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# TECH TOOLKIT

Today's associations must rely on technology to support their missions and create value for their members. The *2021 Tech Toolkit* can help you select companies that can provide and implement the technology solutions you're looking for. From workflow automation and data-collection systems to hybrid event management and membership software, these providers will help you execute on your technology strategy today and in the years ahead.

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# EMBRACE WORKFLOW: CHANGE YOUR LIFE

BY DEBBIE RHODA

**W**ith years of legacy processes, associations can frequently become stuck in their ways. After all, if a process isn't broken, why fix it? However, if a process is taking away valuable time and resources that get in the way of reaching mission critical goals and growth, it may be time to make a change.

Many organizations have the appearance of automation (e.g., application forms on their sites or self-service portals). In reality, this information is still being sent to an employee to manually sift through, organize, and respond accordingly. This requires immense manpower and slows down processing timelines for constituents and associations alike.

Manually organizing and tracking the membership or credentialing journey can quickly become a logistical nightmare. That's where AMS workflow management tools can reduce the need for labor-intensive processes and instead help members through their journey using sophisticated, built-in software with predetermined rules, notifications, validations, communications, and guidance.

Access to workflow software is available to associations through two primary channels:

**AMS inclusive functionality.** A great AMS will have workflow capabilities included in its framework. So, some associations will opt-in for software that covers all their automation needs. Meaning, workflow tools exist alongside membership management, eCommerce, accounting, and more.

**AMS plug-in or integration.** It is possible an association's existing AMS framework will not have a strong workflow feature set, in turn leaving workflow and automation possibilities unsupported. In those cases, associations may seek out workflow add-ons to pick up the slack. This method allows associations to keep their existing AMS and only invest in an add-on as opposed to overhauling the entire system.

Today, there are a variety of technological advancements built to speed up workflows and automate otherwise tedious processes within an organization, minimizing the potential for error and increasing overall efficiency. By streamlining

## COMPANY BIO

Attracting and engaging members, delivering innovative revenue-generating programs, and operating efficiently are critical to your success. But associations are continually challenged by complex processes, siloed systems, and disparate data, which can make delivering on these goals challenging.

Association Anywhere by ACGI Software is a cloud-based association management system (AMS) that can help you excel across even the most complicated processes and membership structures. Built on a proven enterprise platform, Association Anywhere delivers an all-in-one suite of features to centralize data and automate critical processes—enabling levels of agility you never thought possible.

workflow processes, associations will experience gains in productivity, data quality, consistency, scalability, and most importantly, ROI.

### THREE WAYS WORKFLOW SOFTWARE CAN IMPROVE COMMON PROCESSES

**1 Application and vetting processes.** As an association, applications are a crucial part of membership and certification processes. Often, associations require applicants to submit a host of information in a variety of formats. Because of the complexities, some associations are still tackling these applications through paper-based processes. This is extremely time-consuming and can easily be streamlined with the adoption of AMS workflow technology.

**2 Ease and frequency of communication.** Workflow software and tools include not just the gathering of data, but the communication that goes along with it. One of the greatest benefits of high-quality AMS workflow functionality is its ability to improve the quality, efficiency, and frequency of communications between the association and constituents. Automated communications also allow for efficient record-keeping of milestones within the membership or certification journey.

**3 Automatic tracking and engagement.** As part of an ongoing engagement program, workflow software can help associations track membership milestones and trigger automations to acknowledge constituent achievements. These workflows usually follow activity-based qualifications that allow members to leverage their relationship within the association. Recorded workflow data allows staff oversight of the member journey, tracking levels of engagement for future leaders, reliable promoters, and identifying opportunity for involvement in association activities.

Ultimately, as these workflows are made more efficient (or even completely automated), associations gain something huge: time. This means more energy can be spent in critical areas of communication and administration—not in answering emails, filing papers, or sifting through spreadsheets.

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# USING FINTECH TO MITIGATE CYBERSECURITY THREATS

BY JANELLE BENEFIELD

**F**ounded in 1969, Massachusetts CLE (MCLE)'s mission is to offer "comprehensive and practical continuing legal education of the highest quality to the broadest possible audience." Like most organizations, MCLE's website is one of their primary transaction hubs. Professionals in the Massachusetts legal community can visit [mcle.org](http://mcle.org) to purchase educational resources and register for continuing legal education seminars.

As with any entity that accepts credit cards, MCLE is responsible for following the Payment Card Industry Data Security Standard (PCI DSS). However, due to the structure of their payment processing, the nonprofit was subject to extensive PCI compliance requirements.

In 2018, after watching the organization's PCI compliance obligations become more complex, Larry Rungren, director of information technology for MCLE, decided he needed to modify MCLE's system for accepting payments in a way that would substantially reduce their PCI liability, without impacting the payment experience.

When he determined their current payment processor couldn't make the updates needed to achieve this, he began looking for a payment partner who could. For over two years, Larry and his team searched with no success until a twist of fate connected MCLE with payment solutions provider AffiniPay.

Following discussions about goals and technical requirements, both parties were confident about achieving MCLE's objectives.

The first step toward scaling down the nonprofit's PCI compliance liability involved eliminating any storage or management of credit card data by MCLE. This was accomplished by implementing hosted fields on MCLE's online shopping cart.

Hosted fields replace any input fields on your site that collect sensitive payment information, such as credit card

## **COMPANY BIO**

AffiniPay for Associations is an online payment solution developed specifically to meet the needs of professional societies, nonprofits, associations, and association management companies. Our user-friendly, web-based software makes it easy to securely accept payments from anywhere and allows you to offer a professional payment experience to members and donors.

numbers. When a site visitor completes checkout, any data captured by a hosted field is sent directly to the payment processor's secure server, ensuring private information is safe from interception.

MCLE's investment in modern, scalable payment technology has helped ensure the organization is in a good position to keep sensitive data protected not just from new risks but also from established threats that have recently escalated, such as card testing.

Card testing (also known as "card cracking") is a tactic that cybercriminals use to determine if stolen credit card credentials are valid. The fraudster will attempt to make transactions for small amounts on a merchant's website and, if successful, will have confirmation the card number is active and can be used for larger purchases.

In 2020, AffiniPay's in-house risk team detected suspected card testing activity on MCLE's website and immediately notified them. It was recommended that MCLE add Google's reCAPTCHA (a CAPTCHA system that runs in the background of a website and helps prevent fraudulent activity) to their online checkout. The MCLE team implemented this recommendation and have not experienced any card testing incidents since.

## THE TAKEAWAY

As the number and complexity of cyberattacks continue to grow, associations and nonprofits simply don't have the luxury of putting off updates to their payment processing. Now is the time to take advantage of secure payment technology to reduce risks, protect sensitive information, and minimize the impact of potential incidents.

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**AFFINIPAY**  
for associations

# BE PREPARED FOR YOUR AMS POST-LAUNCH

BY VINNU DESHETTY

**A**ssociations 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 date 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.

**Troubleshoot data issues.** To ensure your system works for you and not against 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 resources (staff and time) that would have to go back and make corrections.

**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.** Although integrations can be tricky, they don't have to be. For example, can your applications integrate into one system that gives you one 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.

## COMPANY BIO

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.



**Adapt to business changes.** As an association evolves, all areas benefit from good change management. Be 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 required to keep your AMS running at peak performance without burning yourself out.

To close the technical skill gap, consider these resources:

**AMS provider.** Your AMS provider is 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.

And a 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 of 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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# STAYING VIRTUAL AND EXPANDING YOUR ONLINE REACH IN 2021

BY JOCELYN TAYLOR

**A** few months into 2021, there is hope in the air, but still so many unknowns. We've received many questions about what 2021 is going to look like, but the truth is, no one really knows! So here are the best tips we can give you.

**Virtual is here to stay.** No matter what happens in the next three, six, or 12 months, after a year of virtual events and conferences, a virtual component will now be expected. With ongoing travel bans and varying comfort levels, even if you can have an in-person event, there will be plenty of people who may have attended in the past who cannot or will not go right now. Then, add in the considerations that will need to be made from a planning perspective regarding room capacity restrictions that will limit the size of the in-person audience.

**Expand your reach.** Going virtual in 2020 hopefully allowed you to expand your reach to people who may not have typically attended your in-person conference. You do not want to lose these new learners by no longer offering a virtual component. You may want to explore some ideas to get this new audience more engaged with your online learning offerings:

- Host the recordings of your virtual meetings on-demand. This allows them to view content at their own pace, and they may stick around and check out other offerings.
- Bundle virtual meetings in with other offerings on your LMS.
- Offer up content for free! Not all of it, but offering a free item may get people to engage who initially only came for one virtual event.
- This is a no brainer, but if you offer continuing-education credits or certifications, then make sure it all lives on your LMS.

## COMPANY BIO

For nearly 20 years, Blue Sky eLearn has been transforming the way organizations deliver virtual events and educational content. Blue Sky's customized, cutting-edge solutions connect hundreds of organizations to millions of learners worldwide. These include their award-winning learning management system, Path LMS, webinar and live-streaming services for short events to multiday virtual conferences, and learning strategy and development solutions. These robust, easy-to-manage solutions allow organizations to easily organize, track, and monetize educational content.

- From big annual meetings to short one-hour webinars, multi-step courses to micro-learning, make sure you are offering something for everyone. Not all learners are created equal: Some are in the early stages of their career, and some may want to dip their toe in a new topic or skill set, while others are ready to dive in and get a full certification. The more you have to offer, the more people you will attract.

**More options.** Going along with expanding your reach, having a 100 percent virtual event allows for you to be more flexible. For example, a standard in-person event may be three, four, or even five full days. A virtual event could be a series of shorter days or sessions over an entire month or quarter, expanding your potential touchpoints and value to your learners.

**No last-minute panic.** If you plan to stay 100 percent virtual in 2021, there is no need to worry about changing restrictions, shutdowns, or travel bans affecting your conference. If you are planning to at least have a virtual component, you are in a good place for transitioning to fully virtual if necessary.

**There is no “back to normal.”** Sure, things will not be the way they are today forever, but people have made changes. While in-person conferences, weddings, dinner parties, and travel will return, people have also embraced virtual events, delivery services, not commuting, and spending more time at home. Some of these people will not feel the need to travel to conferences again, and some of their companies will not feel the need to pay for them to travel to conferences when they can get the same education from the comfort of their own home or office.

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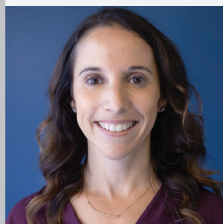
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# THE FUTURE OF COMMUNITY AND DIGITAL ENGAGEMENT THAT'S POWERING THE NOW

BY BENJAMIN MUSCOLINO

**A**s associations and organizations across the country make decisions to have remote work as a long-term possibility, there's a heightened need for digital engagement done right. In fact, a study done by Upwork projects that by 2028, 73 percent of teams will have remote workers. We are certainly more accustomed to the idea of working from home now than we were a year ago, but that doesn't change the fact that collaboration and information sharing is vital to any organization. We believe that a digital strategy with the right platform at the center is essential to having a successful member and customer experience in 2021.

Moving forward, consider how your online platform will evolve and serve your community best. This article highlights a few of the topics we think are going to be most important to your organization in the upcoming months:

## HYBRID EVENTS

Feelings of uncertainty still linger in our minds when it comes to upcoming conferences and other business plans as we've entered 2021. The word "hybrid" is being redefined for our market every day, bringing attention to what upcoming events might look like this summer. This buzzword essentially means that companies are hoping to host events in person for those who can make it safely, but also have a virtual itinerary for those who cannot. These events are often great opportunities for networking in person, but what about those who attend the "virtual event"?

This is where online communities will come in. Instantly interacting and sharing information during the virtual event will make networking opportunities still possible, not just among virtual attendees but for all attendees to have a common area for engagement, discussions, sharing of materi-

## COMPANY BIO

Breezio is an award-winning provider of community engagement and collaboration software. Our content centered approach to community provides a highly collaborative online platform to associations, nonprofits, and organizations. We aim to increase member retention rate, dues and nondues revenue, and user-generated content. Breezio takes a modern approach to community by focusing on collaboration within content, seamless knowledge exchange, and professional development. 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.

als, and more. This puts your in-person registrants and virtual attendees in the same networking space, especially when you have your community software dynamically and securely integrated with your AMS, CRM, or event software.

## COMMUNITY PLATFORMS

Online community platforms are going to be increasingly essential for associations and organizations alike. This will be the center “hub” for your association, especially with an increasing presence of members and employees who are remote. Information sharing and real-time collaboration aids in creating an environment of relevance and expertise for your members. Additionally, it is a source of constant communication and networking.

The Breezio platform focuses on collaboration within content as opposed to around it. What we mean by that is there are several features that allow for free-flowing discussions around specific parts of content. The ability to share information like this is going to be an important feature for your remote workers and members. Community platforms continue to be a central part of association member success but the need for context with our constant collaboration and communication has never been greater.

## INTERACTIVE FEATURES

All online community platforms are different, and it is important for you to the one that is going to be used most by your members and propel your business forward. We think that more interactive features in a community are going to be the key to member success and membership growth. In the Breezio platform, user-generated content is encouraged through features like time-stamped video comments and questions, threaded discussions within content, imported content, and tagging. We’ve seen clients utilize these interactive features to have thoughtful and relevant discussions within their communities along with using the built-in event tools to meet face to-face.

With our own physical communities changing over the course of a year so drastically, we conclude that it is more important now than ever before to create an online space that serves your members best. This may be through interactive features, virtual conferences, and using the latest digital strategies to increase your engagement and realize what community means to you.

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# YOUR BEST YEAR YET

BY RYAN VASQUEZ

**B**e ready to build on your best year yet. Best year yet? Yes, it's no secret that 2020 brought new and unforeseen challenges and calling it your best year yet is a stretch. But across the country many associations had some of their highest member engagement ever recorded this past year. Your members needed you and you were there for them. Often being there meant working harder than at any other time in your career—learning new skills, implementing new technology, and trying new and experimental ways to connect.

So where do you go from here? After a year of disruption, you have an opportunity to build on the successes and silver linings from this past year. We asked association professionals to share the ways they are looking to continue to grow and evolve in our *2021 Association Trends Benchmark Report*. Here are some of the insights.

**Associations will continue to diversify revenue.** Over 70 percent of association professionals said that creating new forms of nondues revenue will remain a priority going forward. Before 2020, nearly a half of an average association's revenue came from meetings and tradeshow and other forms of nondues revenue. With many of those revenue streams disrupted, it's no wonder that there were big jumps in use of webinar and virtual meeting software, online communities, email marketing platforms, learning management systems, and even AMS's, all focused on delivering more and better digital connections into members. Going forward, these new channels and services will help fuel future growth for those organizations that continue to evolve.

**Virtual is here to stay.** From our benchmark report, we learned that the majority of members interacted the same or more in 2020 than prior years, over 70 percent. It's no coincidence that those organizations that quickly moved to offer new forms of virtual connection saw the greatest success. Nearly half of members that interacted more did so because their organizations offered new online options. Look-

## COMPANY BIO

Community Brands is the leading provider of cloud-based software and payment solutions for associations. The Community Brands association suite is the industry's most complete set of software solutions consisting of association management software (AMS), learning management software (LMS), career centers, event management, data and analytics, and payment solutions. It includes Nimble AMS, YourMembership, Aptify, NetForum Enterprise, Crowd Wisdom, Freestone, YM Careers, Pathable, Expo Logic, Core-apps, Attendee Interactive, Configio, and Gravitata. Associations of all sizes use the integrated software suite to increase revenue, improve efficiency, and create lasting member experiences.

ing ahead, over half of members said they plan to interact mostly virtually going forward. Online networking was the top way that organizations drove a sense of community this past year and going forward it is posed to drive even greater engagement in the years ahead.

**Members will continue to seek out training and career resources.** The previous model for education and career progression no longer holds true. The world is becoming more technical and changing more rapidly. The price of traditional higher education is rising exponentially, and alternative education providers are popping up everywhere. Associations have an opportunity to play a leading role in supporting their members' education and career development by supporting lifelong learning. Over 40 percent of association members believe that career development from their association is more important than it used to be, and it continues to be one of the main reasons members join.

**Capitalize on the momentum.** How do you continue to grow membership? By making sure those members who became more engaged in 2020 continue to find value in the organization and stay engaged. It's easier to keep a member than to attract a new one. Gain a greater understanding of why members typically leave in our association member retention report focused on the trends of lapsed members.

**Let technology do some of the heavy lifting.** This past year, association leaders were working harder than ever before, and many technology categories saw big gains, bringing forward many years of growth in one year. This not only creates new revenue opportunities for associations but can also help ensure you and your team are working as efficiently as possible this year. Now is a great time to assess what's working and how new ideas and technology from 2020 should be more fully integrated into your organization going forward.

This year can be one of your best yet. Download our 2021 Association Success Kit and learn how you can derive opportunity from the disruption of 2020.

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# 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

## COMPANY BIO

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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# TOP FOUR REASONS TO INTEGRATE YOUR LMS AND AMS

**G**one are the days when LMS and AMS had to live in two different silos. The integration allows you to eliminate administrative redundancy, streamline member experiences, and improve decision-making techniques with real-time data. All of which decreases staff costs, increases nondues revenue, and improves member engagement. Check out our top four reasons for how integrating your LMS and AMS can do wonders for your associations and members.

**1. Eliminate administrative redundancy and error.** When an LMS-AMS integration isn't in the picture, learning coordinators have to enter the same data into two different systems (double duty). In addition to being inefficient, there is room for data entry errors. Avoid mistakes and implement streamlined processes by integrating your LMS and AMS. An integration allows for two-way data sync—collecting and updating data in real time between both systems.

**2. Streamline member experiences.** The expectations of online experiences continue to elevate as technology improves. As members experience mainstream e-commerce or social platforms, they expect similar experiences with their affiliated associations. One of the easiest ways to meet member expectations is to provide a single point of entry for both LMS and AMS portals. Single Sign-On (SSO) is just the beginning of how an integration can improve your member experience.

After logging in, members can manage both their membership and learning accounts without having to go to multiple sites. Members can update contact information, renew their membership, register for courses, and manage their CEUs—all in one place. This process alleviates the frustration of trying to find information, improves the member experience, and leaves a lasting positive impression.

## COMPANY BIO

MapleLMS is a learning management system (LMS) that can be deployed in a few days and can be managed by nontechnical users. MapleLMS enables online learning anytime, anywhere, on any device. MapleLMS offers out-of-the-box integrations with Salesforce, Fonteva, and other AMS systems, as well as Zoom, GoToMeeting, or Teams.

During the growth journey all through these years, we have served over 2 million users globally, who use our smart products. We have been on our commitment to provide MapleLMS, an integrated, cost-effective, and highly scalable modern learning management system, to promote continuous learning by leveraging education technology and innovations.

**3. Improve member engagement.** Members are more likely to purchase courses based on how relevant the presented options are. Artificial intelligence allows you to improve the online experience, increase engagement, and grow nondues revenue.

An AI-based “recommendation engine” within an LMS offers role-based, relevant course recommendations. An AI engine requires sufficient historical data to offer useful recommendations about courses that benefit a member. Recommendations are based on a variety of criteria that are stored separately in your AMS and LMS. Data points include searches/selections made by other members, course prerequisites, professional goals, job improvement goals, and salary improvement goals. When you integrate your LMS and AMS, your data is housed in one place, which makes it easier for the AI to collect and analyze the same.

**4. Improve decision-making techniques with comprehensive data.** Almost all LMS generally provide data and analytics about learning performance, content quality, assessments, course credits, and continuous education units (CEU) management. Such analytics are invaluable if you create correlations with demographic information and membership subscription revenues. LMS analytics, along with demographic information, allow associations to answer important questions about improving nondues revenues, identifying learning topics, and personalizing marketing content. Broader analytics with information from multiple sources—including AMS, LMS, community portals, and donation systems—help in identifying popular courses, recommendations with difficulty levels, and preferences according to demographics. Associations can easily market their courses to a specific audience and improve nondues revenues with an effective training program, success metrics, and cost management.

Bridge the technologies that both your AMS and LMS offer you to maximize both the platforms. Having both sets of data, capabilities, and features under one portal provides efficiencies your staff will love, and your members will notice. The data has always been there; let the integration make the data work for you. Improve member engagement. Increase nondues revenue. Leave your members wanting more.

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# LESSONS WE LEARNED FROM COVID-19 IN 2020

BY MARK SEDGLEY

**C**OVID-19 taught us many lessons in 2020. While many of those lessons were painful, all were valuable. One of the lessons that became abundantly clear to most folks was just how important technology is to sustain our day-to-day lives in business. At MemberClicks, we were definitely a beneficiary of that lesson. Along the way, we also noticed an interesting shift gaining momentum in the market: a desire to have more technology under one roof.

As many of us went fully virtual last March, the need for integrated technologies exponentially grew. It didn't matter if you were a membership coordinator, an executive director, an event planner (I know, I know), or a constituent, everyone started to realize the same thing: We just need to be able to work and connect. It's funny how those same desires mirrored our societal wishes as well. There is an old adage that crises don't create trends, they accelerate them. We are currently witnessing a trend accelerate.

As more and more people utilize technology to manage their business and relationships, the desire for more of that technology to be under one roof continues to accelerate. This desire is being driven by the need for our tools to simply work together. That becomes difficult for most organizations if they are trying to accomplish this through a web of connections via disparate vendors. The idea of best of breed or bust was nice, but in the end, it doesn't make a lot of practical sense because best of breed is designed to be just that. It's not designed with multiple channel inputs in mind. It's not designed to be affordable. Best of breed is designed typically to do one thing and one thing really well. I know for my own company, I would love to be able to integrate all of the best tools on the market for each of my business needs. But I also know that I can't afford that and that at some level, I need to be able to have quick access and integration across my technological infrastructure. I think this is partly why we are seeing so much consolidation in the broader marketplace.

## **COMPANY BIO**

MemberClicks, a Personify company, provides a platform of integrated software solutions designed to simplify membership management and event management. Solutions include association management software, learning management software, event management software, and job board software. MemberClicks currently serves more than 3,000 clients throughout North America. The company has offices in Atlanta, Indianapolis, and Vancouver.

The second lesson we learned from COVID-19 in 2020 was that engagement really does matter. All of us have bemoaned the lack of connection we experienced over the last year. Connecting people through shared causes and learnings is something associations have done since their inception. COVID-19, however, made that goal very difficult to accomplish. The organizations that have thrived during this time are the ones that have been able to leverage their technology to the max. Many of them already had a strong system of records in place (an association management system). Along the way, they adopted other integrated solutions, such as community engagement software, learning management software, and career development software (e.g., a job board), to ensure they were driving value to their members across the engagement spectrum. So, when something unexpected came along (in this case, a worldwide pandemic), they were able to lean into their other channels. The only way that works, though, is if the technology all plays well together.

At MemberClicks, a Personify company, we believe in making that technology accessible, intuitive, and affordable. We do this to ensure your mission thrives by empowering you to achieve your collective goals through intuitive software that just works. That's the way it should be. I invite you to come learn more.

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MARK SEDGLEY



# THREE KEY HYBRID EVENT CHALLENGES (AND HOW TO SOLVE THEM)

BY JORDAN SCHWARTZ

**T**he international COVID-19 pandemic forced in-person meetings and live events to a screeching halt.

In the past year, companies and organizations have found themselves searching for creative and convenient ways to keep networking and communication alive. With an initial pivot to virtual events and now a hunger and necessity to gather in-person again, the industry has identified a need for a hybrid solution.

A hybrid event is a single cohesive experience that supports both in-person and virtual attendees. As any event and meeting planner can imagine, there are many complexities to hosting a simultaneous virtual and in-person event. It can be challenging to organize and produce, yet the benefits outweigh the challenges, for both event organizers and attendees.

Here are three major considerations when producing a hybrid event and proven strategies for ensuring success.

**Staff and support.** Hybrid events create one event with two attendee experiences. As a result, the staffing resources required to support a hybrid event exceed the needs for planning an in-person or virtual event alone. Plan to hire additional event support staff to meet the needs of both audiences. Dedicated teams allow you to efficiently troubleshoot challenges, so consider adding day-of technical support to assist with inquiries onsite and virtually.

Dual event experiences with a larger execution team makes communication and delegation even more critical. Identify specific tasks and roles to ensure that the needs of each audience are being prioritized appropriately.

**Budget.** Adding event staff and support to help plan and produce a hybrid event can mean higher costs. Additionally, creating a shared experience may involve enhanced A/V and production elements to connect in-person participants to virtual and vice versa. These executional factors can

## COMPANY BIO

Pathable powers virtual, hybrid, and in-person events through our intuitive and customizable event platform. We strive to create thoughtful solutions to promote event engagement, build relationships, and connect people to people from anywhere in the world. Our event technology specializes in supporting, corporate conferences, trade shows, association and educational events, networking, and more.

Pathable brings your event content to life and allows you to easily plan, promote, and host your event. We put people and relationships first, creating memorable and engaging virtual event experiences for attendees, speakers, event organizers, and everyone in-between.

greatly increase the overall cost of hosting a hybrid event, so you should plan your budget accordingly. Shop the market for seasoned, adaptable vendors who can work with you to create the event experience you are looking for. Before any expenses are finalized, take time to understand the value of the content you plan to host from each perspective and map out what costs could be associated.

**Engagement.** Your in-person and virtual audiences will be attending the hybrid event from different locations and learning environments. The event could easily feel divided with some attendees meeting in-person and some who are still siloed at home. The challenge is to create a cohesive joint experience.

Creating memorable opportunities for engagement derives from understanding the expectations of your audiences and matching your event content to share that same value. Through virtual elements, hybrid events welcome guests from across the globe, so plan your agenda strategically to reach a variety of time zones. It's important to outline which experiences are shared and which are separate, if any.

Support in-person and virtual connection through live streaming and enhanced production. Consider using additional support like event moderators who can engage in-person speakers with questions from your virtual audience. Deliver unique and engaging experiences to your virtual attendees that include them in the live experiences.

In summary, accommodating both in-person and virtual attendees can create an inclusive and forward-thinking level of connection. Although there are challenges, the advantages of producing a hybrid event far outweigh the obstacles, enhancing audience engagement and combining the best of both worlds.

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# TRANSFORMING IN 2021: EMBRACE THE DIGITAL- FIRST MINDSET

BY LIZ PALM

**T**he events of 2020 forced associations to adopt new technologies and embrace a purely virtual world.

While unexpected, this was the first step in digital transformation for these organizations. Moving into a still-virtual 2021, with hints of hybrid activities on the horizon, there's an exciting opportunity to continue this digital transformation and fully utilize the technology tools that your association has available.

The secret to successful digital transformation is embracing a digital-first mindset across the association. This prioritizes digital solutions over the more traditional, physical, or manual options. It enables you and your team to approach new opportunities or challenges from the most effective perspective.

With that in mind, let's explore two of the top technology tools that associations plan to implement in 2021, according to our survey of ASAE TEC 2020 attendees: year-round mobile apps and business intelligence (BI) tools.

## ENGAGE MEMBERS WHERE THEY ARE

One challenge continues to resurface with virtual events: how to create more engagement opportunities for members when we cannot meet in person? One of the simplest solutions? A mobile app that your members can use all year.

Apps add engagement activities to your virtual or hybrid events and create a single destination for members to manage their memberships and grow professionally without spending more time in front of a computer. Ninety-three percent of ASAE's TEC Virtual 2020 attendees we polled said they were planning virtual or hybrid events in 2021. Mobile apps have yet to take a leading role at virtual events but should be strongly considered as a way to bring together virtual and in-person audiences.

## COMPANY BIO

At Protech, we are committed to helping associations like yours meet their goals. We leverage our deep industry knowledge and technical expertise to deliver functionality that enables you to achieve your mission simply, effectively, and without surprises.

Protech AMS connects data, people, and processes with intelligent, business applications and Microsoft-powered technology. This suite of technology solutions creates near limitless possibilities for your staff, leadership, and members to connect.

Over the past 35 years, the Protech team has helped associations like yours drive new revenue streams and membership growth; simplify system maintenance and management; reduce costs and eliminate data silos; and take ownership of their technology.



Mobile apps are also a great way to share relevant and timely information with members throughout the year. According to *emarketer*, the average person spends more than four hours a day on their phone. A mobile app puts your association in front of your members precisely where they spend most of their time.

Mobile apps also generate valuable engagement metrics—downloads, open rates, common navigation paths, and so forth—that help you measure activities and make informed, data-driven decisions for future activities.

### DISCOVER NEW REVENUE STREAMS IN A VIRTUAL WORLD

Event revenue is a large part of the association budget. But we don't know when events will return to the caliber they were in 2019. With narrower profit margins due to the lack of in-person events, it has become increasingly important to make strategic decisions based on data you collect.

This data shows that association revenue models are also experiencing transformations. New revenue streams are being developed to lessen dependencies on traditional events. However, determining which new idea will generate the most revenue for your association is a major risk.

BI and analytics tools provide insight into the offerings members find most valuable. Leveraging this information, you can develop and monetize programs that dovetail with these high-value items, ultimately creating new revenue streams. Real-time BI and analytics also track the performance of new revenue streams, enabling your association to focus resources on the revenue streams with the most potential and maximize the return on investment for the program.

### EMBRACE A DIGITAL MINDSET

Changing the way you think can be tough, especially if your association has done things a certain way for a long time. But with the demand from members for better and more valuable virtual benefits, there has never been a better time to reimagine the membership experience with a digital-first mindset. What 2020 taught us is that ignoring potential changes won't make them go away. In 2021, let's be proactive, embrace change, and take your association to the next level.

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**PROTECH**

# THE EXCITING IMPACT OF DIGITAL TRANSFORMATION ON PROFESSIONAL DEVELOPMENT

BY MICHELLE BRIEN

**H**ow 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-

### COMPANY BIO

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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