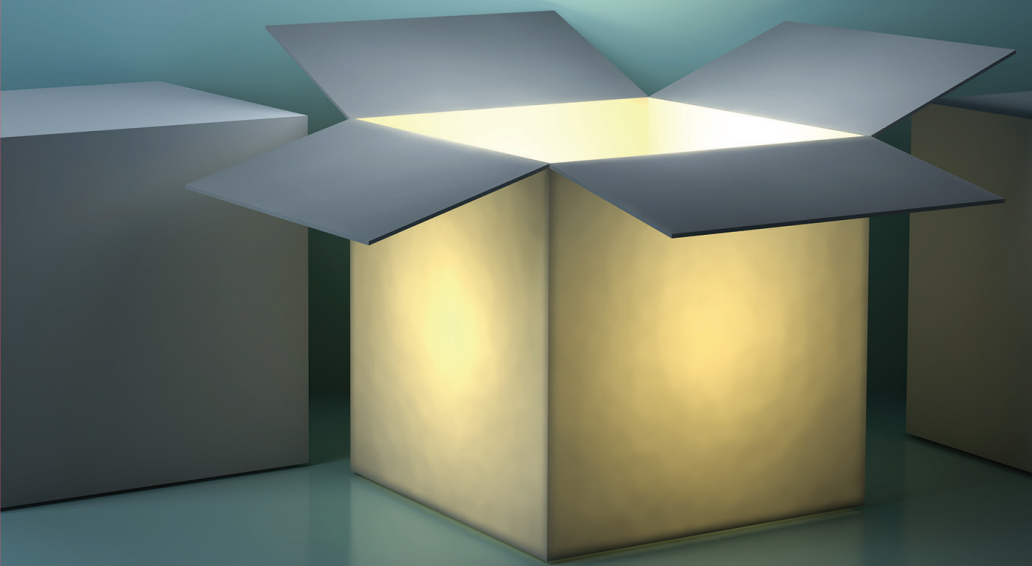


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ASSOCIATION SOLUTIONS TOOLKIT

COVID-19 has required associations to upend pretty much everything, from their annual meetings and fly-ins to their 2020 budgets and member engagement strategy. But the pandemic has also highlighted that associations are willing to be creative and innovative in order to advance their missions in a constantly changing environment where smart approaches to finance, product development, technology, and talent management are critical to success.

The *Association Solutions Toolkit* is designed to help you navigate this new landscape. In the pages that follow, you'll find companies with the knowledge to help you address your most difficult business challenges head-on.

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RETIREMENT PLAN DUE DILIGENCE: IT'S YOUR FIDUCIARY DUTY

BY DEBORAH STEVENS

When was the last time you performed a due diligence review on your 401(k) plan? As a retirement plan sponsor, you are a plan fiduciary. Therefore, it is your obligation to conduct a periodic review to ensure that your plan's design and associated fees are suitable for, and in the best interest of, your participants.

In order to meet this responsibility, the general rule of thumb is to conduct a provider review every three years. The most common method of conducting this due diligence is by sending your plan "out to bid" through a request for proposal. Benefits of conducting an RFP include:

- maximizing cost savings by placing your organization in the strongest possible negotiating position in regard to plan components and fees
- keeping abreast of best retirement plan practices
- providing documentation that shows you have executed appropriate due diligence practices as part of your fiduciary duties.

Sound daunting? Read on for tips that will help prepare you to fulfill your fiduciary duty and enable you to effectively shop for and secure the providers you need to deliver this important employee benefit.

Tip #1: Appoint a committee to handle all facets of the proposal. Ideally, this committee will have three to five members who have relevant expertise. Note that the decision maker within the committee in charge of hiring and implementing a 401(k) plan and its providers will be considered a plan fiduciary with the responsibility of ensuring that the decisions made are in the best interest of your employees.

Tip #2: Identify your organization's goals and priorities for the retirement plan. Start by looking at the purpose of offering the 401(k) plan (for example, to attract/retain employees or boost employee financial wellness). Then consider features and benefits that are important. For example:

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The ASAE 401(k) Retirement Program is an innovative 401(k) plan choice created by ASAE specifically to meet the needs of associations of all sizes. Along with fiduciary protections, it has lower fees and a higher level of service than most plans available today. With this benefit offering, organizations gain the ability to address two pressing talent management challenges: improving financial retirement readiness among current staff and attracting and retaining high-quality, skilled employees in an increasingly competitive workforce market.

- ease of administration
- fiduciary support
- availability of participant educational tools
- quality of the online experience, communications, and functionality, both for the plan sponsor's administrative person and for the participants
- provider's credentialed experts and tenure in the 401(k) business
- customer service excellence
- plan features, such as availability of safe harbor designs, plan loans, and Roth options
- cost/plan fees
- ancillary services, such as financial wellness tools

Tip #3: Review your current provider relationship carefully in light of the insight gained from the exercise in Tip #2. Identify the pros and cons within the relationship. This will help you solidify a good list of must-have features and benefits and desired improvements and enhancements that you can use to assess RFP respondents. It will also help you create the introduction/plan overview section in your RFP.

Tip #4: Research potential candidates to narrow the competition, which will lead to a more focused search that will increase the odds that you will end up with the right providers for your plan. Ask colleagues, friends, family members, and your association leaders for referrals.

Tip #5: Simplify the RFP process by sending the RFP electronically to candidates and by making responding to the RFP easy through use of a Word file or fillable PDF. Also, provide an appropriate amount of time for candidates to respond—typically one month.

Avoid waiting until you encounter a problem with your current plan providers. Being methodical and proactive can help you identify and solve unknown problems before they occur, and this practice will keep you in compliance with your due diligence fiduciary duty.

Bonus! We are happy to share with you an RFP template in Microsoft Word that you can adjust to meet your needs. Please email dstevens@asaecenter.org to request the template.

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ASAE BUSINESS SOLUTIONS **401(k) retirement program**
Re-envisioning the Future

GOLDEN RULES FOR NONDUES SUCCESS

BY JENNIFER BAKER, MSW, CAE

Show me the money. This is the pressure many of us are facing as we seek to address revenue shortfalls and budget strains caused by the ongoing impact of COVID-19. The question is, how do we home in on new nondues solutions to fill the gap without falling prey to short-term, profit-driven perspectives that can lead us to miss the mark?

Now don't misunderstand. The adage "No margin, no mission" is true, and making money is not bad. What is bad are the problems that can come when we lose focus on building value—problems such as wasting staff time and effort and squandering members' mindshare on poorly vetted nondues activities and damaging your brand by selecting partners who do not really get who you serve or are not aligned with your organizational values.

To avoid these pitfalls, consider these three tried-and-true golden rules that have served the ASAE Business Solutions team well over the course of its 60-year history designing, building, and delivering solutions that help associations increase efficiency, enhance capabilities, and reduce costs.

Golden Rule #1: Remember you're a steward. While your interest may be piqued by promises of financial returns, remember to not lose sight of the fact that you are a steward of a mission-driven organization. The late John H. Graham IV, FASAE, CAE, former president and CEO of ASAE, said it this way:

"You know, there's one thing that I've learned about associations that I think is true and that is it's not mine. I don't own the association.... It is owned by the members. It's mine to be a good steward. It's mine to be a good leader. It's mine to demonstrate inspiration and passion, but it isn't mine at the end of the day. At some point I give it back, and my goal is to give it back in a much better condition than I received it."

John's point is critical to maximizing success. When you put your stewardship hat on, you put your members and your market first and you ask the right questions. Questions

COMPANY BIO

ASAE Business Solutions is a portfolio of essential enterprise solutions designed to help organizations like yours grow and prosper. The portfolio encompasses an array of nondues-revenue-generating solutions that can help you fill member needs, including the affinity insurance solution provided by Aon Affinity Nonprofits, the career center and job board solution provided by Naylor Career Solutions, the concierge service solution provided by Circles123, and the energy procurement and management solution provided by APPI Energy.

such as: How does this tie into our organization's purpose? Will this deliver a real return on investment and contribute to our organization's success in a lasting way? What impact will launching this have on the trust we have established with our community? Answering these questions will help you select nondues revenue solutions that are smart and mission-aligned.

Golden Rule #2: Seek the unique. Differentiated offerings are essential in today's world, where almost all products and services are accessible at the click of a mouse. Be sure to negotiate a unique "wow" factor that is not available in the open market to boost your chances of standing out from the competition. Think not only about discounted pricing, but also about special features, benefits or terms, or exclusive value add-ons.

Golden Rule #3: Pick your partners wisely. Winning nondues providers have certain hallmarks, including a sterling reputation, deep expertise in what they do, experience in serving industries or professions like the ones you represent, sound management and financial stability, and the capacity and commitment to deliver excellent customer service to both your members and your organization.

During a fluid situation like the current pandemic, it may be tempting to speed up or skip steps in your investigation to determine proper fit. Don't do it! Instead, follow the golden rules and conduct a thoughtful due diligence process to make choices that will sustain your organization now and into the future.

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NOW IS ALWAYS THE HARDEST TIME TO INVEST

BY BETSY PIPER/BACH

Associations were hardly immune to the impact of COVID-19 on our economy and the financial markets. The ASAE conference went virtual, 501(c)(6) organizations were excluded from benefits under the CARES Act, and reserve balances experienced volatile market value swings, leaving CFOs and investment committees in uncharted waters.

When COVID-19 became a pandemic, governments took decisive actions that virtually shut down most of the economy and sent global equity markets and interest rates sharply lower. Global stocks recovered significantly during the second quarter, but unemployment remains at historic highs, and the threat of a second wave of “back-to-school” COVID cases adds to continued uncertainty.

The recent market crash provided associations with a few key investment lessons. Here are three of the most important ones.

1. “Bond” is not a synonym for “safe.” Most associations with diversified portfolios have a reasonable allocation to bonds (32 percent, according to the ASAE Research Foundation). Bonds can help to cushion the volatility associated with investing in stocks. But as 2020 began with interest rates at historic lows, many investors were tempted to reach for yield by allocating heavily to riskier (but higher-paying) bonds. These investors discovered that during the downturn these bonds lost money as well (while U.S. Treasury bonds rallied). The lesson? Understand the collective risk profile of all your investment assets.

2. Rebalance. Portfolio rebalancing is broadly accepted as a prudent investment practice. It’s also one of the hardest things to do as an investor; selling something that’s doing comparatively well to buy something that isn’t goes against most of our behavioral instincts. A disciplined, data-driven rebalancing strategy can help to remove emotion from this decision. As stock prices declined, associations that sold their “winners” (bonds and cash) to buy back into “losers” (stocks) saw their portfolio values recover much more quickly in the ensuing months.

COMPANY BIO

DiMeo Schneider & Associates is located in five U.S. cities, with 105 employees and \$103 billion in assets under advisement. Through the ASAE Investment Management Solution, DiMeo utilizes strategies and models designed for asset sizes of \$250,000 to \$5 million to help associations fulfill stewardship responsibilities while improving performance and reducing expenses.

As of June 30, 2020, Brown Advisory had approximately 700 colleagues overseeing \$80 billion in client assets, \$57 billion of which are discretionary. They have clients in all 50 U.S. states and 39 countries being served from their 12 global locations. This strategy is a customized approach for asset sizes over \$5 million through the ASAE Investment Management Solution.

3. Stay in the fight. During periods of volatility, it's tempting to simply get out of the markets altogether with the hope of getting back in "when things settle down." Unfortunately, long-term market gains have historically been concentrated in just a small fraction of days; missing those days can cause irreparable harm. An association's best chance at achieving its long-term return objectives might be to simply stay invested. Associations that stepped away from the markets in late March and early April most likely now have a steeper path to recovery.

HOW CAN THE STOCK MARKET PERFORM SO WELL WHEN THE ECONOMY ISN'T?

While the composition of the S&P 500 Index and the U.S. economy overlap from an industry and sector perspective, the recent economic disruption magnifies the difference in their respective components. Sectors whose companies were minimally impacted—IT, consumer staples, and communication services—make up significantly more of the index than of the U.S. GDP. Nearly 50 percent of the companies in the S&P 500 Index were minimally impacted, while the broader economy had far more sectors that were hard hit—think industrials.

The answer: The disparity in performance between the stock market and the overall economy results from the stocks in the indices not reflecting the stocks impacted the most by the events in the current economy.

ASAE Investments LLC may receive compensation from DiMeo Schneider & Associates for introducing associations to them for purposes of investing in ASAE Investment Management Solution. The fee will not increase or decrease the cost of the program. ASAE Investments may only transact business in the District of Columbia if licensed, excluded or exempted from the District's investment adviser or investment adviser representative licensing requirements; and follow-up, individualized responses to persons in this state by the investment adviser or investment adviser representative that involve either effecting or attempting to effect transactions in securities, or rendering of personalized investment advice for compensation, will not be made without compliance with the District's investment adviser or investment adviser representative licensing requirement, or an applicable exemption or exclusion.

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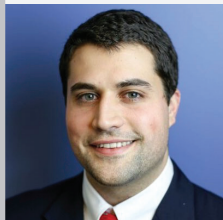
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EVENT CANCELLATION INSURANCE IN THE TIME OF COVID-19

BY SETH J. FLEISCHER

The past seven months have changed our world dramatically due to the COVID-19 pandemic, and unfortunately the many events, conferences, and conventions in the association sector have taken a hard hit. The questions surrounding insurance coverage for future events is vast and has ranged in focus from events with coverage prior to the pandemic, specific communicable disease coverage extensions, and what coverage will look like going forward, including how the coverage shifts for virtual and hybrid events.

First, let's take a look at event cancellation insurance coverage purchased pre-COVID. Those who have purchased event cancellation insurance in the past know that no two policies are exactly the same because no two events are exactly the same. Actual coverage and the quoted premium depend on many factors, including where and when the event will be held and expected revenue and expenses. The standard event cancellation insurance policy typically covers cancellation due to events beyond your control, meaning an act of God such as adverse weather (hurricanes, winter storms, and so on), or other circumstances that disrupt travel or cause damage to a scheduled event venue.

In addition to standard coverage, various optional add-on features were often available, including the communicable-disease (CD) coverage extension. When COVID-19 hit in early 2020, those with CD coverage extensions already in place had added protection that included implications relating to a pandemic outbreak. Coverage depended on the specific terms and conditions of the policy and coverage extension in effect.

It became very clear shortly thereafter that COVID-19 would have major impact on the event insurance landscape. In addition to the exclusion of communicable diseases in policies written in late January 2020 when the World Health Organization declared a global health emergency

COMPANY BIO

Aon Affinity Nonprofits is an ASAE-endorsed provider of the ASAE Insurance Source, providing property and casualty (P&C), management liability (D&O/EPL) and Showstoppers event cancellation insurance to the trade and professional association community. For 40 years, the Affinity Nonprofits division of Aon has specialized solely in providing insurance solutions to the nonprofit sector. The division is comprised of talented individuals entrusted by insurance carrier partners to underwrite and service over 70,000 policies for nonprofit clients within programs that provide a diverse insurance product segment accessed by over 5,000 local insurance agents and brokers.

and carriers excluded CD riders due to insurance underwriter guidelines on risk, insurance providers needed to shift in the face of the “new normal” to considering coverage for virtual and hybrid events in the short term and the speculation that face-to-face events may not come back into play for some time.

So, what does event cancellation coverage look like today? Although similar in nature, offerings vary, and separate products may exist for in-person events versus virtual ones. Coverage for Aon’s new Showstoppers virtual event insurance includes the following claims triggers:

- financial loss due to the failure or malfunction of necessary equipment, which leads to cancellation, abandonment, or interruption of your virtual event
- proven additional costs or charges paid by your organization to avoid or diminish a loss
- cyber incident impacting your organization’s virtual event per the specifics in the policy
- non-appearance of a key speaker if included in the policy
- rescheduled events

This virtual version of the event cancellation policy was designed specifically for the association sector with full consideration given to the importance of meetings and events in the industry. It is always a good idea to expect the unexpected to ensure your organization is protected from unforeseen occurrences surrounding your event. Additional information regarding Aon’s Showstoppers Virtual Event Insurance (as well as the standard event cancellation insurance product) is available at https://www.asaebusinesssolutions.org/event_cancellation_insurance.html

IMPORTANT NOTE: The statements contained herein are in no way a determination or affirmation of coverage and do not speak for all insurance policy provisions offered by all providers. Please refer to your organization’s event cancellation insurance policy as the precise coverage afforded is subject to terms, conditions, and exclusions of the event cancellation policy as issued.

Aon Affinity Nonprofits is the brand name for the brokerage and program administration operations of Affinity Insurance Services, Inc., a licensed producer in all states (TX 13695); (AR 100106022); in CA & MN, AIS Affinity Insurance Agency, Inc. (CA 0795465); in OK, AIS Affinity Insurance Services, Inc.; in CA, Aon Affinity Insurance Services, Inc. (CA 0G94493), Aon Direct Insurance Administrators and Berkely Insurance Agency and in NY, AIS Affinity Insurance Agency.

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MANAGEMENT LIABILITY INSURANCE: A SOLUTION FOR CREDENTIALING ASSOCIATIONS

BY BARRY F. PETERS

When association executives receive a formal complaint related to their credentialing activities, the last thought on their mind should be whether their directors' and officers' or general liability policies will respond to a credentialing claim.

Associations involved in credentialing activities (e.g., standard setting, certification, accreditation, etc.) can be affected by litigation against the organization and executive team. Utilizing management liability insurance is a modern and cost-effective risk transfer tool that associations should consider to protect both the organization's balance sheet and individual's personal assets.

The term "management liability" has traditionally been used to describe a package of insurance coverages designed to protect private and public corporations, executives, and employees against circumstances that may not be covered under an association's general liability or traditional non-profit directors' and officers' liability policies.

Management liability policies contain coverage sections for directors' and officers', professional liability (E&O), employment practices (EPL), media liability, and cyber liability among other coverages. Depending on the various exposures and risk tolerance of the insured, policies can be bundled together with a combined limit or structured with a dedicated limit for each line of coverage.

THE RIGHT LIABILITY PROTECTION

Credentialing associations, executives, employees, and contractors face a range of legal threats, including discrimination (age, race, gender, employment), harassment, negligence, non-performance, libel and slander, revocation of a credential, and cyber exposures. Management liability insurance has become an emerging tool to hedge against these risks.

COMPANY BIO

Alliant is a national insurance brokerage and specialty program (affinity) administrator for property and casualty, employee benefits, executive compensation, specialty association insurance (event cancellation, boardroom plus), voluntary benefits, underwriting, and claims (TPA) services.

Since 1925, our partners and clients have had profound confidence in our ability to deliver in all market climates. Despite our broad reach, we maintain a targeted focus on our clients' business, with our professionals executing a depth of expertise in the industries they serve.

Conversely, traditional association D&O Insurers often limit the protection leaders and the entity receive against civil actions, leaving gaps that can potentially lead to personal exposure for board members and little or no coverage for the entity. Many association D&O and general liability policies include absolute exclusions for credentialing activities and other critical coverages (e.g., vicarious liability or contingent bodily injury/property damage liability). Furthermore, these insurers either exclude or strictly limit coverage for anti-trust allegations.

To close these gaps, leadership should consider a management liability product that provides affirmative grants of coverage for their respective credentialing activities. Equally important is the removal of exclusions that would restrict coverage in the case of litigation involving credentialing activities.

Broad media liability protection is an essential component included in a management liability policy designed to protect against claims based on intentional torts. Associations create and disseminate a wide range of complex content and other communications, including printed publications, websites, advertisements, and social media. Conversely, many traditional association D&O and general liability policies limit or restrict the media liability protection they provide.

Cyber liability is a coverage component provided under management liability policies, providing for the cost to recover from a data breach, virus, ransomware, or other cyberattacks. It also covers legal claims resulting from the breach. Credentialing associations that store sensitive data (e.g., exam questions, credit card numbers) in the cloud or on an electronic device are exposed to significant litigation in the event of a cyber loss. The policy includes other traditional coverages (e.g., fiduciary, crime) extended under the policy.

There are numerous benefits for credentialing organizations to consider this modern approach to managing their unique liability exposures.

This article is provided for general informational purposes only. It's not intended to provide individualized business, insurance, or legal advice. You should discuss your individual circumstances thoroughly with your legal and other advisors before taking any action with regard to the subject matter of this article.

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BE PREPARED FOR YOUR AMS POST-LAUNCH

BY VINNU DESHETTY

Associations build well-thought-out business cases for why they need an AMS, including plans for selecting, implementing, and launching systems. What sometimes is overlooked is the ongoing management of this AMS *after launch* that you have heavily invested in. Don't be caught off-guard—make plans to ensure you have the technical and manpower capacity to keep your system running smoothly and making the most out of your AMS.

POST-LAUNCH ONGOING CHECKLIST

Plan for data hygiene. Cleaning data is a never-ending task. When data is updated, merged, and imported by multiple users, there are bound to be issues with data integrity. Be sure to identify problems, and who will clean the data. Don't make the mistake of delaying data hygiene, as the issues will only increase over time.

Troubleshooting data issues. To ensure your system works for you, be sure to identify why you have dirty data. Identify and fix the problem early on to ensure you have better data. This also saves valuable staff time and resources.

AMS releases. Updates are inevitable and overall a great thing. Be prepared for updates that your AMS provider will make. Understand how updates will affect any customizations, workflows, and reports—no matter when the updates hit your normal work cycle. You may need new technical skills to protect your system's integrity. Prepare in advance by having resources to assist.

API integrations. Integrations can be tricky, but they don't have to be. For example, can your applications integrate into one system that gives you a holistic view of your members and organization? Ensure that you understand potential pitfalls and how to mitigate them. Don't be surprised by unforeseen challenges—they happen. Have someone at hand who can focus on integration, troubleshooting, and ongoing maintenance.

Adapting to business changes. As an association evolves, all areas benefit from good change management. Be

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Aplusify provides associations and nonprofits with the capacity and capability to maximize your Salesforce platform. Our team of Salesforce-certified experts alleviates the burden of implementing and managing Salesforce, freeing you up to focus on strategy and organizational mission. Find out how we can save you time, money, and stress with our Salesforce Managed Services.

prepared to keep your AMS functioning while you plan for upcoming changes.

Staff changes. Whether its family leave or a staff reduction, how will staff changes affect your capacity to manage the AMS? Consider options for how you will handle various scenarios to cover technical gaps your organization may face.

EVALUATE YOUR TECHNICAL CAPACITY

Be realistic as to what technical skills you need on your team to maintain, troubleshoot, and enhance your AMS. We like to think of an AMS like a car. You may be able to drive your new shiny vehicle and can fill it up with gas (or power it up if it's electric). But how are you at routine tasks, such as oil changes? How about the bigger scheduled maintenance? It's very rare to find one person who has all the skill sets and time (capabilities and capacity) required to keep your AMS running at peak performance.

RESOURCES TO CLOSE THE TECHNICAL SKILL GAP

- **AMS provider:** They are your partner in this digital transformation journey. Discuss your technical skills gap and see if their service plans can help.
- **Additional staff:** Look for team members who have experience in your specific AMS and meet the technical skills you need now and in the future.
- **Third parties:** Companies like Aplusify have a team of developers with a wide range of technical skills for you to tap into.

APLUSIFY TIP: DON'T RESTRICT YOURSELF TO A LIMITED SET OF TECHNICAL SKILLS. LOOK FOR AN OPTION THAT PROVIDES YOU WITH THE FLEXIBILITY TO ADAPT TO YOUR CHANGING BUSINESS NEEDS.

Think beyond your AMS launch. Routine maintenance is only part of the digital transformation journey. Have a plan to make the most out your AMS. Go back to your business case and ensure that you are getting what you planned for. With proper planning and access to solid resources, you won't get caught off guard after launch.

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7 TIPS FOR KEEPING YOUR VIRTUAL EVENT ENGAGING

BY JOCELYN TAYLOR

If you're not seasoned in hosting virtual events, you may be worried about holding your attendees' attention.

After all, they aren't sitting in front of you in a conference room, but instead behind a computer at home. Here are some ways to keep virtual attendees engaged:

1. Ask an icebreaker question. Having a chat pod as part of your virtual event allows you to ask a question to the audience and have them reply in real time—and also to one another. It could be as simple as “Where are you located?” which could result in numerous people finding out they live in the same small town in Wisconsin. This allows for a bit of a human element and connection and can be used throughout the rest of the session.

2. Incorporate polling. Polling can work in a similar way to an icebreaker question: Polls can be a great way to kick off a virtual event and get the audience engaged. However, as opposed to a general question being discussed in a chat pod, you get results delivered that immediately provide insight into who your audience is. We recommend having a few polling questions throughout your presentation, if appropriate.

3. Bring in a guest presenter. A guest presenter could mean many things. This could be someone completely splitting the presentation time with you, or someone to come in and share a story or some information for five to 10 minutes. Another idea is having this guest presenter provide additional moderation or asked planned questions throughout the presentation. Any of these scenarios can help make the presentation more engaging when you're unable to gather feedback from the audience in a face-to-face scenario.

4. Encourage questions. While you may not be face to face with your audience, that doesn't mean they won't

COMPANY BIO

Blue Sky eLearn has been transforming the way associations have been delivering online education since 2002. By providing an award-winning learning management system and virtual events to over 400 clients, we continue to develop breakthrough solutions to amplify our clients' messages. Path LMS allows you to organize, track, and monetize valuable online content in a robust, easy-to-manage solution. We extend the value of Path by offering a variety of virtual event solutions, such as webinars and webcasts, as well as educational design services. We partner with our clients to ensure they are able to offer impactful learning programs.

have questions! Just as you may ask them an icebreaker or polling questions, encourage them to ask questions throughout your presentation! Depending on the platform you are using, you can typically decide if you want the questions to be visible to the entire audience or just to you.

5. Use video. Video is typically helpful in keeping people engaged. Whether that is just video of the person or people presenting, or incorporating short videos into your presentation, there are multiple ways to use video during a presentation. And incorporating short videos in a presentation doesn't just have to happen while we're talking virtual: You may want to consider that for your face-to-face events when it makes sense too!

6. Flipped lessons. Rather than covering a step-by-step process or lesson when people join your session, have attendees view on-demand content prior so that when they join your live event, they are ready with questions, feedback, and takeaways, providing for a richer discussion.

7. K-W-L chart. If you're familiar with a KWL chart, it stands for:

- K—what they know
- W—what they want to know
- L—what they've learned

The idea is to get attendees to comment under the “K” and “W” sections at the beginning of the presentation. This encourages participation and engagement and also can help the attendee feel like they have a hand in what they're going to be learning. At the end of the presentation, have attendees comment under the “L” section.

There you have it! These are just seven ways to help keep your virtual events engaging. While there are other ideas and methods out there, and a lot of the time what works can come down to your specific event, things like the size, length, and content can all have an impact.

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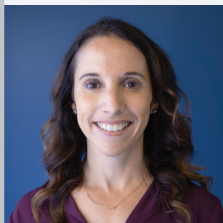
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BUILD CULTURE AND BRAND ALIGNMENT

BY DEDE GISH-PANJADA

This may be the perfect time to formalize your culture road map and ensure it is aligned with your association's brand. Over the past few years, we've embarked on this journey with our own company, as well as with our association clients and thought we'd share the processes and tools proven to be most effective.

CULTURE ROADMAP TO A GREAT PLACE TO WORK

As leaders, we know that workplace culture is key to the success of any organization. But figuring out how to create and maintain a great culture can be daunting. Creating a culture roadmap will help you assess where you are today and identify goals for the future, while providing a framework for maintaining the cultural elements that are working well and weeding out the rest. The Culture Roadmap to a Great Place to Work starts here:

Lay the foundation. Policy, procedure, job descriptions, and people management training and tools. While not the most exciting element of your culture, they lay a foundation that supports three fundamental values: fairness, consistency, and accountability.

Increase engagement. Engaged employees are passionate, committed, and go the extra mile. In other words, they do their best when they care. But they won't care unless they are valued and respected. Increase engagement through recognition programs, professional development, and training. Demonstrate a commitment to diversity, equity, and inclusion. Make time for employees to emotionally connect to work through social activities and volunteer opportunities, especially in this more virtual period.

Define your culture. David Friedman wrote in *High Performing Culture*, "Good companies have good cultures by chance. World-class companies have world-class cultures by design." There are many workplace culture experts out there; all agree that it starts by defining the employee behaviors that drive your success. Define your culture in a list of written values, then intentionally live out those values in everything you do as an organization.

COMPANY BIO

With its Agile Association Management™ approach, Bostrom provides management, outsourcing, and consulting services to clients nationwide and globally from offices in Chicago and Washington, DC. Bostrom is an industry leader that thinks like a startup—constantly innovating, embracing disruption, and transforming associations.

Our passion is bringing your mission to life through authenticity, connection, and community. We start with a conversation. We listen. We discuss. We partner. Visit bostrom.com.

ALIGNING CULTURE AND BRAND

Culture has the potential to greatly affect the sustainability of an association: Staff, volunteer leaders, members, and partners comprise the culture and directly influence the future of the association and its ability to advance its mission.

The Corporate Brand Identity Matrix (CBIM) framework was developed by Stephen Greyser and Mats Urde of Harvard. Each question focuses on one element of the organization's identity. There are nine elements in total, and the matrix is organized in three layers: internally oriented elements on the bottom; externally focused elements on top; and those that are both internal and external in the middle.

This works well when you have a clear value proposition you adhere to but need to align your culture, marketing, and messaging to power and integrate internal and external communications more effectively.

The CBIM also identifies culture alignment, value proposition, and key branding elements to be used in all of an organization's creative endeavors. This matrix provides an added layer of consistency you can give to partners, marketing and social media staff, and volunteers who create and distribute content for the organization. This alignment also results in greater commitment to the brand, sharper positioning (especially differentiation) in the marketplace, a stronger sense of belonging to the group, and more coherent marketing and communications.

When all elements of an association's matrix are aligned, each will reflect and echo the brand core, resonating with the association's values and culture. The alignment of all of these elements leads to the brand core summing up the essence of the association's culture, values, mission, vision and differentiating value proposition. This tool strengthens your marketing activities and brings consistency to how staff and volunteers view and communicate internally and externally.

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MAXIMIZE SPONSORSHIPS AND EXHIBITS WITHIN YOUR VIRTUAL EVENT

BY WAYNE CRAWFORD

The shift from in-person to virtual events has presented new challenges for associations. One of the biggest challenges associations and event planners are facing today is how to maintain valuable sponsorship packages and opportunities for key stakeholders in a virtual environment.

Finding innovative and engaging ways to incorporate sponsors and exhibitors with your virtual event while providing them with valuable experience is crucial to event success. According to Community Brands research, exhibitions and sponsorships generate significant revenue for most events, and, for associations, these are two of the three top sources of nondues revenue.

Here are a few strategies and ideas you can consider for your next virtual event.

ENGAGEMENT

Opportunities that allow sponsors to directly engage with your members are key to creating a valuable sponsorship program. Here are some options to increase engagement.

- **Presenting content:** Primary sponsors can host and present a thought leadership session.
- **Expert panelist:** Have your sponsor join as an expert panelist on an industry topic.
- **Keynote sponsorship:** Like the presenting sponsorship, associations can offer keynote sessions to sponsors.
- **Follow-up content:** Sponsors can provide a thought leadership content piece to share after the event.

BRANDING

Just like an in-person event, there are many ways to give your sponsors visibility throughout your virtual event.

- **Sponsored hall:** Showcase your primary sponsors by offering their own branded hall with their logo and ads.
- **Sponsored booths:** Create engagement tactics with a sponsored booth, such as a wellness booth with yoga.

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The Event Tech Group by Community Brands is a global event management software and service provider. Our mission is to optimize tradeshow management by offering a complete suite of end-to-end event management technology solutions that maximize efficiency, streamline data flows, and improve ease-of-use for event planners and attendees. Our focus on comprehensive integration and ongoing development of leading-edge event solutions, including virtual event software, makes us unlike any other company in the market. Virtual event software features include custom lobbies, networking lounges, exhibit booths, webcast auditoriums, and more. For more information, please visit <https://protect-us.mimecast.com/s/cBoQCERvmKs6JxNoiL4o51?domain=eventtechsoftware.com>.

- **Pre-session messaging:** Present their brand to the audience 15 to 30 minutes before the event starts.
- **Branded breakout sessions:** Brand each session with sponsor colors, logo, or pop-up ads.
- **Branded swag:** Send to attendees ahead of time to wear and share before the event starts.
- **Sponsored VIP room/networking lounge:** Brand content such as a video, banner, or special feature with a sponsor message.
- **Printed programs:** Mail programs with sponsor logo to attendees ahead of the event.

ADVERTISING

- **Sponsored gifts:** Send custom gifts to attendees like wine, facemasks, totes or T-shirts.
- **Customer case studies:** Sponsors purchase a presentation slot and invite a customer to speak on their behalf describing their customer journey.
- **Themed accessories:** Create a virtual happy hour with themed clothing or accessories.
- **Lobby banners:** Exclusive sponsors can promote their brand throughout the duration of the event or specific time slots for multiple sponsors.

SPONSORED PROGRAMS

- **Scavenger hunt:** Encourages attendees to network with exhibitors, including clues and actions for engagement.
- **Virtual mall or store:** Display or sell your products directly to attendees, creating a virtual shopping experience.
- **Matchmaking technology:** An option for hosted-buyer programs to enable sponsors and attendees to have their own one-on-one meetings during predetermined “exhibit hours” in the event schedule.
- **Coordinated food delivery:** Use Grubhub, UberEats, or another service to provide a meal to attendees or select groups of attendees.
- **Sponsored entertainment breaks:** Sponsor a live musician or act.
- **Sponsored games:** Audience response features are tracked for event analytics. Options to add a gift to winners or those who participate in the game.

While virtual events may not provide the same sponsorship opportunities as in-person events, there are still many ways to offer valuable options to your sponsors.

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EventTechGroup
by communitybrands

EXECUTIVE RETENTION IS MORE CRITICAL NOW THAN EVER

BY LIZ SANTOS

With more than six months of pandemic life now under our collective belts, organizations are rethinking how to thrive in a virtual world. One of the lessons learned (or perhaps re-emphasized) is that human capital is an organization's most precious asset. The ability to emerge from the pandemic rests with its talented, dedicated leadership team. Without them, recovery will be prolonged and painful.

NEW CHALLENGES FOR YOUR LEADERS

Our new environment has brought about unexpected changes, from virtual conferences and remote work teams to advanced cybersecurity and innovative revenue streams. Your future rests on your executive team's ability to pivot while maintaining—or even boosting—staff morale amid the myriad difficult decisions being made across the association industry. How can you keep your executives motivated while demanding their very best performance?

RETENTION IS AN ONGOING EFFORT, EVEN DURING A PANDEMIC

Retention plans are critical to surviving this unprecedented period. The pandemic presents an opportunity to review your retention program. After successfully navigating your organization through a dire period, your leadership team has proven its mettle—and increased their marketability. According to *Harvard Business Review*, bold companies realize this is an unprecedented opportunity to hire exceptional talent, even as they downsize their own ranks. Recruiters won't pass over your high performers just because they happen to be employed.

While you are reviewing whether your retention strategy continues to meet your needs, evaluate program expenses. Both employee and executive benefit expenses can be mitigated or even eliminated with certain strategies. Restructur-

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Gallagher's Executive Benefits Practice specializes in nonqualified benefits for nonprofits. We consult on securing their future through leadership continuity and aligning executive performance with strategic goals. A well-designed program helps organizations recruit and retain key leaders. Our expertise is tax-friendly platforms that improve the recipient's benefit while mitigating the organization's expense and generating income for the organization.

Gallagher is made up of specialty practices with solutions for insurance, risk management, and human resources. Our commitment to our clients' success is recognized through America's Best Employers for Women, World's Most Ethical Companies, Best Places to Work for LGBTQ, and more.

ing a retention plan to leverage key features of a split dollar plan could yield several positive changes:

- Increase the executive's benefit
 - Lower the organization's cost
 - Improve the optics of executive pay on your IRS 990 form
 - Leverage an excise-tax-friendly platform for covered employees
 - Provide tax-free retirement income to the executive
- Engage your benefits provider to review expenses for recommendations on how to mitigate the risk and improve your benefits and retention.

Even if you have an executive retention plan in place, you can't set it and forget it like a Crock-Pot. An effective retention strategy addresses organizational goals, succession, vesting, performance, and more. These elements should be reviewed regularly, especially amid financial, regulatory, and competitive changes in the marketplace.

LOSING A KEY LEADER IS COSTLY

The cost of replacing an executive is estimated to be around five to seven times the executive's salary with recruiting fees, relocation, signing bonus, and more. There are several lasting effects:

- Delay in achieving strategic goals
- Negative impact on performance
- Decrease in morale and motivation
- Poor impression on membership and potential job candidates
- Lack of leadership in day-to-day operations

Institutional knowledge also departs with the executive. To compound the impact, it's not uncommon for a CEO's direct reports to depart with them. Your retention plan should include all executives who are critical to the success of the organization.

IN SUMMARY

The pandemic shined a light on the best and brightest of your leaders. A well-designed and administered executive benefits program can help retain those talented individuals who are critical to your organization's recovery and future success. Executive benefits are an important tool in recruiting, retaining, and incentivizing key leaders.

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FREE YOURSELF FROM THE FOUR TRAPS OF NONDUES REVENUE DEVELOPMENT

BY CHRISTINE SAUNDERS

As an organization moves outside of its comfort zone—core membership dues revenue—and into the area of nondues revenue, it faces the risk of getting caught in four traps during the planning of that shift. Here's an overview so you can avoid those traps and be more profitable as a result.

TRAP #1: IGNORING THE COMPETITIVE LANDSCAPE

Assuming that you have a captive audience—your members—from which you can generate nondues revenue can be a costly mistake. True, you may be the only game in town when it comes to your core offering of uniting a profession, trade, or industry, but you may already be trailing your competition in terms of other services, like networking or professional development.

A vast array of organizations are your rivals for your members' time, attention, and money. They compete with a sharp focus on the market and what audiences want, and they are often more responsive than associations can be. Being careful not to simply provide the same services everyone else does is a foundation for success.

TRAP #2: SETTING PRICES BASED ONLY ON COST-AND TOO LOW

Classic pricing strategies are complex, but at the most basic level, it's essential to factor in financial cost, the cost of your target audiences' time, and the return on their investment. Another integral element to consider is the "friction"—the expending of mental and emotional energy—that your audience goes through when accessing your services.

Pricing is a very specialized marketing discipline, all too often under used by associations. Unfortunately, more commonly than not, associations leave money on the table in an effort to price solely on a toe-to-toe peer comparison level, or worse, on gut feeling. Pricing based on the true, holistic

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Founded in 2014, Halmyre is a team of multidisciplinary marketing strategy consultants who deliver intelligent marketing support to our clients. Through the marriage of the ability to think independently and the experience to "do" effectively, we help clients spark growth for short- and long-term success.

As your marketing strategy partners, we support classic marketing strategies across the full marketing ecosystem with integrated customer-centric service design, data intelligence, creative insight, and marketing execution.

value of your service is what will get you the most return on your investment.

TRAP #3: SHORT-CHANGING YOUR SERVICE DELIVERY WITH OFF-THE-SHELF SOLUTIONS

While associations share similarities in terms of issues and opportunities, each has a value proposition that is distinctive to its unique group of members. Who they are and what they expect of you varies. There are cultures associated with different professions, industries, and trades based on training, experience, the nature of their work, and more.

If you approach your service delivery without considering your audiences' wants and needs, it shows that you haven't listened to them and you're not concerned about finding them the right solutions. There can be simple and cost-effective ways to tailor your services. It's time to accept that the service must be unique to your market (your members) for it to succeed in driving the revenue you expect.

TRAP #4: SURVEYING YOUR WAY TO NEW PRODUCTS AND SERVICES

Surveys are an anchor of any organization's ability to listen to its audiences. However, while they provide quantitative analysis and are great at benchmarking longitudinally and assessing market size, among many other things, they are not reliable tools for keying in on what your audience actually wants. People don't always know what they want, or at least aren't able to package the answer into the neat bundles a quantitative survey may look for. Remember what Henry Ford reportedly said about developing the Model T: "If I had asked people what they wanted, they would have said 'faster horses.'"

WHAT TO DO WITH THIS INFORMATION TODAY

Whether you are reviewing existing revenue sources or planning new ones, be vigilant about watching for the four traps of driving revenue and be attentive to maintaining and constantly adjusting your products and services. Do that and you will be able to better develop and maximize your association's nondues revenue.

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THREE ESSENTIAL COMPONENTS FOR VIRTUAL EVENTS

BY RYAN COSTELLO

Even though most organizations have lost a large portion of their event revenue, many are still on the fence about taking their events virtual or are struggling to decide which solution is right for their members.

There are lots of solutions out there and at the same time the default Zoom virtual event isn't cutting it. We're all "Zoom fatigued" and sponsors and attendees aren't buying it as a legitimate replacement to real-life events. When all of this is new and you're unsure how the stakeholders you rely on to generate event revenue will react, I can imagine it's paralyzing.

We've found that organizations that are pivoting to virtual and are working hard to remember the intrinsic value events offer are having great success. In fact, we're seeing organizations generate even more event revenue than they previously were.

Here are three core event fundamentals those organizations are bringing into their virtual events.

1. PRESENCE

Presence is that feeling of being physically, emotionally, and mentally engaged as an attendee rather than simply being a viewer or consumer of what's going on. For example, if you're watching a virtual event session and simultaneously replying to an email, which task truly has your focus? The email.

Presence is something that most event producers are struggling to offer attendees with virtual events. Look for solutions that allow attendees to interact and network with each other on their own—not solely via a chat box during a session.

2. COMMUNITY

Feeling and observing that you are a part of a connected community is a critical part of an event experience.

COMPANY BIO

MemberSuite is the premier software provider of association management and event technology solutions for nonprofits. With an intense focus on wowing our customers, our mission is to build innovative software solutions that empower organizational leaders to grow their businesses through highly effective engagement.

An event community is built by a common reason for attending the event (e.g., subject matter, speaker, host, expected outcomes, meeting new people). This is easy to accomplish as long as you have compelling and relevant content to offer. But the energy that comes from walking up, talking to, or running into other attendees is missing from virtual events. This is what creates a true sense of community and the emotional buzz of being in the crowd. Human beings are social and without a virtual event experience that truly fosters community and networking, the attendee experience will fall flat. Address this by implementing a buddy-program where first-year attendees are paired with second- or third-year attendees to show them around, share session notes and takeaways, and event favorites.

3. AUTONOMY

Autonomy is having the ability to pick and choose what you want your event experience to be as an attendee: which sessions you attend, who you meet, how long you stay in specific areas, what you interact with, which exhibitor booths you visit, which performance to catch, the ability to explore the venue, and more. Think about how much your feet hurt after a long day at a conference. That's because you are selectively moving around a ton. That's autonomy at work.

Autonomy is a significant challenge for most virtual event solutions because there is no concept of a venue and no way to move. You can accomplish this with avatar-based solutions that allow attendees to move around virtual venues and talk and interact as they go. In these environments, attendees are in the driver's seat and every person comes out of the event with a unique, personalized, and memorable experience.

While there are certainly more than three fundamental elements of great event experiences, these three are top-of-mind for me based on my own Zoom fatigue and lack of engagement at many of the virtual events I've been attending.

Remember that going virtual shouldn't lower the bar, it should raise it. Your event staff is resilient and are not strangers to evolving, adapting, and pushing forward on the fly.

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BREAK DOWN SILOS TO MAKE SMART, DATA-DRIVEN DECISIONS

BY BRIAN BRUFFEY

There is likely a technology tool or software application for every business challenge. But if you invest in these tools haphazardly, you will end up with a siloed tech stack that doesn't give you a complete picture of your membership.

For example, if you integrate your marketing automation system with your association management software (AMS), you can accurately track every touchpoint and interaction you have with members and prospective members, including website visits and social media engagement. Or you can sync event registrations with your mobile app and virtual event platform to ensure a seamless event experience for all attendees at a virtual or hybrid event.

However, this is only possible if you establish a single system of truth or hub (usually your AMS) to bring the data from all your systems—the spokes of your tech “wheel”—into one place. This not only ensures the accuracy and completeness of your data, but it also compiles the data in a manner that uses a common “language” to create unobstructed data visibility.

Breaking down data silos gives you access to exponentially more intelligence, builds an accurate view of the member journey, drives better decision making, and helps your staff find new ways to generate revenue and deliver remarkable member experiences.

LEVERAGE BI & ANALYTICS TO EVALUATE PROGRAMS

When all your data is centralized, business intelligence and analytics software like Microsoft Power BI or Tableau can report across all your systems using dynamic, interactive dashboards and real-time reports to uncover hidden insights for your association.

If you want to determine if your education promotion on packaged courses is more effectively increasing attendance or revenue, you could use dynamic, interactive dashboards

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Protech is a Microsoft Gold Partner that delivers the most powerful AMS, built specifically for Microsoft Dynamics 365 and the Power Platform. By combining the world-class CRM platform with member-focused features, Protech's integrated suite of database, financial, e-commerce, and analytics tools seamlessly help you engage members, inspire leaders, and empower staff. The robust, easy-to-use AMS brings your association data, insights, and tools together in one place to help you deliver remarkable experiences. For more information, visit ProtechAssociates.com.

to track key metrics. By comparing course attendance data from your Learning Management System, course purchase information from your AMS or e-commerce solution, and revenue from your accounting system, clear correlations will quickly emerge.

Maybe course attendance is down, but revenue is up. This could mean that the promotion is effective to influence purchases, but not attendance. If that's the case, your team can create a campaign to remind members to attend the courses they purchase so they receive the full value of their investment. If the inverse is true, the deal you are offering may be underpriced. Since the value of the courses is clearly high, you may be able to increase the cost of the package while still maintaining the value that your members expect from the purchase.

UNCOVER A CLEAR PICTURE OF YOUR MEMBERS' JOURNEY

Business intelligence can also help to determine what members value the most from your organization, and which activities or offerings are strong indicators of future engagement from those members.

You can measure education session and event attendance, purchases, and email reads and clicks from each of the respective systems for these activities. But looking at this data altogether creates a view of the annual, or even lifetime, value that you provide to members.

You may even notice trends start to emerge, such as a positive correlation between members who attend a certain event and then renew their memberships, or the likelihood of a member to register for an event based on their levels of engagement with emails and in social media conversations.

REALIZE LONG-TERM BENEFITS

Capitalizing on these insights and trends enables your staff to tailor marketing messages to loyal members, while offering a bit of extra TLC to those members that are at risk of not renewing their memberships or not attending your annual meeting.

Ultimately, these focused efforts will lead to greater results for your entire organization, streamlining activities across departments, optimizing productivity, and increasing revenue streams.

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PROTECH

HAS COVID-19 AFFECTED YOUR AWARDS AND MEMBER ENGAGEMENT PROGRAMS?

BY CAROL AYTON

In matter of months, the pandemic outbreak has changed the way we live and engage with others. Associations and nonprofits have had to learn how to navigate this new normal. However, these unprecedented times have also touched on one of the most basic instincts we are born with: the ability to adapt and get better at what we do.

The three questions we hear often are:

1. Can we manage our awards, fellowships, grants, scholarships, and mentorship programs efficiently while staff works remotely?
2. Can we increase program awareness and reach?
3. Can we make it easier for our applicants, committee members, and reviewers?

And the answer is yes!

Here are three quick-win opportunities that apply to all forms, submission-based, and review programs:

1. Understand where your audience is online. People visit your website for information. Knowing where these visitors come from and what they do is key to your outreach strategy:

- Did they come from a link on a university website or a job board ad?
- Was there a conversation on Twitter about your program?
- Did that email newsletter you sent to members result in more nominations?

Your website likely has web analytics tracking such as Google Analytics. Request a weekly report to be automatically emailed to you.

Learning from your web analytics about where your users are and how they stay connected will help you broaden your program awareness by utilizing the right channels—such as targeted social, email, and online adver-

COMPANY BIO

RhythmQ is a techno-marketing firm with over 12 years of experience of working with associations, nonprofit, and commercial organizations.

RhythmQ's all-in-one online software is used by organizations small and large to manage their awards, fellowships, scholarships, grants, mentorship, and other application-review based programs efficiently in a cost-effective manner.

tising—resulting in an increase of quality.

2. Implement an online software system to manage your program process—start to finish. Managing these programs can be exhausting—collecting applications through email or surveys, reviewing for ineligibility, attaching supporting letters, sending applications to reviewers, or creating reports with z-scores and standard deviations.

Making the switch to an online software system to manage your program end-to-end is key to saving time and money. Here are some questions to ask first:

- Can it be branded to your website's look and feel?
- Can the forms, review rubric, and workflows be customized for each of your programs—awards, grants, fellowships, scholarships, mentorships, volunteer applications, etc.?
- Will it be easier for applicants, reviewers, and administrators to use?
- Can it integrate with your AMS for single sign-on, payment processing, and data exchange?
- Can this be done within a reasonable budget?

Making the decision to move to an online software will help you make a better impact with your programs and save valuable time and money.

3. Track your recipients and alumni to showcase ROI.

An important part of your overall objectives for scholarships, grants, and fellowships can be tracking and receiving post-selection acceptances, documents, surveys, status reports and competition updates. Your online software should manage these processes, resulting in increased efficiency, tracking, reporting and compliance. Other features may include:

1. An online directory for alumni to collaborate, communicate, and share profile updates and articles
2. A tool for alumni to share career and research updates on social media.
3. Search, recruit, and engage members for workshops and initiatives.

Ensuring that your online software has these capabilities will help streamline your post-award processes, making it simpler to engage your recipients and alumni and showcase the ROI of your programs.

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NOT JUST ANOTHER WEBINAR: EVENTS AS INTEGRATED SOLUTIONS

BY JENNY BEARD

Traditional approaches to events have adapted to quickly evolving public health guidelines and organizational dynamics throughout this unusual year. Seemingly overnight, associations moved a diverse range of events online, seeking to replicate in-person experiences virtually. While necessity might be the mother of invention, smart organizations now realize that a blend of digital outreach, strategic communications, and vibrant design is necessary to create uniquely impactful and freshly inspiring events for member-based audiences.

Innovation has driven events during this global shift to purely online environments. Organizations have had to pivot their convenings in unexpected ways, often with expert guidance from planners. From weekly staff meetings to quarterly board meetings, product releases to annual conferences and fundraising galas, every gathering must be reimagined. We have the creative opportunity and audience demand to produce online events as full virtual experiences, not just a direct translation of what works in person.

Recently, we supported one of our long-time clients, a leading national foundation, in producing an adeptly responsive virtual event which addressed how nonprofits can maintain their financial health during this unprecedented pandemic. The event featured thought leadership from a national capacity-building firm that advises nonprofits on strategic financial management. Smart event timing, well-branded design, and targeted digital promotion contributed to its wild success. Retaining nearly 1,100 attendees, resourceful planning layered with strategic communications helped this become the foundation's highest-attended online event.

We support a national education organization to release results of key student achievement data, which are among the most visible and reported-on events in education each year. This spring, we helped make the unexpected pivot

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The Hatcher Group is a full-service marketing and communications firm that mobilizes the missions of our clients. We are hard-working and visionary strategists who champion the power of great stories and innovative ideas to help nonprofits, foundations, and associations achieve their goals. Our award-winning team includes persuasive storytellers, digital media mavens, savvy public relations pros, accomplished multimedia designers, clever event planners, and compassionate policy advocates. Our proud commitment to building a diverse, equitable, and inclusive world drives our organizational culture and motivates our exceptional work. The Hatcher Group is a women-owned small business (WOSB) headquartered in Bethesda, Maryland.

from a planned in-person event to a virtual release. Importantly, going entirely virtual allowed us to include experts who would not have been able to be there in person and expanded audience outreach efforts. A robust social media and digital advertising campaign enhanced direct email efforts, amplified the message, and drove engagement, resulting in over half of the event's registrants coming from social media and exceeding attendance expectations for this first-ever virtual release.

This summer, we partnered with the leading global center for addressing population-wide psychological trauma to conduct its participant training program online for the first time. We built an online learning management system and produced the five-day training event on a virtual platform for over 200 participants. We designed branded PowerPoint templates for presentations, led one-on-one and group event training sessions, and managed a help desk during the event. The intimate work of this organization is rooted in personal connection, which we achieved with thoughtful orchestration.

For the time being, we are approaching a middle ground in the events landscape. A hopeful return to in-person meetings is on the horizon in 2021, and organizations are eager to bridge that gap and find a sweet spot with hybrid events that provide a blended experience for in-person and online engagement. According to a survey of more than 1,200 event planners by *etc.venues*, 95 percent expect to run a hybrid event this year as confidence grows in the blended model. The desire to gather is only building, and hybrid models will offer flexibility until social distancing restrictions ease.

Events remain one of the most effective marketing and communications tools for connecting organizations with their audiences. Gathering together always makes our work more personal, and often more meaningful. But moving events fully online has proven the need for more than just mastery of the mute button. With the right partner, an organization can turn its story into a hybrid experience that inspires members, empowers advocates, and advances organizational goals.

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WHY ASSOCIATIONS MAY BE DISAPPOINTED IN THEIR ONLINE COURSE SALES

BY ANNA MICHA DJAJA

Seven hundred—that's the percentage increase in online course sales reported by one of our national clients in the second quarter of 2020. That is above and beyond their combined online and in-person numbers for the same quarter in 2019. Yet, time and time again, we speak to associations that are continuing to experience low online course sales. Why is this happening?

We are all overwhelmed by the amount of content that is available to us online. In fact, your members may be frustrated with content overload so much so that they fail to see the value of your online education programs. This frustration may be reflected in lower online course sales or even higher membership attrition. That said, there are three key factors that can help your association increase online course sales:

1. Streamline your online courses with an integrated learning management platform. This means having a “one-stop-shop” for all learning content for members. Learning content can come from on-demand recorded courses, live webinar or webcast sessions, and in-person events.

Choosing the right online platform that is easy to navigate is as crucial as choosing the right venue for in-person events. If your members can't find your online courses easily, chances are they won't purchase.

Having one platform to host on-demand and live courses/events eliminates any confusion for members as they do not have to navigate through various sites and platforms. Members can self-register, purchase, and view any of the sessions offered regardless of the delivery method. By making it easy for members to find online courses and keep track of all their learning records in one platform, they

COMPANY BIO

Vocalmeet provides cost-efficient technology platforms for associations to offer their continuing education programs online. Our mobile-friendly and easy-to-use platform allows associations to livestream events, offer webinars, as well as host on-demand courses—all within one platform. All of our platforms come with a flexible e-commerce system for a seamless user registration and payment experience. Our team of digital marketing experts is here to help you optimize your online program sales, at no additional cost.

are more likely to purchase online courses offered by your association.

2. **Content is (still) king, and the price must be right!**

When it comes to online education, quality beats quantity. Think about the paradox of choice: overloading members with courses that may not prove useful can have a negative effect. Instead, by focusing on relevant content with high-quality presenters, associations signal to members that whenever a new program pops up, it's worth checking out.

Additionally, ensure pricing for your online content is appealing to members. Consider standalone pricing for individual courses, bundling options that include newer content with older related courses, discounted rates to new members, early-bird pricing for new courses, or even last-minute pricing for any remaining spots available for live events.

3. **Developing effective online content is only half the battle; the other half is telling your audience about it.**

Leverage the association's website, newsletters, targeted email campaigns, and even social media. Meet your members where they are as much as possible. In addition, with on-demand courses, associations can continue to promote them for as long as the content remains relevant.

More importantly, marketing your online courses requires a different strategy than marketing your in-person sessions. It's not enough to simply rebrand all in-person sessions as "virtual" without any additional information. As some members may not be comfortable with taking online courses, let them know that it's easy to sign up, there's technical support if they need it, and they can access the courses at their own convenience without having to travel or take time off work. Let members know how your online courses can help them improve their skill sets for their professional work. In other words, demystify the online experience.

By offering relevant content through an easy-to-use online learning platform and implementing a strategic marketing plan, your association can undoubtedly drive consistent traffic to your learning management platform and continue to generate nondues revenue from online course sales.

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