

# Associations Evolve:

2022 & BEYOND

Answers

THOUGHT LEADERSHIP ARTICLES FROM AROUND THE GLOBE

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# Contents

FROM THE EDITOR	4
FROM OUR PARTNER	5

## ASSOCIATIONS EVOLVE

Associations Must Evolve to Thrive.	6
Race for Relevance: 5 Radical Changes for Associations.	10
Preparing for a Successful Future.	12
Your Association's Only Succession Plan - The Future of Membership Relies on the Youth	14
The '5G Association': A Mix of the Old and the New.	16
Global Leadership for Associations. It is not a dream; it is a real opportunity.	18

## STRATEGIC PLANNING

Think Like a Futurist.	20
Are Associations Truly Innovative?	22
13 Shifts in Strategic Planning for Associations	24
Translating Strategic Plans to Operational Outcomes.	26
Never Losing Momentum: Why it's important to continue your efforts, no matter the hurdles.	30

## DELIVERING VALUE

The Power of Not Protecting Member Value First	32
A New Strategy for Extending Member Value through Chapters	34
The Value of Connection	36
Lockdown Showed how Adaptable People are – Associations Must be the Same.	38
Communicating Your Value to Your Members All Year Round	40

## MEMBERSHIP

Evolving Your Membership Model - A Step By Step Guide	42
Member Experience: Associations' New Blueprint for Engagement	46
The Humanity of Member Engagement	48
Foundations of a Growing Membership	50
Will Subscriptions Work Forever? The Future of a Popular Pricing Tactic	52

## BUILDING COMMUNITIES

Time to Move Beyond 'Engagement' to Strategic Community Building	54
Building A Community During the Pandemic and Beyond	56
Keeping the Community Fire Burning in Associations	58
Opening the Door to Volunteers	60

## REVENUE GENERATION

The Revenue Generation issues Associations will Grapple with Next	62
Avoiding the Pitfalls of Undue Influence	64
Ten Strategies for Successful Corporate Sponsorships in 2022	66
B2B Selling will Change Forever	68

## MEETINGS & EVENTS

Has COVID Disrupted Association Events Enough?	70
5 Ways Online Events are Evolving in 2022	72
Three Key Drivers For Future-Proofing Association Events	74
Unleashing the Full Power of Your Meeting Legacies	76
To Be – Or Not To Be? Force Majeure Clauses In Your Events Contracts	78

## PEOPLE & CULTURE

Redesign Your Culture for 2022 and Beyond	80
Culture Change Begins with You	82
Communicating with Conviction in a Hybrid Workplace	84
Time to Prioritise Mental Health.	86
The Great Resignation. Is Australia next?	88

## GOVERNANCE

Recasting Governance - The Board of the Future	90
The Professional Privilege of Generative Governance	92
Tackling the Beast that is Modern Governance	94
The Great Governance Hoax	96
Build Your Board Impact	98

## TECHNOLOGY & DATA

The Membership Economy and what it means for the World of Associations	100
The Road Ahead is Paved with Data: Why Data is the Future of Associations	102
Your Digital Rights: Why it's time to care.	104
Will an Uptick in Virtual Technology see Remote Communities Change the Way they do Business?	106
Data-led Projects for Memorable Client Experience	108
Survey Says: Your Survey Probably Stinks	110
The 3 Things Your Next Pricing Survey Must Have	112
YOUR 2022 HOROSCOPE	114

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# From the Editor.

Dear Reader,

The idea for this publication came about (as many promising ideas do) over a glass of wine with an amazing group of colleagues. We were talking about how many amazing association-specific experts existed around the globe. People with incredible ideas and experiences that they were applying to advance the associations they serve. We talked about how these people came from a range of roles including volunteer leaders, association staff, consultants, and vendors (and often a combination of the above). We bemoaned the fact that there was no way of amplifying this thought leadership. That there was no place that brought them together to share their ideas with the rest of the sector.

And so (over the fourth bottle) the idea of inviting all the amazing people we knew from around the world to contribute to a free publication that would showcase their passion topics was born. And from those seeds this publication emerged.

Some people contributed existing articles they knew would have impact and others wrote entirely new content. I was delighted at how enthusiastically people supported the idea, and thrilled to read everything as it came in.

Thank you so much to our wonderful contributors who took the time to contribute to this publication. Thank you for sharing your insights, experiences. Thanks also to Beau Cummin for his wonderful design and to Northern Territory Business Events for their valuable support of this project.

I hope that you will find this collection of articles from the top thought leaders in the global association space as informative, inspiring, and motivating as I did.

All the best for an amazing 2022!

Warm regards,

**Belinda Moore**

Editor, Associations Evolve, 2022 & Beyond

Consultant, [Strategic Membership Solutions](#)

Founder, [Answers for Associations](#)

Founder, [Trybz Online Community Software](#)

PS. Interested in submitting content to our 2023 issue? Please email me at [belinda@smsonline.net.au](mailto:belinda@smsonline.net.au) with a brief overview of your topic and background. I'd love to hear from you.

PPS. You can find webinars, videos, resources, and upcoming events by many of these contributors on the [Answers for Associations](#) free online community for association professionals.

# From our Partner.

Dear Reader,

Northern Territory Business Events is delighted to partner on this inaugural publication to share and highlight global innovation from subject matter experts in the association sector. Business events also provide a valuable platform to share knowledge, stories and innovation and this strong alignment demonstrated a clear need to support this important project.

Innovation has been a key theme throughout the COVID-19 pandemic and prevalent across many industries. From a business events perspective, we have seen the great 'pivot' to delivering conference programs in digital environments and whilst acknowledging this technology has facilitated continuing connections, albeit virtually, we've all missed the physical aspects of human connection.

Whether it's the touch of a familiar handshake from a colleague or listening to an inspiring keynote speaker whilst surrounded by like-minded souls, it is these multi-sensory experiences that add the most value and deliver the most meaningful outcomes for associations and their members.

We are however now pleased to be witnessing strong signs of recovery with a very busy calendar of association business events confirmed for next year and beyond. This level of confidence demonstrates a clear desire for people to physically connect and whilst associations continue to innovate and engage members through hybrid and other formats, there is nothing quite like experiencing a business event, and a destination, in person.

The Northern Territory inspires innovation and gives people the freedom to consider new ways of thinking whilst the natural environment brings clarity to reconnect with what's really important, and to reimagine the possibilities. Our themes of connection to country, people and place resonate more than ever before.

We look forward to welcoming you to Australia's Northern Territory.

**Rebecca McCaig**

Director

Northern Territory Business Events

PS. The Northern Territory Government supports the attraction of association conferences through the [NT Business Events Support Fund](#). This allows organisers of association conferences from eligible industries, at the consideration or bidding stage, to apply for AUD\$100 per delegate.

# Associations Evolve.

Associations must evolve to thrive.

In medieval times barbers didn't just cut hair. They also gave enemas, treated syphilis, and performed surgery. By 1308 the association for barbers, the Barbers' Company, was already well organised. They even allowed surgeons to join – despite misgivings around their lack of hairdressing skills.

The surgeons felt frustrated at their lack of status and broke away to create their own unincorporated Fellowship in 1368.

The separation wasn't permanent. In 1540 the Fellowship of Surgeons and the Barber's Company merged to become the Company of Barber-Surgeons. They also created the barber pole to enable members to advertise their craft specialisation (barbering in white and surgery in red).

The merger also didn't last. In 1745 the surgeons broke away again to form the Company of Surgeons. This later became the Royal College of Surgeons.

Since before Roman times associations have been the dominant player connecting people within professions, industries, sporting groups, charities, employees, and other communities with a common interest.

Associations have taken many forms. They have risen, adapted, fallen, been reinvigorated, and repeated it all again. There has always been internal politics, mergers, splinter groups, and tensions between members.

Despite their internal challenges, associations have had an incalculable impact on most aspects of modern society.

But, while they have often been a catalyst for external change, internally their operating models stayed relatively static. This inertia left them ill prepared for the significant shifts in the external operating environment that began in the 1990s. Key shifts included:

## Rapid technological innovation

The speed and adoption of technology over the past 30 years is unprecedented. Tools like marketing automation allowed even small associations to streamline internal operations, deliver a higher-quality member experience, and generate data-driven insights that usefully inform decision making. Associations who successfully implement an appropriate technological solution have a significant competitive advantage.

## Significant generational shifts

The products, services, traditions, and decision-making channels of most associations reflect the preferences of the Baby Boomers who built them. Often these preferences are not shared by younger generations. Associations have struggled to appealing to younger generations without alienating the older generation (who still have a significant contribution to make).

## Rapid changes in cultural, work, and lifestyle norms

Trends such as the casualisation of the workforce, the emergence of online marketplaces, greater acceptance of diversity in all forms, and the implementation of flexible work arrangements have transformed how we live and work. This impacts associations at all levels. For example, membership categories and eligibility may change as pathways into the profession evolve. Associations are now offering day care services at events and changing the timing of events to accommodate school hours.





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## **Transformations in the way people connect**

The ability to connect people within an industry, profession, or cause has long been a significant component of the value proposition for associations. Yet, people can now connect to like-minded people from around the globe in moments via their mobile device. They can do this for free and without the structures of associations, in minutes. Anyone can create a "collective" and mobilise the masses. Associations are shifting the way they facilitate connections to better leverage this key component of their value proposition.

### **Shift to communities and tribes**

While there will always be competitors for an association's products, services, events, and communications, there is one thing that is almost impossible to compete against ... a strong and engaged community.

Emotionally engaged members are less likely to engage with competitors and more likely to consider themselves an "active" part of the association. This makes your community your biggest competitive advantage.

But communities are not homogenous. They are made up of a multitude of tribes – sub-groups who share a common purpose and values. Nurtured effectively, tribes can be a powerful force for growth. If neglected, or allowed to feel disenfranchised, they have the potential to cause dissent or splinter off to become a competitor.

## **Transformations in the way we communicate**

Traditionally, many associations have broadcast all messages to all people – talking "at" people rather than talking "with them". Communications are more about "what the association wants to say" rather than what the readers want - or need - to hear.

Associations have found it increasingly challenging to compete for the time and attention of members. It is no longer enough to have a compelling offer. Associations also need an equally compelling communications strategy.

Great communications can grow enthusiasm, deepen bonds, and inspire action. This only works when the right messages are going to the right people, at the right time, via the right channels. Personalisation supported by great data, marketing automation, and a keen focus on the member experience is essential.

### **Competitors eroding the traditional value proposition of associations**

Where there is change, there is opportunity. Where associations have failed to capitalise on these opportunities, competitors have emerged.

Competitors come in many forms. They can be other associations, informal Facebook groups, for-profit entities, and even government agencies. Often competition is indirect and competes with a single product line (eg: an event or publication), region, or topic.

Faced with the onslaught of a multitude of small competitors on many fronts, the decline in the value proposition for many associations has been a slow "death by a thousand cuts".



# Associations Evolve.

**Associations must evolve to thrive.**

## **The COVID-19 crisis was a catalyst for positive change**

While the COVID-19 crisis has brought immense tragedy across the globe, it came with several silver linings for associations.

It was a catalyst that enabled associations to implement long-overdue change. Many association professionals believe the crisis will have a long-term positive effect on their association because it had "forced a period of innovation and rejuvenation that has brought forth a clarity of purpose and enhanced relevance to members." (COVID-19 & Beyond, 2020).

The crisis demonstrated the practical value associations can offer. Many associations adapted quickly to identify and resolve member issues. Through providing their members with practical solutions during a challenging time they were able to powerfully demonstrate value and relevance.

Associations who embraced the COVID-19 crisis as an opportunity to innovate are already seeing benefits. Many are reporting increased engagement, higher retention rates, and overall membership growth.

The crisis proved associations can adapt. The speed and effectiveness with which they adapted to the crisis was clear. When provided with the impetus for change - and the freedom to act - associations were very capable of making the changes needed to advance themselves and their members.

## **Overcoming internal barriers to change**

The nature of the traditional association can make change more difficult. Many associations have outdated policies and governance, cultural norms, traditions, and bureaucracy built over many years. In many cases these are entrenched and there is strong resistance to change.

This is not unexpected. Adaption requires change. No matter how necessary it is, change can still be scary, uncomfortable, and inconvenient for many people. Often, it can feel easier to maintain the status quo and avoid the pain of change.

Associations no longer have that luxury available to them and must now actively seek out the internal barriers to change and take steps to mitigate them.





Photo by eberhard grossgasteiger from Pexels

## Where to from here?

Associations cannot reach their potential while shackled by outdated operating models and practices. The evolution to an ultra-connected society requires a similar evolution by associations.

Tinkering at the edges of the issue with simplistic solutions is not the answer. A new membership category, flexible payments for the same offering, or adding a Facebook group will not solve the challenge.

Associations must evolve to meet the needs of contemporary members. Some associations may require only minor changes. Others must transform to shed the detritus built from many years of inertia.

In an uncertain world, the need for associations is greater than ever. Associations must ensure they are operationally positioning themselves to create a sustainable positive impact for those they serve into the future.



**By Belinda Moore.**

Known for her enthusiastic and engaging style, Belinda is frequently engaged by associations to assist with strategy development and implementation. Belinda has written four books: *The Membership Machine*, *Membership Fundamentals*, *Membership Managers' Handbook*, and *Association Annie: Herding Cats*. She has authored the following white papers: *Associations Evolve*, *Association Apocalypse*, *Membership is Dead?*, and *COVID & Beyond: Lessons for Associations*. She also writes the popular *Association Annie* comic strips.

This article is adapted from Belinda's "Associations Evolve" whitepaper.

## Race for Relevance:

# 5 Radical Changes for Associations.

*Significant and irreversible changes in the environment for associations have occurred over the last several decades—many of which have been accelerated due to the COVID-19 pandemic. Major environmental changes require commensurate organisational changes. The modest, incremental adjustments that most associations are making in response are inadequate. Radical changes in the association model are in order if associations are to maintain their relevance and, for some, their existence. We tackle all of this and more in the revised 10th anniversary edition of our book *Race for Relevance: 5 Radical Changes for Associations*, excerpted below.*

**T**he traditional association model once worked well, but it no longer fits today's conditions and circumstances. Following are five major flaws that have materialised in the model.

### **Association boards aren't competency-based, and recruitment isn't often intentional enough.**

Selecting directors based on where they live, who they represent, who they know or how long they've been around is obsolete. Associations will be well served by small boards (5 directors will do) carefully selected for proven governing skill and competencies that match the organisation's opportunities or challenges. If you don't think a 5-member board is feasible, consider that most associations are governed by their executive committees today—and that the Million Dollar Round Table is governed by an executive committee of five (and doesn't even have a board!). In today's environment, associations need a robust, transparent method of identifying, recruiting, and onboarding board members.

### **Association staff are suboptimized.**

While kinder and simpler times allowed this, today a successful association cannot afford to suboptimize its human capital. Squandering valuable time in the "care and feeding" of volunteer leadership and energy devoted to mitigating micromanaging directors is no longer acceptable. Well-intentioned but unproductive committees don't make the best use of the association's human capital. The typical association governance structure is an impediment to performance versus an asset and is costly in terms of time and money. A fully empowered CEO and staff are essential to future success.

### **All member markets are dynamic, and over time most have undergone significant change—without corresponding changes at the association.**

In some instances, markets have rapidly transformed (witness the impact of COVID-19 on entertainment and transportation). Many associations are struggling to serve member markets that are vastly different from those they were initially designed to serve. Kind of like a food distributor still structured to supply the corner grocery store in an era of hyper markets. Industry consolidation and professional specialisation trends require a rigorous rethinking of the member market the association can competitively serve.



## **Associations have a propensity to add new programs, services, products, and activities—without abandoning underperformers or those no longer relevant.**

The underlying assumption is that volume equals value. The more we offer the more value for the member. Chief elected officers add their contribution during their term. Committees spend hours conjuring up new ideas for member benefits. Staff build their résumés with expanded offerings they developed. The result: a growing product and service line that is uncompetitive, lacks fit, and is increasingly difficult to manage and communicate. The successful association of the future will focus on a narrow product line, concentrating their resources for improved performance and competitive position.

## **Associations have been swamped by a tidal wave of technology.**

Associations' relevance is clearly at risk if they cannot quickly bridge the technology gap they have allowed. They must develop a "digital first" mindset and invest adequate resources in new technology. An important first step is an analysis of the association's "technology spend" and developing an approach to quickly shift resources to technologies that will add value and improve program and service delivery. It is not an option. It is an imperative. Ignoring technology is a short cut to irrelevance.

Will making radical changes be easy? Absolutely not. But change is necessary due to an increasingly competitive environment and the ravages of COVID-19. Associations are tradition-bound and risk averse, making change particularly challenging. But there are examples of each of the above changes that have been achieved by associations and there are methods and strategies that can be employed to make it happen.



**By Mary Byers, CAE, and Harrison Coerver.**

Harrison Coerver and Mary Byers, CAE are strategy and planning experts and the authors of *Race for Relevance: 5 Radical Changes for Associations*. Use code R4RSAE to get a 10% discount when you order your copy at the ASAE Store.

# Preparing for a Successful Future.

**S**everal key mega trends underway will continue to impact associations for many years to come. In particular, advances in technology and changing demographics.

The presence of COVID-19 has accelerated investment in technology, with new benefits emerging to satisfy the increased demand for virtual, in home, local and mobile experiences. This is raising questions about:

- The value of membership,
- How to package and communicate that value,
- Future investment in technology, and
- The new demands from the next generation of members.

## **Prediction #1: More strategic discussions, deeper dives into, and a greater understanding of what members value**

The outcome will be a focus on the **intangible benefits and the experiences** that add and destroy value.

For example, the value of:

- Feeling a strong sense of connection with other members and membership offerings.
- Removing worry or making members feel safe and secure, that they are protected and cared for.
- Making them feel you understand them because you:
  - o Have anticipated what they are likely to need to help them move forward.
  - o Only send information that is relevant and don't waste their time with unimportant matters.

- o Provide them access to what they want and how they want it; for example, options for a live event, a virtual event, or 'on demand' material.

- Removing frustration such as enabling them to select preferred communication channels.

A new metric to emerge will be member empathy. Do they feel you 'get' them?

## **Prediction #2: Membership packages will become simpler and more flexible.**

During the past decade, the world's largest consumer organisations have enthusiastically embraced membership business models and introduced interesting innovations in membership packages and offerings.

For example, members can now:

- Cease membership when it suits them, due to a continuous membership offering rather than invitation for annual renewal.
- Pause membership if desired.
- Have access to everything: joining processes are simpler and smart technology intuitively suggests what members might like. Their shop window is individually tailored and personalised.

Members' expectations will change due to greater flexibility and simplicity with personal memberships.

Associations ignoring this trend will be at risk of their members perceiving the association as rigid, difficult or old fashioned.



### **Prediction #3: Associations must continue investing in new technology to thrive.**

Associations have invested wisely in new technologies with positive results. However continued advances in new technology also lifts members' expectations.

One key area of IT investment to consider is **hyper-personalisation**.

There will be a move from personalisation to hyper-personalisation, where each communication is tailored for individuals based on knowledge of them, their current situation, and the journey ahead.

Presenting members with the experience of being guided will emanate from the adoption of artificial intelligence (AI) which effectively anticipates member needs. Suggestions will be inspired by past activities and similar members' experiences. AI will be the enabler.

Over the years associations have developed a huge asset in understanding their communities and the journeys they are on. They know where members are and where they want to get to. Combining this knowledge in mapping member journeys with the new insights gained from AI will provide a powerful tool that adds value.

### **Prediction #4: The importance of preparing and appealing to the next generation of members: Associations will need to make many changes, including their core statements.**

Vision statements will come under the microscope. This is because this generation care about what the association is doing to lay the foundations for a more secure future. Long-winded vision statements – which few remember – will need to be revisited and reworked.

New and inspirational visions of the preferred future will emerge. These will be short, sharp, and memorable statements. They will motivate younger members to sign up as a supporter, volunteer, or member.

### **Reflections**

One positive outcome of the pandemic has been greater innovation in the association sector.

Undoubtedly more changes lie ahead, and new creativity will be welcomed. However, there is also the challenge of the paradox in that the more things speed up, the more we want things to slow down!

The good news is the need and value of connecting with others is stronger than ever, and this puts the association sector in a strong position going forward.



**By Sue Froggatt.**

Sue is a membership development specialist with over 20 years' experience in training, consulting, and research. She is also a recognised speaker at membership conferences around the world.

## Your Association's Only Succession Plan:

# The Future of Membership Relies on the Youth

**A**s associations plan for the coming year, I fear they aren't evolving nearly as much as they need to be evolving. Regrettably, while association leaders say they have innovated and focused on the future, their actions tell a very different story. The way I see it, far too many associations remain rooted in the past.

The launch of virtual conferences and remote work environments shouldn't be considered innovative or new. After all, associations had the capacity and tools to do both for more than a decade. It's a misnomer to say the pandemic pushed associations into the future. In terms of technology, the pandemic simply forced associations into the present.

Likewise, the 'return to normal' is driving many leadership decisions, but normal doesn't exist anymore. Normal is our past, not our future. Romanticising, prioritising, and hurrying to return to the past is a step backward, not forward.

For quite some time, associations have, in large part, ignored the warning signs. In 1994, widespread membership declines first made news headlines. Since then, data indicated the decline was steadily worsening, yet few associations shifted course.

Even now, as the world is being rocked by the pandemic, social and political unrest, and the Great Resignation, associations are making only minor course corrections. Even now, associations are struggling to evolve.

What's it going to take to move our membership organisations forward?

As a membership strategist and futurist, I spend a considerable amount of time contemplating the future. From economic data to Tik Tok and everything in between, I glean insights and data from a number of sources and identify social shifts and how those shifts influence market behaviours.

There are cues about the future of associations embedded in demographics. Regrettably, association leaders tend to overlook these cues simply because they have a tradition of hierarchy, solely amplifying the leadership trajectories and views of seasoned executives.

As a result, associations have failed to keep pace with change, and be relevant to, or inclusive of younger generations.

In 2015, for the first time in 34 years, the world's population started trending younger. Today, more than half our world is under age 30 and the workforce majority is under age 39, yet associations aren't following suit. The average age of membership has continued to increase, as has the amount of decline among young members.

Furthermore, Generation Z, currently ages 11-24, and the generation that follows will be significantly influenced by the pandemic and other social shifts. Childhood and adolescence are influential years in terms of brain and values development, and the youth of today are experiencing more change during their youth than any other generation.

Paying close attention to what impacts the youth in our society, and how they respond, are windows into the future. These impacts are evident in the following trends – just a few of many which associations should consider when contemplating their futures.



## Education and Training

Gen Z consumes more content than any other generation, turning to numerous sources for learning and inspiration, including YouTube, Shark Tank, TED Talks, MasterClass, and even enrolling in Harvard classes online. Due to workforce turnover, skills gaps, and worker shortages, young people will be on a fast-track to leadership and expected to learn new skills quickly. This provides opportunities for associations interested in workforce development, skills training, and certification programs.

## Creative Uprising

Youth have taken to the streets to protest and rally for change, and they create videos and other ways to hold companies and leaders accountable. This activism is an indication of how the membership audience is shifting. Young people will expect your association to 'walk the walk', not just 'talk the talk'. They will expect the association to be part of an on-going conversation, leading and influencing positive change. They will also demand a voice and a seat at the table.

## Connectivity

Associations have unprecedented opportunities to reach more people than ever before. How can you connect – really connect – with your audience from here on out? Humanize your brand. Go to your audience and engage them in dialogue. Ask them what they need. Listen, and create something new and relevant and meaningful. The more you can get members involved in your brand, the better.

In the aftermath of the Great Recession, new economies emerged, and an entirely new value system was introduced. Time became our greatest commodity, happiness became our definition of success, and society began to invest more in travel and experiences and spend more time with family.

As difficult as the Recession was, society evolved. But data tells us membership growth remained flat or declined, which is a clear indication associations aren't evolving at the same pace.

If association leaders start creating environments inclusive of, and in collaboration with young people, I predict an immediate upswing will occur. But if they stay rooted in the past, making minor adjustments to an already outdated membership strategy, associations can expect to experience more decline.

To evolve is to accept you aren't on the right path. To evolve is to realise the future isn't something to predict or just let happen – but something which every association has the opportunity and responsibility to create.



**By Sarah Sladek.**

Sarah Sladek is CEO of Sarah Sladek & Co and XYZ University LLC, author of five books, and host of the web show, *Save the Associations*.

# The '5G Association': A Mix of the Old and the New

**T**here has never been a faster acceleration of digital technology development and innovation for associations than during the past year and a half of the COVID-19 pandemic.

New and enhanced video conferencing platforms, learning management systems, association management software, online communities, and the like have proliferated in the association world in such a short time.

Digital technology, however, is only part of the solution as associations seek ways to engage their members, organise online events, be more efficient in their operations, and generate new sources of revenue.

While technology is the enabler of these activities, relevant content, member experience, and organisational culture are essential ingredients that make associations even closer to their members and stand out from the rest.

So how can an association achieve providing value and uniqueness on one hand and gaining much-needed resources to sustain its mission on the other? Perhaps, the following five Gs can provide an introspection for the association executive in search of ideas and a guidepost going forward:

## Gravitate to purpose.

The American Society of Association Executives (ASAE) defines an association as an organization or group of individuals affiliated with one another who share a common purpose, interest, or mission and exist for the mutual enrichment and advancement of their membership. In essence, the purpose of an association is to serve its members.

In ASAE's multi-year research published a decade ago, "7 Measures of Success: What Remarkable Associations Do That Others Don't", one of the attributes of success is the alignment of member services to purpose, citing that service offerings of successful associations have been consistent with their purpose and have remained central and unchanging even in the midst of changes in the external environment.

## Give value.

There are at least four value propositions an association gives its members:

- 1) Learning (education and certification programs),
- 2) Knowledge (publications such as bulletins, newsletters, journals, books, magazines, websites, and research studies),
- 3) Community (special interest groups, professional sections, online and offline networking, benchmarking and best practices, volunteering opportunities in committees, councils, and task forces), and
- 4) Advocacy (lobbying, formulating policy positions, providing testimonies and specialized information).

Delivering these values with exceptional content and experiences provide impetus to the sustainability of the association.





Photo by Andrea Piacquadio from Pexels

## Generate relationships.

Partnering and working with others not only provides economies of scale but also transfers knowledge and builds creativity and innovation. Collaboration is the new currency associations use to leverage their resources in offering new services to members.

## Grow the staff.

The association is only as good as its people. The pandemic, with all its disruptive effects, has nonetheless spawned new skills and talents for the association staff and new ways of working amidst different settings. Balancing staff re-skilling and up-skilling with understanding and care for wellness is an imperative for associations to grow and prosper.

## Go digital.

There is no way and nowhere to go but to go digital. This has been the case during the pandemic and will be the case post-pandemic. Leaders in the use of technology will remain relevant, attuned with the times, and emerge flourishing into the future.

The "5G association" may not be the fifth-generation version of what an association is supposed to be in the future, but for me, it is a technology-propelled, back-to-basics thinking mixed with lessons learned from the pandemic.



**By Octavio 'Bobby' Peralta.**

Affectionately called "The Association Man," Bobby is founder and CEO of the Philippine Council of Associations and Association Executives (PCAAE) and president of the Asia-Pacific Federation of Association Organizations (APFAO).

# Global Leadership for Associations

It is not a dream;  
it is a real opportunity

**T**here seems to be a ray of hope that post-COVID stages of normalcy in many parts of the world are starting to evolve. As that is happening there will be the obvious worrying about such things as what member retention, leadership development, and, of course, the return of conferences, meetings, and other gatherings will look like going forward.

While we certainly need to address these pressing issues, I believe associations and other not-for-profit organisations should also be looking beyond those things.

Now might just be the right time for the worldwide association community to exert some real leadership.

Not leadership in the form of the greatest number of new members, the best hybrid meetings, the most unique destination, or the biggest conference. I mean, why not take what we have (hopefully) learned from what the world has been through in the past two years and exert some real global leadership in improving our world?

I have been in the association management profession for a long time. I have seen the power and passion of the international association industry exerted to accomplish remarkable things, bring value to members and stakeholders in many forms, and provide incredible insights into the biggest concerns of people and nations around the planet.

What if, in the coming years, we (collectively) harness that power and passion to change the world for the better? We all desperately want some person, some entity, some government, some group to do that.

**Why not us?**

**Who is better positioned to be a change agent** for how different nationalities and diverse cultures and different ideas interact and communicate with each other? We do that every day, bringing people and organisations and decision-makers together, with no judgements, no prejudices, and complete inclusiveness.

**Who is better equipped to bridge the barriers between people and countries** than the industry that owes its success – indeed, its very existence – to being able to negotiate win-win situations for all the stakeholders?

**Who has more experience co-ordinating the advancement of education** at all levels and in all parts of the world? Each year we bring millions of people to technical conferences, advanced learning forums, safety and security discussions, standards-setting gatherings, student achievement events, and educational enhancement meetings.

**Who is more aware of the need to work together to protect the environment**, the atmosphere, and the inhabitants of our planet? We accommodate and help co-ordinate the events and meetings that address these issues. But someone must take a leadership role in assuring that these issues are addressed by initiating these activities in the first place.

**Why not us?**



The association community can bring people together, face-to-face (not just screen to screen), and provide the mobility needed to get to the right people in the room (or exhibit hall, or conference center, etc.).

The association community and its partners can assure the safety and the comfort of participants, can co-ordinate with the technology community to provide for universal access to information, and can extend its hand to those who need to participate but may lack the resources to do so.

The association community can bring value and content to these efforts by maximizing the vast reservoir of human resources it represents. The best minds in every field; the best thinkers on every issue; and the best communicators at every level, are members of these international professional, trade and technical associations.

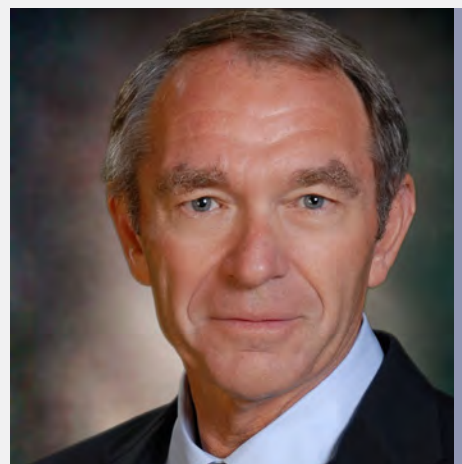
So how do we bring all these forces together to make real change?

We focus on outcomes, not process. We agree on sharing risk as well as well as rewards. The bottom line is that there is no bottom line because the bottom line is no longer considered an outcome.

We establish measurement criteria that has nothing to do with heads in beds, seats in seats, guarantees and attrition clauses, or who gets the most publicity. We do not wait for others to create a timeline; we offer a timeline to others. We commit to things that others think are "not in the realm of the not-for-profit community" because doing the right thing to advance our common well-being is exactly what our realm should be.

The American poet and philosopher Ralph Waldo Emerson once said, "There is no limit to what we can accomplish if no one cares who gets the credit." Someone needs to seize on that philosophy and make a real impact on our global society.

**Why not us?**



**By Mark Levin, CAE, CSP.**

Mark Levin, CAE, CSP has more than 20 years of experience as an association executive and is also an internationally renowned speaker and consultant to the non-profit and association community. He currently serves as Executive Vice President of the Chain Link Fence Manufacturers Institute, an international trade association, and as President of B.A.I., Inc., his speaking and consulting firm.



# Think Like a Futurist.

**W**hen Andy Grove was president of Intel in the 1980s, the leadership team was wrestling with its future direction. Some were in favour of continuing with memory chips, where Intel had established a strong market lead, but its market share was being whittled away by Japanese competitors. The other camp wanted to abandon memory chips in favour of the smaller but fast-growing market of microprocessor chips.

One day, after yet another exhausting management debate that didn't achieve anything, Grove took his CEO Gordon Moore aside and asked him: 'If we got kicked out and the board brought in a new CEO, what would he do?'

Moore didn't hesitate: 'He would get us out of the memory chip market.'

Grove replied, 'In that case, let's do it ourselves!'

With this simple change of perspective, Grove broke the deadlock.

As a futurist, I often tell this story when helping leadership teams plan for the future. If you want to manage change and avoid disruption, think like a futurist. That means avoiding the trap of relying too heavily on your past experience when making decisions for the future.

It's always difficult to act wisely for the future when you're clinging on desperately to the past. But COVID-19 has made this riskier than ever before, so it's even more important to be future-focussed when thinking ahead.

This is exactly what every association should do now. It doesn't mean you throw away all the experience, insights, and wisdom from the past. But start with a vision of your ideal future and build a path towards it. You keep the best from the past where it's still relevant but leave the rest of it behind.

Let's extend the Andy Grove idea of 'What would our replacement do?' and ask the hypothetical question:

'If we were designing an association from scratch to best serve [a particular group of people], what would we do?'

Use this as a starting point for a thought experiment to design the ideal future version of your association.

## Start with "Who?"

Despite Simon Sinek urging you to 'start with why', it's better to start with who – that is, your members. If you were designing your association from scratch, how would you define your membership differently?

Would you expand the scope of membership, or restrict it? Would you have different criteria to join (for example, perhaps a degree is not the only pathway)? Would you define different levels of membership than you do now? Would some current members no longer be eligible?

Would you expand membership to other geographical areas (for example, to Asia, which will be the dominant region for the rest of the century)? Or would you shrink its scope to increase its focus?

## Then ask "Why?"

What should your association do for members? Is its main purpose to offer advocacy, education, community, professional standards, or something else? Assess this based on what your members need, not on what you have done in the past.

## How will it deliver outcomes?

COVID-19 accelerated a shift to digital services in many areas – such as conferences, meetings, training, accreditation, records management, community

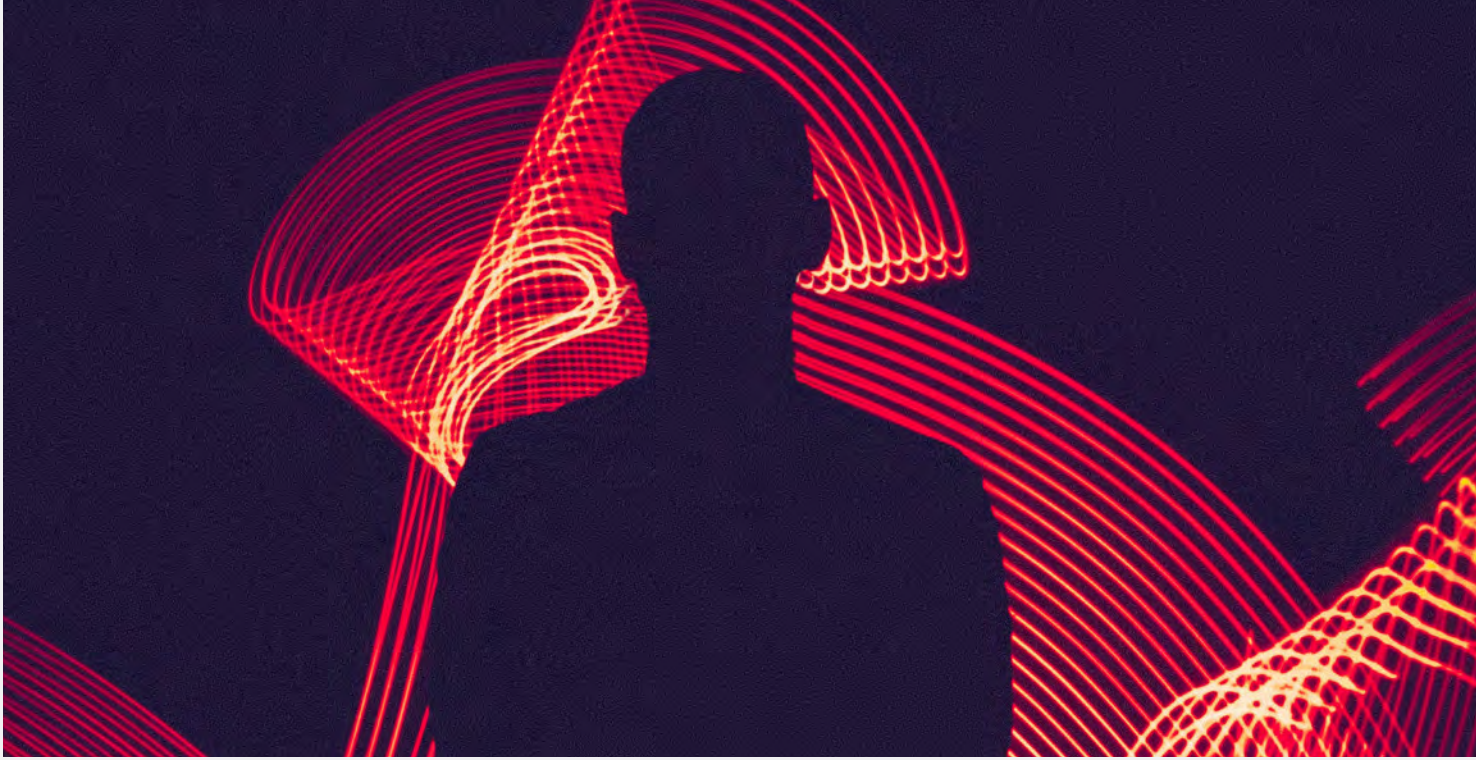


Photo by Akwice from Pexels

engagement, media and PR. Your association might have treated some of these as temporary measures during lockdowns and other restrictions, but are these as good as – or even better than – the in-person equivalents you used to offer in the past?

### Who will lead?

Who are the best people to lead your new association? You might have many decades of experience and wisdom among highly respected long-term members, but that experience might give disproportionate weight to the past.

What if your current board was replaced by a group of smart, savvy Generation Z members? Or had more women? More men? More culturally and linguistically diverse people?

### What will you DO?

It's easy to ask these questions as a thought experiment, but not so easy to convert the answers into concrete, practical action. If you were starting your association from scratch, you don't have any pesky 'baggage' to deal with, such as existing infrastructure, members, reputation, sunk costs, and your constitution. These are all important, and any plan you create must take these into account.

When you plan the path ahead, of course you have to start from where you are now. But the 'outside in' approach above means you're heading towards a more desirable future. Instead of pushing from the past, you're pulling from the future – and that creates a more compelling vision for your members.



**By Gihan Perera.**

Gihan Perera is a business futurist, speaker, and author who helps leaders and teams succeed in a fast-changing world.

# Are Associations Truly Innovative?

**W**ith the right tools and mindset, any association is capable of innovating. So why is it that so many associations struggle to embrace the habits that would allow them to thrive?

That's the question that we set out to answer with the Association Innovation Scan. In partnership with Loyalty Research Center, we surveyed associations across different industries, with varying sizes of staff and memberships, and with a wide range of annual budgets to get a clearer understanding of association innovation today. Research was conducted in the summer of 2020, when COVID both forced innovation and served as a tailwind to encourage it.

Associations have been reactively innovating since the start of the pandemic – in large part out of necessity – but, with this research, we want to encourage and invite associations to make innovation a proactive part of their cultures going forward. Without a doubt, the resulting return on investment is well worth it.

Innovation was important before the pandemic, but it's even more important now. The pandemic has accelerated the urgency for the changes we know we've needed to make. It will be a tragedy if we are still doing the same things in the same way when we emerge. It will be a missed opportunity if we choose to fully go back to the way things were rather than go forward.

According to the research, associations consider themselves to be innovative – 43% of respondents consider themselves to be the "first to adopt" something new, while 37% "wait for a few others" and 13% "wait for many others." It may be that associations are innovative when compared with other associations. However, when compared with for-profit companies and the way they innovate, associations move at a slower, more incremental pace.

When comparing "evolutionary" (smaller) vs. "revolutionary" (significant) advances, 54% consider themselves more evolutionary, while fewer – just 29% – consider themselves more revolutionary. A takeaway question for association leaders is, "How can we become an association that is more focused on significant advances vs. smaller advances?"

## Name What Stands in Your Way

One place to start is by taking a closer look at the barriers, both real and perceived, that stand in the way of innovation.

Lack of resources (meaning staff time or budget) was cited most often in the research as a constraint on innovation. That was followed by complacency and lack of vision, which includes everything from an organisational structure that slows down progress to no sense of urgency to a lack of leadership.

When asked for the title of the individual responsible for leading innovation, many reported high-level executives: CEO, President, Chief Operating Officer, Executive/Association/Deputy Director, Senior Vice President of Strategy and Innovation. Surprisingly, only a small contingent reported that all staff were responsible. Our view is that if everyone is responsible, no one is. Highly innovative organisations have at least one point person to lead the charge.

Of the small number of associations that budget for innovation, 40% have it as a line item in their annual operating budget and 40% borrow from reserves.

Recognising these barriers above exist is the first step and selecting one obstacle to tackle is the second step. They can be interrelated, however. For example, complacency leads to a lack of vision – which can be caused by lack of resources. Don't let that interconnectivity discourage your team from beginning to seek out new paths for innovation.

Though most respondents indicated they have permission to fail (61%) and to stop doing things which are inefficient or waste resources (57%) – and that innovation is critical to their overall strategy (57%), and they use data and insights to guide innovation (57%) – only half indicated they recognise and reward innovation. Even fewer make deliberate investments in innovation (41%) or launch/scale successful innovation effectively (38%).

There's no way around it: Failure is part of innovation, although I prefer to substitute the word "research" for failure because you know more after a disappointment. Association boards tend to be risk-averse and more comfortable protecting the association rather than advancing it. This is why it is so hard for associations to innovate.

Instead, board members should consider scoring themselves on a "risk comfort" scale and then have a conversation about how they can collectively increase their comfort with it. Additionally, associations should continually be experimenting with something so that it becomes an expected part of operations rather than an occasional ask from staff.



## Create a Path Forward

Once an association has made the decision to move from a weak to a strong culture of innovation, there are three stages that can help associations break down what may still be a complex and paralyzing concept – changing mindset and culture don't happen overnight, after all. The three stages are:

1. Create momentum.
2. Formalize a vision and a plan.
3. Implement and ingrain in your culture.

The graphic illustrates the "path of resistance" to achieving a strong culture of innovation. The "easiest" component to install at an association is giving permission – either to start doing or to stop doing.

Then, as momentum builds, it is imperative that victories – big or small – are recognised and rewarded.

As a more formal vision and direction begins to develop, other implementation-specific details need to be built alongside that vision for it to be successful.

Strong innovation cultures have more of the identified components shown here in place. However, few associations I've worked with have a senior staff person dedicated to innovation, invest in innovation-focused training for staff or volunteers, have a budget dedicated to innovation, or identify innovation as a core value.

If an association doesn't have an innovation process outlined on paper, this is another place to start. I like to say, "If you can name it, you can claim it." Doing this makes it tangible and understandable for all involved, including the Board.

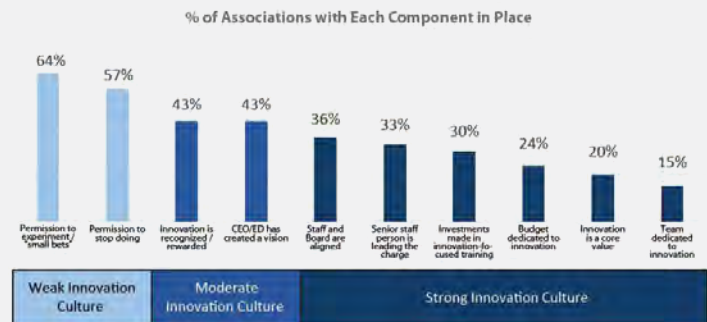
Separately, there's much to be gained from listing and celebrating all the innovation that happened over the past year during COVID specifically. When we're doing it in the moment, we often don't recognise our accomplishments. Looking back creates confidence, and confidence strengthens our innovation muscles.

Leadership, both on staff and boards, can support innovation best by recognising its value. Budget for it annually or have money set aside in an innovation fund. Hold people accountable for it and celebrate both successes and failures. Reward it. Work to make sure the board and staff are aligned in terms of innovation. While this may be an oversimplification of a complex challenge, we know that innovative organisations do these things.

## Take the Pledge

The bottom line is that innovation is no longer an impossible concept meant for a few; it's an imperative for all associations. Many associations are in decline – declining membership, declining participation, and declining revenue. This isn't going to change without new activity. That's what innovation is: doing something differently to create value.

Though true innovation requires organization-wide commitment, a well-defined process and associated funding, associations are invited to take the "10% Pledge" – a commitment to regularly innovate and reinvent 10% of their activities (advocacy, membership recruitment and retention, meeting/events, communications, publications, and certification) on a continuous basis. This pledge is designed to create "innovation mindfulness," a state that eschews complacency and actively seeks new and different ways to create value.



By Mary Byers, CAE, CSP with Sarah Sain, CAE.

Mary Byers, CAE, CSP is a speaker, facilitator and consultant helping associations gain clarity and focus through leadership training and education, and she is one of the authors of *Race for Relevance: 5 Radical Changes for Associations*. A newly revised, 10th anniversary edition will be released in mid-2022. Mary partnered with Loyalty Research Center to conduct, research, and release the *Association Innovation Scan 2020: The Association Professional's Guide to Winning with Innovation*. Sarah Sain, CAE is director of content for Naylor Association Solutions and a writer and editor for *Association Adviser*.

# 13 Shifts in Strategic Planning for Associations.

**G**reat strategies don't happen by accident. Three common characteristics of high performing associations include their ability to:

- Create a compelling shared vision of the future,
- Convert that vision into a strategic plan (a roadmap for the future), and
- Operationalise that strategy effectively.

Like most aspects of running an association, strategic planning has changed a lot in recent years. In particular, there are 13 shifts to be aware of when undertaking a planning process:

## 1. More Succinct.

Strategic plans used to be large documents that could be mistaken for a door stop. Nowadays, some of the best strategic plans are a single page. The key inclusions for these kinds of strategies are:

- A specific timeframe for the plan.
- Vision Statement.
- Purpose Statement.
- Strategic Objectives (sometimes called Strategic Priorities)
- Strategies beneath each Objective.
- Enablers (Strategies addressing how the association will operationally position itself to deliver the Strategic Objectives).

## 2. Planning is a process.

The idea that you can walk into a room with a blank sheet of paper in the morning and leave with a brilliant strategy at the end of the day is (thankfully) in the past. Strategic planning is more likely to be a consultative process that develops a robust and considered strategy – with the input of various stakeholders over several weeks or months.

## 3. Robust conversations not boring presentations.

During the process of developing a strategic plan, workshops are less about having a series of dull presentations telling attendees things they already know (or could have read prior to the meeting) and more about having robust conversations.

## 4. Embracing online.

Planning processes are more likely to be undertaken online than be entirely face-to-face. This enables broader consultation as well as shorter, more productive, consultation with a wider group of participants.

## 5. More realistic.

You can't be all things to all people - it's simply not possible. Plans that are completely unachievable are demoralising to your staff team and disappointing to your members. You should stretch if you can, but targets should still be within the realms of possibility.

Many associations are implementing processes that ensure the strategies – and the associated KPIs – are realistically achievable during the plan's timeframe before finalising.

## 6. Shorter terms.

The most common duration for a strategic plan used to be five years. Nowadays it's more common to see a 3-year plan with annual reviews.

## 7. A vision for those you serve.

A vision statement is not about the association. "We will be the leading association in the country" is not a vision statement. At best it's just a statement of the obvious. Everyone wants to be the best – you don't see anyone striving to be the most mediocre association in the country.

A vision statement should be an inspirational and concise statement about the positive outcome for those you serve if all your work was successful. Eg: A world without Alzheimer's disease (Alzheimer's Association).

## 8. A purpose with purpose.

If your vision statement is the destination, your purpose statement is how you will get there. Eg: We look after doctors so they can look after you (British Medical Association).

Purpose statements should be succinct and powerful. No one is going to be engaged by a purpose statement that requires a cup of tea and a lie down halfway through reading it.

Very few organisations use the term "mission" anymore. Associations have been discontinuing use of the term because the word can carry negative connotations for some people.

## 9. Objectives geared for impact, not function.

Strategic plans have shifted from objectives focusing on function (separated by department) to objectives focusing on impact (focusing on how the association can maximise the positive impact on those they serve).

For example, membership growth is not a strategy – very few people outside the association care how many members you have. If you are seeking membership growth for the purpose of influencing government then your objective could be "raising a powerful voice on behalf of the sector". Membership growth would be an enabler.

#### **10. Focus on fewer, more powerful objectives.**

The more objectives you have, the less likely you are to achieve them all. A good strategy has three strategic objectives that powerfully state how the association will make a powerful impact on those they serve. (Eg: We will be a powerful voice for a better regulatory environment.)

Strategic objectives often relate to the mix of activities associations undertake to serve their members. That mix will be one (often more) of the following activities:

**Service provision** - To provide products, services, events, education, and/or communications to a specific group to assist them to achieve their objectives.

**Representation** - To represent the interests or exert influence on behalf of those you serve to specific stakeholders (such as a government, government agencies, and/or the public).

**Mobilisation** - To mobilise people or organisations to take collective or independent action to achieve a stated objective.

**Participation** - To create pathways for individuals or organisations to actively engage with activities coordinated by the association. These pathways are built from initial trial to elite performance. This is often found in sporting associations.

**Community** - To build a community that enables participants to connect directly to find solutions to their challenges. This can be online, offline, or both.

High-performing associations focus where they can make the biggest impact. Some have the resources that enable them to do this via a mix of all the above activities. Others focus on a single activity where they know they can deliver a significant impact.

#### **11. Enabling operational success.**

Strategic plans should incorporate a fourth strategic objective outlining how the association will operationally position itself to ensure it delivers on the three impact objectives. (Eg: We will be a strong and sustainable association.)

It is here the strategy should address any enablers that need refining. Enablers are those functions that no one outside the organisation pays any attention to unless they are going wrong.

Common enablers include leadership, governance, technology, business and membership models, value proposition, communications, stakeholder engagement, volunteering and committee structures, staffing,

organisational culture, revenue diversity, business development, and sales structures.

#### **12. Facilitated by an association specialist**

The power dynamics within many associations make it challenging for staff or Board members to facilitate this process. There is a lot of value in using a facilitator who is engaging enough to keep people engaged, firm enough to keep them focused, and knowledgeable enough about associations to provide insightful input into the process.

#### **13. The right plan for your association.**

Different types of associations require different types of strategic plans. The strategic plan can be simple enough to also form the operational strategy for small, volunteer-run associations. For more complex organisations, the strategic plan provides a strategic framework foundation upon which detailed operational plans can be developed.



**By Belinda Moore.**

Known for her enthusiastic and engaging style, Belinda is frequently engaged by associations to assist with strategy development and implementation. Belinda has written four books: *The Membership Machine*, *Membership Fundamentals*, *Membership Managers' Handbook*, and *Association Annie: Herding Cats*. She has authored the following white papers *Associations Evolve*, *Association Apocalypse*, *Membership is Dead?*, and *COVID & Beyond: Lessons for Associations*. She also writes the popular *Association Annie* comic strips.



# Translating Strategic Plans to Operational Outcomes.

**M**ost organisations have a Strategic Plan. It's aspirational, intentional and looks great. The Plan probably came about from a well-thought-out process. Organisations generally use a facilitator and include key stakeholders and staff. As such, most Strategic Plans are good quality, developed through consensus, and have core objectives or goals.

So how is it that many organisations then find themselves off-track, with unmet goals, a confused Executive, and disengaged staff? The key variable is staff engagement – your staff are the ones who are responsible for achieving the Plan's ambitious goals.

Bringing the staff along is critical to unfolding a Strategic Plan into the day-to-day of a business. Staff surveys may show staff do not know what the Strategic Plan is and how it relates to their day-to-day experience at work. This means the Executives need to use the momentum and results of successful strategic planning and translate the Strategic Plan into an operational plan to achieve the strategic goals. But how?

At an Executive level, practical ways include:

- Taking the time to explain the Strategic Plan and checking that team members understand the Strategic Plan and what it means for them
- Creating staff key performance indicators (KPIs) that are linked to the Strategic Plan Objectives
- Ensure the business budgets resources for achieving Strategic Plan Objectives
- Build regular reviewing of progress towards Objectives in the day-to-day operations.

This paper describes the experience of translating a Strategic Plan into an outcome-focussed operational plan. Important areas that are crucial for translating Strategic Plans are often forgotten: Objectives, Initiatives, Measures and Targets, and Personal Objectives (see pyramid below). There will be a follow-along example, with practical tips on translating an example Objective into operational plans.



## Objectives

A Strategic Plan usually consists of several Objectives or goals. The Strategic Plan communicates (both to your team and your broader stakeholders) what the Association wants to achieve. However, filling in the missing links of how and why is critical. The Association has a destination but needs to develop a roadmap to get there: the operational plan. And even if staff were included in the strategic planning process, the reasoning behind an Objectives may still be unclear to them. If staff do not understand the 'Why' behind an Objective, it is difficult for them to be engaged with achieving the Objective. A common Objective of membership organisations is to Increase member engagement, we will use this objective as an example to work through the process.

### REAL-WORLD EXAMPLE

#### Objective: Increase Member Engagement

##### How to unpack the Objective

- Gather any materials used in the Strategic Planning process, for example formal and informal meeting notes, and any data/evidence used by participants in the Strategic Planning process.
- With the team, review data from membership surveys as well as the material or data from the Strategic Planning Day(s) related to the Objective 'Increase member engagement'. This could be meeting notes, butchers' paper from group work, sticky notes from brainstorming exercises, facilitators notes. Ask the staff to summarise the evidence, answering the questions 'Why is this important?' or 'Why is this a key area we need to address?'.
- This review leads to a shared understanding of the evidence behind and reasoning for the Objective.

## Initiatives

Initiatives are the activities designed to achieve the Objective. Initiatives are developed, planned, and executed by the team (not the Executive). By developing the initiatives and associated tasks themselves, the team engages with the Strategic Plan. This then generates a sense of ownership of the outcomes. This in turn creates a shared purpose across the organisation because initiatives are linked to shared (Strategic) goals.

### REAL-WORLD EXAMPLE

#### Objective: Increase Member Engagement

##### Initiative: Member Outreach

##### How to develop initiatives

1. The exercises of unpacking the Objective and its evidence often clearly identifies the areas that could or should be addressed. Reviewing the evidence makes the process of designing initiatives easier.
2. In this example, data from surveys reported that members expressed 'not being heard' and 'not being included' by the organisation. With the team, work through key points from unpacking the Objective. Ask targeted questions about how to address the issues identified, e.g., 'How do we give members an opportunity to give us feedback?'.
3. In this example, staff designed a Member Contact Program, so each member was formally contacted personally by a member of staff twice a year.



## Measures and targets

Measures and targets are crucial for tracking progress of initiatives, on the way to achieving each Objective. Setting targets is an intuitive exercise for many people, however measuring can often be harder. Therefore, it is important to follow-up any proposed target with the question 'Can it be measured?'.

### REAL-WORLD EXAMPLE

#### Objective: Increase Member Engagement

**Initiative: Member Outreach**

**How to develop measures and targets**

1. The target in this example is straightforward: every member gets contacted twice a year. With 100 members, this gives the target of  $2 \times 100 = 200$ -member phone calls per year.
2. The team will need to ensure the entire process is thought through. It is important to clearly define how you will know the targets have been met. In this example, ask important questions such as 'How is contact recorded?', 'Do we record every attempt or successful contact?', and 'What do we mean by "contact": email, phone, or in person?'.
3. Assign members to staff to the task. Make use of (or implement) tools to support the outcomes. In this example, you could use an online tool where each staff member records contact with a member assigned to them. Ensure your tools are transparent, so the progress of every staff member responsible for each task is visible.
4. With the entire team, review progress each month.

## Personal Objectives

Personal objectives are often part of individual staff's periodic workplan, or performance plan. To achieve strategic integration, the operational plan should relate tasks to agreed measures and targets, which support initiatives, which achieve Objectives. In this way, tasks have a clear line of sight to the Objectives of the Strategic Plan.

This explicit link facilitates the team member's understanding that what they do contributes to the organisation achieving its goals. Successful organisations often then leverage personal objectives to prevent silos when working toward the Strategic Plan goals. This way, individuals from different sections of the business have personal objectives that contribute to a shared initiative, shared objective, and shared future success.



Photo by fauxels from Pexels

## REAL-WORLD EXAMPLE

### Objective: Increase Member Engagement

Initiative: Member Outreach

Target: 200-member phone calls per year

How to create personal objectives linked to a Strategic Plan Objective

1. Set each team member a personal objective that will contribute to the initiative and therefore the broader goal – in this case, 'Increasing member engagement' via the Member Contact Program.
2. Each team member is assigned a Key Performance Indicator of contacting a set number of members twice a year and updating the shared tool so others can see it is done.
3. The contact of members is not limited to a membership role. All team members including the CEO have a target of contacting a set number of members every six months.

Objectives, Initiatives, Measures and Targets, and Personal Objectives should coalesce in an individual's workplan. In this way, everything staff do day-today contributes to achieving the Strategic Plan.

Objective	Initiative	Measures and Targets	Personal Objectives
Increase member engagement	Member Contact Program	Every member contacted twice annually	Contact 10 members every six months



By Kym De Britt, BBus (Accy). MBA.

Kym is the Chief Executive Officer of the Australian Dental Industry Association. An experienced, versatile Executive with a proven track record of building businesses and business culture through change management and leadership across a range of sectors

## Never Losing Momentum:

# Why it's important to continue your efforts, no matter the hurdles.

**W**hen the pandemic hit, we were faced with unfamiliar concepts and catapulted into unforeseen circumstances. Some people paused. Some people took a step back. Others crawled under a rock and said, "let's wait this out."

But weeks turned into months, and the idea of "waiting it out" was no longer a feasible one. It took us a while to admit it, but the pandemic was here to stay and, as a result, we had to redesign significant parts of our lives.

We were forced to dive head-first into remote working structures. Video conferencing and project management tools became salient and standard parts of our day. Our flexibility was tested, and we stretched our processes – and ourselves – in ways that we hadn't ever before.

For some, these changes were rapid and scary – work-from-home structures were traditionally considered a nice idea, or a way to win over a potential employee, but never something truly endorsed or implemented on such a wide scale.

Organisations, across all sectors, were now faced with two particularly complex tasks. First, they had to figure out the technical challenges of remote working arrangements. And then, they had to grapple with the predicament of maintaining social cohesion for emotionally fatigued workers, while still carrying out successful projects and campaigns.

For the team I manage, this was already second nature. For more than ten years, Fifty Acres had been known as one of the only 100% "work from anywhere" full-service communications agencies in Australia. So, we're seasoned professionals in running a purely virtual team, and the remote working scramble of the COVID-19 pandemic meant that we had a new opportunity – we were able to capitalise on talents that weren't previously getting that much attention.

But all of a sudden, people started to pay a lot of attention.

Everyone around us started to ask "How?". Our clients and friends looked to us for advice. Our networks came to us with questions on how to keep up their efforts, hit their objectives and maintain their results.

Working in the communications industry, I have always been a big advocate for never parking things and never losing momentum – for continuing engagement projects, no matter the circumstances, no matter the hurdles.

Arguably, one of the few positives from the global pandemic is that it has properly shone light on the absolute significance of consistent outreach and strategic planning. More than anything, it's taught us that we can't stop – we need to observe our environments and adapt accordingly. We can't just wait it out.

With change, comes new openings. With realignment, comes new opportunities. With political shifts and a changing landscape, comes a stepladder to pioneering work.



Photo by Branimir Balogović on Unsplash

So "not stopping" is exactly what we did. We ran seminars for hundreds of people. We connected – digitally – with clients, not-for-profits, corporate businesses, and community-based organisations from all over Australia, and taught them how to make the most out of a challenging and abnormal event.

As Public Relations professionals, we emphasised the importance of consistency. We underlined the significance of always talking to your target audience and reaching out to your key stakeholders. We stressed that you must be ready to adapt, no matter the crisis that lands at your feet.

Looking back on my twenty years of varied experience across the communications industry, as a journalist, an adviser, a strategist, and a CEO that wears many hats – not stopping and learning to adapt to and even making the best of your surroundings, will forever be my most invaluable lesson.



**By Jo Scard.**

Jo is the Founder and CEO of Australia's leading for-purpose communications and engagement agency and comes with varied experience across journalism, political advisory, and stakeholder management.



# The Power of Not Protecting Member Value First

**T**he world of commercial cleaning, the focus of ISSA – the worldwide cleaning industry association, based in Chicago, USA, often lies under people's radars. That is, until a world pandemic begins and every facility in every country needs to protect their occupants. This is the situation ISSA, a global association of more than 10,300 members in over eighty countries found itself in during Covid-19.

We have always been an agile organization, adjusting to meet current needs and realize new opportunities, and that is what our team amplified during the pandemic. It starts with taking risks. In ISSA's case, we gave away knowledge to non-members without trying to convert them. People were hungry to consume our content but would likely never be a member.

Rather than focus on protecting paid member value, ISSA did the opposite. We felt it was our social obligation to help society respond to the challenge at hand. But we also knew many of those people were our members' potential customers. By spreading the word about best practices and rational approaches, we were cultivating a more educated audience we believed members would value even more. The result was a larger opportunity for the association long-term and the results were powerful.

## Creating the Customer Funnel

Many associations reach a large audience of prospects who never become members, whether through exhibitions, publications, or social media. ISSA's approach leveraged that group more effectively and I believe it can be replicated in most industries, without a pandemic.

The member/customer approach could be the answer many associations are searching for to commercialize and diversify revenue. Free tips sheets, webinars, YouTube videos and white papers were at the mouth of ISSA's

funnel, followed by low-cost follow-up webinars, which led to full-price virtual workshops, all easy to digest from anywhere. Member and non-member pricing was built in by the second repeat engagement and forms were capturing all interested leads.

ISSA also created an accreditation, GBAC STAR, for facilities looking to validate their protection protocols. We chose to accredit our members' customers instead of members because if we met the largest demand the rest would follow.

That risk paid off as members inquired how they could pay to sponsor webinars and workshops attracting the new audience. Some paid to offer free scholarships to ISSA's content. The funnel – and revenue – was expanding organically.

Some consumers did join ISSA, but even more traditional companies that we hadn't reached before started to join when they saw the voice we were giving their profession and the prospects we were attracting.

## Permission to Take Risks

Like ISSA, many associations tested theories or exploring new relationships before the pandemic. The outbreak allowed those ideas and tactics to be employed with less constraint because so many organizations had to do something to balance the event-based losses or reduced renewals they may have experienced. Whether your association pushed boundaries during Covid-19 or not, it can learn how to incorporate them more purposefully into a long-term strategy instead of a short-term fix.

Trying to diversify revenue within the traditional membership protection model is limiting. Associations that are open to the possibility of packaging some content for non-members and other content for traditional members, will have a wider range of opportunities.

Strategically developing a funnel that allows customers to choose a level of engagement and helps members and customers engage each other, can lead to:

- revenue from non-member customers possibly outpacing that of membership
- membership increasing in ways one wouldn't expect
- increased networking value and related revenue when bringing the two groups together.

## Elements of Success

To create successful scenarios association executives must focus on the processes and tools staff need to best attract and engage their audiences. It isn't enough to create or repackage content for a non-member. Most associations, when honestly evaluating internal operations can identify data inefficiencies, duplicative efforts or time wasters that reduce staff face time with members, customers, and prospects. What can you do to remove these barriers?

Partnering is another aspect to consider. There often is another group that has similar goals but finite resources. Don't be afraid to reach out, even to competitors. When ISSA collaborated with dozens of new industries, it was expanding commercial cleaning's positive exposure and its contribution to society's return to work.

Profit-sharing models for paid content can also incentivized partners to promote resources. This further expands the sales network and customer base.

Association success in the coming years will centre around diversification. Members will always be a core focus, but the options multiply when viewing both customers and members as audiences to serve. Increased revenue is bound to follow when strategically structuring options to foster repeat engagement that compounds value and allows them to network with one another.



**By Dianna Steinbach.**

Dianna is Vice President of Corporate Development for ISSA – the worldwide cleaning industry association and a 20-year association management veteran

## A New Strategy for Extending Member Value through Chapters

**A**s 2020 drew to a close and many of our association chapters were like restaurants closed or on "carry-out only," we asked the association community are chapters still relevant. The brave declared a resounding yes while the majority whispered maybe.

Beyond the obvious issue of blurred geographic lines in a virtual world, association staff witnessed a further loss of chapter volunteers. In fact, the pandemic simply hastened a trend away from the traditional chapter. Notice we say "hastened." For several years, we've been studying the changing boundaries for chapters and frankly geographic lines have been a limiting frame.

Enter an opportunity to embrace new thinking and a new strategy around how associations reach key stakeholders where they reside or work.

In August 2021, ASAE published its latest drivers of change for associations including World Reshaped by COVID. In it, we find opportunity for associations – and their chapters.

**Change:** Work will not return to its previous state as telework grows in many fields. This will affect career paths, pay, business location and office use, and the structure of cities and suburbs.

**Opportunity:** If work is not a place as remote work grows, the need for some form of in-person community in the professional context other than traditional events will likely grow, increasing the value of chapter-generated local meetups and connections.

**Change:** The nature and economics of in-person meetings, events, and training will be permanently altered by the pandemic.

**Opportunity:** Chapters have been able to resume in-person meetings faster than national associations. Additionally, while travel funds are still a question mark for many associations, local meetings largely eliminate that question. As audiences bifurcate between those satisfied with remote events and those yearning for in-person, chapters provide a solution. Witness ASAE's hybrid Annual Meeting where pop-up locations served the need for those interested attending in-person but still not interested in travel.

**Change:** The shift to virtual programming blurred service boundaries between headquarters and chapters and between associations supporting a particular industry or profession.

**Opportunity:** Clarify the HQ and chapter roles in a virtual world. Delineate the value delivered by each entity and design new ways to collaborate and support each other.

So, what about 2022? Taking lessons learned from 2020 and the research from 2021, we can see four doors opening.



### 1) Local remains critical.

We still need members locally on advocacy and locally driven public policy, problem-solving (e.g., getting PPE in the hands of members), and community engagement. Perhaps most importantly, chapters help foster real-time, in-person relationships based on more than a shared occupation, industry, or cause. Our members also have a geographic identity which provides context to our relationships and a perception of closeness which can't be fully emulated by Zoom.

### 2) Answering the Diversity, Equity, and Inclusion (DEI) imperative.

For an association looking to fully embrace diversity, equity and inclusion, there is a strong point for a local network. Chapters can nurture conversation at the local level in a way that supports national/global conversation, especially given that many ethnic groups tend to congregate geographically. Chapters can also offer an accessible pathway for younger and diverse members to engage in the work of the association.

### 3) Chapters extend the primary association's bandwidth for programming, member service and volunteer development.

Just look at the chapters in the US who sourced PPE for members like the AGC Texo Chapter or launched information campaigns for the industry like NACE Maine Chapter #PostponeDon'tCancel. Chapters can act faster and more directly for members. They can develop fresh content. They can pilot programs for the national organization to replicate. Chapters can pivot more readily. We can tap into that agility with the right support and permissions – and perhaps financial resources.

### 4) Budget-friendly.

Many industries and professions caught in a tight financial squeeze will appreciate access to education and events at affordable pricing – something chapters have long provided.

Generally, for associations with an agenda that requires ongoing active local engagement, a vibrant local network will be strategically important. Likewise, for associations representing a constituency either working at the community level (think health care, local resources, local business) or with limited access to or likelihood of business travel, a local network will be strategically important.

To fully answer the question, will chapters be relevant for your association in 2022, look at your strategic plan and the nature of your membership and ask if local is critical and, if so, for what purpose. For many, there will be relevance.



**By Peggy Hoffman, FASAE, CAE.**

Peggy Hoffman, FASAE, CAE, is president of Mariner Management, an association management company and consultancy focusing on member/volunteer engagement and member components. Mariner conducted the industry's key studies on association chapters, including the 2021 Chapter Benchmarking study due out in December 2021. Mariner is the research team behind the Mutually Beneficial Volunteerism study and is currently conducting industry research on effective volunteer models.

# The Value of Connection

**A** good call campaign knows how to respond to the situation within an association - but a great one knows how to respond to the situation surrounding the association.

Over the last 18 months, the pandemic has changed the way in which associations are using outbound call centres to stay connected with their members and evolve with the times. We have seen more associations integrating outbound call centres whether that be for engagement campaigns, renewal campaigns or surveys. These associations are using outbound call centres to have that human connection with their members during a time when human connection is limited.

We have seen in successful associations strong advocacy and adaptability. Now is the time for associations to walk their talk and extend a helping hand out to their members who need it the most. Two of the biggest ways associations can do this is by making sure they are still focusing on connecting with members and their needs, as well as adapting your memberships in a way that reflects the personal needs identified in your feedback from members.

## **Stay connected with your members with a human voice**

Something we have seen consistently with members, no matter the association, is the positive impact a phone call can make for someone. With the various stages of lockdowns and restrictions around the country, one of the positive impacts we are seeing is their responsiveness to having a phone conversation, especially with someone who genuinely wants to check in and see how they're going.

There have been times when we have called members and they've said, "you're the first person I've spoken with today". Or if they're doing home schooling, "you're the first person over the age of five today". Understanding the situations that people are in and being a kind human voice to talk to is incredibly important for associations now and into the future as we still face so many unknowns.

In the last few months, many associations have run surveys as a more humanised check-in with members to ask how they're doing and how they've been impacted by the pandemic. Hearing this feedback straight from the members themselves helps associations to change their approach and more accurately meet their member needs. We have seen great connection rates in these calls - because everybody's at home.

Members are valuing associations that are asking for feedback and genuinely checking in to make sure that they are doing their best to provide relevant value to their members. This personalised human connection with your members can really highlight to your members that they mean more than just being a number in the system.

## **Adapt your membership options based on member feedback**

In a time where it would be easy to just continue providing frivolous value, it's important for associations to ask their members what they really need. The associations that are looking at what they are currently offering and changing it to suit their members' current needs, are doing better than others. This includes having the opportunity to change their membership style and have varied membership types available for people in different circumstances during these weird times.



Varied memberships have been made available for people whose work arrangements have changed. Maybe their hours have been reduced and they're no longer working full time, they're working part time, or just don't have the extra money. People have also really appreciated the opportunity to change from paying membership fees in one lump sum to more manageable payment methods and time frames so they can still be involved with the association.

Associations are finding members are now having to pay for their own membership when it was previously paid for by their employer as a perk of the job. Communicating with your members and understanding their current situation will help you make changes to your memberships and payment terms with the aim of retaining as many members as you can.

Associations need to put real compassion into their membership and work alongside their members for a mutually beneficial outcome. Continuing to have varied or waived membership fees for those who are struggling right now may mean that you will secure that membership and brand loyalty for five or ten years down the road.

Successful associations are those that are seeing value in having a member that sees the value in them. They are those that contacted their members and realised that they may need to change to adapt to the needs of their members right now.

More than anything, it's important that we all have a little bit of understanding of a members' changing needs in this strange environment.



**By Colin Perry.**

Colin is the Managing Director of Optimum Contact, an association and membership-focused call centre that helps build stronger relationships between organisations and their members.



# Lockdown showed how adaptable people are – Associations must be the same.

**H**umans are hugely adaptable. We thrive anywhere from the frostbitten Arctic Circle to balmy tropical isles. And that adaptability served us well when the pandemic erased so many of our daily routines.

Neither us nor our needs fundamentally changed in lockdown, but the way we fulfilled those needs did, from fitness classes on Zoom to home-delivered cocktails.

The same is true for our need for community. Deprived of our 9-5 office families, or cut off from friends and loved ones, we busily built new forms of community, whether online or down at the local off-leash dog area.

The associations that thrive in the post-pandemic world will be those that show the same rapid and inventive adaptability so many of us have individually.

## The great accelerator

The list of things that COVID-19 has accelerated is long – working from home, cloud technology adoption, telehealth, to name just a few.

But one that should be in keen focus for associations is the fading perceived relevance of professional membership organisations, particularly among younger people. In fact, according to US data only two in five young members consider their membership worth the fees.

In recent decades, most associations have diversified income streams well beyond dues alone, expanding into events, training, certification and more.

But even before COVID-19, associations were seeing encroachment on their territory from multiple angles. This

includes new events and online training providers, but, increasingly, people are finding new ways to network, from LinkedIn and online forums, to emerging social media platforms.

The crucial point? Too many associations aren't even aware of their own competition, because they don't make the effort of understanding emerging platforms, such as Instagram and TikTok, where young professionals are increasingly seeking out content and community.

So, what's an association to do?

## Quick to deliver value

The most successful associations are those that are constantly honing their membership value proposition – changing what they offer their members, as their members and the world changes.

One of Mahlab's association clients is a case in point. Dedicated to advancing the practice of its healthcare professional members, COVID-19 posed a formidable challenge.

Not only were their members under incredible pressure, but the situation was also changing faster than their training courses – a traditional staple of the membership offering – could keep up.

In this instance, content was able to help fill the breach.

The association's regular news platform stepped up to become an authoritative source of the day-to-day news members needed to know to stay ahead of practice planning and patient questions.

We spoke to more members more often than we ever had, to make sure we had a fine-grained understanding of the rapidly changing pressures they were facing and could tailor our content to them.

And we streamlined our approval processes so we could publish as quickly as the news demanded it.

Pageviews on the association's digital publication soared by more than a third but that is only a fraction as meaningful as this – our research showed that more than 7 in 8 members were regularly using information from their news publication in patient interactions.

By striving to reassure their professional community that they would miss nothing vital if they kept across their content, the association was able to give their members something valuable – peace of mind.

## Reaching an understanding

No association will have much luck adapting to changes in what their members value if they're not close enough to their members to notice those changes.

Maintaining relevance means staying plugged in to the concerns, big and small, of members.

For the association discussed above, content has become a powerful real-time window into this. Content analytics provide almost instant insight into what members are interested in reading and learning about, insights that then shape everything from course construction to conference speaker choices.

Another powerful tool is the forum the association operates for young members. A private space where members and potential members can network, seek advice, and share insights, the forum is valuable to members, but also to the association.

Every single day, the conversations in the forum illuminate what is front of mind for members, giving inspiration for content, courses and more.

## Takeaways

- Find out where the next generation of members are spending their time.
- Dive into that world to learn more about what members are talking about, and what approaches are resonating with them.
- Sometimes you need to move first and integrate into the strategy later. Small, quick trials can teach so much.
- Empower teams to make decisions and move quickly. Wanting all comms funnelled through a central point makes it harder to respond to member needs in a timely way.



**By Jelena Li.**

Jelena leads Mahlab's publishing client relationships and works closely with both editorial and commercial teams to shape strategies and drive commercial performance. She has 15 years' experience in audience-driven content creation and strategy and spent seven years building and leading the content partnerships team at BBC Global News before joining Mahlab..

# Communicating Your Value to Your Members

## All Year Round

One of the questions Associations are asking themselves right now is: how can we communicate the value of our membership? So much has changed due to the pandemic, and now the cost versus return of Association membership is being brought into sharp focus.

We know the perceived value of membership is key to why organisations become members, renew, or stay engaged. However, how we describe and communicate value is a common challenge for all Associations.

A good place to start when communicating value is to ask: 'What does value mean to our members?' and 'How is that reflected in our business model?'

### What is value?

The [definition of value](#) includes: "the worth of something in terms of the number of other things for which it can be exchanged or in terms of some medium of exchange" and "equivalent worth or return in money, material, services etc". Value is something in comparison to something else, it is subjective, and it fluctuates. What is your membership value being compared to?

- It might be **financial**: "I get insurance with my membership. My insurance is normally \$2,000, my membership is \$1,800 - therefore it's a done deal."
- It could be **time**: "I get access to relevant industry and government information quickly, saving me time finding it myself."
- It could be **exposure to market**: "Our membership gives us access to more people at two networking events than my Business Development Managers can meet in six months."

- Or it could be **educational**: "The industry-tailored educational opportunities help make me an employer of choice."

So, people's perception of what is valuable will determine how your membership value is perceived.

### What is your value story?

How can you communicate your membership value so that it is perceived as important, justifies ongoing commitment, and delivers a strong return on investment of money and time?

Associations need to finely tune the stories they tell about their value in ways that make sense within the context of their member's world.

The below Value Storytelling Framework provides four spectrums to reframe how you talk about your membership.

#### Spectrum One: FINITE TO INFINITE

Do you speak to your members about the tactical work you have done, e.g., We completed 12 newsletters, 300 social media posts, one conference and six webinars?

Or could you talk to the goal you're working towards for your industry and members?

An infinite conversation is about the goals you are working to achieve: the advancement of your profession, raising awareness of your issue or profession, etc. Then, you can outline how you have done that, including your marketing and events.

## Spectrum Two: MATHEMATICAL TO MONEY CAN'T BUY

Some Associations talk of the mathematical value of membership. i.e., they add up everything that they offer and then minus the cost of membership. This isn't value, it is an equation of monetary exchange.

Or could you talk to the 'money can't buy' experiences you provide such as the networking opportunities, the learning you provide and the exponential gains? Your member should be excited about the possibilities of membership.

## Spectrum Three: FEATURES TO BENEFITS

Your Association is talking in features if you print a matrix of 'things' you deliver and tick the relevant columns e.g., if you're gold, you get A, B and C, etc. This is important, to outline the inclusions of membership, but don't lead with it.

Or could you lead with a benefit conversation, which is typified by talking to the net outcome of being involved with your Association, and the impact you will have. What is the benefit of what we can do together that we can't do separately? What are the benefits you provide for your member's brand, sales, staff experiences and culture that they can't get elsewhere? Features talk about you; benefits talk to your members.

## Spectrum Four: PRODUCTS TO PURPOSE

Like the features and benefits flip, products, such as training, are important to communicate but it might be time to switch up your communication and talk to your purpose first.

To galvanise a community and inspire loyalty, the conversation needs to turn toward purpose – the higher reason for coming together or the goal we collectively wish to accomplish.

Your purpose is what will attract the right members; your products will keep them paying. Sometimes your products will attract people, however your purpose will keep them

connected. You can dial these up and down depending on the current context.

Once you understand what your members need and what your value is, you can then choose the right tools to communicate your real value. Here are some tips:

- Tell people why it mattered what you did, as well as what you did and what would have happened if you didn't
- Talk to the benefit of the membership first, not to the feature / product / service
- Demonstrate evidence of the value you have provided through storytelling and quantitative evidence. Lead with stories
- Sell on the possibilities of the collective vision
- Answer explicitly: what is the contribution members can make?

Articulating your value and communicating it to your members is a sure-fire way for your Association to reach its membership potential.



**By Felicity Zadro BA MA.**

Felicity is the Founder and Managing Director of ZADRO, an integrated communications agency. Felicity is inspired to support organisations to make meaningful and authentic connections with their communities through the power of excellent communications.

# Value STORYTELLING FRAMEWORK

<b>SPECTRUM ONE:</b>	<b>FINITE</b> <span style="float: right;"><b>INFINITE</b> →</span> How are you working towards your goals?
<b>SPECTRUM TWO:</b>	<b>MATHEMATICAL</b> <span style="float: right;"><b>MONEY CAN'T BUY</b> →</span> What are the unique opportunities you provide?
<b>SPECTRUM THREE:</b>	<b>FEATURES</b> <span style="float: right;"><b>BENEFITS</b> →</span> What is the impact of working together?
<b>SPECTRUM FOUR:</b>	<b>PRODUCTS</b> <span style="float: right;"><b>PURPOSE</b> →</span> What difference can we make?



# Evolving Your Membership Model

## A step-by-step guide

**A**ssociation membership models are rapidly evolving to meet the changing operating landscape.

Many membership models have evolved in an ad-hoc manner which has resulted in them being unaligned to the purpose of the association. For many, their membership model is inhibiting their ability to maximise their impact on those they serve.

Thankfully, there is a growing understanding that associations do not exist to recruit or retain members. And that membership is just one of many tools that can assist them to advance their purpose.

### Traditional vs Community Membership Models

Traditional membership models are highly resource intensive so can be hard to maintain in the current operating environment. In traditional models the association assumes the role of creator and distributor of content, events, training, or other services.

Contemporary membership models are designed to enable associations to capitalise on their unique competitive advantage – strong and engaged communities. In community membership models the association assumes the role of facilitator. Rather than create content, they seek to become a platform that connects participants with opportunities they often do not control.

Community membership models are far more leveragable than traditional models. Particularly when they are supported by technology geared to facilitate online and offline community building (eg: [www.trybz.com.au](http://www.trybz.com.au) which powers [www.answers.net.au](http://www.answers.net.au) – a free online community for association professionals)

The right membership model must fit the purpose of the association. That said, there is no "one-size-fits-all" membership model as every association is different.

It is rare to find associations that are purely one type or the other. Most are a mix of the two (although there are many associations who should be far closer to the Community end of the spectrum than they are).

Examples of the differences between Traditional and Community Membership models include:

	Traditional (Service Provider) Models	Community (Facilitator) Models
<i>Role</i>	Association provides services to members. The focus is on recruiting, retaining and engaging members.	Association fosters a community of paid and/or free participants. Focus is on nurturing a strong and engaged community.
<i>Membership Fees</i>	An annual membership fee that can be paid in installments. May have a free some free services to attract non-members.	Free and paid membership options. Paid version often a subscription (eg: monthly) and automated (direct debit).
<i>Non-Members</i>	Limited engagement (if any) at a higher fee. Seen as a “lesser” participant.	Significant engagement. Are welcome community participants. Can pay for additional benefits and upgrades.
<i>Groups</i>	Association manages groups. Fewer groups, little duplication. Groups not controlled by the association are discouraged.	Many groups with lots of duplication. Groups self organise on the association platform. Association may manage some “core” groups.
<i>Income</i>	Most income generated via activities provided by the association. Eg: membership fees, events, sponsorship, third-party programs, and services.	Leverages new income streams via the platform (eg: micro-transactions, research, ad-targeting). Often still generates income from traditional sources.
<i>Content</i>	The association tends to create and distribute most content. Association tells and informs members. Most member engagement is with the association or via its activities.	Both free and paid community participants create and distribute majority of content. Association content is around “core” activities.
<i>Services</i>	Prefers to own and/or control the majority of products and services.	Fosters a vibrant marketplace where competing quality suppliers are welcomed (entitlements likely differ from other participants).

Those seeking to review their membership model should consider the following steps:

### Step 1: Know the outcome your membership model needs to achieve.

A great membership model comes from first understanding why you exist (your purpose), who you serve (or who you should be serving to attain your purpose), and how you serve (what activities do you need to undertake to achieve your purpose).

The choice of activity is particularly relevant as different activities have different implications for your membership model. Examples of the implications include:

	Mobilisation	Representation	Community	Participation	Service Provider
<i>Purpose of Membership Model</i>	To gain as many adherents to the cause as possible and motivate them to action.	To provide strength in numbers, funds and influence. Targets members who can provide one or more of these.	To build a large and active user group who habitually engage with others in the community.	To generate sustainable participant numbers by getting non-members to try, commit and progress along pathways.	To generate an ongoing source of active users of association products and services.
<i>Membership Fees</i>	Low or non-existent to reduce join barriers.	Can be quite high. Often sliding scale or tiered.	Often subscription model or freemium.	Fees often tiered by participation level.	Often medium to higher fees to fund services.
<i>Comms Strategy</i>	To motivate members to act on behalf of the “cause” in specific ways.	To unite members behind the cause being advocated to ensure ongoing support.	To get participants to share content and engage with each other.	To get members to regularly participate and increase skills.	To get people to use products and services.
<i>Content</i>	Raise awareness of issues, inspire action, and provide feedback on progress/results.	Raise awareness of issues, consult on position, and provide feedback on progress/results.	Most content created and distributed by participants.	Content designed to build sense of team for “stickiness”	Most content created and sent by the association.

## Step 2: Create your membership model concept.

Before spending too much time on the detail, scope out and generate buy-in for a broad vision of the future. This requires you to decide which membership model concept aligns best with your purpose, those you serve, and your activities. This includes:

- Developing the proposed membership categories, eligibility, fees, and data requirements (for additional personalisation).
- Identifying the major implications of a shift to this model. Eg: technology, staffing, communications, governance, committee or branch structures, etc.
- Clarifying the next steps.

Once the concept is developed, generate buy-in and agreement for the concept by decision-makers before moving on.

## Step 3: Develop your member value framework.

Your member value framework outlines:

- the value you are creating for each membership category (can also be used to consider key market segments),
- the benefits you offer,
- the features required to effectively execute those benefits, and
- the way value delivery varies between different groups.

This is an exceptionally useful document that, once completed, can be used to undertake financial modelling, advise technology companies on your requirements, refine your product and service offering, and identify ways to generate additional revenue.

Here is a sample of a member value framework:

SEGMENT	ORGANISATIONAL			INDIVIDUAL	VENDOR	SUBSCRIBER
	Leader	Manager	Doer			
VALUE	For those wanting to start, grow or develop a business.	For those needing to successfully manage a team.	For those who want to execute tasks effectively.	For those wanting to start, grow and develop their career.	For those wanting to promote useful products and services.	For those wanting to keep up-to-date with the sector.
FEE	\$50pm			\$10pm	\$50pm	Free
ELIGIBILITY	Organisations in the sector.			Individuals in sector.	Suppliers of relevant products.	Individuals in the sector.
DATA – ORGANISATION	Number staff, location, capabilities				Type of product/service,	
DATA – INDIVIDUALS	Special interests, location, career stage, communication preferences, qualifications,					
ACCESS THE MARKETPLACE (Find Suppliers / Sell Product)						
Find suppliers or vendors	YES	YES	YES	YES	YES	YES
List business in the directory.	X	X	X	X	YES	X
ACCESS THE WORKFORCE (Find Staff / Find a Job)						
Search job listings	YES	YES	YES	YES	YES	YES
Promote a vacant role.	YES	YES	YES	X	X	X
ACCESS RESOURCES						
Access general resources	YES	YES	YES	YES	YES	YES
Access specialist resources	YES	YES	YES	YES	YES	X
List your resources	YES	YES	YES	YES	YES	YES
Sell resources via the site.	YES	YES	YES	YES	YES	X
ACCESS FUNDING						
Receive funding updates	YES	YES	YES	YES	X	X
Access grant writing services	YES – At a discount	YES – At a discount	YES – At a discount	YES – At a fee	YES – At a fee	YES – At a fee
CONNECT WITH YOUR COMMUNITY						
Post questions to the community	YES	YES	YES	YES	YES	X
Respond to questions	YES	YES	YES	YES	YES	YES
Join special interest groups.	YES	YES	YES	YES	YES	YES
Create special interest groups	YES	YES	YES	YES	YES	X

## Step 4: Build strong foundations

The next step is to align your internal processes, policies, procedures, and other underpinning operational frameworks to your model. This includes embedding the model into your technology, marketing automation, and reporting; governance and decision-making pathways; component frameworks (eg: committees, branches, special interest groups) and volunteering pathways; product and service offering; revenue sources and sales frameworks; branding and positioning; and staffing structures.

## Step 5: Plan and execute operationally.

At this point you are ready to move into operational planning and execution. This step includes your transition and launch planning, stakeholder/member experience and engagement, sales and marketing, communications, organisational culture, meetings and events, partnerships and sponsorships, and other operational functions.

## Potential challenges

Following are some of the most common challenges experienced by associations during the process:

- Appetite to evolve vs transform – Many decision makers are reluctant to undertake major transformation and may push for smaller steps forward. That pathway often not the most appropriate.
- Buy-in by members and/or decision-makers – Change is scary for many people. To maximise your chances of success it is important to generate buy-in as soon as possible. Getting people involved in the process is a great way to facilitate understanding.
- Technology selection – The right technology is critical. It is common for people to purchase based on functionality without considering that the member interface is equally important. If it isn't easy to use, they won't use it.
- Transitional resourcing (staff and funding) – This process is not business as usual. There is a lot of work and, if you give it to staff who are already busy, it won't get done. Consider a transformation manager.
- Shift in workforce skill set requirements – A shift of model often leads to a shift in the skill sets required by the organisation. To preserve a positive culture the adjustment should be handled respectfully.
- Potential cultural shift required – The culture of associations with traditional membership models is quite different from those with strong community models. A significant shift of model requires a commensurate cultural shift.
- Funding shift execution – Just because you have the potential to generate revenue doesn't mean you will. Any shift in revenue streams needs to be effectively executed for the potential to be realised.
- Transitional planning – This kind of change doesn't just happen. Careful planning is required for each step.

While evolving your membership model can be challenging, it is a necessary process for those seeking to ensure their association is positioned to maximise their impact far into the future.

Good luck.



**By Belinda Moore.**

Known for her enthusiastic and engaging style, Belinda is frequently engaged by associations to assist with strategy development and implementation. Belinda has written four books: *The Membership Machine*, *Membership Fundamentals*, *Membership Managers' Handbook*, and *Association Annie: Herding Cats*. She has authored the following white papers *Associations Evolve*, *Association Apocalypse*, *Membership is Dead?*, and *COVID & Beyond: Lessons for Associations*. She also writes the popular *Association Annie* comic strips.



## Member Experience:

# Associations' New Blueprint for Engagement

**P**rofessional family. Intellectual home. These are some of the terms engaged members use to describe their feelings about their favourite association.

Over the years, I conducted thirty-three research studies on behalf of professional and industry associations, personally chatting with over 473 members. One epiphany from these conversations is how much members feel their membership.

New members can walk into a room and sense a rising joy when they realize they have found their peeps. Members feel warm and squishy when they perceive belonging. They enjoy knowing their contribution to the community matters. They desire to give back. When members meet just the right person, they get a thrill from that conversation.

Professionals might feel lonely during their day jobs, but many members talk about the acceptance, kindness, and generosity their professional community gives to them. Joining is personal and joining is a decision that is packed with emotions.

### **Prediction 1:** **Associations will move beyond transactions**

Small transactions are rarely all that emotional. Imagine your printer runs out of paper, so you head to the store to buy a ream. Likely once you find the right colour, you'll start comparing page count and price. The best-priced product will win your purchase. This decision is often low on emotion and is simply transactional.

Associations are more than the sum of their transactions, like member applications, registrations, and renewals. Associations are experience creating centres. Experiences will happen organically, or they can be planned. Every great experience drives the emotions that grow member engagement. Even inexpensive, easy, fast experiences matter a great deal. Prime your staff to offer more little touches, like personal welcomes, smiles, or thoughtfully composed emails.

### **Prediction 2:** **Associations will warm-up**

Just like great value is engaging, so are friendliness, helpfulness, and cooperation. As associations learn to create and curate wonderful member experiences, some will find they need to warm up their tone. For example, members say that some organization's super polished and professional tone is a bit stuffy and even off-putting. Reading content written in that professional voice makes new members wonder if they'll fit in or if they are enough.

In member experience-focused associations, staff are accessible, responsive, and good-natured. Emails are amicable, and web copy is simple and perhaps fun. Each association will find a new balance between professionalism and the kind of engaging warmth that we see the best consumer companies leverage right now.



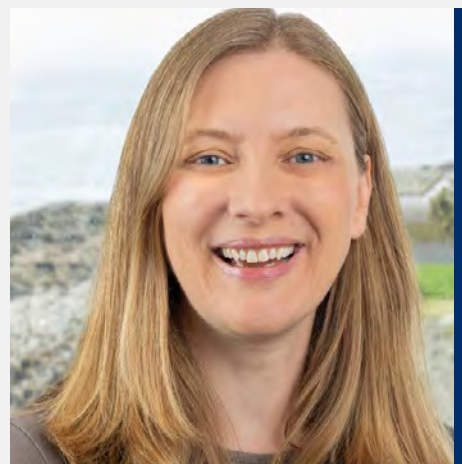
Photo by Christina Morillo from Pexels

### **Prediction 3: Associations will defy definitions**

During Spring 2021, my partners at Matchbox Virtual Media and I were joined by over 150 enthusiastic association leaders to figure out how to make virtual networking more meaningful, comfortable, and fun. We learned many actionable strategies (detailed in this roundup report), including networking, which is too narrowly defined. Say the words "networking event," and most people will think of a reception, and if they deliberate a little longer, they may also come up with speed networking. But these are just two of the dozens of networking event formats we can employ. Narrow definitions limit our focus to just a few options.

Like we narrowly define networking events, we tend to define associations based on what they typically offer, like conferences, articles, research reports, and certification. Expanding the view of what is possible in service to our members and their professions, industries, sectors, and fields opens our options. For example, creating problem-solving events, developing soft skill training, or collaborating with meaningful partners may radically improve the member experience.

Would you like members to refer to your association as their professional family or intellectual home? For every event you host, new product you develop, phone call you answer, think about how you want members to feel. Welcomed? Accepted? Valued? Part of the team? Then lean into intentionally creating delightful experiences for your members.



**By Amanda L Kaiser.**

Amanda experiments and researches engagement - specifically member, attendee, and virtual engagement. She believes that associations and member organizations have reached the inflection point for engagement because spurred by the pandemic, there now are tools and methods to help members meaningfully connect, collaborate, and co-create virtually, in-person, and all year around. Amanda is the co-creator of the Virtual Networking Incubator in partnership with Matchbox Virtual Media. She partnered with Dynamic Benchmarking to create the New Member Engagement Study.

# The Humanity of Member Engagement

Unlike a transactional B2B model, the association membership model is rooted in relationships, which ebb and flow over time.

This has never been truer than during the disruption of 2020 and 2021 in which personal and professional connections have been limited and strained. Yet, in response, many non-profit organizations accelerated their technology adoption without consideration for the humanity of engagement.

The last 20 months have been reactive and focused on content delivery. I fear we have lost appreciation for the human-centric, mission-driven art of member engagement. We are all going virtual, on-demand, hybrid, asynchronous – so much conversation about "how" to get the material out in substitution for in-person meetings.

We have forgotten the audience, our customers, and the individuals who make up associations, and the industries and communities they serve. I believe moving forward, future recruitment and retention efforts must include similar urgency and consideration in four areas:

- Understanding our members' changing and evolving needs
- Leading with vulnerability and empathy
- The power of authentic communication
- The impact of consistent customer service

## Understand Members' Changing Needs

Whether a professional society, a charitable organisation, or a trade association, those you are trying to serve have been changed. The life of every member, donor, and volunteer leader has changed in some way.

How is your organization learning about and demonstrating an appreciation for those changes? How is your organization capturing new information detailing

members' changing expectations, usage patterns, and career paths?

This effort goes beyond just surveys and is an area where you can put those post-pandemic technology investments to work. But remember the intent of the data and reach out in intrinsically personal ways. A personal email, a birthday card, a good old-fashioned phone call. How are you asking your members, "how are you?"

No one wants to feel like a number or a transaction. Customers value a personal touch. Do not automate everything. Some non-profit associations I have worked with have started phone trees or hotlines, providing personal telephone outreach or an available human voice on the other end of the line to provide support, ask questions, and update member information and preferences. In one case, a non-profit executive decided to make "check-in" phone calls to every member to see how they were during difficult times. These calls are not limited to the pandemic. Studies show that periodic calls, especially during a member's first year, are critical to engagement and retention. These are also invaluable opportunities to listen to your members.

Members may not know what they want from a new digital journal or virtual conference, but you can ask them what has changed in their world and what keeps them up at night. While surveys can show you care about members, I encourage you to find new and more direct methods to engage your members in conversations about them. Consider focus groups, a question at the end of each webinar or virtual seminar, virtual happy hours, or other opportunities for members to engage with each other and discuss emerging challenges, frustrations, and new realities. Be available to your members through investment in a human connection. Plus, every inquiry, call, survey, or invitation to share is a chance for your members to interact with your organization, brand, and community!

## Lead With Vulnerability & Double Down on Empathy

Your members' vulnerability impacts the industry in which your association operates, requiring leaders and staff to be empathetic to what their members may be experiencing during a time of unrest and uncertainty. How do we express empathy in support of our members? By listening and creating a sense of community. Many associations already do this through meetings, trade shows, online communities, and special interest groups.

Tell your members' stories in a way that empowers the vulnerable and elevates the discussion of best practices and solutions. Make your members feel important no matter what they are going through. Consider new recognition programs, mentoring opportunities, member spotlights, or content from the point of view of those members overcoming hardships. Remember, vulnerability should be a two-way street. Use these challenging times

to tell the stories of staff, share organizational setbacks, and demonstrate compassion for all stakeholders.

## Leverage Communications to Increase Relevance

In these days of virtual meetings and "Zoom fatigue," challenges of working from home, and the onslaught of digital communications, associations need to find new ways to break through the static and make themselves relevant again. Breaking through doesn't mean more. It means taking our first two steps of first, knowing our members better, and understanding their circumstances to reach out in more targeted and sincere ways. Communicate, communicate, communicate about what you are doing for your members – both internally and externally. Collaborate with industry employers, other organizations to launch a PR/advocacy effort focused on your member's most pressing practice needs – pandemic related or not. In addition to your new member onboarding processes, consider regularly scheduled webinars that review content and services offered by the association. Include time for Q&A with the president, CEO, or other key leaders. Remind them of their benefits/fees, other information and make it easy for them to engage. The key is to micro-target as much as possible, personalize and automate. Maybe most importantly, invite them into the communications – share, comment, create, etc.

## Customer Service is EVERYTHING

Is your organization a place members can come to for solutions? Will your members encounter an automated phone menu only to get to a voice mailbox and face an AI chatbot to find information on the website?

In the United States, a chain of fast-food restaurants has raised the bar and set new human-centric expectations for customer service. "Little things like being told 'please' and 'thank you' — it feels like you're appreciated as a customer and a human being at Chick-fil-A," said Kalinowski Equity Research founder Mark Kalinowski.

Chick Fil A has made it a part of their business model to focus on personal connections and go above and beyond to exceed expectations. Simple human gestures have set them apart from their competitors, those with expensive commercials and fancy technology. Chick Fil A empowers their staff to go above and beyond and recognize that "we're all people with a lot of emotional things going on that don't necessarily show on the surface, so we try to offer amenities and kindness."

Does your association treat members like people, or are they simply registrations and renewals? Are you personal in your engagement, responsive in your service, and respectful in your communications?

What can you learn from Chick Fil A? Please understand that your interactions with a member happens in the context of their life, their challenges, and their expectations at that

time. How focused on customer service is your organization? How do you define it? How do you measure it?

Now more than ever, your organization's relationship with members and prospective members needs to be fostered and nurtured. I in no way espouse you ignore technology.

Please embrace digital, social media algorithms, AI and automation, on-demand access. Please adopt the technologies that will provide a more valuable member experience in a world of new parameters.

However, the most critical ingredient in your technology strategy is the people! A human-centric technology plan will know what the members need, what they are going through, and how to communicate with them within a community of support and responsiveness.



**By Elisa Pratt, MA, CAE, CVF.**

Elisa is the Chief Strategist at Brewer Pratt Solutions, LLC. Elisa is a Washington DC-based non-profit guru, an engagement and membership rockstar, and a strategic advisor to 501c organizations of all sizes. Elisa specializes in architecting hyper-custom solutions that transform organizations and amplify relevance.



# Foundations of a Growing Membership

**A** growing membership is a rising tide that lifts all boats. A thriving membership represents a powerful force that generates volunteers, customers, attendees, content, and ongoing revenue to enable an association to accomplish its mission. A lack of growth results in tighter budgets and limits the development of new initiatives and investments in products and services.

So, what enables associations to grow their membership?

A decade of survey data from associations across the globe and published in the annual Membership Marketing Benchmarking Report, shows the driver that correlates with the increase in total membership counts is a robust membership recruitment strategy. And successful programs build their efforts on five marketing foundations.

## The Target Market

**Who** you want to reach. This includes determining your primary markets and acquiring or building databases of these prospects. Even if your message is not perfect and your graphics lack impact, reaching the right person with your invitation still has a much higher chance of success than marketing to the wrong person, with all other elements done to perfection.

In his book, *This Is Marketing*, Seth Godin, says your top priority is "Who's it for? ... Once you are clear on 'who's it for,' doors begin to open to you."

## The Membership Offer

**What** a member will receive. This includes how you package your membership product and what special offers you will make in your promotions to attract new members. Membership is a push product. It is sold, not sought. A prospect can likely join 24/7 on your website. So, an incentive is needed to get someone to join now.

Some worry that a special offer like a new member discount will lead to a less committed member. But test after test by many associations demonstrates that a strong offer in the near-term and long-term boosts membership growth. In the for-profit world, companies run sales promotions not because they like giving away money but because it grows the number of customers and revenue.

## The Marketing Message

**Why** a member should join. This includes defining your value proposition and presenting solutions and benefits to get members to act. On receiving a promotion, the first questions someone asks are "what is it?" and "what am I being asked to do?"

Fortunately, associations are typically very good at describing the value of membership. But they often fail at telling the prospect what to do with the information.

Defining a Call to Action (CAT) needs to be the starting point in planning a promotion.

Start creating your promotion with the action you want your prospective member to take and the place where you want the prospect to go to join and work backward in your messaging.

## The Promotional Tactics

**How** a member will be reached. This includes selecting and using a broad range of marketing channels and optimizing the frequency and timing of promotions.

Many associations' growth has been hindered by relying on a single tactic to bring in new members. Pandemic meeting cancellations hurt those groups that depended on an annual meeting to attract members. Others that rely on email acquisition efforts have burned out their email lists through overuse.

The solution is to deploy a marketing portfolio using an omnichannel strategy. This approach uses a variety of communication options like mail, social media, paid digital ads, telemarketing, and personal sales efforts to reach potential members delivered on a frequent and sustained schedule.

## The Testing and Tracking

**Where** to take future efforts – this includes trying variations of the four points listed above and recording which lists, offers, messages, and channels produce the best ROI and number of new members.

Even well-run recruitment efforts show dramatic variance between their best prospect segment, offer, and message when accurately measured.

So, structuring statistically valid tests can determine what is working and what is not productive. Some test outcomes impact results – even with minor changes -- by well over 100 percent.

Without a testing strategy, a recruitment program will substantially underperform. There is no "perfect" in marketing, just better marketing. Ideally, at each step of the recruitment process, something is learned. Successful associations are learning organizations.

As you develop your recruitment efforts, remember challenges and objections will come. You may hear, "we cannot do that because," "we need approval," or "we need more research." These concerns may delay efforts and stall progress. Instead, the right course of action to get members is to do something now. Try a "Ready, Fire, Aim" approach by launching some initial efforts right away to measure the market's receptivity. Adding new members drives the vitality and resilience of your association.

Get started now.



**By Tony Rossell.**

Tony serves as the senior vice president of Marketing General Incorporated (MGI), a direct marketing agency in Alexandria, Virginia. He is the author of *Membership Recruitment: How to Grow Recurring Revenue, Reach New Markets, and Advance Your Mission*. He is the past chair of the ASAE Membership Council. Tony also directs the annual *Membership Marketing Benchmarking Report*.

# Will Subscriptions Work Forever?

## The Future of a Popular Pricing Tactic

**S**ubscriptions are everywhere. Big companies, small companies, public, private, venture-backed, bootstrapped, and across virtually every industry.

And many are starting to complain of "subscription fatigue".

They might feel that the subscription pricing isn't justified by the offer (a Product/Market Fit problem).

Or maybe they feel bad about fact that they aren't taking advantage of all the great value their subscriptions provide—too many unread New Yorkers, uneaten Blue Apron kits (Subscription Guilt).

Or maybe they're just angry that it's so darn hard to find the cancel button.

I am a big fan of subscription pricing. I have dedicated more than twenty years to helping organizations use subscription pricing as a tactic in building deeper, more trusted relationships with their customers. But they're not for everyone and they aren't right for every situation.

Increasingly, people are wondering if subscription pricing is here to stay, or just a fad. I was motivated to write this article by these questions and in particular by product strategy guru Gib Biddle, who asked me to weigh in for his Ask Gib PM newsletter on Substack.

Subscriptions are not new people paying recurring fees in exchange for access to content, commerce and/or community benefits for hundreds of years. What is new is that technology is extending the infrastructure that enables the kind of trusted relationships needed to justify subscription pricing.

With the rise of things like cloud computing, subscription billing, usage analytics and community platforms, it's never been easier, operationally, to implement subscriptions as part of a business strategy.

Subscriptions support a more customer-centric approach. To be successful with a subscription, an organization needs to focus on delivering ongoing value, that supports a subscriber's ongoing goals or problem-solving needs. Therefore, in many cases, the subscription offering provides more value. I don't need to own a car—I need to get to work every day. I don't need a CD collection—I need access to the music I love.

If you want to incorporate subscription pricing into your business, you need to take a step back and focus on the "forever promise" that your customer wants you to make to them. It's all about being willing to rethink the bundle of benefits you provide on an ongoing basis, instead of focusing on selling widgets.

Many organizations have found that by taking that step back and rethinking their business in terms of that ongoing impact, by using subscriptions, they are better meeting their customer's needs. It's a better model.

Subscriptions aren't perfect. They are a step in the right direction—an effort to better align the needs of best customers with a solution that more completely solves their problem.

But there are times when you don't need an ongoing bundle of benefits. Maybe your usage has peaks and valleys, or significant upfront investment is required before a subscription makes sense, or you want a subscription service around a product you want to own.

What's great about subscription pricing is that it recognizes that there is value in an ongoing, formal, predictable relationship between a customer and an organization. Subscriptions go beyond the traditional ways of paying for value—and put the focus on optimizing for customer impact.

Subscriptions are here to stay and are part of the business tool kit. But they are just the beginning of a renaissance of new business models, new ways of packaging value to better align with the goals of the customer.

As Marco Bertini and Oded Koenigsburg point out in their excellent book *The Ends Game*, advances in technology have made it possible for firms to collect "impact data" that tells them when and how customers use their products and how those products perform, and that firms can draw on this data to turn products into seamless services.

Subscriptions and all of the anything-as-a-service offerings are just one way of pricing for impact—and that's the real future.



**By Robbie Kellman Baxter.**

Robbie Kellman Baxter is a strategy consultant helping companies develop and optimize membership models and subscription pricing. Deep expertise in subscription-based and SaaS businesses, and the Membership Economy.



# Time to Move Beyond 'Engagement'

## to Strategic Community Building

**C**ommunity is a powerful thing. It binds us around identity and purpose. It helps us connect and belong. It's a safety net when we need it, and a catalyst for action. For organisations, communities can drive motivation and loyalty; build trust and social capital; generate knowledge and ideation; grow revenue and create cost efficiencies; distribute risk and reward; and more.

Associations are inherently primed for community, and those evolving into the next chapter are embracing community at the centre of their work. Why is it then, that some community building projects wind up in an unsatisfying trade-off between enormous effort and scant return? I've worked with hundreds of organisations to build high-value online communities for over two decades and I can tell you there's two key reasons this work fails.

Let's explore them now and empower you to evolve beyond surface-level engagement to true strategic communities delivering sustainable benefits.

### Indispensable community

The most common reason a community fails? No strategic plan. If you're throwing open the doors and hoping your members will organically make something amazing happen, get ready for disappointment. More than ever, we're depleted, overwhelmed, and battling competing priorities. You need a clear roadmap for why you're gathering people into a community, who those people are, and how that gathering will unfold over time.

You already work strategically in other areas. Yet community as an organisational asset rarely enjoys the same attention. Perhaps, because it's innately human and involves relationships at the core, it seems somehow inappropriate to architect it. It's the opposite. Without intentionality at their core, communities struggle to form

and become effective for participants. What is being asked of members? How does it connect to their intrinsic needs and motivation? And how are you supporting them in that ask?

Social scientists have taught us that communities have an established life cycle that typically takes 3 to 5 years to reach maturity - and that's when they have a solid plan and consistent community management. The true north of a strategy keeps your focus over time and increases the odds that you'll enjoy the compounding benefits of a thriving community.

A strategic plan lets you chart those benefits for stakeholders and determine the unique value of the community experience you're fostering within an attention-deficit economy. It identifies key priorities (you can't and shouldn't do it all) and guides you toward meeting their objectives. How will you be indispensable to your members, and what kind of behaviours, activities and outcomes will you need to see happening to ensure you stay that way?

Without a strategy informing your why, you can't know what to measure, or whether your work is effective. Community metrics are notorious contextual. If you're unclear about your direction of travel, you'll succumb to chasing surface-level engagement metrics that look good on a monthly report but are ultimately hollow and easily dissipated.

When things change or go wrong (perhaps the only guarantees in life), you'll need to adapt your community building and management tactics. What will you measure, analyse, and adjust if you don't understand why the community exists for members, how value is formed and where it lies?

## The indispensable human

The second primary reason communities fail is a lack of community management. Community management is a discipline that draws on psychology, anthropology, communications, and other fields. It's the job of the community manager to steer purpose and optimise shared value generation for members and the organisation.

This proactive stewardship is essential - especially in the early stages of an online community - to cultivate and sustain the cultural and social conditions for success (including factors like psychological safety). Despite myths to the contrary, communities have never managed themselves, and always have people at their core, accountable for keeping things safe and on track, monitoring and modelling social norms, and representing the community's interests.

Associations that elevate their engagement game aren't just setting up a platform and calling it a community. They're investing in a strategic plan to ensure qualified, high-value engagement, and community management to optimise their hard work and investment.

The good news is that, as community design and management has professionalised into a global practice across the last two decades, there's a rich abundance of resources and expertise to support you on the journey.

## Here are five top tips to get you started on a strategic approach to community

1. Conduct user research with the people you're hoping to build your community for. Dig deep to understand their situation.
2. Drawing on your research, determine which problem the community helps you solve (for your members first, and your organisation second).
3. Differentiate your community positioning in relation to the other communities, organisations or sources your members engage with (e.g., your community will be the safest peer support environment, or the fastest way to get an answer to their question).
4. Define a clear purpose statement for your community that explains who participates, and which of their needs will be met.
5. Identify founding members that can validate your plans, co-create the next layers and act as early community champions.



**By Venessa Paech.**

Venessa is Australia's leading expert in online communities. Her many clients include Woolworths, Australia Post, ABC, SBS, AASW, and Teach for Australia. She is Director of Australian Community Managers, the member organisation for community management practitioners, and she teaches online communities at the University of Sydney, where she is pursuing her PhD

# Building A Community During the Pandemic and Beyond

**T**he global pandemic has forever more changed the way we live, work, connect and learn. It has also forced Associations to re-examine everything they stand for, and we are now facing a time of relevance like never before.

Talking about relevance, we couldn't believe our luck that 3 months before the Pandemic hit, we were already well underway developing the Answers for Associations online community.

To say we were unnerved and excited was an understatement, but we took this in our stride and used the outside influences in the Association market to work even more closely with our developer to ensure that our platform would be fit for purpose beyond the Pandemic.

## Staying Relevant in a Digital World

**2020** changed everything,

**2021** was the year of transition,

**2022** will be the year of growth and relevance.

Before we jump too far into the future, we need to spend a moment and appreciate the opportunities the Pandemic has bestowed on many of us. That is the ability to be nimble, connect and learn at a level that adds value at both an individual and corporate level, and connect at a distance, not just linked by travel.

The crisis has sparked a wave of innovation and to some extent, we're now all tech executives. With the adoption of a digital world making it so much easier to connect with members all year round, associations now have a real opportunity to make a difference in how they can serve their members in a meaningful way, where and when they need it.

When we first created the Answers online community, we had a certain expectation of how our members would use the platform, although what we found was that our online community became something so much more, and that was a literal toolkit in their back pocket. Which meant our members were accessing our online community where and when they needed it the most. And as we saw over the last 20 months, that was very rarely from an office desk.

So, how do we keep this momentum going?

## Technology Should Fit the Strategy, Not be the Strategy

Online communities have been around for more than 20 years, but it's only in the last 12 months that they have firmly taken a seat at the Boardroom table as we navigate a digital world first.

Beyond place-based is where the role of online communities will take a strong hold in continuing the conversation amongst members in between your annual conferences. It also gives members an opportunity to tell you what they want, so no more guessing.

Over the past 12 months, I have seen some communities with cult like followings, some are coming along nicely, and others are still in the touch and go phase.

I implore you, when looking at the value you want to share with your members, know that technology should fit the strategy, not be the strategy.

Let me say that again, a community strategy is a way of sharing your associations vision and aspirations and how your members and stakeholders fit into this journey, the technology is simply the platform you use to tell this story.

It's also ever evolving!



Photo by Branimir Balogović on Unsplash



**By Angela Shelton.**

## 2022 and Beyond

Communities will continue to thrive well into 2022 and beyond. And there will be a stage where well thought out community strategies will convert into highly sort after destinations, where the members take over, and the conversations come alive.

For every successful community there is a Head of Community or Community Manager whose sole focus is on keeping the community safe, relevant, and useful.

Community Managers are the key players in this scenario, so don't be afraid to seek the support of an outside expert, let your members guide you on the journey they want to take and give your Association a voice all year round!

Angela is a passionate leader, skilled at mobilising people and resources to achieve great success. A relentless optimist, she thrives on helping Association Professionals showcase and improve their success through supporting their learning with innovative events and connecting people to their tribe.



# Keeping the Community Fire Burning

## in Associations

**I**t's no secret that the pandemic has caused associations to think differently about how they engage with their members.

Forming a bond with members is essential to how associations help their members find solutions and become a valuable resource for them by helping them create networks and form helpful relationships through local chapters or annual events.

However, safety concerns have moved all organizations to think differently about how that engagement looks and many have turned to online communities to fill the gap.

With a slow return to in-person events, associations must think about the long-term strategy for engagement with their members – both online and face-to-face. As the world has evolved, members have more robust choices about how they can engage with an organization.

Just because they can meet face-to-face doesn't mean that they will opt to. And not just because of the pandemic. Being able to engage in ways that allow them to find balance in their lives is important which means that non-essential travel (whether local or abroad) may not be a priority for them anymore. However, the quality of the interactions they have and their privacy while doing so is a priority.

The future of member engagement needs to look different as we move past the challenges associated with the pandemic.

What should associations pay attention to keep communities going? Here are some key considerations to keep in mind going into 2022 and beyond.

### Understand the language of community at the top.

We spend a lot of time telling community professionals they need to speak the language of business leaders if they want to get buy-in. And while not wrong, we should also be asking senior leaders to understand the language of community building.

If executives will boldly claim community means something to their association, they also have a responsibility to evolve their thinking around community Return on Investment so that the value of the relationships and trust built through community building efforts is apparent to the success of the business. Don't put all the burden on community professionals.

### Be tech smart, but don't lean on it too heavily.

Tech is often the first place many associations go when they think about building community. And there has been an abundance of community tech being introduced as organizations jump on the community train.

The truth is, while important, it is not the most important thing you should be considering when building your community program. Before you even get to platform selection, understand who your community is for, why it exists, and how you will fulfil the objective of the community and let that help you find the right technology to support it.

Know what's out there, but don't let it guide your program decisions.

## Trust and safety aren't going away.

Gamification in your community is a "nice to have". Trust and safety aren't. A big part of what drives participation in communities isn't the fact that one may or may not get a badge or show up on the leader board. It's whether one feels safe enough to ask a question and do they trust that their contributions matter?

This is all in the culture that is built within your community. And in the policies and safeguards that you put in place for participation.

Do not approach this lightly. As more and more organizations reconsider social channels as their community gathering places, it's important that organisation leaders take this seriously. Failure to be attentive in this area can do a lot of damage.

## Community roles continue to evolve... staff up.

If you're delegating community management to someone part-time, now's the time to stop.

Managing communities takes as much time and effort as your membership program, your chapter program, or any other program within your association. Hire someone who will be responsible for the strategy of your community program, road mapping, moderation, content. Start with a Head of Community and lean on their expertise in community building to ensure the right budget, people, and resources are in place to ensure the program's success.

There is no shortage of community professionals out there. Tap into them.

Communities aren't new, digital, or otherwise. And associations are much like communities, by nature of the way they operate. But that doesn't mean that we get managing these spaces right.

As we look toward the future of community management, associations must look beyond old governance models and question what we think we know to ensure solid strategies and tactics are in place to build communities that and not just a big email list.



**By Marjorie Anderson.**

Marjorie is an experienced community management professional with expertise in building a large global community for associations. She is skilled at developing cohesive community strategies that connect to organizational goals and consider the full user experience across an organization's digital ecosystem.

# Opening the Door to Volunteers

**V**olunteer burn-out is real and for many associations, we saw that with increasing clarity in the past 18-months.

Interestingly, in one of our smaller associations, we initiated a robust diversity, equity and inclusion committee and program and increased the number of volunteers engaged in our programs. Several global associations reported similar results.

What's the difference between associations struggling and those succeeding?

The difference is these associations responded to the changing volunteer workforce – pre-pandemic – while others are still wedded to the traditional, term-based volunteering.

The difference can be seen in three critical areas: the work we are asking to be done, the time we are requiring and benefit giving that time.

**The work:** the secret is connecting members to an **issue to rally around** such as addressing diversity and inclusion or in the case of the industrial hygienist's association creating up-to-minute briefings that helped members safely open workplaces.

**The time:** creating **short-term, impactful volunteer opportunities** like work groups, one-time jobs, and ad hoc advisory councils.

**The benefit:** **tapping into the immediate needs of members** as they require gaining key technical skills, sharpening leadership skills, or gaining knowledge.

The cracks were already in our volunteer systems pre-pandemic. The 2017 Mutually Beneficial Volunteerism study shared the framework for a strong volunteer program and the ASAE Foresights Volunteering Driver gave us a road map in 2019.

The driver identified two important opportunities available to associations when we reimagine our volunteer programs:

1. Modernizing association volunteering systems to offer more flexible project focused models will provide opportunities that attract younger volunteers.

Such a purpose-oriented approach will be more attractive to incoming generations and career-changers seeking more clearly defined and time-constrained opportunities for meaningful engagement with the association.

2. One of the hot buttons that came out of ForesightWorks is a call to accelerate decision-making. We understand that the digitization and the increasing rate of change is bringing a greater complexity and uncertainty to many of our organizations. Meanwhile, the traditional volunteer board and committees inherently slow down decision-making processes.

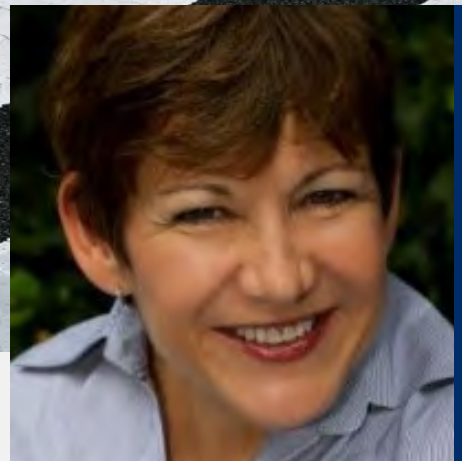
So if we want to in essence bring in the next generation, embrace the new technologies and be able to assure that our organizations have what it takes to make the critical decisions in the moment of need, we should take a hard look at the volunteering driver and ask ourselves "How can we take our volunteer game to the next level?".

So, if we want to in essence bring in the next generation, embrace the new technologies and be able to assure that our organisations have what it takes to make the critical decisions in the moment of need, we should take a hard look at the volunteering driver and ask ourselves "How can we take our volunteer game to the next level?".

Volunteers are the heart of our non-profits and changing with their needs supports our needs.



Photo by Ryoji Iwata on Unsplash



**By Peggy Hoffman, FASAE, CAE.**

Peggy Hoffman, FASAE, CAE, is president of Mariner Management, an association management company and consultancy focusing on member/volunteer engagement and member components. Mariner conducted the industry's key studies on association chapters, including the 2021 Chapter Benchmarking study due out in December 2021. Mariner is the research team behind the Mutually Beneficial Volunteerism study and is currently conducting industry research on effective volunteer models.



# The Revenue Generation issues Associations will grapple with next

**T**he global pandemic has forced Associations to closely examine their revenue streams and profit estimations, as they have had to adapt and evolve their programs, events and even membership offerings as a result.

When we look toward the future, there are some fundamental shifts in the way Associations will need to look at how they address the commercialisation of their organisations.

## The need for staff to have psychological safety

The first big shift we are starting to see is the need for 'psychological safety' associated with risk management and risk mitigation.

Especially in highly bureaucratic and conservative business cultures, there has been a low appetite for risk, whereby 'trying new things' has involved copious amounts of preparation, business cases and assurances. This was possible when the context was relatively stable, the market predictable and demand for services was high.

In the new environment, where regions are opening at varying speeds, having different experiences of COVID-19 health care, and stipulate their own travel restrictions, the context is and remains unpredictable.

Associations need to have a greater appetite for risk so they can design and take to market new ideas, initiatives, and products to attract, engage and retain members. Risk and the associated increase in flexibility, including permission to move fast will be needed. The business adage of 'we will wait until this blows over' before we do anything new, could be fatal.

However, to try new things without 100% certainty plans will work out, staff and management need a work culture in which they can suggest new thinking and try new things without fear or serious repercussion. Especially in hierarchical cultures, people need to have the room to think differently, make mistakes, fail, learn, and move on.

They need the 'psychological safety' in which to thrive.

## Managing regional and state barriers for national Associations

In some countries across APAC, we have seen an amplification of the regional mindset, as lockdowns have created micro social and business environments.

This has resulted in differing member experiences and needs, as people turn to local sources of information and support to manage their lives and businesses. This 'localised' focus will be an issue for national Associations to contend with in their membership structures and product offerings as they advocate for their profession, industry, or issue.

National Associations will need to consider how – for the short-term at least – they can adapt their support of members to deal with local regulatory issues to drive value and relevance.

This might also be a great opportunity for Associations to strengthen local networks and engage new stakeholders for a common cause. The net effect will be increased engagement from existing and new members – impacting the potential revenue growth.

## Enhanced diversification of engagement and revenue streams

Pre-pandemic, Associations were looking to diversify their revenue streams, however, this has been expedited as organisations grapple with the threats and try to take advantage of the opportunities created by the crisis.

The main opportunity Associations are looking to leverage is that of increased engagement, with Associations asking themselves, how can we diversify our current revenue streams to increase engagement of members (current and prospective), in new and interesting ways?

A good example of this, are education programs. The revenue stream may be the same (education), but Associations have diversified the programs, added levels of training, and now provided online and offline experiences to target new audiences such as young people, emerging leaders and allied professionals.

This thinking extends to the way sponsors and partners have previously been engaged and how their return for being involved has been 'calculated' or expressed.

We have seen many Associations move from engagement models based on narrow and physical tactics such as logos on event bags, to partnership initiatives, shared advocacy programs and educational dissemination.

We will see many of these changes 'stick' well into the future.

## The value of time

Extended time with family and local communities during lockdowns, reduced or non-existent work commutes and limited regional and international travel has left an indelible mark on the busy professional's sense and value of time.

Associations will need to rethink how they engage members – at what times of the day, where and how – to respect and value their member's time and familial commitments.

This extends to rewarding in-person attendees at events in different ways to digital attendees, and delivering content-rich, valued-packed visceral experiences to ensure strong participation and revenue generation.

Revenue generation and the commercialisation of Associations going forward must be grounded in a sound understanding of the fundamental shifts in the personal and professional lives of members, a strong understanding of the principles of profit generation and flexibility and creativity to deliver.



**By Adjunct Associate Professor Deanna Varga.**

Founder and Managing Director of Mayvin Global, Deanna is renowned for her highly attuned business acumen, extensive experience, and delivery of commercial and revenue generation strategies for Associations.

# Avoiding the Pitfalls of Undue Influence

**W**e've heard many things about how COVID-19 has affected the association sector. We've even heard about the impact on sponsorship and partnership revenue. However, few people are talking about the other significant shift.

COVID-19 has precipitated a strong shift in the way corporates leverage partnerships with associations. We have seen the floodgates of undue influence well and truly open.

## What do I mean by "undue influence"?

Associations have a privileged position. They are the gateway to professions, industries, and regions. Strong associations have comprehensive databases of the participants within the sectors they serve. Many can influence legislation and regulation. Often, they set the standards for their sector.

In short, they are the trusted representatives of those they serve.

Associations have a unique and powerful ability to influence decisions and perceptions amongst those they serve. They can also wield that power to influence governments, other regulatory bodies, or the public. They have a level of credibility and trust that few corporates will ever attain.

This makes them a perfect target for corporates seeking to leverage that power to achieve their own objectives.

Great partnerships occur when the objectives of the corporate, the association, and those it serves align. For example, when heavy vehicle vendors collaborate with a trucking association to advance road safety initiatives.

"Undue influence" occurs when associations enter partnerships which allow corporates to exert influence over a sector - or on behalf of a sector - in a manner that is contrary to the interests of those the association serves (despite the fact the association is likely generating a healthy financial return from the partnership).

Undue influence can appear in many forms. Some real-life examples I have seen include:

- The association updates their standards at the request of the corporate despite the fact it will negatively impact on members.
- The corporate wants the association to promote their highly biased "research" under the association banner to influence perceptions and buying habits in their favour.
- The corporate pressures the association to lobby government for legislative changes that will protect their position, limit competition, and, ultimately, restrict supplier choice for their members.
- A technology vendor requiring the association to promote them as their preferred vendor when their product is inferior.
- A corporate operating in a morally questionable manner pressured the association to suppress discussion about this.
- A corporate was able to have the association run articles that negatively reported on their competitors' offerings and product quality.

## So, what's changed?

Prior to COVID-19, even with the high-value partnership negotiations, the most significant outcome corporates were seeking was a defined return on investment. Whether that be quality leads, increased transaction volumes, or dollar value objectives. Occasionally corporates would engage to exert influence, but this was rare.

This is changing. Many corporates are now looking at associations on a more strategic level. Instead of simply channels to increase sales, they are seen as vehicles to exert influence that can transform the economic landscape to the benefit of the corporate.

This "shift to influence" is one of the cleverest I've seen in over 20 years of negotiating partnerships.

It is also one that associations should understand lest they find themselves in a position where they are facilitating an "undue influence" situation.

## How can we avoid undue influence?

To ensure you are engaging in partnerships that don't risk undue influence, develop processes to assess potential partners that ensure the interests of those you serve will take priority – no matter the amount of money on the table.

The first step is to select the right partners. Before jumping straight into a partnership take the time to understand whether the corporate is a fit for your association. This includes consideration of factors such as:

- The specific objectives the corporate is trying to achieve – does it align with the needs of those you serve?
- The quality of their service, product, or offer – is it something you are proud to align your association and its members with?
- The culture of the organisation – is the way they operate compatible with your organisation? (eg: are they wanting to hard sell your members in an environment where that is not appropriate?)

The next step is to understand what deliverables you are willing to agree to – then structure your partnership offer accordingly. For example:

- **Research** – You may agree to undertake research on behalf of the corporate. But stipulate that it must be independent and unbiased.
- **Advocacy** – You may agree to advocate to support the corporates' agenda. But only where that advocacy is also in the best interests of those you serve.
- **Standards** – You may agree to let the corporate provide input in standards development. But the final decision will rest with the association and will reflect the best interests of those you serve.
- **Editorial** – You may agree to let the corporate provide articles for inclusion in your communications. But maintain editorial rights to enable management of misinformation or awkward viewpoints on subject matter.

## Where is this heading?

Associations have a trusted position in the hearts of those we serve. We must ensure we retain that enviable position of influence by always ensuring that our members come first.

Post COVID-19 the operating environment for high-value partnerships is quickly regaining momentum with signs of quite exciting times ahead.

Corporates are opening their wallets and jumping back into partnerships with an enthusiasm that bodes well for associations.

Associations who put processes and strategies in place to prevent undue influence are laying the groundwork for very successful and profitable collaborative partnerships to flourish.



By Julian Moore.

Julian Moore, Australasia's foremost non-profit sponsorship practitioner, specialises in generating revenue for associations and other non-profits. Julian is an accomplished and entertaining speaker. Throughout his presentations, he gives real world examples and case studies that inspire and motivate attendees. He focuses on providing practical and useful ideas that can be implemented immediately to start benefiting your organisation.



# Ten Strategies for Successful Corporate Sponsorships in 2022

**W**on't it be great when the COVID-19 pandemic is behind us, and your association can go back to reaping the benefits of corporate sponsorships that we experienced in 2019? **Not!**

It's unlikely that sponsorship programs will be the same as they were pre-pandemic. The pandemic has been the great sponsorship re-set for three interrelated reasons:

- #1. Most companies are reassessing their marketing strategies and seeking new and better value propositions.
- #2. As a result of #1, while some companies derive value from logo placements and banner ads as sponsor benefits, many companies are demanding more impactful sponsorship benefits.
- #3. As a result of #1 and #2, companies are considering – and comparing – the numerous ways they can achieve their business and marketing goals, including many different association sponsorships; webinars, conferences, and expos offered by for-profit companies; the company's own social media, website, and webinars.

## Creating a Sponsorship Program for 2022 and Beyond

Based on input I have received from hundreds of associations since the pandemic began, as well as one-on-one interviews with dozens of corporate sponsors, here are 10 strategies for successful sponsorships in the years to come:

1. To structure your sponsorship program, be sure the program is in alignment with your association's mission and focuses on the needs of your association's members. Though some associations have revenue challenges because of the pandemic, now is not the time to compromise the association's values in exchange for sponsor revenue.
2. To operationalize your sponsorship program, develop a business model with components like goals, audiences, tasks, and resources. Sponsorships should not be merely a task assigned to one person; many on the association's staff should be involved.
3. To determine the timeframe for your sponsorship program, think "year-long", not "conference". Having all sponsorship benefits concentrated around a several-day conference is not likely to be of value to top-tier sponsors that have year-round business goals.
4. To decide the benefits to offer sponsors, start with an analysis of what your association and your members need. Do members need content not currently available from your association? Do members need information related to emerging topics, including the pandemic, diversity, and inclusion, etc.? Sponsors benefits can be crafted to fill these gaps.

5. To package benefits for sponsors, customize to meet the needs of each company – especially for top-tier sponsors. Companies seeking greater sponsorship value are unlikely to find that value in a prospectus or Gold/Silver/Bronze-level pre-packaged sponsorships.
6. To understand the benefits sponsors need, have a one-on-one conversation with executives from each company. Ask about marketing goals; if there is a segment of your membership they're trying to reach; how they describe a successful sponsorship; their most successful sales strategy; their biggest marketing challenges.
7. To create benefits of value to sponsors that are also based on member needs, consider involving sponsors in educational content (workshops, webinars, white papers, toolkits, etc.); focus groups and roundtable discussions; research projects; strategy development meetings with the association's staff and/or board; etc. Instead of logo visibility, consider high-level recognition like co-branded content; joint social media campaigns; sponsor participation on an advisory council; etc.
8. To increase sponsor value at virtual conferences (since some form of virtual events is likely here to stay), provide top-tier sponsors opportunities to post educational content for conference attendees; participate in live or videotaped interviews on topics of importance to members; serve on panels for sessions; access registration data segmented by demographics.
9. To determine the beginning and renewal date for sponsorships, find out that the best date for each company (not your association's fiscal year or the calendar year). Ask each company when they make budgeting decisions and when they would like their sponsorship to begin.
10. To identify new sponsor prospects, consider companies in addition to long-time sponsors and exhibitors. Are there companies your association's members purchase from that could become sponsors? Do your members have needs for new products and/or services due to the pandemic or other changes in the trade or profession your association serves?

## Upward and Onward in 2022

The coming years can be a time of sponsorship growth for associations that recognize three key factors:

- Companies are seeking marketing value.
- Companies have a lot of choices of how they spend their marketing dollars.
- Associations that position their sponsorship programs to fulfil the needs of members and sponsors will derive the most success.



**By Bruce Rosenthal.**

Rosenthal is a strategic advisor, consultant, and educator to associations. He creates sponsorship programs that increase revenue, add membership value, and foster association sustainability.

# B2B Selling will Change Forever

**W**ith COVID-19 and lockdowns changing markets and causing disruption it is inevitable that associations will look to the levers that will maximise revenue and reduce costs to respond well now and place themselves in a stronger position going forward.

Border closures, lockdowns, and distancing regulations have made working from home a new normal for our teams and for our members. It's transformed the look and feel of member engagement, and it seems the genie is out of the bottle forever. That said, it makes sense that revenue channels and teams realign themselves accordingly to remain the vital organ that pumps the very lifeblood of the association.

Project teams are now dedicated right sizing and right formatting membership/partnership teams, their locations, and the protocols they use in response to this disruption.

My view is that associations will readjust their channels to market in the following ways:

## **Reduce the size, scope, and reach of teams on the road**

Lockdown 1.0 in March 2020 redirected the focus for revenue generating teams from prospecting and selling in person, (in customers' offices and workplaces) to remote engagement through Zoom or Teams. Some even remembered that mobile devices can also be used to talk with customers – not just for selfies!

Understandably CFOs also realised the need to rethink the ROI of having these teams structured, resourced, and aligned primarily for an "in person" market.

The justification of costs associated with having teams on the road nationwide (the car itself, petrol, tolls, parking, insurance, registration, maintenance... the costs of regular interstate travel: flights, travel, accommodation). wasn't there anymore.

The cost of sudden border closures and travel uncertainty forced many to search for a better way.

## **Increase the size, scope, and reach of phone-based membership teams**

Lockdowns have been Internal (phone based) membership's teams' time to shine. Already fit for purpose and experienced at growing account revenue over the phone meant that they simply got on with it.

For the first time their value became visible. They're a fixed cost that delivers significant return. Predominant upside, and a major component in future engagement.

ABS Head of Household Surveys, David Zago, said the latest Household Impacts of COVID-19 Survey conducted from 12 – 21 February 2021, showed two in five people with a job (41 per cent) worked from home at least once a week in February 2021, compared with 24 per cent at least once a week before March 2020.

Some members may never return to working full time in the office. This changes territories, in person meeting locations and planning. Physical location isn't a factor for phone people.

Redirecting resources, training, and territories to expand the scope and remit of phone teams makes sense.

## Accept the shortage on sales talent and adjust the focus

Medium (45%) and large businesses (43%) were more likely to report they were having difficulty finding suitable staff, compared to small businesses (26%). Source: ABS Data May 2021.

When it comes to sales talent though, anecdotally I'm told by my clients they're experiencing a negative recruitment market. The gap between a partnerships manager or memberships manager leaving and being replaced is widening and with it, an increase in lost revenue.

Application volumes are down and submitted applicants lack the skills or experience (or both) to simply walk in and be productive without significant support. Pre COVID it took around 6 months for experienced people to generate returns with minimal additional investment.

Head hunting remains an option for senior roles, but it's cost prohibitive for lesser roles.

The costs of developing revenue generating talent are keenly felt as senior leaders now recruit, onboard, manage and coach remotely; many haven't meet in person for months if at all. They need additional skills. They need them now.

## Have smaller "member facing" teams focused on higher value prospects and members/partners

This is where there is greater return. The cost of developing and managing these high performers is realised in the business they're able to bring in. Right-size the member facing team and dial up their skills with a higher degree of consulting capability that owns their territories like a business owner to identify, engages progress and win more of the right members/partners in the right way to grow them. The challenge is now applying previous engagement best practice to a remote membership base.

## Utilise sales enablement technology to improve the customer experience and refocus activity on high value interactions

A report from McKinsey October 2020 showed that 70-80% of decision makers prefer remote human interactions or digital self-service due to ease of scheduling, save on travel expenses and safety. While the data from the US, the themes still apply to Australia.

Membership portals, self-service, and AI, reduce "lower value" tasks (e.g., chasing invoices, checking credit limits, or dealing with supply issues) and redirect more time to "high value" activity.

Technology that enables teams to plan more effectively also improves margin, reduces cost to serve and improves efficiencies. Sales enablement technology gives easier access to cross departmental information and maximises opportunity. Important during a "build back".

With every change or challenge lies an opportunity and this is an opportunity to align the way we engage as an association to the way the market now wants to engage.



**By Ingrid Maynard.**

Ingrid is known as The Sales Dr and specialises in Sales improvement programs that build internal sales and service capacity and create lasting results for corporations, large and mid-sized enterprises. Every program is bespoke, to create purpose-built systems, tools, templates and workshops and coaching programs to measure the shift in behaviour and outcomes.



# Has COVID Disrupted Association Events Enough?

**V**ery few associations in the APAC region were prepared for the extraordinary shift in event design and delivery that resulted from COVID-19.

We were unprepared for the quick transition needed to create virtual experiences that provided a place for members to continue connecting in meaningful ways.

But... have associations changed their approach to conference and event design and delivery enough?

## The rise of hybrid

Hybrid conference! These words alone have caused many events professionals within the association sector to reach for something to lean on. We were unprepared for the impact of designing a virtual conference experience, including very few digital platforms to choose from, without trying to connect with those based in the Northern Hemisphere.

I've been a part of many conversations where what it means to deliver a true hybrid conference has been debated and discussed several times over. The outcome you ask? Well, it comes down to who is managing the conference and it ranges from live streaming or recording the whole or parts of the in-person conference; to creating two programs for each audience which overlap at selected intervals.

The thing is, hybrid is just the delivery mechanism. It's the avenue by which we share the content so vital to association members. Is it where we should be focusing our time and energy? The question so many are yet to ask is, what should those two, or more, programs look like in a post COVID environment?

Each time this discussion comes up, the conversation seems to end up at the same place... with associations falling back to the same program designs delivered prior to COVID. Is the 2-3-day conference with multiple streams, calls for submissions, a trade hall, networking during the catering breaks and everyone traversing to the one location the type of conference members want to attend and sponsors & exhibitors want to support?

## The role of experiences

Do members want to attend the same conference in the same format year on year? Is that the type of conference you want to attend? Or do you want an experience; do you want to feel something and not aimlessly wonder from room to room looking for the right content delivered in the right way for you?

Do sponsors want to always have an exhibition booth or any of the number of same packages that so many associations offer?

We need to give attendees a compelling reason to leave the comfort of their home, to take time out of their day, to commit the funds to attend our conference instead of any number available to them. And we need to justify to sponsors why their limited budget should be allocated to our event and not a competitor.

We will be competing more than ever with international conferences. After so long not travelling and seeing the world, the option to combine a holiday with a conference is more attractive than ever for those who want to meet again in person. To hear a foreign accent, see a wonderful sight, meet people from diverse cultures... these are all reasons for choosing an international conference over one home-grown, delivered in the same way, with the same speakers, the same attendees, and the same venues.

How do we break the appeal of something that appears more alluring? We change our approach, and we change our definition of what it means to run a conference. Trends to keep front and centre when designing your future conference and event strategy:

- **Hybrid** is here to stay. According to the EventMB report 'The Future of the Event Industry 2021', hybrid is a necessity as many attendees will not be able or willing to attend in person, especially if they must travel.
- **Consider a multi-year design strategy.** Rather than developing your annual or biennial conference program, look to a 5-year plan that gives you the time to create multiple experiences that grow and change year-to-year for your members.
- **Design experiences that give everyone a voice.** Use the tools available to allow your different audiences to connect with each other, with speakers and with sponsors.
- **Entertain to education.** Put some adventure in the content and don't be afraid to brief your speakers to ensure your content engages and entertains attendees.
- **Learn from others.** Break out of old habits and look to others who have adapted during the pandemic. What can we learn from those who deliver different styles of events such as writers and comedy festivals, corporate and product launches? You don't have to spend big to create an impactful experience, ideas come from everywhere.
- **Micro conferences.** Smaller events have a more personal feel and the opportunity for meaningful networking connections to be made. Bigger isn't always better. Be open to consider satellite hybrid events that offer your members an opportunity of a local in-person conference where that micro site connects to others around the country or globe.

Technology that enables teams to plan more effectively also improves margin, reduces cost to serve and improves efficiencies. Sales enablement technology gives easier access to cross departmental information and maximises opportunity. Important during a "build back".

With every change or challenge lies an opportunity and this is an opportunity to align the way we engage as an association to the way the market now wants to engage.



**By Paula Rowntree.**

Paula is a leader within the association and business event sectors with more than 20 years' experience successfully designing, developing, and implementing business event strategies.

# 5 Ways Online Events are Evolving in 2022

**T**he COVID-19 pandemic has caused lasting change in the event strategies of associations and the organisations and individuals they serve, with more people than ever before attending meetings and events virtually in the past 18 months.

The shift was almost immediate in 2020, with 85% of organisations reporting a new-found appreciation of the benefits of virtual meetings and events, and broad acceptance of their advantages, including:

- Increased convenience
- High engagement and interactivity
- Greater reach
- Lower cost, and
- Reduced risk.

And according to research conducted by Redback a year later, online attendance of events and meetings in 2021 became almost a universal experience: only 2% of respondents to the 2021 Redback Report said they had not attended an online event in the 4 weeks before the study was conducted.

## Digital-first in 2021

One in two of us now attend 10 or more virtual events a month, and one in three expect to attend an even greater number of online events next year, the research shows.

In fact, 2021 was the year in which a digital component became a requirement for almost every event, making online, digital-first and hybrid events the order of the day.

What began as a necessity and evolved into a risk minimisation strategy designed to ensure event programs could go ahead in a volatile landscape situation is changing as we look towards 2022, as organisers determine which events should remain predominantly online and which require a face-to-face element.

## Associations in the spotlight

In the association sector, change has been rapid, with few other options available to peak bodies that often rely on events as a key revenue stream.

"We have always done a series of webinars, webcasts and online workshops given the nature of our work and business as a peak association," said one respondent to our study.

"However, 2020 saw the numbers grow exponentially as our short courses, professional development and main conferences and forums also went virtual. The response from our members and networks has been terrific."

But while the number of online events we're all holding and attending has increased exponentially, fatigue with virtual events has also grown, and audience expectations regarding the quality of online events have risen markedly. Organisers, keenly aware that distractions are just a click or an untimely household interruption away, are looking to raise the bar when it comes to offering engaging online event experiences.

So how are online events evolving to meet these new challenges in 2022 and beyond? From discussions with our customers, we've identified 5 key trends to be across:

## Make a virtue of convenience

With convenience one of the biggest benefits of online events, organisers are studying the data or surveying their audiences to ensure their online event program is closely tailored to their audience's specific needs and preferences.

This includes offering the right content in the most suitable event format, running to the audience's preferred duration, in the most convenient channels.

For example, our research shows audiences have turned

to shorter, sharper event formats, with 45 minute the most popular duration, and mid-morning or mid-afternoon the preferred broadcast times.

While event organisers must get to know their audience's specific preferences, it's also critical to offer events on-demand, to be viewed at a time of the audience's choosing.

## Take a creative approach to event formulation

A tiny talking head next to a never-ending succession of slides doesn't cut it for most online events. Instead, organisers are taking a much more creative, sophisticated approach when it comes to formulating their online events.

That includes choosing interactive formats such as panel discussions or fireside chat-style interviews, staging online events in physical locations such as broadcast studios, incorporating green screen technology when it comes to branding, backgrounds and graphics, and the inclusion of interactive elements such as polls, surveys, quizzes, and breakout rooms.

Audiences know it can be hard focusing on one tiny screen for long periods of time, and they expect organisers to adopt engaging formats to help them tune in.

## A professional approach to presenting

With video meetings now nearly ubiquitous, video is also playing a more sophisticated role in more formal events such as webinars, conferences, and AGMs.

This includes the preparation of pre-recorded video packages to be played during the event, as well as live (or pre-recorded) crosses to remote presenters.

On top of that, audiences expect presenters to be trained in online presenting, which can be very different from presenting to a live audience, so it's worth investing the time and effort to ensure your presenters can deliver the virtual audience engagement you need.

## A tailored digital experience within hybrid events

Even for hybrid digital and face-to-face events, it's no longer enough simply to stream some sessions online or offer them on-demand after the event.

Online audiences expect a highly tailored, well thought-out digital component to hybrid events when it comes to pricing, sponsorship, and opportunities for interaction.

To this end, we've seen digital company subscriptions offered when an organisation books a table at a physical event, unique sponsorship opportunities created online, and networking sessions, exhibition booths and interaction opportunities developed specifically to suit digital participants of hybrid events.

## Leveraging online events to create content libraries

Canny digital event organisers are live broadcasting (or pre-recording and simulive broadcasting) their event once but making that content available many times to attract the broadest possible audience.

In addition to offering live events on-demand online after the initial broadcast, organisers are using those recordings to create libraries of on-demand content, editing them into smaller chunks to distribute via social channels, offering them as podcasts, and more.

In 2021, the level of acceptance of online events was higher than ever. In 2022 and beyond, virtual event organisers must tailor them precisely for their audiences to create and maintain the engagement, convenience and interactivity that will keep digital audiences coming back for more.



By Sara Drury.

Sara is passionate about helping organisations map out their event strategy, and then working with them to bring it to life and achieve maximum ROI - we she believes we have only scratched the surface when it comes to the virtual sphere and can't wait to see where it takes us.



# Three Key Drivers

## For Future-Proofing Association Events

**T**he impact of COVID-19 on business events has been sudden, severe, and long-lasting. Traditional models for association conferences have been turned completely upside down.

The silver lining to this is a propulsion for associations – once slow adaptors to change – to reignite the purpose of engaging a community in a "phygital" (physical + digital) world.

High performing associations should consider these 3 key drivers when designing their event strategies:

1. 365-community engagement strategy
2. Technology as the enabler, not the strategy
3. Double down on the Experience Economy

### 365-community engagement strategy

No longer will associations simply convene at their annual conference or participate in sporadic educational and networking activities the remainder of the year. Instead, associations will need a 365-engagement strategy of O2O2O (online to offline to online) activations all year round. This not only caters to members but widens their community to encapsulate all customers – anyone interested in what your association has to offer, including products, programs, and overall body of knowledge.

Associations that have offered low or no cost access to their virtual educational content, to both members and non-members, should capitalise on this marketing channel for their conferences. Participants that previously had no intention of paying to attend the physical event have the chance to sample the educational offering available before committing to a significant financial outlay or

valuable time away. Additionally with no geographic limitations or barriers, virtual events have opened new audiences that may participate in any future hybrid conferences.

Example: A regional healthcare association established a free monthly webinar program 12 months before their inaugural virtual congress. This gave the wider community a taste of the high-calibre educational opportunities delivered by the society. Within the first 3 months, there was a membership increase of 250%, which then translated into record numbers for their annual conference, all the while continuing the steady growth of their e-community post event.

### Technology as the enabler, not the strategy

With endless technological tools such as virtual conferences, closed e-community groups, and online learning portals; associations need to look inward and define their own priorities before sourcing a digital solution.

Where technology has typically been seen as the solution, it is now time to adjust this perception to use technology (and the data it collects) to support that analysis. Associations collect massive amounts of data from members and participants— and have been for years. With a wealth of online activity having taken place over the last two years, associations have more data at their fingertips than ever before!

Virtual event platforms have enabled associations to gather rich data insights, which can be used to analyse participant behaviours and user demographics.

Example: One national association analysed over 12 months the key words repeated in their online chats and monitored duration attendees participated in virtual conference sessions to provide insights as to topics of interest. In this way, technology can help with segmentation, personalisation, and customisation of content that truly appeals to the motivations, needs and interests of your audience.

Turning this data into actionable information is the real challenge, but when done right can inform strategy development and identify the tools that will maximise engagement and generate growth. Using technology and data insights to design (rather than deliver) the stakeholder experience will ensure you remain aligned with the needs of the community you serve.

## Double down on the Experience Economy

When considering a return to in-person events, associations will need a redesign of their event experience. Now is the time to experiment with changes in program and format to adopt the best elements of online learning for the face-to-face event.

Challenge yourself: Are you prepared to cancel hour-long, boring keynotes, and implement more fast-paced TV show like experiences with a "commercial break" every 15 minutes to reset and recapture engagement? Think about sounds and smells. If we take the music out of most films, most of the emotion is lost; look at what the retail industry is doing with specific scents that drive increased sales.

Associations need to work hard to evolve in a way that delivers memorable events that members, customers and partners will be pleading to attend. The experiential, engaging association conference of the future must be 'human-centric' and create space and time for intensive engagement with topics, issues, and opinions. This will allow passive audiences to become active and committed conference participants, whilst at the same time establishing a feeling of cohesion.

We are all navigating a changing environment that is different from the past, yet no less rich in possibilities for those who are prepared to get creative. Whilst we need to let go of the hope of in-person events returning to pre-pandemic conditions, let's embrace all the opportunities that associations can now implement into re-defining what engagement means for educational activities in the future.



**By Cindy-Lee Bakos.**

Cindy-Lee is the Association Solutions Director for MCI Australia. She leverages her operational event and association management experience in a business development and consulting role at MCI to ensure optimised engagement and maximising revenue generating opportunities for associations.

# Unleashing the Full Power of Your Meeting Legacies

**F**rom healthcare to urban planning, transportation, youth unemployment, climate change or sustainability, better solutions are needed globally in domains across the environmental, social, and economic spectrum. The urgency and the scale of these problems means a new approach which can accelerate innovation and learning is needed.

It is at the front lines of these challenges, that association meetings have the potential to take on an elevated role- helping to accelerate innovation and learning whilst stimulating positive and lasting social, economic, environmental, political, and sectorial legacies in the destinations in which they host the meeting.

Strategic Meeting Legacy Planning is one of the key mechanisms, through which associations can create new shared value through innovation, creating and capturing new value for stakeholders in the short term whilst delivering positive impact for the community in the long term.

The power lies in its ability to align the often-disparate interests of the meeting's stakeholders, focusing their energies and resources strategically to drive progress towards the desired vision.

Designing the event around a set of long-term legacy ambitions, the meeting can become the building block from which new strategic partnerships across industry, research and policy can be mobilised, community engagement enhanced, and innovation ignited to solve society's most pressing challenges.

Doing so produces a set of tangible beneficial outcomes for associations that can unfold at multiple levels and across different time scales:

## **Validate your association's impacts on societal development.**

Whether your association is representing a granular field of science and technology or a macro- cause such as water management, your association is a key actor supporting societal transformation.

As purpose-driven and member-led organizations, your association's ultimate success depends on your ability to demonstrate to your members and other key stakeholders that your association is making progress towards reaching your vision.

Communicating the ways in which your association is working to achieve its vision and reporting on the impact you are making, will provide the crucial validation needed to ensure continued retention and growth of your member and stakeholder community moving forward.

## **Enhance the strategic focus of your meeting, improving its design and the tangible outcomes.**

Association meetings are considered mission-critical because of the unique opportunity they provide for your entire community to converge around a focused topic to accelerate the exchange of knowledge, learning and professional development.

They are also typically one of the primary sources of revenue-generation for associations.

As such, it is essential for you to maintain a compelling value proposition for your meetings that will continue to entice attendance by delegates and exhibitors and engagement by sponsors and partners in an increasingly competitive environment.

Legacy planning requires you to think beyond the traditional operational aspects of planning your meeting. It will drive you to think both strategically and creatively and in doing so will unlock new ideas to enhance the content and design of your meeting for the ultimate benefit of the community you serve.

## **Broaden your meeting's potential audience and increase revenue generated**

Articulating a set of strategic legacy ambitions can create opportunities to engage with sectors, disciplines, and geographies beyond your traditional meeting audience.

To deliver on the legacy goals you are aiming for, do you need to be engaging with policy makers and regulators? Do you need to strengthen your collaboration with the technology sector, with entrepreneurs or youth?

Expanding the voices that can be present at your meetings, translates to more delegate and exhibition sales for you, and new business partners and connections for your participants on the conference floor.

## **Unlock new funding opportunities.**

Adopting a strategic legacy framework can become a trigger to consolidate your relationship with sponsors for the long term on challenges of mutual concern. In this way, engagement with event sponsors could evolve from a limited, time-bound exercise to an ongoing collaboration beyond the individual meeting. Likewise, engaging with actors beyond your traditional audience around a common legacy vision creates the potential to leverage new sources of corporate, subvention and philanthropic funding for your meeting.

## **Stimulate new strategic partnerships to strengthen your value proposition.**

The role of collective capacity and knowledge is critical in progressing towards your association's vision and legacy ambitions. This capacity and knowledge will be dispersed among diverse stakeholder organizations. Thus, an optimal way to reach your vision is through collaborative action in the form of new strategic partnerships.

Beyond enhancing your association's efforts to achieve its legacy ambitions, such strategic partnerships can enhance your competitive advantage and your value proposition by providing access to a unique set of resources for your member and/or participant community.

Ultimately the strategic pursuit of meeting legacies will enhance the pace & depth of transformation globally. The time is now for your association to go make that happen!



**By Chloé Menhinick.**

Chloé has 20 years of experience of working in the Associations Industry and leads projects on strategic meeting legacy planning implementation and measurement around the world.

# To Be – Or Not To Be?

## Force Majeure Clauses in your Events Contracts

**J**ust in the last decade or so, we have experienced wars, SARS, the GFC, pilot strikes, awful fires, floods, an un-pronounceable Icelandic volcano, and now, of course, the dreaded COVID pandemic. All have seriously disrupted the events sector.

When these "force majeure" things happen, having well-written contracts can mean the difference between survival, or not. Very often, your answer to Hamlet's question "To be, or not to be", lies with your contracts!

### Why your event contracts are so important?

Many associations rely heavily on the financial success of their annual conference and other events. Successful events generate funds to provide member-services throughout the year. Financial failure of those events can be a catastrophic, existential threat.

If you are an association event manager or a PCO, this article is for you!

When managing an event, you're the "ring-master of the circus". You have to co-ordinate and juggle a variety of participants in the ring, such as:

- Suppliers, including venues, accommodation, audio-visual, cleaning, security, speakers and entertainers, and many others.
- Sponsors, who pay to be promoted at the event.
- Exhibitors, who wish to show-case their products or services at the event.
- Attendees or "delegates", who may be members, non-members, and students.

### To be or not to be - the slings and arrows of outrageous fortune.

Your association will need contracts with all these participants. Each contract will need to properly reflect the event you are trying to fashion. If well written, they will also protect your organisation from the "slings and arrows of outrageous fortune" – the many challenges that the world has thrown at us and which, sadly, are likely to revisit us in the future, in one form or another.

### Force majeure reconsidered.

All events contracts should cover cancellation and postponement – and it has ever been thus. The pandemic has, however, forced us to look at "force majeure" clauses in events contracts in a much more sophisticated way than ever before.

Laws differ around the world, but a common thread is that the law – based on the principles of "frustration of contract" – applies very narrowly and, in most cases, *only forgives performance of contractual obligations when made impossible by external, overwhelming circumstances*, such as COVID-19.

Most "force majeure" clauses, especially in venue contracts, just re-state this: A party is not liable if it cannot perform its obligations, due to external, overwhelming circumstances.



## The venue contract.

Let's pause to focus on that: Venue-hire contracts are usually the biggest cost for most events.

When covid lockdowns prevent your delegates, exhibitors, or sponsors from attending, they, and you as hirer of the venue, are not prevented from performing contractual obligations at all. Rather, it is the benefit of the contract that cannot be enjoyed.

So, as the hirer of the venue, you remain legally obliged to continue paying the venue, as provided in the venue-hire contract. Your obligation, as hirer, is to pay, and that isn't made impossible by covid lockdowns.

You may have to cancel or postpone the event – and that, as you know, usually carries hefty fees. The venue thus receives a windfall gain, and your association suffers a windfall loss.

If, on the other hand, the venue is legally required to shut down and cannot open its doors for your event, it is relieved from liability. The venue is not obliged to refund advance payments you've made. Again, a windfall gain for the venue and a potentially catastrophic loss for your association!

So, beware such narrow Force Majeure clauses, particularly in venue hire contracts, but also in contracts with suppliers of any kind. When you receive such a contract, you should be prepared to negotiate it (with your friendly event lawyer's guidance) and to "walk away" if the venue/supplier won't play ball.

## Contracts with delegates, sponsors, and exhibitors.

In addition, you need to ensure that your contracts with delegates, sponsors and exhibitors also contain fair and balanced provisions. Consider entitling them to cancel, agree to postponements or conversions to virtual format, or to receive full or partial refunds.

Giving refunds can be a bitter pill, but it's better than having disgruntled members, who may decide not to renew their membership!

COVID-19 is just one of many actual and potential disruptors. Experience has taught us that the interconnected world is likely to throw yet more "slings and arrows" at us in the future.

So, if you haven't reviewed your contracts with venues, delegates, sponsors, and exhibitors, you should be doing so... right now! The legal costs involved are a drop in the ocean, compared to what you may have to pay if your contracts don't cover these (and other) issues appropriately. To be ... or not to be?



**By Matt Crouch.**

Matt is the principal at Matt Crouch Legal. He is a specialist events lawyer, teacher, author, and presenter, who's assisted associations and event managers with their events for over 30 years.

# Redesign your Culture for 2022 and Beyond

**A** lot has been written about how the pandemic suddenly forced everyone to work remotely—and how associations had to pivot quickly to offer virtual conferences and other virtual programming for their members. I was impressed with the level of agility I saw in associations—I wasn't sure they had that in them.

What has been largely ignored during this time, however, is workplace culture. And this is a problem, because the shifts we've made in the past couple of years are not just temporary, they are structural.

## Structural change is permanent

Being forced to quickly learn how to run a virtual conference was not just about doing demos with virtual meeting platforms—it was an acceleration of an irreversible trend that has been happening for a long time that we call digital transformation.

You can't provide deep value to members in today's environment without there being a tech component. You may be an association, but in 2022, you are also a tech company.

And here's the rub: becoming a tech company is more of a cultural challenge than a technology one.

## Does your culture support being digital?

Being digital demands a culture that values innovation, for example.

That goes beyond allowing your people to sometimes be creative or telling everyone you are focused on the future (though that's a start).

It means rolling up your sleeves and running experiments, failing sometimes, and testing unfinished products out with customers. Most association cultures won't tolerate that activity because they think it will make the members unhappy.

But in 2022, if you can't stay ahead of the changing digital delivery challenges that will require continuous innovation on your part, your members won't stick around long enough to be unhappy.

## How are you changing how you collaborate?

A digital culture also has much higher standards around collaboration.

Based on our culture assessment research, I can tell you that associations, in general, have cultures where people are eager and willing to collaborate and help each other out.

They're good facilitators, and they care about internal relationships, all of which is important for collaboration among individuals.

Yet when it comes to collaborating across group boundaries, associations typically fall short. Their cultures do not value cross-functional communication as much, and they suffer from rigid silos.

But part of the new digital reality is that your members don't care if your database and website work better for the membership department or the meetings department—they just expect it to work.

So, if your departments can't learn how to look past their own needs and start collaborating in service of results, you're in trouble.



Photo by Jason Goodman on Unsplash



## Digital transformation = culture change + vendor selection.

By Maddie Grant.

Digital transformation is ultimately about culture change, supported by the adoption of new tools.

The pandemic may have forced us to move more quickly than we anticipated on the tool front, but 2022 is the year you need to catch up on the culture side.

You should always be designing your culture around what makes your organization successful, and in today's world that means taking a hard look at what your culture really values in the areas of innovation and collaboration (among others).

Remember, your culture is changing whether or not you're being intentional about it.

Don't leave your success up to chance and start creating a digital culture today.

Maddie Grant, co-founder at PROPEL, is an expert author, culture designer and digital strategist who focuses on helping organizations prosper through culture change. She has specific expertise in digital transformation and generational differences in the workplace.

# Culture Change Begins with You

**I**n this new pandemic era, there is much more understanding about the value of consciously cultivating organizational culture.

Associations have a chance to lead at this moment, and many are doing just that. Here are some key considerations as you explore how to evolve your culture with your staff, which will assist your staff's ability to support your Board and members.

## **The tone is set by the leader and is felt across the organization.**

When exploring how to change anything in your organization's culture, start with yourself as a leader.

Whether you are the chief executive or a future leader, always begin with you. Own your impact on others – your greatness and the areas you need to support. Explore your own biases, your desires to improve, and where you might need education or coaching. If you manage or lead people, be an example and support each team member individually, meeting each person where they are and helping them grow while also monitoring the whole team dynamic and accountabilities.

What you do will set the tone and can create norms.

## **This work is about being human with other human beings.**

There are aspects of cultural work that mirror good strategic planning.

You will need a vision, goals, plan, and accountability. Part of what's different is that this work is personal. This work is about being human with other human beings. No one will be perfect. Everyone will need to be given grace along the way and likely some education, as well.

Questions to ask yourself could include:

- Do your colleagues describe you as authentic or trustworthy?
- How do you create equity and belonging across the organization?
- Are you aware of your biases and their impact?

Be courageous in your exploration and yet have patience as well. You can only take this journey one step at a time. Make each step count.

## **People own what they build.**

Bring everyone along with you. If you are the leader, share your vision of the new future and why changes are essential. Socialize it so that everyone can influence it and maybe improve upon it. Create a process to get input from everyone and then provide everyone a role in creating that future.

## **Culture is everyone.**

While the Chief Executive is accountable for the entire organization, everyone is impacted by an organization's culture.

If you find people aren't showing up in an agreed-upon manner, your lowest accepted behaviour will be part of the accepted culture. Keep your standards high and your culture brave and safe.





## Belonging is priceless.

People don't quit jobs; they quit people. If your culture supports people bringing their whole selves to work and your culture is one of belonging, your employee retention will reflect that value.

The same is true in your membership. A culture of belonging is the new standard for how to be together and for the membership experience, which includes equity, inclusion, and diversity.

Are you ready to lead this change?

## Get Support. No one can do this alone.

Find peer groups, friends, family, and experts who can support your journey as a leader or someone who seeks to improve their impact and shed their biases.

This journey brings up feelings and requires us to learn new skills, so be patient with yourself as you dare to lead differently.



**By Sharon Newport, CAE.**

Sharon, is an award-winning association executive turned organizational consultant and executive coach specializing in cultural transformations, diversity, equity, and inclusion. Sharon also serves as adjunct faculty at Georgetown University's Institute of Transformational Leadership. I'd love to hear how your journey evolves. We association folks must stick together!



# Communicating with Conviction in a Hybrid Workplace

**V**irtual workplaces are here to stay, whether employers like it or not. Recent research by PwC indicates that 90 percent of Australians want to continue working from home in some capacity.

This is going to have a huge impact on how we work. Getting the hybrid model – that combination of at-home and in-office work – right is going to be hard.

Impacts will be felt when it comes to all aspects of your association, including productivity, culture, employee engagement, collaboration, innovation, and of course, the bottom line.

We need to consider communication channels, technology, and people's individual working environments.

Getting it wrong can have big consequences.

Getting it right can energise your people and your organisation.

For the hybrid model to succeed, associations need to:

- Examine their communication approach
- Strengthen their communication channels
- Re-evaluate how they measure performance – have a focus on outcomes rather than outputs and time in the office
- Have a flexible approach that considers the needs and circumstances of all employees individually.

More than ever, associations have a responsibility to understand the relationship between home, work, and the social network their people have. It's important to understand the links between:

- The complexity of their working from home experience. For example, do they have a dedicated workspace just for them, or are they sharing the dining table? Are they also helping with home-learning for their children or caring for elderly parents?
- Their job requirements – the outcomes they are expected to achieve, and the volume of work required
- The quality of the support network they have professionally, personally, and socially

What might your people need from you as an employer and organisation?

## How are you communicating?

The way leaders communicate is critical, and as we move into a hybrid work world, it takes on an even greater relevance.

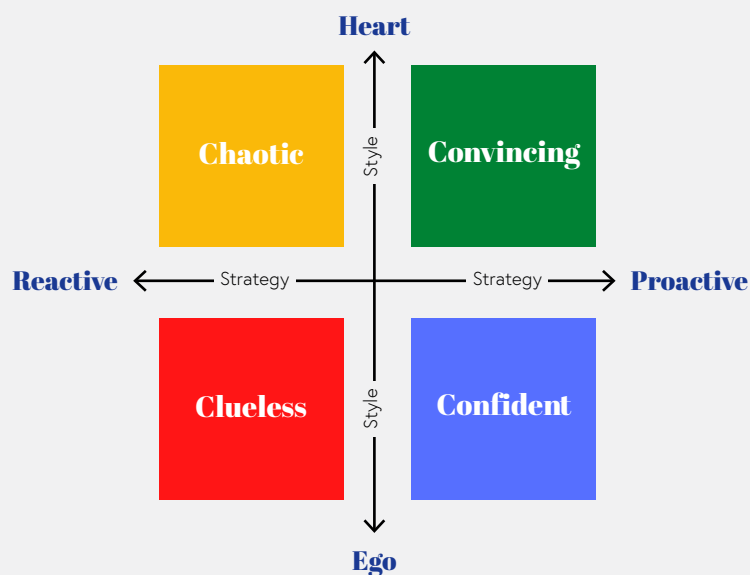
When we communicate well, we motivate, educate, and inspire. We earn trust and we encourage others to act. Good communicators create a connection that is honest, emotional, and genuine. They take time to understand others and they know how to "speak human".

This is especially significant right now, as once the Covid crisis has passed, people will reflect and remember how you made them feel during this time.

## Four communication approaches

As leaders, it's more important than ever that we know how to communicate so we create real connection and sustained engagement. While it might seem like we are more connected than ever, ironically, we – as individuals and as organisations – are more disconnected than we have ever been before.

- Clueless communicators are driven by ego and the need to always be right. They react to what is happening, are poor at listening and don't like to be told what to do. They frequently operate out of self-interest, demonstrate poor insight and judgement, resulting in disconnected – if not dysfunctional – teams.
- Chaotic communicators are exhausting. They think before speaking because they are passionate about what's "right". They don't make the time to plan and prioritise strategy, leading to inconsistency, which creates personal overwhelm and distracted teams.
- Confident communicators can sometimes come across as deceptive as they are strategic and driven by their own ego. Too often they are overly focused on achieving outcomes at the expense of kindness and compassion. Their people can feel insignificant and under-valued.
- Convincing communication is cornerstone of trusted leadership. It has purpose and is meaningful, so it leaves a lasting impact. Conviction creates change, energises individuals, and teams, leads to alignment of values and purpose, and achieves greater results.



What does your communication approach look like?

## How to become a convincing communicator

### 1. Lead yourself first

Our most important relationship is the one we have with ourselves. Manage your energy by filling your own cup first. Look after your own physical and mental health— get enough of the right food, water, exercise, and rest.

### 2. Shift your mindset

Do you have a mindset that places communication at the heart of all you do? Leadership is about relationships and relationships rely on communication to earn trust.

### 3. Communicate to connect

Convincing communication leads to real connection and sustained engagement. Do your people understand what you want them to do? Is your purpose aligned to your message and is it clear, compassionate, and consistent? Are you using the right channels for your audience?

### 4. Maintain your momentum

Maintaining momentum relies upon having a clear focus on what matters, aligning your values and purpose, and having good habits, rituals, and routines in place.



By Mel Kettle.

Mel is an internationally renowned expert at communication that builds trust and the author of *The Social Association*. With over twenty years' experience working at the intersection of leadership and communication, she has the technical skill and business smarts to guide you, your team, and your association to communicate with conviction and increase your influence.

# Time to Prioritise Mental Health.

**T**he world has changed. The COVID era has caused a mass reassessment of peoples' priorities where wellbeing and mental health have been placed centre-stage. What does this mean for your association, your staff, and your members?

## Changes to workplaces

Working from home has now become part of the way people work. Work flexibility is both expected and appreciated by many employees who are no longer content to spend all week in the office when they can be just as productive at home.

Pre-pandemic times many lamented the slow encroachment of work into home life - the emails from smart phones in the late hours, the work taken home on laptops - they've had to adjust. Now work has engulfed whole spaces of our homes making it increasingly difficult to close the doors on work time.

This means that employers will have to consider the impact struggles at work have on home life and vice-versa.

## Burned out workforce

Microsoft's 2021 [Work Trend Index](#) revealed that high productivity is coming at the expense of a burned-out workforce. The same report tells us that 41% of the global workforce are considering leaving their roles over the next year. Of course, people are reassessing.

Even before the COVID19 pandemic the [world health organisation estimated](#) that anxiety and depression globally cost us \$1trillion USD in lost productivity. This extraordinary number masks the human lives and suffering lying behind it. The pressure of the pandemic only exacerbated the existing situation.

Some people flourished personally and profited financially from the lockdowns and outbreaks. Others did not. Many people noted how busy and stressful their lives were and reassessed what worked well and what did not.

## The great resignation

The ongoing crisis and trauma we've experienced have elicited predictable reactions in our human nervous systems: fight, flight, and freeze.

The fight response causes people to stay in situations and put their energy towards things that are important to them whether it's their work tasks, better conditions and wages, structural change et al. This employee or member might be the proverbial 'squeaky wheel' who may be a wonderful advocate for your association or may be the employee who is angling for a raise.

Conversely, the freeze response keeps people stuck and trapped. This might express in behaviour like presenteeism, where they are showing-up but their productivity is low and their results aren't what they used to be.

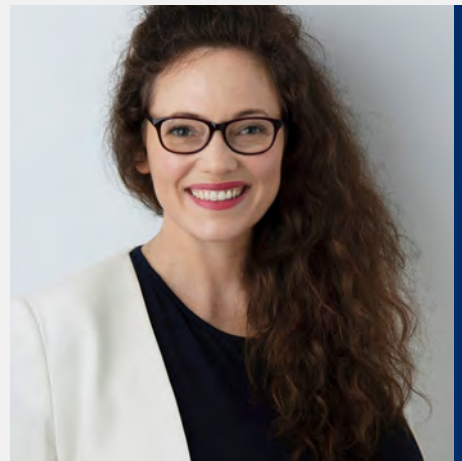
Overwhelmingly now we are witnessing the flight response in action; people are voting with their feet and leaving their jobs. This period is being hailed as 'The Great Resignation'. You might see a greater turnover of your staff and members as people leave jobs, change how they work or change professions.

## What helps?

People feel better when they feel safe. Having more control over what they do and how they do it helps with this. What can you do to restore autonomy and agency for your staff and your members? What do you need to do to have ongoing safe and honest conversations with staff and members around their mental health and wellbeing? Yes, this will impact your bottom line - a [Deloitte study](#) of Canadian workplaces showed a return on investment of CAD \$1.62 for every dollar spent on mental health programs.

Continued uncertainty is the new normal. We are at the beginning of a new era and organisations have a massive opportunity to support health and wellbeing.

Wise organisations will make the mental health a priority.



**By Liana Busoli.**

Liana is the Director of Big Life. She has a wealth of experience working with and in NFP organisations. She is a psychotherapist and trainer with a particular interest in trauma, vicarious trauma, and staff burnout.

Liana gives people and organisations the support, tools, and education they need to improve their mental health and wellbeing and live bigger, richer, and fuller lives.

# The Great Resignation.

## Is Australia next?

**A**t a time when many people are craving the certainty of "precedented" times, ironically, we're potentially on the cusp of another wave of workplace changes.

Recent research by [Microsoft](#) found 41 per cent of the global workforce is likely to consider leaving their current employer within the next year. For Gen Z, those between the ages of 18 and 25, the number is even higher at 54 per cent.

It's difficult to predict how exactly this may play out in Australia, but if international trends are indicative of what we'll see domestically, we should be paying attention. In the US, 4 million Americans quit their jobs in July 2021 whilst a [study](#) by HR software firm Persinio indicates that 38 per cent of employees are considering changing jobs in the next 6 to 12 months.

COVID-19 has ignited a seismic shift in the labour market. Remote work, once thought of as experimental – even impossible – became the norm for many organisations overnight.

At a time when many have felt socially disconnected, we've also been given a lens into each other's lounge rooms. Pets and children make unpredictable appearances in virtual meetings, and it's humanised us all.

It's also redefined the psychological contract – the mental and emotional deal you make with an employer. These are the beliefs, expectations, hopes or obligations that can't necessarily be described within your employment contract.

Psychological contracts are fluid, not fixed. As the employment landscape, teams, and individuals grow and change, so too do the psychological contracts. The psychological contract now firmly includes worker wellbeing as well as career development opportunities, diversity of work and fun at work. The boundary between work and non-work time and activity is broken and will not be reinstated in the old way.

Remote work is here to stay. How that looks for organisations and the people that work there, is in flux. It is all a matter of negotiation and new hires are focused on their lifestyle fitting with the job not the other way round. Flexibility has taken on a much larger meaning and can make or break an organisation.

Throughout the pandemic mental health has also taken on a new dimension. Once largely talked about in terms of individual "illness", a new narrative has taken flight. Collectively, we're talking about wellbeing, protecting, and promoting mental health, and about how we structurally address mental illness.

Workplaces are at the heart of supporting strong and resilient workforces with mental health needs being addressed.

There's been a fundamental shift in how people think about the role of work in their lives, and work's ability to enrich their life experience.

The blurring of professional and private time with remote work threatens some of the core principles of psychological safety at work. Boundaries, structure, rest, time to switch off, limiting excessive work over hours are vital for creating mentally healthy workplaces.



Predictions of a mass resignation have certainly put employers on notice, but there's always been a strong argument for making mental health a focus at work – both economically, and psychologically.

[Research](#) by PwC has found successfully investing in mentally healthy workplaces has a significant return on investment. For every dollar spent, there is on average \$2.30 in benefits gained by the organisation.

Instinct and Reason [found](#) mentally healthy workplaces are a powerful recruitment and retention tool, with 71% of Australian employees saying this was important when looking for a future job.

Importantly, having a mentally healthy workplace was second only in pay to be attracted to a new job.

Just like people, psychological contracts are complex. We must not oversimplify or over-state the benefits of remote working without looking at its relationship with people's broader experiences at work.

Digital overload is real and growing. Globally, for Teams users, weekly meetings have more than doubled with a 148 per cent increase, just in a period of 12 months.

Interestingly, Australia's increase, while still notable, was lower at 125 per cent.

While the necessity of virtual meetings may partially account for such a sharp incline, workers are increasingly reporting fatigue at spending hours per day in virtual meetings.

[Research](#) from Stanford University highlights that increased close-up eye contact and being able to see yourself constantly on the screen can be incredibly tiring. Also, in face-to-face interaction, non-verbal communication is quite natural, but over video you must work harder to communicate clearly and effectively.

Mental health is the leading cause of sickness and long-term work incapacity in the workplace. One in five Australians experience a mental health condition in any given year. Recently the Productivity Commission report into mental health found mental ill-health and suicide in Australia cost the country at least \$200 billion a year.

Why should businesses care? Because employees expect them to.

It reduces absenteeism, staff turnover and underperformance, which are a significant cost to the business bottom line.

Regardless of whether Australia will face a Great Resignation, engaged, connected, productive and psychologically safe workplaces should be the rule, rather than the exception.



**By Zena Burgess.**

Dr Zena Burgess is the CEO of the Australian Psychological Society. She is an experienced non-executive Director and Chief Executive Officer with significant experience across commercial and social enterprise organisations.

She holds a PhD in Organisational Psychology and Masters Degrees in Business Administration and Education. Zena was awarded Fellowship of the Australian Institute of Company Directors in 2013.

# Recasting Governance

## The Board of the Future

In my forty years of working with boards as chairman, director, or CEO, I have seen governance described as many things including: Fiduciary oversight (yawn), risk management and strategy development (slightly less yawning), control of staff and resources (shudder), legal compliance, and on it goes.

These views have been developed over years and have been perpetuated by the plethora of training programs, journals, academic discussions, and professional bodies that focus on specific aspects and tools in the pursuit of "good governance."

Over the past few decades, the tools of the Board have had more prominence than the role of the Board. Now is the time to recast Governance and refocus the role of our Boards so they are fit to create the future.

There are three key elements to the role of the Board of the future. These are:

- to make the choices
- that create the future
- for the communities we serve

Strategy, risk, governance, and finance are just tools to assist the board to make the choices that create the future for the communities we serve.

The implications of this simple recasting of governance are profound. Let's explore these a little.

### ...To Make the Choices

When asked what boards do, most people say they make decisions. I have asked thousands of directors and senior leaders how their board members would describe a decision. In many cases it is unconsciously seen as something that:

- is Final - it cannot be revisited as it is The Decision, even if it was made 5 years ago.
- is the Answer - and once we have the answer, we can stop looking at the range of possibilities for other alternatives.
- it must be Right - which is a problem because if something does not fit that decision it must, by definition, be wrong.

This unconscious bias towards a "decision" is fraught with danger. It often leads to slow decision making. We must get it right, so let's get even more information and give it to yet another subcommittee.

And, once the decision has been made—that is, boards have found the final and right answer—they no longer need question whether that decision is working for them. Any information they subsequently receive that could reflect on the decision will typically be constructed and filtered to show how right the answer is. Questioning around alternatives and options comes to a halt, as does critical thinking. Now, not all Boards do this, but there are way too many where this is the norm.

Choice, on the other hand, is all about identifying possible options—there are, after all, an infinite number of ways of doing any one thing. The key role of the board is to do all the required analyses—e.g., financial, risk, strategic, ethical, ESG (environmental, social, and governance), etc—and then from amongst the various options that are available, make a choice to be monitored for effectiveness over time. The board reserves the right to change direction and swiftly choose again if it becomes apparent the original choice is no longer working. This is true strategy at work.

### Practical Tips

**Insist on at least two or three strategically viable options for any board issue that needs a decision or choice. These options should be fully analysed, and the board's role is to discuss, question, test and make a choice from options, not rubber stamp.**

**Provide at least two strategic questions for the board to consider that will open discussion around the choices that could be made, and the possible implications of each.**

### ...That Create the Future

The role of the board is not to receive reports about how busy the senior executives are. The role of the board is to make the choices that create the future for the communities they serve.

Creating the future is all about being aware of what is happening in the strategic environment, focusing on the things that are likely to impact your organization, choosing what needs to be modified, created or stopped and repeating this process continuously.

The two key tools for this are the vision and purpose statement (the impact we wish to have on the communities we serve) and the strategic plan (the top 3 or 4 things the board agrees will occur in the next 2 or 3 years to achieve the vision/purpose).

## Practical Tips

**Recast the board agenda to reflect the key strategies from your strategic plan. If the board agenda is primarily operational, then the board will function from an operational perspective.**

**Invite external specialists/stakeholders to present to the Board about what they view as strategic issues in their sector and the implications this might have for your organisation. Review the implications for the strategic plan and amend plan as required.**

**Invite key staff who are responsible for an area of operations, to give a short presentation to the Board on the top 2 strategic issues their area of responsibility faces in the next 10 years and discuss the potential implications for the organisation.**

## ...For the Communities We Serve

The purpose and power of any organization is not to perpetuate itself. It is to make a difference in the communities we serve—to impact people's lives!

As such, we need to understand the full potential of what we can achieve for and with our stakeholders and be able to articulate this in our vision/purpose statement.

The communities we serve will change from time to time as demographics and our strategic foci shift. So, they need to be continually monitored for the impact our organization is having. You can do this by answering the following questions:

- Who are our stakeholders this year?
- Has this changed or is it likely to change next year?
- What do our stakeholders perceive as our impact on these communities?
- How do we engage with our stakeholders to facilitate greater change?

This focus at the board level on the communities we serve raises the whole issue of stakeholder engagement to a new level, maximizes the possibility of the board being strategic and brings culture to the forefront.

The discussions that this process engenders are fascinating and can truly lead to change in our world, which is why our organizations exist in the first place!

## Practical Tips

**Involve key stakeholders in your strategic planning and risk identification processes**

**Develop performance measures that identify the changes in your communities from your strategies and programs, typically by measuring communities' perceptions of the changes created because of your effort. This will keep the board grounded in their reason for existence.**

Board meetings need to facilitate Directors to "make the choices that create the future for the communities we serve." The practical application of this is what creates truly generative boards that deliver against the promise that they are to their communities and society.



**By Steven Bowman.**

Steven Bowman is Managing Director of Conscious Governance and brings a great depth of experience facilitating Board reviews, strategic planning, and in-house Board development.

# The Professional Privilege of Generative Governance

**N**on-profit governance is often viewed as a burden, interpreted as somewhat of a poisoned chalice, with the kudos of a board position offset by the challenges of decision-making and the weight of responsibility for the success (or otherwise) of an organisation.

Board membership can be viewed as perfunctory, often understood as simply scrutinising executive performance, ensuring legislative compliance, and engaging in strategic discussion every few years when a new plan is required.

And this is a fair perspective.

Almost all membership boards have emerged from a cooperative culture of shared endeavour, where member-led organisations relied on volunteers to roll up their sleeves and take an operational lead on delivering key outputs.

This was combined with governance responsibilities that arguably were viewed as secondary to operational priorities, and boards of directors functioned as effective executive (or management) groups rather than distinct governing bodies.

## Impact of Professionalisation of Associations

Since the turn of the century however we've witnessed a precipitous professionalisation of association management, illustrated by the ever-increasing number of Certified Association Executives practising across the globe.

Professionalisation has propelled organisations forward, enhancing value propositions, increasing member expectations, and amassing financial reserves that ensure financial strength and underpin business resilience.

As membership organisations have grown and diversified their portfolios, governance practice has failed to keep up,

and the interpretation of governance as a burden continues to permeate the membership sector, exemplified by dwindling volunteer numbers, patterns of poor behaviour, disengaged electorates, frequent misapprehensions about roles and responsibilities, and common misconceptions about the purpose and potential of non-profit governance.

## Volunteer Leaders must Professionalise

As we approach the quarter mark of the 21st Century, membership bodies must embrace governance as leadership and invest in the professionalisation of volunteer leaders; but it is that word, "volunteer", which is the root cause of so many headaches, with boards and executives alike assuming not to impose upon the goodwill of volunteers by obliging them to adopt professional practise.

"They give us their time for free" and "they're very busy with their day jobs" are complete misnomers. We should of course acknowledge the altruism of our volunteer leaders, without whom the membership environment would be distinctly lacking but it is erroneous to suggest that because they volunteer, we should not expect them to be professional in how they govern.

The Board of Directors is after all the only group within an organisation which is legally accountable for that organisation's actions and performance and thus, if for no other reason, should represent the pinnacle of professionalism.

## Volunteer Leader Professionalism is more than just maintaining oversight.

But professionalism within the boardroom demands so much more than maintaining financial oversight and ensuring compliance.

People often ask how membership governance differs from other forms of governance, and in truth it is the opportunity to utilise volunteers' skills and expertise for the long-term benefit of the organisation that is the key differential.

Everyone must be compliant – profit, non-profit, charity, third sector. Everyone must be solvent. Everyone must fulfil their regulatory and fiduciary roles. But not every board can influence in the way that membership boards can. It is against the extraordinary backdrop of an unprecedented and extensive list of macro and nano trends that association boards must respond with professional competence.

*COVID-19 | global recession | climate change | ageing populations | multi-generational workforces populist narratives | digital disruption | social media | remote working | Black Lives Matter | mental health | artificial intelligence | gender inequality | big data | Smart Cities | social values | the Zoom boom | geopolitics | 5G | the meta-organization | surplus office space | the gig economy | ethical leadership | machine learning | competitive advantage | LGBTQ+ | 4-day weeks | immigration | DEI | COP26 | income inequality | cultural innovation | the attention economy | futures literacy*

Associations are working harder than ever to define their value proposition within complicated socio-economic environments, and their need to advocate, influence and respond to circumstances has never been more urgent and necessary.

In these uncertain times all association leaders, irrespective of their memberships' context, are striving to operate at peak efficiency and effectiveness, and to support their members in increasingly fragile socio-economic and political environments.

Indeed, perhaps for the first time in generations, associations must be wholly pragmatic in ensuring they add durable value to their members' professions, industries, and communities.

Within this remarkable multitude of contexts, association boards, their chief executives and c-suite teams face increasing expectations from across a widening spectrum of interested parties, ranging from members, volunteers, and staff, to sponsors, policymakers, and industry.

It is thus increasingly important that professional association management be underpinned by an articulation of professional association governance, albeit delivered through an energized and committed volunteer workforce.

The interests of an association are not best served by directors discussing operational minutiae. Protecting and advancing the interests of an association requires vision, ambition, courage, confidence and, crucially, relevance.

Our boards of directors are untapped resources which should be trained, equipped with professional knowledge and expertise, and used relentlessly to advance the interests and value of the association.

If your association isn't compliant or is borderline insolvent then yes, you've got much bigger problems to worry about than investing in innovation; but if you're focussed on growth, enhancing financial strength, and ensuring business resilience, then your board should be centre stage in terms of strategic planning and generative thought.

It is an exciting time to lead an association and governance represents one of the most exciting components of association leadership. Engaging in creative discussion, adding specialist insights, contributing professional expertise, and supporting the long-term sustainability of the organisation is not a burden. It is a professional privilege. One that members should be clambering to enjoy.

The board must of course exercise accountability and must be responsible to their organisation's stakeholders, members and/or shareholders; but the board environment should always be a creative space that promotes positive attitudes and a culture where everything works towards fulfilling the organisation's vision, mission, and value.

Simultaneously the board must exercise prudent control and be entrepreneurial, which admittedly can be a challenge but also presents a very exciting opportunity.



**By Andrew Chamberlain.**

*A former association Chief Executive, Andrew works internationally to provide specialist support on non-profit leadership, governance, and strategy.*



## Governance: A word in search of meaning

# Tackling the Beast that is Modern Governance

**G**overnance. Universally, there is agreement that governance is an essential element of a well-run organisation, however, despite this, there is not a generally accepted and agreed definition of Governance.

Most definitions focus on the more structural and formal elements highlighting compliance. The danger of governance becoming too prescriptive with risks and compliance is that the focus is biased towards an avoidance of worst-case scenarios rather than accommodating aspirational best-case scenarios.

### Drowning in Laws and Regulations

The "go to" fix for anything governance is ever more laws and regulations. UK studies of GDPR (General Data Protection Regulation) implementation showed organisation fatigue. To meet obligations, window dressing becomes a tempting solution.

So often, what appears to be missing is the behavioural reality – how these formal constructs are lived day-to-day. The behavioural manifestation is the more critical aspect of governance, the state that allows an organisation to operate at its absolute peak and the state that has historically proven most elusive for boards and senior executives to understand and regularly track.

### From Linear to Systems Thinking

One concept that is essential when mapping an effective governance approach is systems thinking. At its core, systems thinking ensures that the organisation is treated as a whole, rather than a sum of siloed and individual parts. It's an acknowledgement of the dynamic, interconnected and continuously evolving nature of an organisation and the environment that it sits within.

Of course, many of us consider our governance responsibilities within a linear dimension. And in a lot of ways, life would be easier if we could focus on one element at a time independently of other things, but it's unrealistic and ineffective. Linear thinking supports a more simplistic view of a bygone world.

### Toffler's Future Shock

American futurist Alvin Toffler wrote a novel in the 70's elaborating on the theme of "future shock" summarised as "too much change in too short a period of time". The synergy of this concept with the challenge of current day leadership can't be overlooked.

Without contemporary understanding of the nature and breadth of organisational and societal forces, leaders are becoming disconnected and disorientated. Too many are operating within a fuzzy world.

It has become clearer over the past 2 years that our world, and the environment that most organisations operate within, is far more dynamic and paradoxically interconnected than ever before.

Each organisation is subject to forces that historically were more easily identified and prepared for, whereas increasingly now, there are far more unknown forces at play. The critical concern is that the unknown forces tend to emerge so quickly that leaders are left with insufficient time to spot the warning signs and minimise the impact.

## The challenge for leaders

Many who consider that their role involves governance feel that they are ill-equipped to handle the continually evolving and complex construct of governance.

Today's governance practice needs to allow the organisation a level of flexibility and nimbleness that rigid structures do not. In a sense, a unified organisation strategy seeks to act as an anchor point and north star to align organisation actions to a common purpose, ensuring everyone is moving in the same direction.

## An absence of 'How'

In speaking with experienced governance practitioners, the most critical missing element in today's governance is an understanding of the "how". How does an organisation design, implement and measure their own meaningful governance solution?

After all, there needs to be a way to regularly measure and optimise governance or else it becomes a 'set and forget' construct which flies in the face of an organisation operating profitably and sustainably in our dynamic world.

## A solution exists

The how is what we've spent the last 30 years researching, theorising, and testing in market. We've developed a governance framework that offers a powerful lens into the interconnected nature of an organisation's operations. By developing a holistic governance construct it enables organisations to measure current practices, including identifying present strengths and emergent opportunities, thereby positively advancing their social licence.

This empowers organisations to operate at their peak both from a performance and impact perspective, for all stakeholders and society at large. What captivated us the most from the outset was it didn't matter how different two organisations were regarding structure and purpose, the elements that made an organisation sustainably high performing were consistent.

The "how" of governance and its essential pathway to ensuring it achieves the organisation's meaningful and positive contribution to its stakeholders can be mapped, benchmarked, and monitored.



**By Damien J Smith.**

Founder of Enterprise Care, a business focused on working with boards, leaders, and advisors in their use of whole of organisation governance. Damien's portfolio includes Board Chair and Board Committee roles, Deakin University MBA course presenter, author, and speaker.

# The Great Governance Hoax

**F**rom a not-so-distant past, the idea of 'culture' was typically spoken around those with deep family ancestries or the travellers wanting to explore new terrain. Far from corporate minds and even further from a boardroom. As times have shifted, so too has the idea of 'culture' and where it is seen today.

In the USA, one 2019 report states that 14 major companies with governance deficiencies (including culture) lost \$490 billion in shareholder value. With 94% of Australians believing a company's culture is important, the workplace and social impacts are just as high.

Some executives see corporate governance, and the more recent addition of culture, as a hygiene matter or a necessary evil. However, a more comprehensive view of governance and its place in the corporate narrative has started to emerge as boards start to create and cultivate culture as a core part of the board's role within their organisations. Boards are making moves to align their decision making in the context of the how, the why and perhaps more importantly "should we" to model and live 'good culture'.

Now, not to discredit the culture connoisseurs among us, when we really investigate this culture conversation, could it be that we have been subjected to one of the greatest cons to have occurred in the discipline of corporate governance?

## It's a culture con, not a culture-con

If we look back at governance writings and articles from 8-10 years ago, you'll find that culture barely made a mention. It was seen as the topical add-on and a 'nice' thing to have. Now, the word in its arguably simplistic nature, is in everything and everywhere. Culture is now the go-to concept into which we categorically fit our organisation's underlying problems. But in a genuine deep dive into culture, many do not spend enough time to notice where the real treasure is buried.

When asked about culture, people are generally poor at both defining and explaining it, let alone reflecting on their own culture and how it should be measured or monitored. This commonly comes about from having not enough insight into the organisation's operational environment, given that this is the traditional domain of Management, nor the indicators of culture in that organisation.

Accountability, honesty, integrity, power, influence; all familiar terms with previous associations and interpretations, we hope. This list is some, but not all, of the fruit bearing trees that can help guide and help decision-makers in the boardroom, rather than the catch-all of culture.

And how can a board instil or encourage deep cultural changes to drive behavioural uplifts and reduce the high risk of defaulting back to the status quo? To do directorship right, whether for-profit or not-for-profit, it requires a degree of determination, diligence, and directness. Board's need to be brutally honest with themselves around the effectiveness of their performance and the need for development when required. It is here where the opportunity arises to spend the time and reflect on the culture and how the board lives and models the organisation's values. Perhaps that is where real transformation can occur.

In the context of an organisation, it is more ideal to consider the practical guiding principles of governance than it is to look solely at overarching and packaged up culture standards that may be up for sale. The former is far more apparent, assessable, and actionable than the latter. As such, all governance arrangements should be structured to support and enhance the capacity of the board and not merely to follow governance fads and fashions.

## Gambling on principles is a waste of fortunes

The impacts of a contaminated board can have tremendously deteriorating effects. If we take the example of the 2021 inquiry report into the Crown Casino, we can extrapolate a few lessons that ought to be worth taking the gamble on to consider.

From an overwhelmingly controlling shareholder, to money laundering and criminal network ties, to dysfunctional management procedures, was there no thought or weight given to the driving forces of how this played out in the boardroom? With interests lying in popularity and loyalty, the board failed to keep the organisation legally compliant and allowed bad behaviours to flourish in all facets of the entity.

It truly highlights the lack of actionable and accountable measures in place, and the negative reach the abuse of power and influence can have throughout a company.

From our experience at Board Matters, there remains a troublesome discourse amongst boards that believe a policy driven organisation will somehow bring about people who will be able to create a culture that drives out any bad behaviours, and reactively, encourages good behaviours. No amount of restructuring and policy driving alone can truly save a sinking ship, as the Crown discovered far too late. (More detail on this idea can be found in my book, 'The Role of the Company Secretary: Influence, impact and integrity'.)

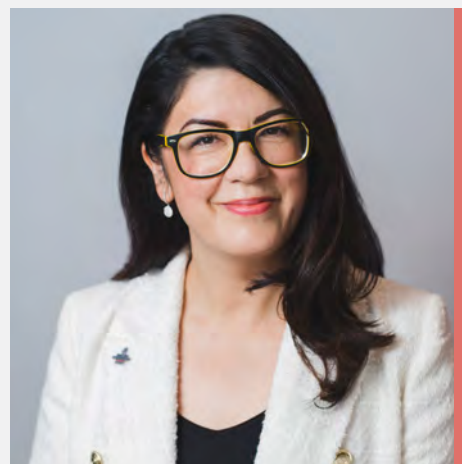
## One-size never fits, not even most

To facilitate a driving force behind an organisation and encourage positive and constructive behaviours, we urge boards to rethink away from the idealistic notion that is attached to culture, and instead go to the backbone and ask, 'what is good governance?'

We encourage boards to engage in future proofing dialogues and be front facing to the necessary reflections their organisations may need to accept and change. As we as people have different brains, so too does every organisation and its board, thus the need to tailor the thinking around your specific parameters is the only way to do it.

To subscribe and accept that a one-size-fits-all method of introducing 'good culture' to your board is worthwhile, is to play right into the greatest hoax of modern governance.

To reap the impact a board can deliver requires a level of curiosity, courage, and commitment to capitalising on how far the board's leadership brushstrokes reflect into the organisational canvas.



**By Jennifer Robertson.**

As a portfolio career advocate, Jennifer Robertson is a practising lawyer, company director, and managing director of Board Matters, a governance consultancy firm. With over 15 years of governance experience, she consults with many corporate clients and facilitates the Company Director Course for the Australian Institute of Company Directors.

# Build Your Board Impact

**D**irectors join boards for a reason. Most directors care deeply about the work of your organisation and really want to contribute to its success. So how can you provide an environment where that happens?

## Understand the mechanics of impact

Impact is generated by momentum. A stationary flywheel will generate no power. A board that is not making progress will not deliver, it will only consume. To help your board move forward, consider the momentum that you can generate in each of these four key areas:

### 1. Influence and respect within the board

A single director who cares is pretty useless. It takes a whole board to make the decisions that will bring about change. Every director needs to be able to influence his or her colleagues effectively, ethically, and expertly. Few directors arrive in your boardroom with the knowledge to do this. If you want positive impact, you need to give your directors the skill to go beyond superficial board practices and get deeply involved in building the association of the future.

Directors must build strong relationships with each other, with the senior executive team, and with the board itself. Put effort into developing this and you will have the foundations of a team that adds value, learns on the job, and doesn't fight itself when things get tough.

### 2. Effective oversight to give insights

A board can be a terrible burden if the directors perform their oversight duty without giving back in the form of insights. Every director should understand the key performance indicators and why these indicators have been chosen over others. Again, for positive impact, you need to ensure that directors understand the business of the association.

A good director should be well enough informed that when they ask a question it is usually not to better understand, but to encourage the rest of the board and the senior management team to reflect and better understand. Put effort into developing the boards understanding so that they can give back by extending the bounds of what is possible.

### 3. Focus on the future

Ask any director why they joined, and they will usually tell you something about an envisioned future that inspires them. Ask them how they feel about the way your association engages the board in developing strategy and they will usually tell you that they feel they could do more - a lot more.

Design a strategy process that touches the board several times a year, to seek input into trends, ideas from their experience, suggestions about possible performance issues, reviews, and learnings from implementation, etc. Make strategy something that everyone can contribute to, and you will get a strategy that is robust, resilient in the face of change, and that is actively supported and enhanced by the board.



#### 4. Build stakeholder relationships

Directors – technically – are responsible for stakeholder relationships, just as they are responsible for ensuring that you have adequate solvency or appropriate systems and controls. Too many boards are allowed to abdicate this responsibility, placing it instead on an already well burdened management team or, increasingly, on a range of external consultants and contractors.

Craft a stakeholder map that allows the board to consider the strategic relationships and to support their development. A sound policy, supported by director education, will prevent overreach into management operations. Use the board to extend your grasp and firm up relationships.

#### Understand the desire for impact

These four steps are an iterative cycle, improvements in one will lead to increased capacity for improvements in the others.

Directors will naturally progress as you become more experienced in building momentum.

At some point, as you continually refresh the skills of your board, they will leave.

A good chair will have many conversations with each director over the course of their tenure. If you can use these conversations to get really clear early in the first term of appointment about the impact the director wants to have, and the perceptions of the value that the director has contributed to this board and how they will be measured, then you can have a conversation about where the director wants to go next, what development opportunities will help, whom they could meet through the connections made on this board, and what might be said about them when a recruiter does a reference check for their next board.

Succession planning is about getting the skills your board needs when they need them and replacing them when they are no longer required.

Impact planning is about working together so every director can be the change he or she wishes to see in this world. And that is something we can all aspire to.



**By Julie Garland Mclellan.**

Julie is a professional company director and corporate governance consultant. She is the author of the "Director's Dilemma" newsletter, and six books on governance. Julie undertakes board and director appraisals and practical in-boardroom education using real-life scenarios.

Her guidance behind the scenes has helped many boards, CEOs, and chairmen to turn difficult situations into successful outcomes.

# The Membership Economy

## and what it means for the World of Associations

**T**he membership economy is booming with more and more businesses enjoying the benefits of more predictable cash flow and opportunity to build strong, ongoing relationships with their customers. From giants like Netflix, Tesla and Uber to small business owners delivering sets of socks or ongoing fitness programs, it's hard to find a consumer credit card that wouldn't have a few recurring membership transactions.

On top of that, the pandemic has dramatically changed the world of online learning and communities. More businesses and individual consultants and trainers than ever before are embracing the capabilities and endless opportunities the digital world has to offer. Over the past year alone we've seen hundreds (maybe thousands) of new online learning programs, courses, memberships, and even successful mini-MBA programs delivered online.

While many association leaders don't take these trends as seriously as they should, traditional membership models are losing to the disruptors of the membership economy.

### How does the membership economy affect associations?

Businesses operating the membership model are not only tapping into the association market, interacting with their existing and potential members, and using up individual resources such as time and money, but also shifting consumer expectations.

In most cases, new online courses and memberships are set up on cutting-edge, user-friendly software and offer exceptional digital user experiences.

Competing membership economy players are not trapped in cumbersome networks of old-school association management software, allowing people to register for events and signing up for memberships with one tap on their mobile phone.

This recent trend is just another reminder for association leaders to review their member digital journey and think about how they can innovate to provide an excellent member experience.

### Traditional association tech ecosystem

When it comes to choosing software for the association technological ecosystem, traditionally associations tend to look for an all-in-one customised Association Management Software (AMS) to try to solve all their needs with one piece of software.

This can include membership and event management, website content management, newsletter blasts, financial management, Continuous Professional Development Programs, online communities and so much more.

This may have seemed like the path of least resistance at the start, but now it makes the whole organisation inflexible to rapid digital changes. In many cases, an all-in-one solution can end up being extremely costly, inflexible, and not agile enough to keep up with technological advancements and member expectations of their digital experience.

In recent years, we've been observing rapid technological changes, with hundreds of specialised cloud-based software providers, known as SaaS (Software as a Service), appearing on the market.

Focusing on a narrow business area (for example, sending emails, managing finances or online communities) allows software providers to excel in their core functionality and deliver the best digital experience for customers.

These providers also understand that providing ad hoc pieces of software that don't "talk" to each other is not beneficial for businesses, so providers form partnerships that enable smooth integrations, allowing organisations to create an efficient tech ecosystem. Additionally, existing

software integration tools make it easier to synchronise separate pieces of software.

## Understanding the importance of digital transformation

Why is digital transformation so important for associations? And what is being done to ensure digital transformation is a major priority? These are the questions associations will need to answer if they hope to stabilise, let alone continue to grow.

As is the case in the corporate world, a contemporary association must be built on data-driven decisions rather than accepted practices – in other words, it's time to move past the outdated notion that "it's worked like this for decades". The reality is it won't work like this in the future, so the sooner an association adapts to modern tools and technologies, the better.

The benefits of digital transformation are real. First and foremost, it creates a highly personalised member experience, which is precisely what modern consumers have become accustomed to and will expect any association to provide. Furthermore, an association and its people must be digital savvy to attract the younger members who will keep it alive, relevant and critical to its industry moving forward.

Another common myth is that digital transformation requires significant investment. Not in 2022. With so many affordable software solutions to choose from, even micro businesses can afford to build a comprehensive digital ecosystem to deliver an excellent experience to their customers.

The future of associations is being brave enough to embrace current digital technology and experiment with the different MarTech solutions now available on the market.



**By Olena Lima.**

Olena is the Founder and Principal Consultant of MemberBoat, a digital marketing agency dedicated to helping professional associations and other membership organisations embrace emerging digital marketing tools and simplify their journey to digital transformation

# The Road Ahead is Paved with Data: Why Data is the Future of Associations

**W**hen exploring how associations are evolving, it is imperative to acknowledge the role of digital technologies in how the sector has shifted. While digital is often framed as a disruptive force, it can also be a source of great value addition. And just as the last generation has heralded great change in the activities and value of Associations, the road ahead will also be characterised by significant digital change.

It's going to be bumpy. But from a membership perspective, it is paved with data gold.

## The way it was

Before we get into the reasons for this data-driven future, it's worth exploring the recent past of digital and its impact on associations.

In the pre-digital age, associations were often the only way that professionals could meet, learn about best practice, and do business with one another. In the digital age, connections between people, companies and organisations are easier to establish. And since the pandemic, we have become so used to meeting online that even the most digitally resistant workers are familiar with virtual conferencing platforms, websites, email, and some social media.

So, two key changes in consumer behaviour have happened over the last 30 years:

1. The rise of digital networks to connect people with similar interests; and
2. The forced development of skills in the use of digital engagement platforms.

From an associations perspective, the result of these changes in behaviour are:

- Reduction of the value of association data in the membership list (because these lists can be extracted from tools like LinkedIn); and
- Depreciation of the value of association-provided digital training programs (because Covid-19 has forced use of virtual conferencing).

It could be argued that over the past generation, digital has disrupted a substantial proportion of the value that associations were previously able to provide for their membership.

But paradoxically, it is digital that provides the greatest potential for membership value creation in the generation ahead.

## Data as a membership benefit

We are now living in a time where data is the basis of competitive advantage and strategic decision making. And access to accurate, up-to-date data is key to making the right decisions about how to respond to change. You only need to look at how Covid-19 data around caseloads and vaccinations to see how essential it has been for decision making around social distancing and border restrictions.

Increasingly, organisations will need to use data to support decision-making, to advocate for funding, and to remain competitive. And associations are likely to become warehouses for business intelligence data relevant for their sectors.

It is likely that business intelligence data will manifest in one of two main categories:

1. **Association benchmarking and reporting:** data collected from the membership and represented back to the membership, indicating trends and best practice; and
2. **Sector mapping:** data collected from third party sources and designed to assist decision making. This may include market research, economic data, health data and so on, usually presented visually, or using geographic information systems (mapping) tools.

While both data collection activities involve a cost to associations, either in data collection or subscriptions to data services, membership fees will increasingly be channelled to these data activities. And members will seek this value, because it would not be economically viable for them to access that business intelligence without the economies of scale provided by associations. The gold in the data comes from the gold of membership.

## Data's next stop: AI

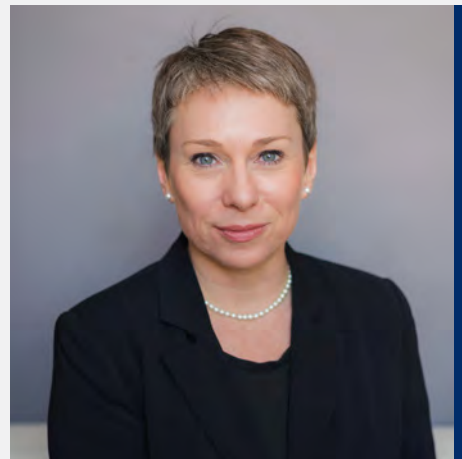
Then there is gold in the opportunity of feeding collected data and/or association processes and activities into artificial intelligence (AI) systems to help with delivering better services. As AI tools improve in both usability and personalisation, associations stand to benefit their use in improving operations and developing member capability.

Potential AI applications include:

- Chatbots on membership sites to answer member questions or solve simple member problems (eg: Hyro, Landbot, Xenioo)
- Customer engagement tools designed around member/customer retention (eg: NimbleAMS, Silverbear, MoEngage)
- Market predictions for industry sectors (eg: Google AI Platform, Tensorflow, Microsoft Azure, Watson Studio)
- Relationship mapping to drive deeper connections between members (eg: aidentified.com, ConnectTheDots - ctd.ai, Salesforce Einstein Relationship Insights).

Not only will data help drive better suggestions in AI tools, but it will generate value for both associations and their members in improving engagement, retention and understanding of the environment in which members are operating.

So, while there is still a deal of change and learning ahead, the value that digital once deprived from the purse of membership associations has suddenly been reinstated with a vengeance. The value of associations will once again be vested in their data. And the knowledge, understanding and opportunities that can emerge from that data are all pure gold.



**By Joanne Jacobs.**

Joanne is digital strategist and Co-CEO of innovation consultancy, Disruptors Co. She mentors start-ups, provides expert commentary and has worked extensively in academia.



## Your Digital Rights:

# Why it's time to care

**A**s 2022 approaches and the digital transformation of our world enters another decade of exponential growth the time has come for us, as individuals, to care about our rights online.

With the ever-changing digital landscape, and the unprecedented affect the online sphere has had on our real lives in recent years, digital rights are increasingly becoming an issue we need to talk about.

In Australia we have some of the highest uptake rates of new technologies but also a legislative process which is increasingly in favour of both the politicians and corporate interests, not individuals.

### But first, what are Digital Rights and why do we need them?

Digital rights are analogous to the other rights we enjoy as free citizens, i.e.: human rights, labour and employee rights, your rights to privacy and your rights to vote and purchase land. We need a similar set of rights to protect us as individuals in the digital world too.

These can be as simple as the right to delete your account and all your user data once you are done with a service. It can also be as far reaching as protecting your private data from being collected and sold without your consent, or your right to query online transactions.

Digital Rights generally covers the topics of:

- Privacy and Security
- Personal Information and Data Rights
- Access to Technology
- Journalism and News publishing.

The speed of which the digital transformation overtook our world was unprecedented and legislators have failed to keep pace with the changing environment. We need our rights established in the courts relating to these issues as without them, new services and laws can be enacted which slowly erode our understanding of what we are entitled to as individuals and open the door for future incursions on our rights.

The short-term effect may be small however we have already seen in the last 10 years the rise of data tracking and surveillance and without adequate protections for our citizens this may continue unabated in new ways we are unprepared for.

### Ok, so why now?

Already in 2021, we have seen new laws passed to combat online hate speech. As it stands in Australia today, if you post a defamatory remark in a public comment, on ANY public page, you can personally be sued for that comment but also the owner of the public page where you posted it can all be sued for defamation.

At the same time, there is no law ensuring platforms provide the features to allow public page owners to protect themselves. In this instance the ability to turn off public comments should be a right to those individuals who own public pages if they are to be liable for any comments posted there.

Now, I'm not here to dissect this law, in some instances it will help online bullying, and in others it will hurt small businesses and individuals.

Regardless, the point remains that we used to have the right to post whatever we like in public comments without fear of a defamation suit and now we cannot. This is a change that has a wide-ranging impact but is little understood by many.

Personally, as the CTO of a Start-up (Trybz) with a growing user base, I have made it my mission to build technology with a view that digital rights belong to the organisation and individual, not the platform.

We have always had our users' rights at the forefront of our development and the rights of our clients. We have implemented the recommendations of the Australian Privacy Principles and the upcoming Online Safety Act (Jan 2022) to name a few.

How many services do you use that you know have the same outlook on your rights? Or worse, how many want to chip away at those rights in the interest of profit?

A robust legislation protecting the rights of Australian Online Consumers is the only way you can be sure.

Digital rights and what they should be (and what they currently are) is a topic that requires a rigorous public discussion, and more personal attention from all individuals who are increasingly living a portion of their lives online. If we as individuals and members of a society do not define these rights and responsibilities for ourselves, we are being shown that under-informed legislators and business lobbies will shape this space for us.

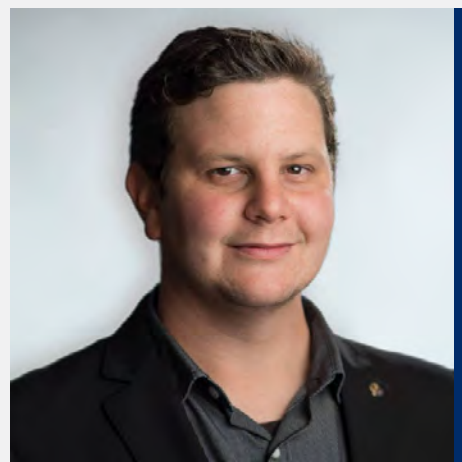
In 2022 and beyond we will see more new legislation and we will see more tech giants setting their own rules for us as users to follow, without any under pinning rights to govern what the terms force us to agree to.

## Where to from here?

Associations, with their large membership base and existing voice with government, are ideally positioned to elevate the conversation.

If you are interested in collaborating with others to advance this issue, please contact me to speak further.

If not us, then who?



**By Stephen Los.**

Stephen is the Chief Technology Officer at Trybz. Known for his enthusiastic prowess in all things design and development, Stephen leads the Trybz team with a background in designing high-engaging online platforms.

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# Will an uptick in virtual technology see remote communities change the way they do business?

**F**or way too long, Australia's remote communities have suffered the tyranny of distance. Associations and other not-for-profit groups operating outside the coastal strip, where 80% of Australia's population occurs have less access to resources, skills, political processes, and opportunities for engagement. Small population numbers and the huge cost of travel from the Outback to coastal cities means that these organisations simply do not have the same opportunities as their city counterparts.

But the fast uptake of virtual technology because of COVID-19 - both inside and outside of these towns - could change all of that. And the timing couldn't be more perfect.

Until COVID hit, the uptake of virtual technology in these remote parts of Australia was sub-optimal and not due to any lack of willingness from the communities in question. Slow internet speeds (and sometimes no internet access at all), patchy phone reception and lack of training all had an impact. So too the willingness of city counterparts to allow full virtual participation by those who are geographically remote.

The opportunities presented by adopting new virtual technologies right now are significant.

## Recruiting volunteers and committee members

I've been delivering training for grassroots not-for-profit groups in these remote parts of Australia for decades and one thing always strikes me as unique to the Outback. When you ask people to introduce themselves and the groups they represent, the lists are very long. There are so few people in these towns that people who do volunteer - in all manner of roles - tend to do so for many groups.

Access to technology that allows people to participate as volunteers or committee members remotely should mean that associations and other not-for-profit groups in remote Australia can access a new cohort of volunteers - both from neighbouring communities that are also remote as well as from coastal cities with much larger populations.

Video conferencing, instant messaging, cloud-based file-sharing, collaborative work tools such as GoogleSheets, work-flow management software and the ability to sign documents electronically are transforming how these groups engage new volunteers and board members.

## Accessing training and mentoring opportunities

The cost and time associated with travel in Australia is a huge barrier to the equitable participation of people located in the Outback. A course or training opportunity in the nearest capital city might already have a hefty price-tag attached to it. But once you add the cost of travel, accommodation, and time away from home, the true cost is often completely prohibitive.

As training providers twig to the opportunity to engage remote associations and community groups via hybrid opportunities, they'll see an increase in participation. This benefits ALL participants. I'm not taking straight virtual delivery here - we've been attending webinars for decades. Instead, I'm talking about a mix of face-to-face and virtual delivery where people still can interact with each other through proper facilitation. Those who can travel, do. Those who cannot still get an exceptional virtual experience feeding off the in-person interactions happening many miles away.

## What does this mean for association workers?

- Associations everywhere can benefit from this uptake of virtual tools but only if they're consciously and pro-actively thinking outside of the square when it comes to engagement.
- Remote organisations should ensure they have policies and procedures that mean they're constantly experimenting with and implementing solutions which capitalise on new technology and an increased willingness of others to use virtual communication and organisation tools.
- Ensure your teams are pro-actively seeking opportunities outside of the town in which you're based. Virtual participation means we're no longer bound by driving distance or tight travel budgets.
- There are tonnes of grants around to assist small businesses (which in Australia always includes not-for-profit businesses) to adapt to a 'new way of doing business' in the post-COVID world. But you don't know what you don't know. If you're going down this path, make sure you get external advice about what options are available to you, or include costs for consultants in your project plans
- Consider new technology and virtual tools in the context of your mission and vision. These tools should help you do a better job of achieving your mission. That means you need to be clear about what you're using new technology for. Choose technology and tools that make life easier. Invest in training staff and volunteers so that they're confident making the transition.
- Learn, review, and adapt as you go. Digital tools usually mean we can do a better job of analysing data. We no longer need to guess if our people are using technology or how, or what impact it's happening. These technologies come with built-in analytics. If something doesn't work for you, try another option.



**By Samantha Morris.**

Samantha runs Wombat Creative where she helps rural and remote communities achieve sustainability goals. She works across conservation and land management sectors as well as the arts and regional development

# Data-led Projects for Memorable Client Experience

## #no.more.desktop.research.

That is the hashtag that the General Manager of Design at a major financial institution posted in social media when he received a report from NotionAi on the future of rewards in the payments industry.

Indeed, it was a different kind of "report": one that instantly synthesised relevant global articles on the topic, identified themes and competitor practices from around the world into a live, dynamic report that is always on.

Large businesses are increasingly acknowledging the role of analytics and artificial intelligence for knowledge discovery. Indeed, the role of this is well understood for structured (including numerical) data.

However, the role of analytics in unstructured (text) data is less understood in spite of the fact that "80-90% of the world's data is unstructured".

This represents a fundamental shift in the future of project research, whether it is for formulating strategy, identifying best practices for new product development, understanding key business topics like climate change, understanding market and consumer trends, or saving time and increasing the success rate through better informed client pitches.

In establishing NotionAi, our analysis showed that typically topic research takes between 6 weeks to 3 months. However, many organisations are unable to evolve from this state due to inertia, hierarchical structures that assign research responsibilities to junior staff, or a sheer lack of awareness of the new capabilities in big data, artificial intelligence and analytics that are increasingly available as cloud solutions to deploy.

## The drivers of the shift are threefold:

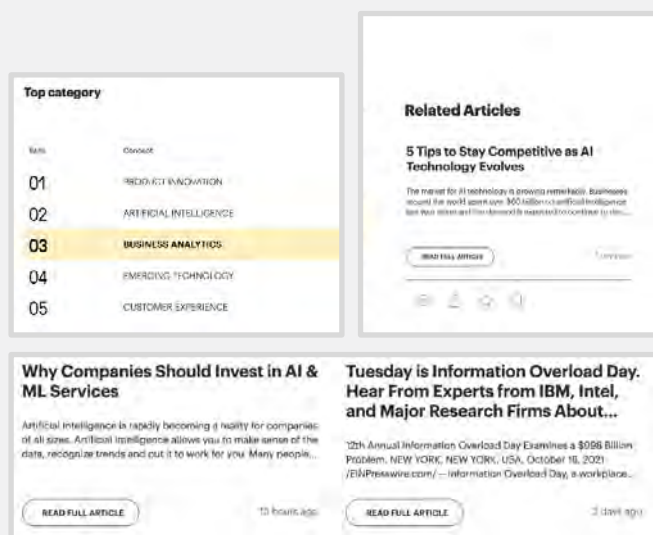
1. The speed of change in the business environment: we are witnessing the highest level of uncertainty and volatility in the business environment, further exacerbated by the Covid-19 pandemic. As a result of it or caused by it, we are experiencing information overload, fake news and targeted ads that develop and reinforce bias.
2. The need for up-to-date information by our clients and stakeholders. Our clients are facing disruption from online players, oftentimes arising in countries afar but capable of taking business away locally.
3. The evolving role of humans in the lightning speed analytics environment. Generating insight and decision-making is still a uniquely human responsibility. However, we need to increasingly acknowledge that machines are far more equipped at gathering information than we are. Data gathering should not take longer than the time taken to generate insights for decision-making.

Therefore, how soon an industry or sector has to embrace the future of project research is a function of:

$$\text{Speed of Change} \times \text{Need for Information} \times \text{Human Augmentation} = \text{Future of (Big Data) Project Research}$$

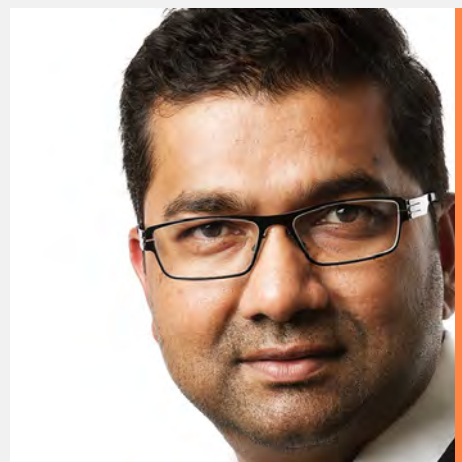
A decade ago, a content search on this equation would have resulted in recommendations around the need for desktop research, surveys and focus groups. However, a query in the NotionAi platform using the keywords of "information overload, insight and decision-making", representing each of the elements of the equation, surfaced the prevalence of analytics and AI in product innovation and customer experience applications:





"While this is a good start, if you need your small or medium sized business to use the same sort of data and analytics that big corporations employ, you must develop your own internal data-driven organization strategy."

Associations can help in the evolution to data-led research and insights for their members and member businesses by adopting and enabling the adoption of SaaS tools for instant analysis of the world's content to discover personalised insights. After all, it is a competitive advantage for members and, consequently, associations.



**By Vinesh Prasad.**

Vinesh is the Founder and Chief Executive Officer of NotionAi. With his international experience in leading strategy for large multinationals, Vinesh believes in the idea of empowering knowledge work through designed AI solutions that enable strategy and decision making.

# Survey says: Your Survey Probably Stinks

**H**ow was our service?... Your opinion matters... Tell us your thoughts... these are just a few of the trite subject lines we're all used to seeing in our inbox from the myriad of marketers and businesses seeking our valuable input. Associations included.

It feels as though every organisation thinks they are the only ones sending these invites out. And the worst offenders are those that:

- Want 20 minutes of your time (sure I've got nothing better to do!)
- Offer nothing in return (not even a chance to win or the survey results)
- Are poorly targeted (not relevant to me)

Survey fatigue is real. Very real. Free survey software like Survey Monkey has turned everyone into a clipboard-wielding survey researcher – except instead of approaching you at the shopping centre, they bombard your inbox anytime you make a customer service call or a purchase.

Association research is one of my agency's specialised areas – and despite best efforts, it's becoming harder every year to get people to take online surveys – with response rates and sample sizes on the decline.

It's with a heavy dose of irony I'd like to share the results of a survey to make my point: The 2021 Membership Marketing Report from Marketing General surveyed over 700 association professionals and found that 88% of associations had surveyed their members in the past year – up from 74% the year before.

Conversely, only 34% conducted discussion-based, one-on-one qualitative interviews (online, in-person, on the phone), down from 49% the year before.

It seems associations are addicted to surveys – but it's the members who've overdosed on them. Just as having a powerful camera in my iPhone doesn't make me a professional photographer, having free access to SurveyMonkey doesn't make everyone a great survey designer, either.

Despite the downward trend, the need for qualitative research is stronger than ever if associations truly want to become customer-centric – see the rise of the Chief Empathy Officer.

For all the talk of 'disruption' in the past 20 years, Covid-19 has been the biggest disruptor of all. The lives of association members are more in flux than ever. Thus, we're finding people appreciate the chance to talk about their experiences, they have more time to talk (working from home, they don't have to fake a dentist appointment in the middle of the day to sneak out for a focus group), and they appreciate the extra cash more than ever.

Generally, a dozen or two qualitative one-on-one interviews, ranging from 30-90 minutes, is all you need to get a rich understanding of what's happening in your association members' lives. And Zoom chats have eliminated the need to travel – allowing us to speak with a wider array of members.

However, if you can't curb your addiction to survey tick-boxes, here are four ways to reinvigorate your approach to association insights:

## Limit your survey to 20 questions.

This will force you to edit yourself and only ask what's most important. 20 questions equates to a five-minute survey – it's reasonable to assume a person can complete 4 questions per minute – with some being quick and easy (i.e.: your age, state, gender) and others requiring more cognitive effort.

Use surveys as a bridge to qualitative interviews.

What's working well for our clients is using surveys to ask a few (3-5) open-ended questions, and then ask who is open to follow-up qualitative interviews. Usually around 60% of participants say they'd like to be invited to a discussion... and yes, we pay them for their valuable time.

## Setup a research panel.

Invite members to be a part of an ongoing 'sounding board' that helps shape the organisation. That way, you only send surveys to those who are interested. This can lead to a skewed sample of your more most engaged members – but for many topics this will be fine (however, not for member satisfaction studies).

## Get creative in your questions.

Asking traditional questions will yield the same insights your competitors can access. Switch it up for a change. A favourite of ours is the visual metaphor exercise where we show people 6-8 images and ask participants to answer a question by picking an image and then explaining why they picked that image. This can unearth implicit attitudes and emotions that aren't so obvious and rational.

As an example, we showed survey participants 6 famous buildings – ranging from the Leaning Tower of Pisa to the Marina Bay Sands in Singapore – and asked which best represents their tech stack and why. Not only did participants find the survey more engaging to take, but the most selected image also (Spain's Sagrada Familia) told a memorable story about the never-ending tech stack evolution.

The aforementioned (ahem) survey from Marketing General found the #1 reason why association members don't renew their membership is "lack of engagement." Research with your members is just one of many ways you can engage them, and demonstrate you are interested in learning from them and meeting their needs.

Given the obsession with engagement these days, shouldn't your approach to member insights be engaging itself? Next time you feel the urge to write a 50-question survey with no prize or payment, stop yourself and ask, "Would I actually take this survey myself?" Let that be your litmus test for the right and wrong way to solicit feedback from your members. Or better yet, ask for 12 members to have a Zoom chat with you – you'll be surprised how ready and engaged they are to share their thoughts with you.



Image: Photo by Angela Compagnone on Unsplash



**By Ben Grill.**

Ben is the founder of The Insights Grill, a brand strategy and market research agency specialising in association member research, content development and brand perception research.

# The 3 Things Your Next Pricing Survey Must Have

**W**e have conducted numerous surveys for market research and market testing around value and pricing. We've found that most surveys require three core components.

## 1. Always ask if you can follow up.

First, you should always have a question asking if you can follow up with the person responding.

This matters because your survey is typically the first step in market research. If you'll be leading into focus groups next, you'd ideally like to invite those who responded to those focus groups.

After all, you already have baseline data on them and can ask more specific, personal questions in the focus groups to grow the data you're collecting.

If you don't ask if you can follow up, then you're assuming that they will invest more of their precious time with you, and you are removing consent from your relationship.

When you ask to follow up, it can be as simple as asking, "May we follow up with you if we have further questions?" followed by a yes and no option. This allows you to quickly segment who said yes, resulting in a core list of people that you can continue market research with.

We also recommend that you always ask for the name, email, and phone number of each respondent. You will have a harder time getting people to leave their phone number - we are conditioned to our phone being personal while our e-mail can manage unwanted messages - so you can make the ask for phone number optional.

However, what we have found is that when you ask for the phone number and you begin by making personalized phone calls inviting people to focus groups after the

survey, you have a much higher rate of people converting from the survey to confirming their participation in the focus group, rather than just doing an email blast, even if individualized.

Yes, the additional phone calls will take more work than sending a batch of emails with custom name fields, but this builds your relationship with your audience to get the best, quality answers from them.

They are the ones investing in your organization. We should care enough to build trust and relationships for the types of answers we are seeking around value and price.

## 2. Always ask persona questions.

Unless your survey and AMS tools sync so that you can see the personas of who replied, you **must** ask persona questions so that you can better segment the answers for trends and value ladders by persona.

Most associations do not have great data on the segments of their audience. They might be able to tell you the different personas based on anecdotal information that they observe through attending events and understanding who their audience is, but associations must get better at tracking this data within their AMS, so that they can more quickly send personalized communications and offerings.

Because most associations are lacking this, we typically include persona questions within the survey so that we can segment the answers.

There are many persona questions that you can ask. We have a survey bank with over 50 questions that we can include in the surveys we author.

Of course, we do not include all 50 questions, but it gives

us a great springboard to share with our clients so that they can pick which questions matter most and customize them for their own survey.

Here are some examples of persona questions worth asking:

- If they are a member or not.
- If they are a lapsed member, why did they leave?
- If they are a current member, how many years have they been a member?
- Where do they live?
- What seniority is their position at their organization?
- Are they someone who has purchasing decision making authority at their organization?
- How many people at their organization are members?
- How frequently do they or the other members of their organization attend events or engage with other components of membership?

By asking these persona questions, you can begin to create segments within your responses to see how different segments receive the value you offer and how that might move the pricing needle for their segment's willingness to pay.

It also allows for you to invite segments to focus groups so that you have proper representation across your answers.

### 3. Always ask about value and pricing. Well, not always pricing.

The third component that you need for your value and pricing survey is - drumroll please - questions specific to value and pricing.

In general, we recommend staying away from pricing questions in the first survey that you send.

The reason?

If this is the first point in the journey of your conversation, would you want to be asked about price? Usually not. It comes off as greedy and unaligned with your mission.

By starting with value, you get an open door to how you can add more value in (and sunset what isn't of value), then you can share new potential packaging and ask about pricing.

This isn't to say you can't ask at all in a first survey, but if we do, we tend to limit it to one question, and it is very general.

Also, if you ask about pricing up front, you'll typically receive much lower answers about pricing than if you save them for later in the conversation because **no value has changed**.

We absolutely do recommend having questions about value to lead with. Examples include:

- Which components of a membership do they value most? - have them rank them or pick their top three favourite components of membership. This can also

work for an event, the process of a certification, or for the components of a sponsorship.

- What could be taken away from the product and they wouldn't care?
- What should be added to the product that would really make a difference for them and make this a more complete solution?

Asking open ended questions in the beginning around value really helps you to gather data that can then form the types of questions that you ask later in the process to refine what specifically should be added or removed from a product, and then ask about their willingness to pay based on those changes.

There are other components that your unique survey might need depending on the goal of your survey and your overall strategy, but these three components should give a large head start on the next survey you decide to conduct.



**By Dr. Michael Tatonetti, CAE, CPP.**

Dr. Michael is a Certified Association Executive and Certified Pricing Professional on a mission to advance associations in their pricing models for financial sustainability. As a Strategic Consultant and Trainer, he works with associations to harmonize pricing and value across membership, education, sponsorship, events, and marketing. He is also an Association Executive with Professional Pricing Society, overseeing education, certification, and strategy for marketing, membership, and sponsorship. Dr. Michael is a proud Association Forum Forty Under 40 honouree for his dedication to the association field.



# Your 2022 Horoscope

## CAPRICORN

You will experience a golden moment in time. All your Board members read their Board papers and attend the meeting where a critical issue is scheduled for discussion. Unfortunately, due to injuries from a rabid Life Member bite, you will be absent from the Board meeting for the first-time ever. The issue will be held over until the next Board meeting. Less than half your Board will be able to attend.

## PISCES

You will successfully cultivate a strong relationship with the leader of your country who agrees to fund all your major programs for years into the future. The day your funding is due to be finalised they will be deposed by a faction led by a talking donkey. The public will overwhelmingly approve of the new addition to parliament with the consensus being "at least he isn't as much of an ass as other options." The donkey eats your funding application.

## TAURUS

The giant white elephant that has been sitting in the middle of your Board table for years will go berserk. The loss of your favourite mug in the ensuing chaos will be offset by the joy of seeing your most frustrating Board member being chased permanently off into the distance by the elephant. The giant white elephant will return and resume its place in the middle of the table. Everyone will pretend it didn't happen and isn't still sitting there.

## CANCER

You will painstakingly prepare a budget for the new year with forecasts carefully created using insights from reliable data and research. Conservatively, you estimate a small surplus for the year. The Board will not be happy. They will want the budget to show a larger surplus. They quadruple your sponsorship income targets and decline the budget for a sponsorship salesperson. Your bonus for the year will be based on achieving the new sponsorship targets.

## VIRGO

You will be offered the opportunity to attend the premier international conference for your sector as a guest of the organisers. You will be invited to present about a successful project you have personally developed, and it will also be a welcome opportunity for a long overdue holiday. Your President will hear about the trip and decide to take your place. She will cancel at the last minute and no one from your organisation will attend.

## SCORPIO

Your Board will decide to run your annual conference at an offshore destination. One of your Board members has always wanted to travel to Antarctica. After a robust exchange of views, including your comprehensive assessment of a broad range of risks, the Board will unanimously vote that they, too, would like a holiday in Antarctica courtesy of your annual conference. Delegate numbers will be your highest ever.

## AQUARIUS

You will undertake a member survey to discover why your retention rate is low. Overwhelmingly, members express disappointment with the fact you do not offer a specific service. You have been offering that service for 20 years. You will devote a sizeable portion of your budget on a major promotion letting members know the desired service exists. Two members take up the offer.

## ARIES

The president of your association will make a major announcement that will garner significant levels of front-page media coverage around the country. Unfortunately, it will not bear any resemblance to the agreed association position on these matters. You will undertake copious amounts of media skills training. You will have ample opportunity to apply these skills.

## GEMINI

Your Board will run a fantastic strategic planning day and develop a fabulous vision for the association. Unfortunately, as you and your team will not be involved, it will be completely unrealistic. As your bonus will be based on achieving the strategic outcomes, you will decide to move into your office to save time commuting between your bed and work each day. The increase in your stress levels will be matched by the increase in whisky sales at the pub next door.

## LEO

Many years of database frustrations will be overcome when a Board member recommends a friend who can solve the problem. Just kidding. Your database issues will continue to frustrate you. You will make an executive decision to throw your computer out the window and revert to card file. Member retention and engagement increases as your stress levels decrease.

## LIBRA

You start a new job at an association. Your new assistant decides she doesn't like you. When you ask her to schedule a meeting in your calendar, she will say it's not in her job description. When you point out that managing your calendar is at the top of her list of duties, she will accuse you of bullying and take stress leave. She will be the only other staff member. Her father will be president of the association.

## SAGITARIUS

You will find yourself working with a fantastic Board, a motivated staff team, an engaged and growing membership base, and significant reserves. It will all seem so easy that you will start wondering if you are dreaming. You will pinch yourself and wake to find a Board member going through your inbox. They've opened your jar of chocolate covered peanuts and are busily sucking the chocolate off. Seeing you are awake they will offer you a shiny, choc-free peanut.



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