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GET DOWN TO BUSINESS
LEARN AND CONNECT TO SOLVE YOUR ORGANIZATION'S BIGGEST BUSINESS CHALLENGES

ASSOCIATIONS @ WORK TOOLKIT

Thriving in a competitive marketplace requires both creativity and discipline, grounded in business intelligence—and you're not off the hook because you work for a nonprofit. Associations are working to advance their missions in a high-speed, constantly changing environment where smart approaches to finance, product development, fundraising, and talent management are critical to success.

The *Associations @ Work Toolkit* is designed to help you navigate that terrain. This is your guide to ASAE's new Associations @ Work Business Conference, offering two days of learning and networking opportunities. And in the Guide to Business Solutions, you'll find companies with the expertise to help you address your toughest business challenges.

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CONVERGE. CONNECT. CREATE

ASSOCIATIONS at WORK®

BUSINESS CONFERENCE

10/16-17/2017

BALTIMORE MARRIOTT
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BALTIMORE, MD

WELCOME TO ASSOCIATIONS @ WORK.

This is your guide to the onsite experience and everything this conference has to offer—from learning labs and industry partner sessions to keynotes, deep dives, and more.

Here you'll come together with colleagues from all association business functions—executive management, finance, development, operations, human resources, and fundraising—to solve cross-functional challenges and propel your careers and associations forward.

View the full schedule and learn more at **asaecenter.org/AtWork.**

SUNDAY, OCTOBER 15

12:00–4:00 p.m.

Registration
UNIVERSITY BALLROOM 1

1:00–4:00 p.m.

PRECONFERENCE WORKSHOPS

Margins Matter: Make More Money with Proactive Pricing
EAST BALLROOM ABC

Focus on What Matters: How and When to Sunset Programs
WEST BALLROOM DEF

MONDAY, OCTOBER 16

8:00 a.m.–5:00 p.m.

Registration
UNIVERSITY BALLROOM 1

8:00–9:00 a.m.

Continental Breakfast
GRAND BALLROOM PREFUNCTION

INDUSTRY PARTNER BREAKFASTS *
Are Your Accounting Processes up to Snuff?
CHESAPEAKE ROOM

Hosted by

Halt Buzas & Powell, LTD
TRUST, INTEGRITY AND A COMMITMENT TO YOUR SUCCESS

Optimize Talent Development with Personalized Learning
PROMENADE ROOM

Hosted by

sumtotal
A Skillsoft Company

9:00–9:30 a.m.

KEYNOTE

Unlocking Happiness at Work
GRAND BALLROOM

Separate registration required.

* Industry Breakfasts are first come, first serve.

9:45–10:45 a.m.

INDUSTRY PARTNER SESSION
Customer Experience: It's All In The Delivery
STADIUM BALLROOM 1

Hosted by

We'll handle it for you.
BRIGHTKEY

LEARNING LABS

Are Your Reserves Aligned to Enable Your Strategic Plans?
STADIUM BALLROOM 2-3

Leverage Diversity, Equity, and Inclusion for Greater Impact
STADIUM BALLROOM 4-5

What Great Sports Dynasties Can Teach Us about Creating
Championship Performance
UNIVERSITY BALLROOM 2-4

9:45 a.m.–12:00 p.m.

DEEP DIVE
The Strategic CFO and High Performing Executive Team
PROMENADE ROOM

11:00 a.m.–12:00 p.m.

INDUSTRY PARTNER SESSION
A Broad View of Asset Allocation
STADIUM BALLROOM 1

Hosted by

SUNTRUST

LEARNING LABS
The Disaster Experience QuickFire for Association Executives
STADIUM BALLROOM 2-3

The Emotionally Intelligent Leader
STADIUM BALLROOM 4-5

Traditional to Virtual Office: Decentralizing Your Work for Success
UNIVERSITY BALLROOM 2-4

12:15–1:45 p.m.

NETWORKING LUNCHEON ROUNDTABLES
GRAND BALLROOM

CONNECT TO THE WIFI

NETWORK NAME:
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PASSWORD:
AAW2017

2:00–3:00 p.m.

INDUSTRY PARTNER SESSION
All the Bells & Whistles—Best in Class Cloud-Based Fiscal
Management Solutions
STADIUM BALLROOM 1

Hosted by

LEARNING LABS
The Business Case for Hiring and Retaining Workers Over 50
UNIVERSITY BALLROOM 2-4

Organization Evolution: How Digital Strategy Impacts Everyone
STADIUM BALLROOM 2-3

The Secrets of Donor Loyalty
STADIUM BALLROOM 4-5

2:00–4:15 p.m.

DEEP DIVE
Improving Leadership through Behavioral Style Interpretation
PROMENADE ROOM

3:15–4:15 p.m.

INDUSTRY PARTNER SESSION
The Insurance Nerds Tackle Three Myths About Cyber Security
STADIUM BALLROOM 1

Hosted by

LEARNING LABS
Change Your Leadership Stage to Enhance Your Team's Productivity
STADIUM BALLROOM 4-5

Develop Meaningful Financial Reports that are Easily Accessible to
Non-Financial Users
STADIUM BALLROOM 2-3

Why Doesn't Anybody Ever Wash a Rental Car?
UNIVERSITY BALLROOM 2-4

4:15–5:00 p.m.

NIGHTCAP AND DISCUSSION
What Keeps You Up at Night?
GRAND BALLROOM

Hosted by

GET THE CREDITS

8 CAE CREDITS

8 CPE CREDITS

8 PDCS

**+3 ADDITIONAL
CREDITS PER
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AT **KBERNSTEIN@
ASAECENTER.ORG**

TUESDAY, OCTOBER 17

8:00 a.m.–4:00 p.m.

Registration
UNIVERSITY BALLROOM 1

8:00–9:00 a.m.

Continental Breakfast
GRAND BALLROOM PREFUNCTION

INDUSTRY PARTNER BREAKFAST *
Your Employees' Retirement Readiness Depends on You
CHESAPEAKE ROOM

Hosted by

asae retirement trust
Re-envisioning the future

9:00–9:30 a.m.

KEYNOTE

Creating a Purpose-Driven Workplace
GRAND BALLROOM

9:45–10:45 a.m.

INDUSTRY PARTNER SESSION
Rejuvenate Your Research
STADIUM BALLROOM 1

Hosted by

Vault
Accounting. Analytics. Research.

LEARNING LABS
Are Your IT Cybersecurity Contracts Exposing You to Unnecessary Risks?
STADIUM BALLROOM 2-3

From Corporate Sponsorships to Partnerships: Then and Now
UNIVERSITY BALLROOM 2-4

Is Your Compensation System Producing the Results You Need?
STADIUM BALLROOM 4-5

9:45 a.m.–12:00 p.m.

DEEP DIVE
Conduct a Business Process Review for Improved Operations
PROMENADE ROOM

* Industry Breakfasts are first come, first serve.

11:00 a.m.–12:00 p.m.

INDUSTRY PARTNER SESSION
An Unbiased Look at Active Versus Passive Management
STADIUM BALLROOM 1

Hosted by

LEARNING LABS
Benchmarking 411: Utilize Benchmarking to Inform
Your Business Plan
STADIUM BALLROOM 2-3

Millennial Leaders Fostering Inter-Generational Collaboration
STADIUM BALLROOM 4-5

Uncover Your True Real Estate Costs and How to Manage Them
UNIVERSITY BALLROOM 2-4

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LUNCHEON LIGHTNING TALKS
GRAND BALLROOM

Pennies Matter

Presented by

Retention & Training Go Hand-in-Hand

Presented by

Redefining Work

Presented by

2:00–3:00 p.m.

INDUSTRY PARTNER SESSION
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STADIUM BALLROOM 1

Hosted by

2:00–3:00 p.m.

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Collaborative Games for Group Decision Making
UNIVERSITY BALLROOM 2-4

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Stop Reviewing and Start Appreciating
STADIUM BALLROOM 2-3

2:00–4:15 p.m.

DEEP DIVE
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3:15–4:15 p.m.

INDUSTRY PARTNER SESSION
Do Your External Reports Accurately Portray Your Organization's
Financial Results
STADIUM BALLROOM 1

Hosted by

BDO

LEARNING LABS
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GUIDE TO BUSINESS SOLUTIONS

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CYBER LIABILITY: RISKS, EXPOSURES, AND COVERAGE

BY BARRY F. PETERS

Cyber liability, often referred to as network security and privacy liability, is a risk that is inherent to every organization. With cyber threats growing in frequency and intensity, it is imperative to have a highly specialized and technical professional focused on evaluating and securing the proper coverage for your business.

WHAT IS A CYBER-LIABILITY POLICY?

A cyber-liability policy can take on many different forms and has various elements of coverage. Each policy is different, and it is important to understand the extent of the coverage being purchased.

In its broadest sense, cyber liability serves to protect the insured entities and individuals from claims made against them for defense costs and damages arising from a breach of their networks or the wrongful dissemination of private material.

The policy also contains an extraordinarily valuable "first party" element, wherein coverage is provided for the costs incurred by an insured entity upon discovering a breach. Most carriers also provide a data breach coach or claims team to help coordinate the various elements necessary to appropriately respond to a breach and comply with regulatory requirements.

Since organizations hold or are responsible for the collection and storage of sensitive employee and customer data (whether subcontracted out to a third party or not), this exposure is ever-present.

WHAT DOES A CYBER LIABILITY POLICY COVER?

Data breach and first-party costs. Covers defined expenses commonly associated with a data breach. This includes costs associated with data-breach counsel, computer forensics analysis, privacy regulations compliance, notification and credit-monitoring services for affected individuals, and public relations or crisis-management services to restore a company's reputation.

Network security and privacy liability. Covers liability of

the organization arising out of the failure of network security, including unauthorized access or unauthorized use of corporate systems, a denial of service attack, or transmission of malicious code.

Internet media liability. Covers infringement of copyright or trademark, invasion of privacy, libel, slander, plagiarism, or negligence arising out of the content on the organization's website.

Cyber/network extortion. Covers monies and associated expenses arising out of a criminal extortion threat to release sensitive information or gain unauthorized access to a network.

Business interruption. Covers lost income or extra expenses in the event that the network is inaccessible for an extended period of time.

Digital-asset-restoration costs coverage. Covers costs incurred to replace, restore, or recollect data and/or network resources lost or destroyed resulting from unauthorized access to the system.

Regulatory coverage. Provides coverage for regulatory proceedings brought by a government agency alleging the violation of any state, federal, or foreign identity theft or privacy protection legislation.

Cyber terrorism coverage. Covering financial damages an insured is legally liable for arising from an act that is certified by the Secretary of the Treasury to be an act of terrorism pursuant to the federal Terrorism Risk Insurance Act.

Payment card industry standards compliance coverage. Covers damages as well as payment card loss, which the insured is legally obligated to pay resulting from noncompliance with the payment card industry data security standard.

Social engineering fraud. Social engineering fraud, or "fraudulent inducement," is an emerging risk gaining widespread attention in the marketplace. This exposure is often addressed under a crime of fidelity policy. However, it has potential overlap and implications to cyber risk. This coverage provides for indemnification of the loss of monies and securities caused by a fraudulent inducement to transfer funds to a third party purporting to be a customer or vendor.

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CYBER-LIABILITY INSURANCE 101 FOR NONPROFITS

BY PAM TOWNLEY AND ERIC A. JOHNSON

You've seen it in the news. There have been numerous high-profile cyber events affecting data held by for-profit companies. According to the *2017 Cost of Data Breach Study,* more than 1,935 cyber breaches were reported in 2016, of which 62 percent of the breaches were the result of hacking, more than half included malware, and 43 percent were social attacks. Plus, the average organizational cost for data breach in 2016 was $3.2 million, according to the *2017 Data Breach Investigations Report,* while the average cost per compromised record was $141.

It may be tempting to think that cyber-liability exposure is a problem isolated to the for-profit arena, but cyberattacks are not just a risk for large for-profits. Hackers do not care about your tax status. They will go after protected personal information, such as financial account numbers, patient health information, Social Security numbers, credit card information, and account passwords wherever they can find it. Failure to protect personal information can result in a financial loss to a nonprofit organization due to the cost associated with responding to a breach, as well as a loss of membership and funding from donors due to damage to the nonprofit's reputation.

As the networked world becomes ever more complex, it's critical to conduct a full organizational review of your nonprofit's cyber-risk with the executive committee, as well as IT, operations, and membership staff. This should include an in-depth review of any contracts with third-party vendors who store, manage, or otherwise have access to your member or donor data. Every nonprofit should have legal counsel review contracts to assess what responsibilities are assumed by these vendors in relation to the nonprofit's obligations to its members and donors.

Once your organization has identified its own cyber-risk, then you can outline concerns in writing to your insurance

broker or consultant. It's important to note that the cyber-liability insurance marketplace has grown more complex in response to the evolving cyber-liability risk landscape. Within the insurance marketplace, there are varying degrees of cyber-liability coverage offered as potential "add-on enhancements" to current insurance policies (e.g., business insurance, management liability, errors and omissions insurance) or through separate insurance policies. Here are some of the cyber insurance basics you need to know:

- Cyber-liability can address both the first- and third-party risks associated with protected data in their care, custody, or control.
- Cyber-liability is insurance coverage for liability that arises out of unauthorized use of or access to protected data within your network or business. Cyber-liability policies also provide coverage for liability claims for spreading a virus or malicious code, computer theft, extortion, or any unintentional act, mistake, error, or omission made by your employees while performing their job.
- The typical business insurance policy only covers so-called "tangible" assets, and electronic data is not considered tangible under the typical policy definition. Cyber-liability insurance fills that gap and can go even farther.
- Most components of coverage address issues after a cyber-event, including, but not limited to, costs to notify those individuals impacted by the cyber event, including notice required by law, public relations expenses, and cost to respond to an extortion demand including reimbursement for ransom amounts paid.
- Some components of coverage address issues before a cyber-event happens such as breach-preparedness services.

Of course, as the extent of coverage afforded broadens, the cost will also increase. This is why it's key for nonprofits to rely on their insurance broker or consultant, as well as legal counsel, to provide guidance navigating the complex cyber-liability insurance landscape.

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HOW TO MANAGE RETIREMENT PLAN FIDUCIARY RISKS

BY BETSY PIPER/BACH

Can you manage your retirement plan fiduciary risks now to avoid problems later?

Yes, here's how.

All retirement plans follow a written instrument called the plan document. Typically, the plan document lists those individuals (by job title) who are accountable for the various fiduciary responsibilities of the plan. If the plan document does not happen to name them, the fiduciaries will be those persons at the organization who are responsible for deciding to offer the plan and/or are functionally doing the job of a fiduciary. This means that even though your job title has not been listed in the plan document, if no one else has been named as a fiduciary or no one else has been delegated the responsibility, you could be found to be a fiduciary and held personally accountable if things go wrong. For example, if you are on your organization's 401(k) committee or investment committee, you can be found to be a fiduciary. Or, if you make decisions concerning whether a participant may take a hardship loan or you are responsible for ensuring contributions are made on time, you can find yourself named as a "functional" fiduciary.

Why do you care? Because the Department of Labor and the Internal Revenue Service care. These are the regulators of retirement plans, and they will most definitely find individual association staff accountable in the absence of clear guidance.

Don't let this happen at your organization. Protect yourself from the perils of unmanaged fiduciary risk by taking these steps:

1. Form a 401(k) Committee with a charter and all of the related appurtenances.

2. Name the fiduciaries of the plan in your plan document

(by job title). These include the trustee, the ERISA section 3(21) non-discretionary investment adviser, the ERISA section 3(38) discretionary investment manager, and the ERISA section 3(16) plan administrator.

3. Act solely in the interests of participants and beneficiaries (duty of loyalty, no conflicts).

4. Act for the exclusive purpose of providing benefits and defraying reasonable expenses.

5. Act in accordance with plan documents (if consistent with ERISA).

6. Have an investment policy statement which recognizes 404(c) regarding diversifying assets and follow the document.

7. Perform all duties with care, skill, prudence, and diligence of a prudent person acting in the same capacity and with same knowledge (focus on process).

8. Document, document, document. Process is more important than bad results.

Let's go back to number 2 for a moment. One of the best ways to protect yourself is to name a discretionary trustee. A discretionary trustee takes away from the rest of the fiduciaries the "exclusive authority and discretion to manage and control the assets of the plan." It's important to note that a "directed trustee" is not the same as a discretionary trustee. A directed trustee is only responsible for following proper directions delivered by a named fiduciary; they have a narrower role in the fiduciary control and management of the plan assets and hold co-fiduciary responsibility with the named fiduciaries. If your plan document does not name a trustee, then you will be on the hook unless you have taken the step of naming a discretionary trustee or, at least, a directed trustee.

In summary, it is impossible to totally shed all fiduciary responsibility, but you can successfully mitigate your fiduciary risk by having written documents, delegating responsibilities, and holding a regular 401(k) committee meeting where your process is documented on a regular basis.

RECRUIT AND RETAIN THE BEST TALENT

BY DEDE GISH-PANJADA

The most important factors for associations performing at a high level are attracting, retaining, and properly utilizing talent. Associations and other nonprofits have seen talent recruitment and retention become a substantial business operations challenge.

Consequently, associations must consider altering salaries and other rewards to retain and maintain a highly skilled workforce. To conquer these challenges and compete effectively when recruiting and retaining the best talent, associations must revolutionize their business models and leverage their missions.

Associations that wish to turn the tide away from talent "jumping ship" and toward recruiting the best talent have focused on strengthening their employee value proposition (EVP) or talent plan. Associations with an effective talent plan have incorporated four components: purpose, people, work, and total rewards.

Purpose. An organization's mission, vision, values, image, and reputation shape its purpose. As nonprofits, we have a distinct advantage. We have missions that are focused on purpose and elevate our staff's commitment to the organization and those it serves. As association leaders, we want and expect our staff to embrace our mission, vision, and values and deliver the organization's unique experience and brand promise to our members, key stakeholders, and constituents.

People. We must create a work environment that fosters positive relationships. Leaders need to be effective. Managers need to be supportive of staff growth and professional development. And their peers need to be collaborative. In exchange, we expect our staff to demonstrate the desired behaviors and values the organization has adopted. Effective leaders and managers do the following:

- Instill trust and confidence.
- Grow the business.
- Take a sincere interest in their staff's well-being.
- Behave consistently with the organization's core values.

- Clearly define and drive the desired culture throughout the organization.

Work. As association leaders, we must be clear about expectations of what our jobs entail, regularly evaluate staff's performance and competencies in their jobs, and align rewards with performance. This includes:

- Understanding how your teams' work is organized by the type of work that is done.
- Identifying clear organizational, functional, and technical competencies required to perform well and be successful within the organization.
- Knowing how the work fits into the wider organization.
- Establishing future career opportunities.
- Assessing the physical environment in which work is performed.
- Providing access to the tools and resources to perform the work well and efficiently.

Total rewards. Defined as the combination of monetary and intangible incentives, total rewards are how association leaders attract, retain, and engage staff to achieve the organization's greatest potential. Total rewards are comprised of three elements:

- Foundational rewards that provide staff with a baseline of employment.
- Performance-based rewards offered for superior performance, which drive a high-performing culture.
- Career and environmental rewards, such as training, mentor, flexible work, and wellness programs, which help employees to manage their careers.

We recommend a successful EVP plan as an integral part of an association's strategy, with buy-in from leadership and management, as well as active human resources oversight.

Many associations collaborate with outside professionals to create or strengthen a compelling EVP. Whatever your path is to optimal human capital management, your EVP is a strategic component.

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DIGITAL TRANSFORMATION: FUELING INNOVATION FOR ASSOCIATIONS

BY JEAN-PAUL (JP) GUILBAULT

Digital transformation is an evolving reality, and organizations continue to make extensive investments in new digital technologies.

The next phase of digital transformation is upon us as organizations work toward the seamless integration of technology, connecting the front-, middle-, and back-office systems to enhance the user and customer experience and increase operating performance. Privacy and security are persistent and growing concerns. But the benefits of smarter, ubiquitous technology keeps us healthier, safer, and more productive in the long run.

As organizations address the changing landscape, aligning to digital transformation accelerates their need to meet business requirements focused on results, innovation, and improvement. To set up associations for future success, it's time to ask:

- What is digital transformation?
- Are organizations embracing it?
- Should they embrace it?

The meaning of digital transformation. Digital transformation is the acceleration of business activities, processes, competencies, and models to leverage the changes and opportunities of technologies and their impact in a strategic and prioritized way. For associations, it's influenced and driven by technology innovation, member behavior and demand, and environmental factors.

In turn, the culmination of these measures affects the strategic choices associations make when automating processes for organizations and the people they strive to have relationships with, and the kinds of experiences they're steering toward.

The benefits of digital transformation. Association leaders are now applying technology to support digital transformation in the front-, middle-, and back-office operations to deliver a stronger connection between them and their members, while creating greater value.

There's no escaping the latest industrial revolution, and digital transformation disrupts the way we attract, retain, provide value to, and share content with the individuals we are seeking stronger relationships with. To rise above the disruption, a digital organization must embrace a core set of attributes to succeed.

- **Agile innovation.** Take risks to capitalize on information and resources to inform the design of products and services that differentiate.
- **Predicting opportunities.** Having data requires exploring new areas of innovation. Turn data into actionable insights.
- **Transparency and trust.** Brands must inspire trust with members and dictate perception. Maintain positive relationships and keep a secure organization to drive success.
- **Personalized experiences.** Lots of data means personalizing the way members interact with organizations. It allows for effective targeting and a customized experience that surprises and delights.
- **Always on.** Never go dark on members and deftly manage the right technology for the right experience. Dictate to the market. Force the competition to keep pace.

The synergy from digital transformation. Ultimately, digital transformation for an organization leads to connection. When we digitally transform, we break down more than technological barriers. We also break down communication and data silos. Departments can easily access information and gain insights.

This realization leads to acknowledging value in working with a well-connected suite of solutions, which supports an association across its multiple digital transformation initiatives. Fewer vendors means less complexity and a stronger partner with a complete understanding of your association, its goals, and operation.

The task of digital transformation can be daunting, but it doesn't have to be. Step back and look outside-in: Who are you trying to have a relationship with, and what do you want them to think, feel, and do?

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FIERCE EVENT LOYALTY: TRANSFORMING PASSIVE PARTICIPANTS INTO LOYAL AMBASSADORS

BY BRIAN STRICKLAND

L et's start with a multiple-choice question: Do most people attend your events because (A) they want to or because (B) they have to?

Are most people choosing your event over countless others because they treasure the wealth of meaningful experiences you're providing? Or are they choosing the path of least resistance and just coming because they need to score some quick continuing education units are are then planning an early exit?

An increase in early departures is a red flag that event loyalty could be at risk.

If you chose answer A, then your event loyalty could still be at risk if you haven't tested those assumptions with your customers or run those assumptions by your vendors.

According to a recent Salesforce.com study, 82 percent of sellers are out of sync with what matters to their buyers.

UNDERSTANDING LOYALTY

Several years ago, Seth Godin wrote a thought-provoking post, "Two Kinds of Loyalty," where he explored two approaches many organizations take to build loyalty:

- **Loyalty of Convenience:** "The problem with the loyalty of convenience is that the customer is always tempted to look elsewhere for options," Godin says. "And the vendor is always working to build barriers that don't necessarily increase satisfaction."
- **Loyalty of Identity and Satisfaction:** According to Godin, "I'm not even looking" loyalty is that the customer [or attendee] "is as committed to the relationship as the vendor is. You earn this sort of loyalty, you don't architect it."

This second level of loyalty is attained when there's a convergence of experience-driven culture, meaningful content, and executing on data sets. It drives more authentic communication and connection with your customers, which in turn further deepens their loyalty to you.

NOTICE, ANTICIPATE, AND DELIVER

Getting clarity on what your guests value most about your event is an important first step. This will help you anticipate what they'll want in the future.

One example is to anticipate their needs at every touch point, starting with their arrival at the airport. You could greet guests as they arrive and quickly direct them to cabs to ensure a smooth journey to their hotel.

Housing is another example where you can notice past behaviors and anticipate future desires. Your housing invitation could include: "You booked the Westin last time. Would you like to rebook this property? Here are two other hotels you might consider that are similar."

MAPPING OUT YOUR LOYALTY STRATEGY

Every time you delight your guests, their loyalty grows stronger. However, true emotional loyalty is earned over a sustained period of time and across multiple branding touch points—one of which is your event.

The Eight Phases of a Successful Event, which is an e-book published by Experient, is an excellent framework to apply as you map out your event plan. It will keep you focused on the eight distinct phases your guests navigate on their event journey. Download a free copy of The Eight Phases of a Successful Event for free at www.experient-inc.com.

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experient®
A Maritz Global Events Company

SOFTWARE ADOPTION GOES BEYOND FEATURES

BY JAKE FABBRI

At my parents' house, there are three remote controls on the coffee table. One operates the TV, one the DVR, and I have yet to determine what the third remote controls. But it must be important, because it sits there on the table with the rest of them. Watching television requires a very specific combination of buttons pressed on a particular sequence of remotes. One missed button will cause you to have to start over. My mother is convinced she's actually signaling alien life, instead of turning on the television.

Mom knows she can use the TV to listen to Pandora or watch HGTV, she could even log into Netflix and watch a movie, but she prefers to sit in front of the silent television, and listen to music on her phone. What my dad doesn't understand is that it's not about the number of great features and capabilities the television provides, it's just not worth the time and effort to figure out how to operate the remotes, especially when Mom's smartphone will do the trick just fine.

When you're trying to solve the issue of low software user adoption, don't just focus on the great features that staff aren't using, think about bridging the user experience gap. In the end, the software will have to make users' lives easier, or they can't fully leverage what the software has to offer. Your staff are more likely to use software that is:

Intuitive and efficient. My mom is a smart woman, but Dad's remotes just aren't intuitive. Similarly, good software should be designed for humans. It should follow a logical sequence of processes and make our jobs easier. If it doesn't, users will find a simpler way to accomplish the same tasks.

Easy to learn. It's not enough to train end users on the system, they should also know how to answer their own questions. Is online training provided? Is the system well-documented? How large is the community of other users?

Familiar and reliable. Your staff is looking for software that works. It's as simple as that. One simple way to know how your staff will feel about the solution is to check out

the online reviews. Capterra, Review My AMS, and the Salesforce AppExchange are great places to see what other people think of available systems.

Able to integrate with other systems. Make sure your new system integrates the tools staff are already using. Your new solution should have open APIs and easy integrations. There's no need to re-create the wheel. That means the system both reads and interprets data from other systems, and it writes back to those systems. Incompatible data just adds to the world of outdated spreadsheets and doesn't make anyone's job easier.

Available anytime, on any device. The system needs to work on any device; this means your staff can do their jobs on a Mac, PC, tablet, mobile phone, and more. Users will be more likely to adopt a solution that is available when and where they want it.

Easy to install and upgrade. Are setups and upgrades overly technical? Does setup require coding knowledge? When end users are empowered to participate in software installation, they are more inclined to take ownership of their software and understand how to configure the system to follow business processes that are already in place.

When it comes to user adoption, features are great—necessary, even. But if a new system requires overly technical processes or a combination of steps that simply don't make sense, staff are going to find their own ways of doing their jobs. And your fantastic, feature-rich software will sit unused.

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ENGAGE YOUR MEMBERS WHERE THEY ARE: ONLINE

BY ANDY STEGGLES

Association members are inherently community-oriented—collaborating and meeting with others regularly to get the best results. As technology helps streamline how members interact, associations can tap into the best online tools to ensure continued learning happens on a seamless, accessible platform. Private online communities give members the ability to engage in ways that work best for them.

Below are six ways associations can use online communities to increase member engagement and enhance the overall community experience.

1. **Spur conversations and increase networking.** Members who are scattered across states and around the world have a hard time connecting with one another due to time differences and busy schedules. An online community can provide tools to drive interactions, such as discussion forums and networking tools like directories, detailed profiles, and daily/weekly digest emails. ASAE benefits by using these tools in their own online community, Collaborate, and generates 30 percent more discussion posts than in previous listservs, helping members build deeper connections with the association and their peers.

2. **Enhance online and offline event engagement.** Online communities can host digital events, such as "ask me anything" discussions and webinars, or provide a dedicated online space for your annual conference. Known as event communities, these can increase the life of your event for months by:

- Drumming up pre-event enthusiasm with handouts, discussions, and ways for solo attendees to connect before your conference.
- Showcasing live social media feeds during the event and giving attendees an easy way to stay in touch with new connections.
- Encouraging follow-up conversations through discussions and session recordings.

3. Diversify volunteer tasks. Online communities are ideal for sharing virtual, microvolunteering, and in-person volunteer opportunities. Post tasks in the community so all members, regardless of location, can find them. Then use community tools to manage and track volunteering. ASAE is taking advantage of such tools with Volunteer Town Square in Collaborate. ASAE also uses the tools to make managing volunteer leaders, committees, councils, and ad hoc projects easier.

4. Provide accessible learning opportunities. Communities help with professional development by hosting mentoring programs and learning management systems with written, audio, and visual content. When hosted in a community, members from around the world can connect with expert mentors and take online courses regardless of where they live, often helping them land better jobs or promotions. Such programs are popular benefits, especially for millennials and Gen Z who prioritize jobs.

5. Generate data to improve member experience. Use behavioral data from your community, including page views and popular topics, to see members' interests, concerns, and priorities. Write that data back to your AMS to get a complete picture of member needs and use it to create more valuable benefits and optimize your member experience. ASAE's Collaborate is a good example. With nearly 60 percent of membership participating in Collaborate through subscriptions, posting, or content consumption, Collaborate generates high-quality data that ASAE can use to deliver more value to its members.

6. Get the tools you need to engage members. Associations that effectively engage members online see returns in satisfaction, referrals, and membership growth. ASAE's active Collaborate members, for instance, have a 23 percent higher net promoter score than their peers, making them more likely to recommend ASAE to their colleagues. To put your association on the path to similar results, get the tools you need to engage members online. Higher Logic's online community platform can help.

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THREE TIPS TO GENERATE REVENUE WITH YOUR AMS

BY PATRICK DORSEY

AMS technology should no longer be viewed as simply a productivity tool to perform tasks faster and cheaper. Rather, today's mobile fist, analytics-driven membership management platforms should transform the way an association conducts business. Managing the business of your association, including the ability to increase revenue, identify new sales opportunities, and build membership value, should be simple and intuitive. The following three examples demonstrate how associations can leverage their AMS and membership data to generate more revenue and achieve new levels of membership success.

BE PROACTIVE AND INCREASE CONVERSION RATES

Are your members and prospects visiting your association's e-commerce store and adding memberships, event registrations, and other items into their cart but not completing the purchase? Membership management platforms should include the ability to run, schedule, and deliver real-time dashboards on completed versus abandoned shopping carts or provide an instant alert to the appropriate staff to identify the "abandoned" shopping cart. With this information, associations can choose to send a personal "reminder" email, add the "shopper" to a specific marketing campaign, or call the individual. Perhaps a coupon or promotional code would further incentivize the purchase? Sometimes the reminder is enough to drive the purchase of new memberships, renewals, or registrations.

Quick tip: Use your AMS's analytics and data visualization tools to identify recurring patterns within specific membership and prospect demographics or product types to better understand how, why, and when shopping carts are abandoned (or completed).

KEEP YOUR MEMBERS COMING BACK

We've all heard the saying that "it's far less expensive" to retain existing members then it is to find and convert new members. As a result, membership retention has become

an increasingly important metric in measuring the health of an association. Successful associations focus on building loyalty, exceeding expectations and personalizing every touchpoint throughout the entire membership lifestyle. To provide exceptional customer experiences, associations require a membership management platform that eliminates data silos and connects various member interactions across multiple platforms. With an increasingly comprehensive view of each member, associations can target individuals with personalized programs that drive retention and renewal rates.

Quick tip: Focus on the critical data used to segment your membership data and use the AMS to create a "data audit" report to ensure you are leveraging technology and human interactions to collect critical data points at each stage of the membership lifecycle.

CROSS-SELLING PRODUCTS OR SERVICES

Your AMS tracks a member's purchases, registrations, and nonfinancial interactions. With this insight, associations should initiate campaigns to recommend other products or services to compliment a previous purchase or simply suggest a product an individual may like—based on the purchase history of individuals with similar characteristics or their own purchase behavior. This upsell/cross-sell process is ongoing and creates new streams of revenue as well as opportunities to drive highly relevant and valuable engagements with members.

Quick tip: When done right, cross-selling builds deeper relationships with your members. It should not be looked at as a sales tactic but more of a member satisfaction tactic. The ability to cross-sell a product or service or upsell a new membership level or event registration is an opportunity to build a stronger relationship with individuals or organizations.

If you're not already mining your existing data and using your AMS to its fullest extent, your association is missing out on new revenue-generating opportunities and the chance to strengthen relationships with existing members.

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RESPONSIVE WEB DESIGN: 6 BEST PRACTICES

BY JON DANFORTH, CAE

All of us agree that delivering website content to mobile devices has long been imperative in maintaining and enhancing website engagement with our constituents. We've all seen the stats of the growing number of people using their smartphones for a wide-ranging number of activities, with an increasing demand for sites and content that are tailored to their device. Over the past few years, responsive web design has become more common among associations as their chosen strategy for delivering website content to mobile devices.

In a nutshell, responsive web design is a mix of HTML and CSS media queries that automatically respond to the available size of the resolution of the user's device, to deliver the content of a page more elegantly based on the most common device resolutions. This is not limited to mobile devices, although they are clearly the target of this approach. While not a perfect solution, responsive web design has a distinct advantage in that your website content is authored once and its display is automatically oriented and resized to the device, requiring less time and cost to maintain your organization's website.

One of the advantages of responsive web design is how easy it is to create and maintain, so even if your site is already responsive it is not too late to adhere to these practices:

1. Create flexibility. While it takes longer initially to create separate CSS definitions for different resolutions, avoid the temptation to cut corners. Responsive design is based on the number of pixels available, then adapting the content based on percentages of the total screen allowed for each element. It is not enough to create generic styles for desktop, tablet, and smartphone. You need to consider notepads, new plus-size phones, watches, and so forth. Creating styles for additional resolutions in your CSS will result in a better user experience.

2. **Use Javascript.** Older browsers that do not support CSS3 media query options can be handled through Javascript. There are pre-made libraries that make older browsers (IE5+, Firefox 1+, Safari 2) support CSS3 media queries. While Javascript cannot bridge the functionality gap of the older browsers, rendering content can be much improved. In addition, Javascript can be used to manage images, ads, and other important elements more powerfully than CSS and HTML alone.

3. **Keep your site concise.** Your site is a tremendous resource, but avoid the temptation to overload it with a lot of pages. Do not create long and cumbersome menus that are hard to click. Don't create pages with too much content forcing the user to scroll forever. Attention spans on mobile devices are extremely short when the site is not easy to navigate.

4. **Consider hiding content.** Just because you only create one site does not mean you have to display it all on every device. Consider hiding less important or repeating content like footers on smaller devices to make pages shorter.

5. **Redefine your images.** Responsive design is all about the percentage of available space used by each content element. Be sure to define the size of your images using a percentage rather than exact pixels so that the image remains intact instead of being cut off. For example, use "width: 80%" instead of "width: 980px."In this example, a width of 980 pixels would cause the image to be cut off on a phone.

6. **Update regularly.** The easiest way to give your website a fresh look without having to redesign it or overhaul its content is to update the style sheets. Make it a habit every few months to swap out icons, change background and foreground colors on buttons and headings, and alter text styles.

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