conference sessions, webinars, online courses, certificate programs, and related content about that topic on your website. They choose the content depth, delivery method, price, and time commitment they prefer.

Your association takes full advantage of technology. The LMS is used not only for online learning programs, but also for new member onboarding, association and chapter-leadership development, and staff onboarding and training.

HOW TO PREPARE FOR DIGITAL TRANSFORMATION

A shift in mindset is required, and it must start at the top. Leaders must understand the extent to which digital is already disrupting business as usual, changing how people access information and education, and favoring new competitors.

Expect resistance. It's a natural and understandable byproduct of fear. If your association begins to take risks, build new lines of business, and shift resources away from legacy programs, some people will perceive threats (real or imaginary) to their budgets and jobs.

In times of change, communication and transparency are musts. Create the right conditions for cross-functional or -departmental collaboration. Provide support, and help staff acquire the skills, knowledge, and mindset they need to build their confidence and commit to the work required.

Digital transformation is an opportunity to continually ensure your association is leveraging its people, processes, and technology to deliver the value your members and customers seek.

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ARE YOU DELIVERING WHAT (NEW) MEMBERS WANT?

BY DAN STEVENS

There are a few things we know for sure: the world is digital, your audience demographics have changed, and when it comes to education and marketing, content is king (and measurement is queen). The question is, how well-prepared is your association for this new world?

YouTube Channels, LinkedIn Learning, Facebook Groups, and Reddit Communities are just a few of the ways content curation is occurring online. People (i.e., your members and prospects) have immediate access to others who are similar to themselves and a wealth of information. Furthermore, it is all free and easy to consume (i.e., short, digital, visual, and mobile). So, what is your association doing to compete?

Here are some options to consider:

Convert the knowledge you already have into a multimedia offering. Make it short, unique, visually rich and mobile. For example, convert a speaker session from your annual event into an online, gated livestream. Then, interview that same speaker on camera and produce a three-minute video, and a 30-second social media video, as well as an article for your upcoming newsletter and a short blog. You have now taken one expert's conference session, which is only available to the portion of your members who attend the event, and delivered six different assets to your full membership and prospective members. Providing members with information that your association is uniquely able to provide, in a format that is easy-to-find, consume, and act upon, will keep them coming back for more and demonstrate the ongoing value of membership.

Use social media as a conversion tool—not a platform. Social media is both friend and foe. Social media is not concerned about your association's page traffic and post views. They care that audiences stay on their platform and consume a variety of information. The algorithms deeply understand what people are interested in and will display

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Association TV® (by WorkerBee, TV, Inc.) empowers associations to use video strategically. Our online platform and multimedia services model modernize the way associations inform, educate, and inspire their community. We dramatically improve engagement, which drives the success of your association's retention, recruitment, and revenue. The Association TV® engagement model enhances associations' relevance to today's—and tomorrow's—members, making it easy for them to find, consume, and act on valuable content. We help associations affordably leverage the power of video and multimedia, making your association's content programming profitable, purposeful, and predictable.

a variety of content such as similar topics (not provided by your association), personal interest, advertising, and even the odd cat video to keep them on their platform. However, we cannot ignore this powerful medium because, face it, that is where the people are—but, you can control how you use it. Associations should be measuring conversions, not likes. Save full-version content access for members or lead-gating opportunities and use social media to share a taste of what your association has to offer with a wider net of people and drive traffic back to your atmosphere.

Offer personalized and tiered access to content for your various audiences. Learning from Netflix, podcasts, and magazines, there are many ways to share information with a broad audience, while ensuring the best value for your membership. By utilizing subscriptions, pay-per-view, gating, premium, and “freemium” options, you can monetize and track the performance of your assets. For example, providing a sample of content, for the fee of an email address, allows you to nurture nonmembers; unique and exclusive content that is member-gated for full access demonstrates value; and securing full session conference recordings behind a paid digital pass creates additional nondues opportunities.

The generation that has grown up with the internet is now your target members. The way they search for, consume, and interact with content is different than previous audiences, and it is time for associations to adjust. If you aren’t ahead, you’re behind. Technology can help.

For more information on these topics and more, order a free copy of *Moving Your Association from Analog to Digital: A CEO’s Guide to Rapid Change*, at association.tv/analog-to-digital/order.

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