

# The No BS Guide to Digital Transformation: How Intentional Culture Change Can Propel Associations Forward

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## Who Cares About Digital Transformation?

### “Why does the association community need digital transformation?”

When we first started talking about writing on digital transformation in the association community, this was the most common reaction we heard. When we pressed for more details—asking, “Why would you think we *don't* need digital transformation?”—responses included:

- “Digital transformation is a dated topic—people have been writing, thinking, and talking about it for years. What more could you possibly add at this point?”
- “The profession or industry our association serves isn't particularly high tech, so we don't need to be, either. Why should we invest our limited resources in this?”
- “We're not Amazon or Apple, and we never will be. What's the point in holding ourselves to impossible standards?”
- “We've already transformed ourselves. Our website has a modern, responsive design, we have robust social media accounts, and people can join, renew, and register for our events online. What else is there to do?”

Indeed, digital transformation *has* been written and thought and talked about a lot. In our research, we found substantive studies from respected groups like *MIT Sloan Management Review* and Deloitte as far back as 2015 addressing how to thrive in the already-extant digital ecosystem or how to become a digitally mature organization. Even six years ago, this wasn't a nascent topic.



## Who Cares About Digital Transformation?

The thing is, as one of those 2015 *Sloan* reports points out, maturity in digital transformation is about integrating various types of technology in service to larger strategic organizational goals. Digitally immature organizations focus on “solving discrete business problems with individual digital technologies.”<sup>1</sup> Or, as another *Sloan* article puts it:

“Technology helps you do business differently, but the right strategy is not technology-focused. It incorporates the right technologies for the right jobs. It uses high tech where those capabilities are important and low tech where a simple solution can do the job.”<sup>2</sup>

Does any of the following sound familiar?

- Audiences using more smartphones and tablets? Create an app.
- Having trouble accepting online registrations? Switch Association Management Systems (AMS).
- Younger members on TikTok or Clubhouse? Better set up an account.
- Experiencing problems with magazine fulfillment? Quick, convert it to a PDF and upload it to the website.

Someone—staff, member, volunteer, customer, board member—identifies a problem or gap, so you just throw a piece of tech at it without thinking through your association’s larger strategic goals or how—or whether—that tech fits in. You just slap on a technological Band-Aid and move on.

One of the keys to digital maturity is to flip your thinking: You don’t create a strategy for mobile (or social, or analytics, etc.); rather, you have a member/audience strategy that includes mobile (or social, or analytics, etc.). Too many associations are focused on the Band-Aid and not on the larger business strategy and how tech can play a role.

A lot of industries and professions *are* “old school,” in that they aren’t super high-tech, particularly not with regard to the kinds of tech that come to mind when we think about digital transformation: apps and mobile devices, social media, cloud solutions, data analytics. If your association serves an industry or profession like that, you might think this doesn’t apply to you—at least not yet.

But your members’ and customers’ digital expectations aren’t set just by their professional lives; their expectations are also impacted by their personal use of technology. Amazon. Apple. Google. Netflix. Per Salesforce’s 2018 *State of the Connected Consumer* report, even among business-to-business customers, 69% expect an “Amazon-like” buying experience and 84% of customers expect to be treated like a person, not a number, if you want their business.<sup>3</sup> Meanwhile, per Community Brands’ 2019 *Digital Evolution Study*, only 57% of members think associations are doing a very good or excellent job of personalization—and only 23% of association staff members agree.<sup>4</sup>

1. *Strategy, not Technology, Drives Digital Transformation: Becoming a digitally mature enterprise*, pg. 3

2. <https://sloanreview.mit.edu/article/your-company-doesnt-need-a-digital-strategy/>

3. *State of the Connected Consumer*, pp. 9-10

4. *Digital Evolution Study*, pg. 9

Everyone is using digital tech in their personal lives. Salesforce asked consumers whether they were using eight different digital platforms, and the only one that fell below 50% use in any generation was digital voice assistants (like Siri and Alexa) in the Boomer and Traditionalist (Silent) generations. More than 50% of Boomers and Traditionalists are using online communities and social media, seven in ten are using online chat support and mobile apps, and 75% are using online knowledge bases, self-serve online portals, and text support. For Millennials/Gen Z, with the exception of slightly lower use of digital voice assistants, it's four (or more) out of five for every single one of those things.<sup>5</sup>

And your members don't care about your org chart when they're grading their customer experience with your association. "Customers judge companies based on their experience as a whole—not just interactions with individual departments—and they expect consistency."<sup>6</sup> For instance, it's not OK for your meetings department to be using data and technology in strategic, member-centric ways, while your membership department still takes two weeks to process applications and renewals because they're using paper forms, checks, and a bank lockbox.

And although we promise this won't be another hastily assembled monograph purporting to tell you everything you need to know to survive and thrive during COVID-19, the pandemic makes digital transformation especially critical for associations right now.

For too long, too many of us in associations assumed that digital transformation wasn't for us. It was too expensive and too hard, and it required too much technical knowledge and talent that we couldn't afford to recruit. Besides, our members didn't really care all that much, anyway—they didn't mind mailing in their registration forms and checks, and they wanted to attend our professional development trainings and conferences in person.


Well, never waste a good crisis. Or, as Altimeter put it in its recent report on digital transformation: "The digitization of organizations that was previously anticipated to take years happened in a matter of days."<sup>7</sup>

The pandemic forced associations to act fast, which meant that not every decision we made was the absolute most perfect right one that we would've come to with unlimited time, data, and other resources, but we learned that we could move quickly and not get everything right the first time, and the world didn't end.

***The pandemic forced us to  
tell ourselves a new story.  
We had to throw out  
"we can't because ..." and tell  
ourselves "we will, and here's how."***

With regard to digital transformation, it's no longer a question of "will we, or won't we?" Circumstances have conspired to force association executives to think about how we're going to do digital, bringing it into the core strategy of the organization, not as some separate project that lives in IT, and to think about how we're going to be effective and how we're going to know.

While digital transformation is, in fact, a somewhat mature discipline, your authors believe associations have both unique advantages and particular challenges we face in trying to transform ourselves, assets and drawbacks that the extensive existing literature on the topic doesn't really address. Associations have been struggling with digital transformation because the advice that exists on how to do it misses what makes our community special. This monograph aims to change that.

But first, it's important to define a few terms. 

5. *State of the Connected Consumer*, pg. 14

6. *State of the Connected Consumer*, pg. 10

7. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pg. 3

# What Digital Transformation Is—And What It Isn't

Many interpretations are commonly offered for what digital transformation is, which has led to significant confusion about the concept. Here are just a few.

**The marketing perspective:** Digital transformation is about reaching the right customers in the right way at the right time.

“Digital transformation is the process of using digital technologies to create new—or modify existing—business processes, culture, and customer experiences to meet changing business and market requirements. This reimagining of business in the digital age is digital transformation.

It transcends traditional roles like sales, marketing, and customer service. Instead, digital transformation begins and ends with how you think about, and engage with, customers. As we move from paper to spreadsheets to smart applications for managing our business, we have the chance to reimagine how we do business—how we engage our customers—with digital technology on our side.”

—Salesforce<sup>8</sup>

## Willingness to Explore: An Interview with Martin Mocker

Readers of this whitepaper may already be familiar with the work of Dr. Jeanne Ross, author of *Designed for Digital: How to Architect Your Business for Sustained Success*, which was frequently mentioned as a foundational text in the case study interviews we conducted. Dr. Ross recently retired, but we had the opportunity to speak with one of her co-authors, Martin Mocker, professor at ESB Business School at Reutlingen University, Germany, and research affiliate at the MIT Sloan Center for Information Systems Research.

### Q: How do you define “digital transformation”?

Two separate transformations are often conflated by executives: Becoming digitized and becoming digital. Both use technology to bring about substantial improvements in business performance, but they are not the same thing.

Becoming digitized involves using various types of technologies to improve operational excellence in business processes like reliability, throughput, and cost efficiency. Organizations have been becoming digitized for decades.

Becoming digital is new. This involves using various types of technologies to move beyond business processes improvement into creating business offerings that are customer facing and revenue (profit) generating. Becoming digital allows an organization to rapidly innovate to solve customer problems it couldn't previously solve.

When we think of digital transformation, we tend to think of “born digital” companies like Uber or Airbnb, but more traditional organizations can become digital as well, by acting more like “born digital” companies. The key is culture change.

8. <https://www.salesforce.com/products/platform/what-is-digital-transformation/>

**The technology perspective:** Digital transformation is about using digital technologies throughout the organization (i.e., no longer just the remit of the IT department).

“Digital transformation is the integration of digital technology into all areas of a business, fundamentally changing how you operate and deliver value to customers. It’s also a cultural change that requires organizations to continually challenge the status quo, experiment, and get comfortable with failure.”

—The Enterprisers Project<sup>9</sup>

**The IT perspective:** Digital transformation is about the move from on-premise hardware to cloud computing.

“Digital transformation can refer to anything from IT modernization (for example, cloud computing), to digital optimization, to the invention of new digital business models. The term is widely used in public-sector organizations to refer to modest initiatives such as putting services online or legacy modernization.”

—Gartner<sup>10</sup>

## An Interview with Martin Mocker Cont'd

The established companies that comprise the majority of my research are better at becoming digitized, perfecting what they're doing, improving processes, and adding more products like the ones they already have. Where they struggle is in creating something completely new in a systematic way that involves conducting experiments, working with autonomous teams, and coaching them to success, rather than making decisions in the hierarchical way they're more accustomed to.

### **Q: What should organizations—nonprofit or for-profit—concentrate on right now to best advance their digital transformation efforts?**

Organizations need to answer five key questions:

- 1. Do you know what your customers want and are willing to pay for?** Organizations answer this via co-creation with customers and via experimentation. Successful organizations know that it's critical to kill products that aren't working fast and know how to do that.
- 2. How do you go fast without creating a mess?** We find that the larger the organization, the bigger the mess experiments tend to create. Rather than constantly creating new platforms, successful organizations focus on creating—or finding—“digital Legos” they can snap together so their teams aren't constantly having to reinvent digital assets.
- 3. Are you the only organization that is going to use the digital platform?** Successful organizations open their APIs (application programming interfaces) to outsiders. (To learn about an association that has done this, see the Construction Specifications Institute case study, on pages 25-26.)

9. <https://enterprisesproject.com/what-is-digital-transformation>

10. <https://www.gartner.com/en/information-technology/glossary/digital-transformation>



**The HR/people perspective:** Digital transformation is about people, not just technology.

“Although digital transformation is heavily technology centered, it’s a mistake to only focus on roles and departments that are tech-intensive. Digital transformations are just as much about the people as they are about the technology. ... Digital transformations are about helping people make better decisions and take quicker actions. That’s why there needs to be multiple voices and stakeholders from different parts of the business involved. Without those varying perspectives, you risk mismanaging implementations as training employees need for new processes, behavior, and, sometimes, roles won’t be adequate.”

—Forbes<sup>11</sup>

**The leadership perspective:** Digital transformation is about change and management of that change.

“Digital transformation marks a radical rethinking of how an organization uses technology, people, and processes to fundamentally change business performance.”

—George Westerman,  
MIT principal research scientist<sup>12</sup>

## An Interview with Martin Mocker Cont'd

### 4. Who is developing the digital offerings?

Successful digital transformation requires new ways of working, new staff roles, new organizational structures, and new types of management, where managers coach rather than making decisions in a hierarchical, command-and-control fashion.

### 5. Do your operational systems support your new offerings?

Successful organizations are able to scale, which requires reliability in internal operations.

### Q: What's the most exciting trend in digital transformation right now?

What I'm excited about is not any particular technology but that the technologies that exist enable organizations to fulfill meaningful missions in ways they couldn't before.

One example is Philips Healthcare. Their mission is to improve health outcomes while also lowering healthcare costs. The only way to do that is by using digital technologies, like remote monitoring and AI (artificial intelligence), to create better customer-focused solutions. They've created a direct link from their digital offerings to their mission.

Another example is USAA. Their mission is to facilitate the financial security of their members, which benefits not just USAA's bottom line but society as a whole. Obviously, organizations need revenue, and companies need to make a profit, but I see increasing numbers of organizations using digital technology to create a better intersection between their mission and larger societal benefit.

11. <https://www.forbes.com/sites/willemsundbladeurope/2020/09/01/why-hr-is-critical-for-digital-transformation-success/>

12. <https://www.cio.com/article/3211428/what-is-digital-transformation-a-necessary-disruption.html>

**The strategy perspective:** Digital transformation is about new business models.

“Digital transformation is the strategic adoption of digital technologies. It’s used to improve processes and productivity, deliver better customer and employee experiences, manage business risk, and control costs. Digital transformation represents myriad tools, solutions, and processes. An effective strategy is one that’s customized for each unique organization.”

—Citrix<sup>13</sup>

And the list goes on.

Now, each of these definitions is at least partially correct. But we need to be wary of two common fallacies.

## **Fallacy #1: Digital transformation is fundamentally about the adoption of new technologies.**

While the continuous evolution of software, tools, and technologies, and the business adoption thereof, plays a big part, merely purchasing new technologies is not digital transformation.

Here’s another way to look at it.

We love Jeanne Ross and Martin Mocker’s distinction between being “digitized” versus being “digital.” Digitization involves standardizing business processes. It is associated with cost-cutting, reliability, efficiency, and transparency.<sup>14</sup> You can think of “digitized” as the implementation and upgrading of back-office or internal infrastructure and business processes.

“Digital,” on the other hand, is the adoption of new technologies for customer-facing programs, products, and services. As Mocker put it in our interview with him, which begins on page 4:

## **An Interview with Martin Mocker Cont'd**

You have to be willing to redesign your organization as necessary to fulfill your mission, but that requires “organizational surgery,” which creates a level of disruption many executives are unwilling to tolerate. That brings us back to culture change.

### **Q: What advice would you have for an organization that’s attempting, but struggling, to make this shift in how it operates and relates to its audiences?**

Do an honest assessment of where you are—you can use the five questions to do that—and create a roadmap of where you want to go. Start small by conducting experiments and committing to using them to learn directly from your customers through the process of co-creation.

The challenge, particularly in the era of the COVID-19 pandemic, is to learn what customers desire and which of their pain points you can address digitally as fast as possible. That will enable you to rapidly move out of crisis mode, preserving your revenue-generating products while also conducting valuable digital experiments. The most successful organizations are “ambidextrous,” meaning they can maintain both short-term and long-term focus, which is not natural for most people.

To quote a company that’s been successful in their digital transformation efforts, “We don’t know about what customers want from us, but we’re going to learn.” The best organizations cultivate that willingness to explore.

13. <https://www.citrix.com/glossary/what-is-digital-transformation.html>

14. <https://enterpriseproject.com/article/2019/5/digital-vs-digitized-CIOs-can-help>

“Becoming digitized involves using various types of technologies to improve operational excellence in business processes like reliability, throughput, and cost efficiency. Organizations have been becoming digitized for decades. Becoming digital is new. This involves using various types of technologies to move beyond business-processes improvement into creating business offerings that are customer facing and revenue (profit) generating. Becoming digital allows an organization to rapidly innovate to solve customer problems it couldn't previously solve.”

In *both* cases, however, merely purchasing and implementing new software does not automatically mean that you have successfully changed “the way things have always been done.” Using new tools in similar (non-efficient) ways as the old tools is definitely possible, as most association staff can attest. This is not just about putting some or all of your association's functions online, nor is it about experimenting with (or hoarding) new technologies inside departmental silos. Digital transformation requires wholesale organizational change.

## Fallacy #2: Digital transformation means adopting a “digital-first” culture.

While many (though not all) definitions of digital transformation do include the notion that it requires some level of culture change, be careful of those that advocate for a narrow definition of culture change that is driven primarily by the digital revolution. In other words, there's a fatal flaw in how CIOs and other tech advocates understand culture's role in digital transformation: **They put digital first, not culture.**

We see that theme consistently in the writing in the tech sector on this topic. Some argue that successful digital transformation requires a “digital-first culture,” one where technology is central, and everyone in the organization, from the receptionist to HR to the C-suite, is required to have a tech-first mindset. Tech sector writers tend

to advocate for things like experimentation, failing fast, prototyping, and innovation to be the pillars of a successful culture.

Why?

Because that's how technology people work.

They view digital transformation as integrating technology into every part of the business, so obviously those components need to be central to the culture. But the problem here is that, while a tech-first approach may work well as the foundation of startup culture, it is less effective and can even be counter-productive as the foundation of culture in other types of organizations.

This is not to say that more mature organizations can safely ignore experimentation, prototyping, and innovation—far from it. But we believe that, to be successful, digital transformation must *start* with culture change and *proceed* to technologies, not the other way around.

Hence our core challenge:

Associations want to create more value for our members and have a greater positive impact for our professions and industries




We need to change how we work in big ways to do that



We need to figure out what tools to buy or build to make that happen

In short, digital transformation becomes an iterative process of adapting how we work to better serve our stakeholders in the evolving digital environment.

Why aren't associations doing that? 



# Why Associations Struggle with Digital Transformation

First of all, digital transformation is hard for everyone, not just associations. Per the *Harvard Business Review*, 70% of digital transformation efforts fail. Further,

“of the \$1.3 trillion that was spent on DT last year [2018], it was estimated that \$900 billion went to waste.”<sup>15</sup>

YIKES.

As the *HBR* article goes on to point out, what digital transformation efforts mostly succeed at is magnifying existing organizational flaws.

Our hypothesis is that, for associations, it’s not so much the “digital” that’s the problem—it’s the transformation.

This is not to say that associations don’t still have work to do on the technology front—they absolutely do, and we’ll talk a bit more about that in the next section and in the case studies—but we believe the bigger hurdle is culture change.

Furthermore, this is a major reason why a lot of the existing studies and advice on digital transformation haven’t helped associations that much: For-profit culture and nonprofit (or, if you prefer, tax-exempt) culture are fundamentally different.

It’s become trendy in some quarters in association management to disparage membership and the membership relationship. We disagree.

The reason people “associate” in the first place is to accomplish something as a group that they can’t accomplish easily, or at all, alone. But there are plenty of ways to come together to accomplish tasks as a group that aren’t associations: civic and neighborhood groups, political parties, teams, religious communities, communities of practice, consciousness-raising groups, support groups, study groups, etc.

People can also become “members” in many different places: Amazon Prime, Costco, Sam’s Club, local journalism outfits, Substack, Patreon.

But membership in an association is not the same as membership at Costco or in a community of practice, and while associations definitely have customers—you absolutely should have customers you sell things to in addition to your members, and other types of audiences you serve—association don’t *only* have customers.

Association members own the organization. They are your bosses, informally as a whole, and formally in the form of your board of directors. They are also the users of the organization, the customers, and the targets of your staff’s efforts to provide the programs, products, and services they need to be successful. Members are your customers, but they have a vastly greater investment in your association than customers of consumer businesses. That, in turn, profoundly affects associations’ efforts at digital transformation and complicates associations’ culture work.

For example, one of the keys to digital transformation is collecting and using customer data to provide personalized experiences that align with those customers’ goals.

15. <https://hbr.org/2019/03/digital-transformation-is-not-about-technology>

Associations have an advantage here. As Community Brands' 2019 *Digital Evolution Study* demonstrates, although members are concerned about data security, the significant majority are willing to share their data with their associations, particularly if the association plans to use that data to provide personalized content and is transparent about why the association is collecting the data in the first place.<sup>16</sup>

Yet associations are lagging on actually doing that. Less than a quarter of association professionals who responded to the Community Brands survey think their association is doing a “very good” or “excellent” job at delivering personalized content.<sup>17</sup>

That gap? That's about culture.

Here's what this particular scenario looks like in real life.

Your association is eager to up your data game. You're starting to collect data from a variety of sources, internal and external. You're trying to pay closer attention to Google Analytics and web traffic. You're tracking social media reach. Your new virtual conference provides a treasure trove of possibilities when it comes to tracking engagement from attendees. Your membership staff are doing their best to track members' participation and purchases and to tie those data points to retention. While different departments have varying degrees of skill with data analysis, everyone is trying to make data-driven decisions. Maybe you've even convened a team to try to organize all of this data and produce actionable insight from it.

But that “actionable insight”—while it might be happening piecemeal, inside specific departments—is not reaching the level of true organizational business intelligence.


Why?

Because there's no cross-functional sharing of data-informed knowledge so that everyone understands how the pieces of the puzzle fit together. There's data hoarding: “Only trained experts can run reports.” There's a lack of connection between individual employees at all levels and the data that matters: “That's the marketing department's job.” The senior managers only look at the data that relates to making their own numbers. There's friction between Team “we could be doing so much more with our data” and Team “just because we can collect it doesn't mean we should.”

All of the above is about culture.

Digital transformation roadblocks show up in culture patterns like these:

- **Awkward Collaboration.** People help each other individually, but organizational silos make group collaboration difficult.
- **Reactive Transparency.** Decisions are frequently made based on inadequate information because people only discover what they needed to know in retrospect.
- **Uneven Discipline.** Some groups are held to higher standards of accountability than others—and no one ever fixes it.
- **Unclear Priorities.** The organization has a strategic plan, but nobody knows if what they're focused on this quarter is moving the needle on it.

How do you change your culture so it enables digital transformation rather than blocking it? 

16. *Digital Evolution Study*, pp. 5-6

17. *Digital Evolution Study*, pg. 9

# Culture Change + Vendor Selection

“Digital transformation = culture change + vendor selection.”

—Maddie Grant, PROPEL

## Let's Talk Tech

We're going to start with the easy part—the technology (vendor selection)—and then move on to the hard work of managing your people through culture change.

As association executive and digital transformation evangelist Garth Jordan pointed out at the SURGE Spring 2018 event, the point of digital transformation is to use technology to reduce transactional friction for both members and staff.<sup>18</sup>

Which begs the question: **Which technologies actually do that?**

In reviewing the literature on digital transformation, we noticed general agreement around four main tech categories:

- Cloud
- Data Analytics
- Mobile
- Social

We'd like to add three more to that list:

- Artificial Intelligence (AI)
- Internet of Things (IoT)
- Web

Before we get into what the “digital” part of digital transformation might look like, there's an over-arching principle we want to highlight.

As a recent article in *MIT Sloan Management Review* put it: “Get away from silo thinking. ... Focusing on the technology can direct aspirations toward what technology can do, rather than what a transformed business should look like.”<sup>19</sup>

In other words, you don't need a mobile strategy—you need an *organizational* strategy that incorporates mobile (and social, data analytics, cloud, web, AI, and IoT).

This may be the most important mindset change you can make: Stop focusing on the shiny tech objects. Focus instead on the capabilities offered by technology to make life easier for your staff, members, and other audiences. The tech is not end; it's the means to the end of accomplishing your organizational goals and providing better solutions for your internal and external audiences along the way.

What would that look like?

All of our research points to one common factor: A customer-centric focus.

That means moving your IT services to the cloud if you've realized that running a server farm shouldn't be a core staff competency (because your staff are your customers, too).

That means creating a website where information is organized and presented in ways that make sense to your members and other audiences, not one based on your internal departmental structure, as the American Society for Microbiology has done with their recently redesigned website: <https://asm.org>.

18. *Strategic Digital Transformation: A Collection of Insights from SURGE Spring*, pg. 19

19. <https://sloanreview.mit.edu/article/your-company-doesnt-need-a-digital-strategy/>

That means taking a “Mary Poppins” approach to your social media, where a spoonful of sugar (fun) helps the medicine (informing people, marketing to them) go down, like the Council of DC Twitter account,<sup>20</sup> and organizing your social media presence around Joe Pulizzi’s 4-1-1 Rule, rather than using it just as a shouty marketing channel.<sup>21</sup>

That means doing the hard work of collecting and analyzing data so you can use it to drive your decisions. (For more on how to do this, see the Spark/Mariner whitepaper *Getting to the “Good Stuff”: Evidence-Based Decision Making for Associations*.)

That means continuously learning about your members so you can get better at anticipating what they’ll need based on “life events,” which *MIT Sloan Management Review* recommends as a critical step to preparing for a digital future.<sup>22</sup>

Let’s dig into that concept of responding to “life events” a little more. In the *Sloan* article mentioned above, one of the stories shared is about a bank that realized that nobody wants a mortgage—people want to buy a house.

Lots of associations promote that they offer “networking, education, and advocacy.” The thing is, no one wants “networking.”

If I’m coming to your networking event, I might want someone to hire me or buy my product. I might want to hire someone or buy a product. I might be looking for a mentor or a protégé, or to catch up with professional friends and colleagues.

### Should You Build an App?

You’ll learn more about what some of your association peers are doing in social, mobile, data analytics, cloud, web, artificial intelligence, and the Internet of Things in the case studies to follow, but we want to address one specific tech question: What about an app? Should your association invest in creating one?

We are app skeptics, and here’s why.

In December of last year, Tech Crunch reported on Apple’s most downloaded apps of 2020:

#### Top Free iPhone Apps

1. ZOOM Cloud Meetings
2. TikTok
3. Disney+
4. YouTube
5. Instagram
6. Facebook
7. Snapchat
8. Messenger
9. Gmail
10. Cash App

#### Top Paid iPhone Apps

1. TouchRetouch
2. Procreate Pocket
3. Dark Sky Weather
4. Facetune
5. HotSchedules
6. AutoSleep Track Sleep
7. The Wonder Weeks
8. SkyView
9. Shadowrocket
10. Sky Guide<sup>i</sup>

i. <https://techcrunch.com/2020/12/05/this-week-in-apps-the-years-best-apps-2020s-biggest-downloads-the-app-stores-newest-hire/>

20. <https://twitter.com/councilofdc/>

21. <https://blog.marketo.com/2012/07/the-4-1-1-rule-for-lead-nurturing.html>

22. “Thriving in an Increasingly Digital Ecosystem,” *MIT Sloan Management Review*, Summer 2015, pp. 32-33

Likewise, no one wants “education.” If I’m looking to your association for professional development, I might need CEUs to maintain my license. I might want to get promoted, and I think earning your certification will help. I might need to learn a specific skill to do my job better. I might need to connect with a peer who can answer my questions about a particular challenge I’m facing.

The various digital revolutions associations have witnessed in the past 25 years have not stopped people from joining. However, these revolutions have changed what joining means and people’s expectations about what joining gets them. You need to push yourself to understand what your audiences are really after—their needs, the personal and professional challenges they face every day, the goals they’re trying to achieve. Only then can you think intelligently about how technology might make those life events easier for them to accomplish.

Now that we’ve covered the easy part—the technology—let’s move on to the hard work of culture change. (Although if nerding out on the tech is your thing, we highly recommend McKinsey & Company’s *Unlocking Success in Digital Transformations* and *Designed for Digital: How to Architect Your Business for Sustained Success* by Jeanne W. Ross, Cynthia M. Beath, and Martin Mocker.)

### All Digital Transformation is Culture Change, But Not All Culture Change is Digital Transformation

The dominant narrative about culture change is that it’s hard, senior leaders don’t want it, and everyone else will resist it. But if there’s one thing the COVID-19 pandemic showed us, it’s that, if there’s a good enough reason, workplace culture can turn on a dime.

#### Should You Build an App? Cont'd

Meanwhile, Google makes its continuously updated list of most-downloaded apps public at <https://play.google.com/store/apps/top>. You may notice some (or a lot of) overlap.

What do all of these apps have in common?

They’re highly (maybe even addictively) engaging (social media, entertainment, games), or they allow users to perform specific important personal or professional tasks (video conferencing, HR functions, parenting, finance, health and fitness).

This is why dedicated association apps that facilitate accomplishing a particular and important audience task—conference apps, apps that allow users to earn and track continuing education units (CEUs)—do well, and everything else generally underperforms expectations. Association apps aren’t addictive (which is probably a good thing), and there’s no compelling reason your members and other audiences need to use them regularly.

It’s more effective to invest your limited resources in creating a mobile-first website that’s fully responsive and has been tested end-to-end to make sure all the functions work correctly on tablets and smartphones.

The most common big fail there?

It’s usually anything that requires interacting with something outside your content management system (CMS), like an association management system (AMS) connection that facilitates members’ joining or renewing or a learning management system (LMS) connection that facilitates taking courses and tracking CEUs.

If your AMS or LMS functions require people on smartphones to pinch and scroll to accomplish critical tasks—joining, renewing, registering for events, tracking CEUs—put your money into working with your vendor to fix that or into finding a different vendor, not into an app your members are unlikely to use frequently enough to justify your investment.



As Jamie Notter wrote in *Forbes*,

“Culture is not something that lies static until someone decides to change it. Culture is more like a living force that is always ready to change and morph but is generally constrained by the cultural guardrails we have established in our organizations. This current crisis effectively ripped away some of those guardrails, and our cultures started changing rapidly and extensively (and almost effortlessly, in some cases) as a result. But the lesson here is not that we need a crisis to change our culture. The real reason this crisis enabled such effective change is, in fact, the lesson: It was crystal clear about the “why.” We instantly transformed into a remote workforce, because if we didn’t, thousands would likely die unnecessarily. We all know why we are doing this, and we can see the direct link between us engaging in these unfamiliar behaviors and the positive results we hope to get (slowing the spread, saving lives). In most non-crisis efforts to change culture, however, we are not very disciplined about connecting those dots.”<sup>23</sup>

It’s a significant irony that so many of us in associations tout the importance of digital transformation, as if the need for it was somehow self-evident, yet so few of us who are charged with implementing digital transformation are successfully articulating the “why” for our people when we’re asking them to change how they do things.

In each of the case studies you’ll read in this white paper, all of which showcase successful digital transformations, there is a clear mandate from leadership, a clear reason to take some big leaps of faith and invest in a new way of doing things. While culture change is happening all around us all the time, one of the keys to turning that into *intentional* digital transformation is strong support from the C-suite (and from the board or volunteer leadership), actively providing direction and the resources for that change to happen.

Other common stumbling blocks to digital transformation include:

- **We don’t treat people how we want to be treated.** We somehow disassociate our members’ and customers’ digital habits from our own habits as digitally savvy professionals. We either aggressively market to them, as if they don’t filter emails and unsubscribe to pushy communicators just like we do, or we become so worried about “over-communicating” with our stakeholders that we don’t realize that they overlook our once-a-week information dump. Successful digital transformation case studies demonstrate a real-time, nuanced understanding of how, when, where, and why their constituents need information, which is how actual humans interact with each other.
- **We ignore our most valuable asset.** We undervalue the treasure trove of data we hold on our members. We have access to enough information to be able to support them throughout their entire professional career lifecycles, but we rarely invest in effective data governance, data management, data analytics, or the basic data hygiene that is critical to customer-centric digital transformation.
- **We still can’t decide if we should be leading our members or serving them.** Association executives have to operate in two realms simultaneously. We have to meet members’ immediate needs, helping them solve today’s problems and achieve today’s goals. But we also have to do the forward-thinking work of leading members into the future of their profession or industry. Striking the right balance is critical, and digital transformation can help because it is inherently future-focused, innovative, and mission-aligned, with the explicit goal of creating value by using technology to do new and different things.

23. <https://www.forbes.com/sites/forbescoachescouncil/2020/04/23/an-important-lesson-in-culture-change/>

You may be wondering: **What does any of this have to do with culture change?** Well, everything, because you can't solve these conundrums until you have fixed the ingrained culture patterns that keep them in place.

The core unit of analysis for culture is not values, beliefs, or even behaviors. The core unit of analysis is the **culture pattern**. Your culture is made up of patterns that define what is valued inside the culture, which then drives behavior.


For example, most association cultures claim to embrace the *concept* of innovation, things like creativity and future-focus, without really valuing the *practice* of innovation, things like risk-taking and experimentation. That pattern (concepts over practices) is a key reason why innovation doesn't happen, even when we claim to want it and value it, and why digital transformation initiatives fail.

If you want to achieve successful digital transformation, you must be diligent about discovering the culture patterns in your organization that could be interfering and then making the necessary adjustments.

How do you do that?

1. **Define the current state.** You can't go from point A to point B without knowing where you're starting from. Analyze and describe your culture in detail, not as you ideally would want it to operate, but with a clear-eyed acknowledgement of how it really does operate.
2. **Understand the culture patterns that are slowing you down.** Figure out how the current state is preventing success. This is ultimately a "what got you here won't get you there" exercise. What worked before is not working now, because the ecosystem in which your association operates has changed, yet the old patterns persist.
3. **Write up what we call your "culture plays" in a culture playbook.** Identify the specific processes, structures, and behaviors that need to change to solve the problems you identified and to generate better results. Show people how your plays will do the equivalent of "slow the spread and save lives."

This work is not only change management; it's *culture management*. In this work, you'll likely focus on certain areas of culture that relate directly to the aspects that are slowing down your ability to take on digital transformation: internal collaboration, transparency and information flow (horizontal and vertical), innovation practices (not just concepts), diversity and inclusion (because you must reflect the world around you), and agility and speed of decision-making.

Armed with this knowledge, you then have the insights you need to start measuring your digital maturity. 

# Assessing Maturity

As we'll also discuss in the final section of this whitepaper, to make progress on your digital transformation journey, you have to know where you are right now. In other words, you need to assess your association's level of digital maturity. Or, as the Altimeter report we'll discuss in more detail below puts it:

“Organizations must make tough choices about where to focus their efforts and initiatives. Benchmarking where they are—their digital maturity—against where they need to be to achieve their business transformation goals is essential.”<sup>24</sup>

There are a number of options, but the best we've found so far is the model from Altimeter, a Prophet Company. Many readers may be familiar with Altimeter, which was founded in 2008 by Charlene Li and Brian Solis, both of whom have been featured as keynote speakers at ASAE's Technology Conference. Altimeter became part of Prophet in 2015, shortly before it released its first maturity model report, *The Race Against Digital Darwinism*, in April 2016.

*The Race Against Digital Darwinism* described six stages of digital transformation maturity, focused around their impact on the customer experience. The model assessed organizations across six key elements:

- Governance and leadership
- People and operations
- Customer experience
- Data and analytics
- Tech integration
- Digital literacy

The model then slotted organizations onto a scale ranging from “business as usual,” where organizations take a legacy perspective focused on digitizing operations (to use Jeanne Ross and Martin Mocker's framing), all the way to “innovative,” where digital transformation becomes embedded across the organization as cross-functional teams adopt a customer-centric mindset and seek to become solutions partners to those customers.

In 2020, Altimeter revised and simplified its model in *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*.

In the updated report, the authors note: “The digitization of organizations that was previously anticipated to take years happened in a matter of days.”<sup>25</sup> We've observed a similar dynamic in the association industry, as we've noted already, where almost overnight “we can't, because ...” became “we will, and here's how.”

As the Altimeter report notes, in 2020, digital transformation turned inward for many organizations, as many had to adapt quickly to an entirely remote workforce in an era of significant budgetary pressures caused by the pandemic recession, a dynamic we've observed in the association industry as well.<sup>26</sup>

Altimeter's revised assessment measures organizations on 26 criteria organized across five key elements:

- Leadership and culture
- Customer experience
- Marketing and sales
- Technology and innovation
- Data and artificial intelligence

24. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pg. 4

25. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pg. 3

26. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pp. 5-7

The updated scale includes five levels of digital maturity, while maintaining the customer-centric foundation identified in 2016, “as the adoption and acceptance of technology by customers is the driving force for digitization. Furthermore, customer-facing digital capabilities are key to driving accelerated growth.”<sup>27</sup>


### Altimeter’s Five Stages of Digital Transformation Maturity:

- **Making the Case**, where organizations start performing customer-facing experiments on digital platforms.
- **Developing Foundations**, where organizations seek to understand customer journeys while improving staff digital skills.
- **Building Operations**, where organizations scale up their digital experiments and investments to involve entire departments. (Of note, 44% of organizations assessed landed here, with 31% at an earlier stage and 25% ranking as more mature.)
- **Integrating Platforms**, where, by this point, department-level operations have been digitized, and organizations can update legacy platforms to facilitate organization-wide integration.
- **Optimizing for Growth**, where the organizational focus is on creating outstanding customer experiences by leveraging cutting-edge technologies.<sup>28</sup>

The point is to complete the work of modernizing infrastructure and improving operations (it is 2021, people), so your association can focus on using data to drive decisions about innovation in new programs, products, or services that are “born digital” and create outstanding member, customer, volunteer, and other stakeholder experiences.<sup>29</sup>

As we’ve seen elsewhere, the Altimeter assessment affirms that C-suite support, particularly CEO/CIO/CTO support, is critical to digital transformation success, as is connecting your efforts to your organization’s overall business goals, because “clear business outcomes increase the likelihood that digital transformation will be taken seriously across the organization.”<sup>30</sup>

Relatedly, Altimeter offers the following warning: “Organizations without mature digital capabilities in a world that has shifted more digital than ever will lack revenue engines.”<sup>31</sup> That is not a situation any of us can afford to be in, particularly as we look ahead to an extended recovery from the pandemic recession.

For more information about the Altimeter model, including how you can take the assessment for your own organization, visit <https://www.prophet.com/altimeter/research/digital-transformation/>. 

27. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pg. 16

28. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pp.17-18

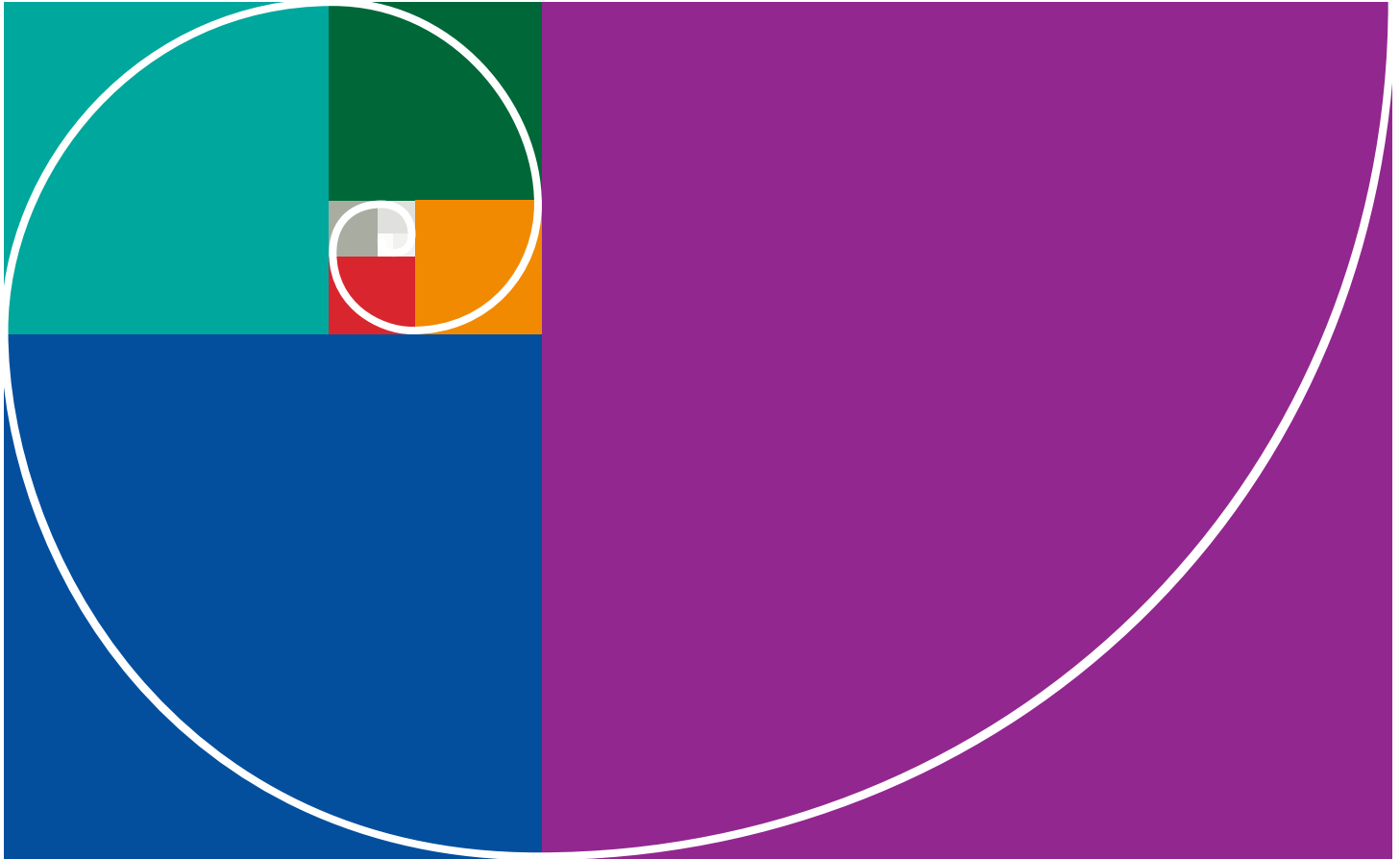
29. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pg. 20

30. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pp. 23, 25

31. *The 2020 State of Digital Transformation: Benchmarking Digital Maturity in the COVID-19 Era*, pg. 26

## Culture Management Maturity Model

For a culture-first comparison, Maddie Grant and Jamie Notter's ebook *The New Work of Culture: A Maturity Model for Managing Workplace Culture and Unlocking Human Potential* describes a culture management maturity model with the following stages:



### CULTURE AS A:

#### CONCEPT

**0 - Unintended**  
culture by default,  
or ignored

**1 - Idealized**  
core values posters;  
may not reflect reality

#### PRACTICE

**2 - Designed**  
paying attention  
to culture

**3 - Managed**  
processes in place to  
support culture work

#### SYSTEM

**4 - Embedded**  
included in HR, policies,  
communications

**5 - Integrated**  
infused into strategy  
and leadership



## Culture Management Maturity Model (Cont'd)

### Culture as a Concept

#### Level 0 – Unintended Culture

- No formal processes are in place for defining or improving culture.
- The definition of culture (and any change in culture) is driven exclusively from the top.

#### Level 1 – Idealized Culture

- Cultural values are defined, including key principles and the behaviors that support them.
- Specific rituals and/or artifacts have been created to internally communicate what the culture is.
- Employee experience is measured and analyzed on a periodic basis.
- People dynamics, such as internal conflicts or senior team effectiveness, are explicitly addressed.

### Culture as a Practice

#### Level 2 – Designed Culture

- Completion of a qualitative or quantitative culture assessment.
- Specific processes, structures, or technologies are being intentionally altered (via plays in a playbook) to align the culture with success.
- Time, money, and other resources are being spent to improve culture.
- Senior management is visibly committed to intentionally shaping culture.
- The initial infrastructure for your Culture Operations is in place.

#### Level 3 – Managed Culture

- The culture work is supported by solid project management processes.
- You're measuring the progress of your culture work as part of a broader culture metrics strategy.
- An annual culture budget (with a tactical focus) is in place.
- There are formal roles, responsibilities, and teams focused on the culture work.
- There are solid communications about the culture and ongoing culture work.
- Middle management supports and understands the culture work.

### Culture as a System

#### Level 4 – Embedded Culture

- Culture is baked into your core talent acquisition and retention practices.
- Some of your HR FTEs are 100% focused on culture.
- Your website tells your culture story effectively to the outside world.
- Your policies are updated and aligned with your culture.
- You might have redesigned your office space with culture in mind.

#### Level 5 – Integrated Culture

- Culture is infused into strategic planning and decision-making.
- Decisions about organizational growth keep culture in mind.
- Governance bodies are aware of culture and change it when needed.
- There are active internal networks designed to keep culture alive in people's behavior and approach.

# How Do I Get Started?

This is the crux of the matter: How should association executives bridge the *theory* of digital transformation to the *practice* of digital transformation? When considering your own association, what do you need to change or do differently to step into this new world?

As we've articulated throughout this whitepaper, this is exactly where much of the literature on digital transformation falls apart for associations. In our work in associations and conversations with association executives, we find that the association community has largely bought into digital transformation intellectually, but, because culture change is so critical to digital transformation, and because the advice that exists has been developed by people who are not aware of the cultural differences of associations, it's very hard for association executives to figure out what to actually do.

We're here to help.

## 1. Assess

The very first step we recommend: **Assess where you are.**

Many high-quality digital maturity assessment tools are available, including Forrester,<sup>32</sup> Fusion Productions/ Association TRENDS<sup>33</sup> and the Altimeter model we covered in the previous section.<sup>34</sup>

You also need to assess your culture. Many culture assessments are out there (Human Synergistics, CultureIQ, etc.), but we are obviously not neutral here and would point you to the assessment that Maddie created, the WorkXO Culture Assessment.<sup>35</sup>

Pick one, assess yourself, and figure out where you are now. That's the only way you'll have a clear picture of what your options are for where you can go next.

## 2. Support

Second, **secure leadership support** and, perhaps even more critical, **secure a funding commitment.**

Every study we reviewed for this whitepaper, and every association executive we talked to in conducting our case study interviews, stressed that enthusiastic C-suite support is critical to success.

***"Together, the CEO and CIO/CTO roles provide point leadership for digital transformation in 60% of reported cases."***<sup>36</sup>

"Digital transformation is about the most senior levels of leadership. For every CIO/CTO entrusted with the responsibility, there is a CEO who thinks business when they think digital and has taken responsibility upon themselves for driving digital transformation."<sup>37</sup> Your CEO doesn't have to be a digital native—although that's increasingly possible as the Millennial generation moves into more senior roles—but she needs to be fully bought in in order to effect the challenging culture change that's required to be in the 30% of digital transformation projects that succeed.

32. <https://www.forrester.com/report/The+Digital+Maturity+Model+40/-/E-RES131801>

33. <https://www.associationtrends.com/Digital-Transformation-Assessment-for-Associations>

34. <https://www.prophet.com/download/2020-state-of-digital-transformation-plx/>

35. <https://propelnow.co/culture-assessment/>

36. *The 2020 State of Digital Transformation*, pg. 23

37. *The 2020 State of Digital Transformation*, pg. 26

One constant that held between Community Brands' 2017 and 2019 studies of the digital evolution of associations was: **Lack of dedicated funding**. In 2017, only 27% of associations surveyed planned to increase their investment in technology.<sup>38</sup> By 2019, that was up to 44%, but that still leaves more than half of association executives surveyed feeling unprepared for the future.<sup>39</sup>

Because technology—and association audiences' needs and expectations with regard to associations' use of technology—evolves so quickly, you may not know the exact dollar figure you need right now, but, without a commitment of at least some financial resources, your plans for digital transformation are going nowhere. Rather than trying to budget your technology needs down to the last penny, we recommend association executives take the approach offered by Jeff De Cagna in his 2012 ebook *Associations Unorthodox* and allocate resources with a focus on strategy, flexibility, and trust, collaborating in real time to reallocate funding as necessary to meet new opportunities as they arise.<sup>40</sup>

### 3. Identify

Next, it's time to dust off your organizational strategy and goals **to identify strategic areas where digital tech (social, mobile, data analytics, cloud, web, AI, IoT) could make a difference** in the experiences of your internal or external audiences.

Remember that your goal is to take an outside-in mindset, to be member-centric. You don't, for instance, need to develop a stand-alone strategy for data. You need a data-informed member and customer strategy.

How do you develop an outside-in perspective and become member-centric? Spark and The Demand Networks previously dealt with this at length in the 2015 monograph *Leading Member Engagement from the Outside-In*. Our research revealed eight keys to member-centric engagement:

- Think like your members
- Build real relationships
- Organize around shared purpose
- Focus on outcomes
- Co-create
- Harness the power of collaborative community
- Encourage continuous learning
- Take the long view

The foundation, however, is starting with your members and other audiences, seeking to understand, at a deep level, the challenges they face every day and the goals they are trying to achieve, and then focusing on connecting them with solutions.

### 4. Review

This is going to involve **reviewing your legacy systems and processes**, so you can identify what's holding you back, set priorities, and create a plan to modernize them. For those who are fans of *Designed for Digital*, this is the “operational backbone” work it describes. Every association we have worked with or worked for has work to do in this area.

You may be thinking, “Not us! We're thoroughly modern!”

Are you sure?

38. *Digital Member Study*, pg. 16

39. *Digital Evolution Study*, pg. 20

40. *Associations Unorthodox*, pg. 26

Does your AMS integrate seamlessly, sharing data with all your other systems? Are all your external-facing functions fully mobile optimized? Do you still have any processes that can only be done on paper? (Which is, of course, different than continuing to offer paper as an option for those members who prefer it.)

It can be hard to figure out how best to change systems and processes, because we get locked into the ways things are done now and have always been done. This presents a tremendous opportunity to engage members and other audiences in a design-thinking exercise to reimagine a better way. For more on how to do this, see Jeanne Liedtka and Tim Ogilvie's *Designing for Growth*. For an example of an association that has done this successfully, see "NAFSA: Association of International Educators: Combining Design Thinking and Lean Startup" in *Innovate the Lean Way*.<sup>41</sup>

### 5. Recruit

Related to this, you need to **recruit your team**.

Obviously, this is going to involve staff—and not just IT staff. As we hope is clear by now, digital transformation is not just, or even primarily, an IT function. As identified in McKinsey's 2018 report *Unlocking Success in Digital Transformations*, creating networks of cross-functional teams and providing training in how to lead those teams is strongly correlated with success.<sup>42</sup>

This relates to the Institute for the Future's 2019 *Future Skills Update* report, which identifies the skills employees need to be successful in the "world ahead," one that includes increases in automation, changes in the culture of work, and new organizational models. Those skills include:

- Personal skills: resilience.
- People skills: cross-cultural competency, social intelligence, virtual collaboration.
- Applied knowledge: novel and adaptive thinking, cognitive load management, sense-making.
- Workplace skills: new media literacy, design mindset, transdisciplinarity, computational thinking.<sup>43</sup>

These are the very skills you should be hiring for, training in your existing staff, and looking for as you assemble your digital transformation staff team.

You also need to recruit team members from among your association members, customers, and other stakeholder audiences, like your volunteers and vendors. They will help you hone your outside-in perspective and knowledge, engaging in co-creation with you to help you learn and harness the power of community. These external stakeholders should be early-adopter types who will be excited about the opportunity to help you with your design-thinking process and to beta test things that are not quite ready for prime-time.

41. *Innovate the Lean Way*, pp. 19-20

42. *Unlocking Success in Digital Transformations*, pp. 7, 9

43. *Future Skills Update + Literature Review*, pg. 21

### 6. Experiment

Why do you need beta-testers?

Because you are going to need to get comfortable running tests and letting “outsiders” try things that aren’t fully functional, so that you can collect rich feedback from them that goes far beyond 1-5 Likert scales and use that feedback to improve and iterate based on what you learn. In other words, you’ll need to **adopt a lean startup approach**, as described in Eric Ries’s book *The Lean Startup* and applied to the association context in *Innovate the Lean Way*.

### 7. Culture

Finally, you’ll need to **up your culture management game**.

We’ve already pointed out that you should start with a culture assessment, but, in addition to knowing what your culture is, you need to build your capacity for intentionally designing and changing your culture to support your success drivers. You must be actively managing your culture (much like you do your finances or your technology), which means having people focused on it and resources devoted to it.

Your people should be managing things like:

- Identifying the specific process, structures, and technology changes that will move your culture in a direction that supports digital transformation.
- Measuring the impact of culture-change activities, both on the culture itself and on overall organizational results.
- Integrating culture into your HR activities, like performance management and hiring.

Remember, you either have a culture by design or a culture by default, and you’re not going to achieve transformation with a default culture.

All of the above can help you with changes to mindset, culture, and approach. **But what about specific investments in particular technologies?**

Once you know where you are in the journey toward digital maturity, secure leadership and financial support, align with your organizational strategy and goals, prioritize legacy systems to update, recruit your team, and familiarize yourself with the principles of lean startup (the Build-Measure-Learn cycle, Minimum Viable Products, and the Pivot), where do you actually put those funds you’ve secured?

For that, we turn back to Community Brands’ 2017 and 2019 digital evolution studies, because they have some good, specific recommendations that can help you think about where you might start.

Their 2017 recommendations for increased investment include:

- Member journey maps
- End-to-end mobile responsive design
- Personalization
- Data analytics and business intelligence<sup>44</sup>

In 2019, they added:

- Technology that supports non-dues revenue sources, such as professional development, certifications, and career centers
- Data privacy and security<sup>45</sup>

What about the culture side? How do you ensure that you end up in the 30% group, whose digital transformation initiatives were successful, not in the 70% group that wasted \$900 billion?

44. *Digital Member Study*, pg. 20

45. *Digital Evolution Study*, pp. 23-24



The same *Harvard Business Review* article that cited that alarming statistic offers advice including items we've already highlighted, like letting strategy drive investment (rather than the reverse), adopting a lean startup approach, and taking a customer-centric, outside-in perspective.

But one unique concern *HBR* identified that's worth emphasizing was the importance of recognizing employees' fear of being replaced.<sup>46</sup>

In 1997, Elizabeth accepted her first job in association management, leading a four-person membership team and running IT for a scholarly society. She's always been a bit of a geek at heart, so she was looking for opportunities to make use of digital technologies to serve members better and make her team's jobs easier.


She knew that one of the best places to learn what digital innovations members and other audiences might be looking for was those team members, who interacted with members and customers via phone and email every day. So she attempted to solicit ideas for improvement from her team. This did not get off to a fast start, and she couldn't figure out what the problem was. She knew her team members were smart, observant people with good ideas and deep knowledge of members' goals and challenges. What was going on?

One, as "front line" staff, her team was used to being ignored by management. But even when she started to implement their ideas—and make sure they got the credit—they were still slow to share ideas. Finally, exasperated, she asked them what the problem was.

Sure enough, one of her team members opened up, during one of their periodic one-on-one coaching conversations: The team was worried that, if they no longer had to spend 40 hours a week pushing paper, one or more of them would be fired.

It was only when Elizabeth spoke directly to their fears—assuring them that the point of increasing automation was to free up their time and attention to devote to more interesting work, providing high levels of one-on-one customer service, and not to cut staff—that they really began to blossom. They became comfortable with both sharing their good ideas for improvement and also taking the authority she had given them to do what they thought was right to resolve members' issues, without fear of punishment.

The result was significant increases in total membership count and overall membership satisfaction over the course of the next several years—doing well while doing good.

In other words, the team achieved a culture change that allowed the association to operate more efficiently and effectively, while also providing an improved experience for both internal and external audiences. That's the promise of digital transformation, one we hope the information, stories, and advice we've shared in this whitepaper will help you achieve for your association. 

46. <https://hbr.org/2019/03/digital-transformation-is-not-about-technology>

# CASE STUDY

## Construction Specifications Institute: The Crosswalk Platform

**“Our BHAG (big, hairy, audacious goal) is ‘McKinsey reports construction has become one of the most digitized and efficient industries, in part due to CSI’s Crosswalk platform.’”**

Mark Dorsey, FASAE, CAE, CEO

When Mark Dorsey arrived at CSI in 2015 and realized it had to work to do to become digitized before it could achieve his goal of becoming digital, he knew just who to call: Cimatri’s Rick Bawcum, with whom Dorsey had worked at a previous association. (For more on the digitized/digital distinction, see *Willingness to Explore: An Interview with Martin Mocker*, pages 4-7.)

The team made rapid progress on becoming digitized and were quickly able to transition to, as Dorsey described it, “transforming the way we work through a digital-first strategy, looking at everything we do through a digital-first mindset.” For CSI, that means that everything it does that has been analog has a digital corollary, and everything it creates that is digital will be available offline as well. This process involved not just reviewing CSI’s internal operations and member-facing programs but also considering the needs of the entire construction industry.

That industry review quickly identified a major gap: Efficiency.

“McKinsey has documented serious problems with inefficiency in the construction industry as a whole, which also creates a huge productivity gap,” said Dorsey. He described an industry that is highly fragmented, where discrepancies and errors creep into data as it passes through the chain of custody, even when that data is in the form of digital documents, because so many different people and companies use so many different platforms and software packages to work with that data.

If you’ve ever done a construction project on your own house, you’ve likely seen this up close and personal, as your general contractor manages all the various suppliers and subcontractors necessary to complete the project, each with their own catalog of products and their own processes and procedures for everything from arriving at the job site to billing.

Most of us might look at that situation and see an insurmountable barrier. Dorsey and Bawcum saw an opportunity to create something new that could serve not just CSI members but the entire construction industry. The result: Crosswalk (<https://www.crosswalk.biz>).

“Rick had the idea—‘middleware for construction standards’—and, when we presented it to the CSI board of directors, they immediately saw the potential, supported it, and moved right to thinking through how to fund it,” said Dorsey.

“I definitely think it helped that there was a ready market, where everyone immediately understood the need for Crosswalk,” added Bawcum. The team at CSI had done their prep work well, collecting data and stories from the vendors of widely used construction software platforms, who saw their users doing a lot of data entry (which, as we all know, results in errors) and being forced, by the complexity of the various systems they had to navigate, into choosing the easiest-to-meet, lowest-common-denominator standards rather than the best standards for a given project.

“Everyone—certainly in North America and, to a degree, globally—uses our standards to organize construction projects, so we knew we could start from a unified touchpoint,” noted Dorsey.

The genius of Crosswalk is that it doesn’t attempt to replace software packages that stakeholder groups (owners, architects, designers, engineers, contractors, facilities managers) like and prefer to use. Rather, it uses an API (application programming interface) based on CSI’s standards to allow those systems to seamlessly talk to each other and pass data efficiently and effectively. As Dorsey put it, “Crosswalk enables current, accurate information and allows us to meet people at their time and place of need, which in 2021 should be the ‘table stakes’ of serving your audiences.”

CSI did have some challenges along the way, both in explaining to members why the association was going to invest resources in a product that wasn’t specifically designed for them directly to use and in explaining to their potential B2B customers why they would want to adopt a third-party platform to improve their end users’ experience.

Fortunately, as Bawcum pointed out, “I’ve yet to be in a situation where I’m talking about Crosswalk with someone in the construction software industry where they didn’t get it. Crosswalk hasn’t necessarily been easy to build, but the concept and vision were right, so people—potential customers, the CSI board—understood and were supportive right away.”

Dorsey concurred, “The only times I’ve seen an audience be resistant is when they don’t grasp the application, which, in practical terms, has meant we were speaking to the wrong person.”

Crosswalk also solved a major challenge inherent to the standards process: updates and version tracking. “We update our standards with the assistance of SMEs (subject matter experts) every few years, but that means the standards often change, sometimes more than once, while a large project is underway,” Dorsey said. “Think of these standards as an ingredient to software. We used to hand you a book or a spreadsheet so you could add the ingredient to your software, which is more error-prone, time-intensive, and inherently less current. Crosswalk solved that problem for end-user software while also enabling different groups (owners, architects, designers, engineers, contractors, facilities managers) to work together more easily and efficiently, and with fewer errors, so projects get built right, on time, and on budget.”

Where are they in the process of development, iteration, enhancement, and ROI?

Crosswalk formally launched May 4, 2020, “a little over a year from the board approving the first round of funding,” noted Dorsey. “In less than two years, we went from concept to having more than 20 customers using the platform,” said Bawcum. Both attributed that speed to using agile software development, including hackathons, and a lean startup approach, where they stayed laser-focused on creating a minimum viable product and getting it to market.

Dorsey has given the team the ambitious ROI goal of break-even or profitable on an annual basis by year three. CSI is off to a promising start, having already tripled its pipeline for licensing revenue beyond what it normally brought in through its old-school printed-book-and-spreadsheet model.

Crosswalk has also revitalized CSI’s brand in the larger construction industry, from “dusty old Buick” (in Dorsey’s words) to a digital-first innovator and creator of an ecosystem that integrates construction software products and provides benefit for software end users.

Dorsey noted that the CSI board has been so enthusiastic about the first iteration of Crosswalk that it has already authorized funding to develop the next three features on the roadmap: instituting a blockchain ledger to manage identity, confidentiality, version control, chain-of-custody, and payment services; using artificial intelligence/machine learning for software wizards, crowdsourcing, and reference data; and integrating the Internet of Things into the construction industry.

What advice would they have for other associations looking to do something similar?


“You have to get the culture and governance right first,” asserted Dorsey. “Your board has to be willing to change the way they make decisions and to provide the financial support you need to achieve the vision. Our vision is to change the world of work for the better for our members and other audiences. Crosswalk is the most visible example of this, but everything we do at CSI is based on a mindset of digital transformation.”

Bawcum concurred: “And that’s more about transformation than digital. We have to be willing to change the way we work.”

## About CSI

Founded in 1948, CSI is a national not-for-profit association of more than 7,000 members dedicated to improving the communication of construction information throughout continuous development and transformation of standards and formats, education, and certification of professionals to improve project delivery processes. CSI members work tirelessly to effectively communicate the designers’ vision, the material producers’ solutions, and the constructors’ techniques to create outstanding facilities that meet facility owners’ objectives.

CSI is dedicated to improving the communication of construction information through:

- A diversified membership base of allied professionals involved in the creation and management of the built environment.
- Continuous development and transformation of construction standards and formats.
- Education and certification of professionals to improve project delivery processes. 

# CASE STUDY

## Healthcare Financial Management Association: Operating Like a Newsroom

***“It’s important to use data and analytics to inform your decisions, but they can’t paint the whole picture for you. When you’re breaking new ground, no one can tell you exactly where to go, or what the path will look like. It’s your job to figure that out.”***

Brad Dennison, Director of Content Strategy

When he was hired in early 2019, Brad Dennison was given a relatively straightforward charge, particularly for someone with his long experience in newsrooms: “Redesign the magazine.”

At the time, HFMA’s magazine was a typical association publication. It came out in print and PDF monthly, mixing information about the profession, short “newsy” articles, and longer peer-reviewed pieces.

“It felt,” said Dennison, “devoid of humanity, and out of touch with today’s reader expectations.”

Dennison worked with his team of five senior editors to redesign the magazine, of course, but he also used that as an opportunity to completely change how the association handles all its content, transforming HFMA into a real-time media group that operates like a newsroom, with a constant flow of content that’s coordinated across platforms. “The magazine redesign provided an easy and logical jumping-off point for the rest of our content work,” said Dennison.

Over the past two years, the magazine has matured to featuring annual story arcs, where the editors pick major themes like telehealth or pandemic-caused deferred care and clearly demonstrate those themes’ intersection with healthcare finance, and the team creates plans for using the story arcs on all HFMA’s platforms—print,

newsletter, social media, video—so that content flows in easily digestible pieces 24/7.

“Now any important topic is never ‘one and done.’ We make deliberate decisions about the cover story of the magazine each month, and then we’re able to promote that topic in an organized and intentional way all month on all our platforms,” said Dennison. “You have to push your audiences to good content. You can’t just publish it and expect them to find it.”

What are readers thinking?



“We’re in the midst of a formal research project on this right now, but I can say the project has exceeded my expectations. Previously, getting 1,000 page views on a story was a big deal. Now that would be considered disappointing, and our most popular pieces see 10-15 times that level of traffic,” said Dennison.

“Anecdotally, I’ve received direct feedback from healthcare executives describing how our content has helped them or made a difference, whether it’s our new soft skills leadership column, our recent public discussion about the implications of Amazon shutting down their Haven healthcare startup, our January 2021 webinar about what to expect in healthcare policy from the new Biden administration, or our recent podcast with McKinsey on how managers can better support parents working from home during the pandemic,” added Dennison.



## CASE STUDY

# Healthcare Financial Management Association: Operating Like a Newsroom

How have they accomplished that?

“We use analytics extensively to weed out topics that people don’t need or aren’t interested in, and we no longer cover topics that other outlets are covering. I watch our analytics daily—I can’t learn what I need to know from a quarterly or monthly overview. By paying close attention, I know what the hot topics are immediately, and that drives what we share on all our social media platforms and what goes into our newsletter,” explained Dennison.

What advice would Dennison have for association executives looking to do something similar?

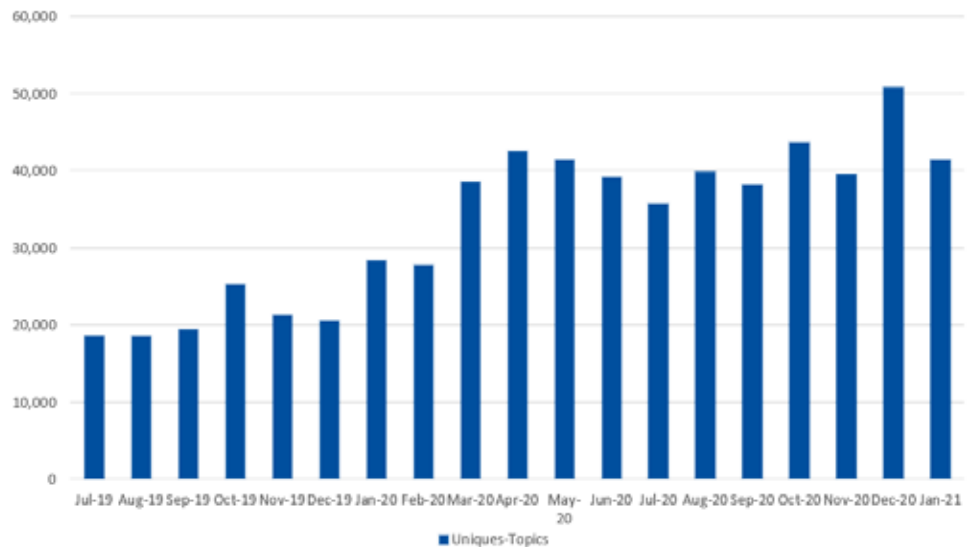
“Hire people for what they do well, and then let them do it. Don’t find someone who’s great, and then try to squeeze them into a box that doesn’t fit. We’re at non-optimal point A, and this person was hired to get us to optimal point B, so give them authority and support they need to do it. Also, you’re trying new things and seeing what happens, so remember to have some fun with it! The pandemic has forced us all to be more agile than we ever knew we could be. Don’t forget that lesson.”

- [Click here](#) to view the HFM magazine pre-transformation (January 2018).
- [Click here](#) to view the new HFM magazine (February 2021).

### About HFMA

The Healthcare Financial Management Association (HFMA) helps its members—both individuals and organizations—achieve optimal performance by providing the practical tools and solutions, education, industry analyses, and strategic guidance needed to address the many challenges that exist within the US healthcare system.

HFMA.org Traffic: Topics Unique Visitors 2019-21



The diverse HFMA community has more than 64,000 members, including healthcare finance leaders and professionals from hospitals and health systems, provider organizations, physician practices, business partners, and payer markets.

At the local, regional and national levels, HFMA advances the profession and industry by:

- Providing relevant education and professional development opportunities.
- Building and supporting coalitions with other healthcare associations to achieve consensus on solutions for the challenges facing the U.S. healthcare industry, as well as ensure accurate representation of the healthcare finance profession.
- Educating a broad spectrum of key industry decision makers on the intricacies and realities of maintaining fiscally healthy healthcare organizations.
- Working with a broad cross-section of stakeholders to improve the healthcare delivery system by identifying and bridging gaps in knowledge, best practices, and standards. 🌟

# CASE STUDY

## The Independent Community Bankers of America: Future-Focused Data Strategy

**“Associations have to shift our thinking to create space for digital evangelists to innovate how we relate to our members and customers.”**

Prabhash Shrestha, MS, PMP, CAE  
Group Executive Vice President, Chief Digital Strategy Officer

When Prabhash Shrestha interviewed for the chief digital strategy officer position at ICBA in 2017, leadership said they were looking for someone who could update the association’s infrastructure for the digital age. A little more than three years later, ICBA’s journey to understand its stakeholders’ ecosystems and create an association platform where all those stakeholders (members, prospects, subject matter experts, corporate supporters, regulators, financial tech companies, external product and service providers) can “play in the same sandbox” is well underway.

“I’m a fan of Dr. Jeanne Ross’s model, and we knew we had work to do on digitizing, so that’s where we started,” said Shrestha. (For more on the Ross model of digital transformation, see the *Willingness to Explore: An Interview with Martin Mocker*, pages 4-7.)

After assessing where ICBA was in 2017, Shrestha and his team enumerated 13 different initial digital strategy focus areas, including:

1. Digital Governance
2. Customer Service
3. Project Management
4. IT Staffing and Resources
5. Knowledge Management and Transfer
6. Vendor Management
7. Cloud
8. Mobile
9. Data
10. Cybersecurity
11. Training
12. DevOps
13. Disaster Recovery and Business Continuity

ICBA was recently able to narrow this list to six items after putting new systems, policies, processes, resources, and staff in place:

1. Customer Service
2. Infrastructure Enhancement
3. Data
4. Mobile
5. Cyber Security
6. Digital Products and Services

“We painted a vision of where we wanted to be in two years’ time via a journey map and then held ideation sessions with each internal department, both to foster collaboration and to understand their needs and business goals, so we could become champions for them around the technologies they would need to achieve those goals,” explained Shrestha.

Among the many specific projects Shrestha’s team took on was the creation of a future-focused internal and external data strategy. “Our goal is to be the largest, most comprehensive data repository for independent community banks. Our dream is to be the source of data for our industry; to provide services to our member banks, partners and sponsors; and, while safeguarding the privacy of our member banks and their customers, to find ways to monetize data products and services to ICBA’s non-member customers,” said Shrestha.

## The Independent Community Bankers of America: Future-Focused Data Strategy

The team started by creating more than 60 internal dashboards that provide staff members with real-time access to critical data they need to make decisions. But that was just the first step.

The ICBA digital team then started asking themselves questions like:

- What if a member bank could log into ICBA's site and obtain meaningful, personalized insights, resources, and tools to enhance that bank's operations?
- What if a member bank could get access to the kind of local demographic information that would improve its customer acquisition?
- What if a member bank could get peer comparison data or insights into a competitor in a geographical range it defines?
- What if ICBA could help member banks better project profitability, provide customer service, compete with big banks, and understand the regulatory environment?
- What if ICBA could provide data to trusted systems or entities using API-driven robotic process automation?
- What if ICBA could help drive customers to member banks?
- What if ICBA's marketing department could use machine learning to precisely target suitable ads to the right markets at the right time?

"The culture change has been hard," admitted Shrestha, "but it is working." He attributed that success both to an intentionally designed process and to organic movement within the ICBA staff, as they experience success in projects, which creates buy-in, which in turn creates more opportunities for success in additional projects.

"We were fortunate to have some teams who were willing to be 'guinea pigs,' testing data visualization, validating the output of our data initiatives, and trying data-based decision making in their business cases. This is a dream scenario for data evangelists," said Shrestha.

Shrestha also called out the critical role of leadership support—and funding. "After my team did the initial assessment and presented our 13 digital strategy focus areas, association leadership was willing to invest in everything I recommended, which was a very pleasant surprise. In order to walk the talk of digital transformation, we have to be willing to fund it."


What advice would Shrestha have for other associations looking to begin the digital transformation journey?

"Remember that digital transformation is not primarily about the technology. It's about people, process, and culture. It's about understanding, at a deep level, how you do business, how you understand and serve your customers. If you focus on that and continually ask yourself, 'How will my members be able to achieve their goals most easily from anywhere?' everything else you plan for and build will contribute to their—and your—success. There is no time to waste. Strategize. Seek funding. Start soon. Start today!"

### About ICBA

The Independent Community Bankers of America® creates and promotes an environment where community banks flourish. With more than 50,000 locations nationwide, community banks constitute 99 percent of all banks, employ nearly 750,000 Americans and are the only physical banking presence in one in three U.S. counties.

Holding more than \$5 trillion in assets, more than \$4 trillion in deposits, and more than \$3.4 trillion in loans to consumers, small businesses, and the agricultural community, community banks channel local deposits into the Main Streets and neighborhoods they serve, spurring job creation, fostering innovation and fueling their customers' dreams in communities throughout America.

ICBA is dedicated exclusively to representing the interests of the community banking industry and its membership through effective advocacy, best-in-class education, and high-quality products and services. 

# CASE STUDY

## School Nutrition Association: Stronger Together, Rebuilding Together

*“We could’ve taken our in-person event and just dropped it into a digital platform, but that’s not transformation. Instead, we took the opportunity to create something entirely new that would provide value in a new way.”*

Rhea Steele, MS, CAE, CIP, Chief of Staff

When the COVID-19 pandemic hit, plenty of associations quickly moved their in-person events onto virtual platforms, particularly those that were scheduled for the spring or summer of 2020. Instead of doing the same, SNA shifted gears, cancelled in-person events, and created entirely new virtual events. The events were designed from the ground up as virtual programs and tailored to meet in-the-moment member needs.

“We noticed right away that our members were struggling to feed kids during the pandemic. It wasn’t just a challenge for in-school food services but also for food manufacturers, who had to adapt their packaging for a different distribution model, and for regulatory agencies, who were trying to ensure food safety and equity in an unsettled environment. Just offering a typical virtual conference on a webinar platform wasn’t going to work,” said Jen Lewi, MBA, CAE, senior vice president, membership and professional development.

Recognizing the member need to share ideas and come together in virtual space, the staff at SNA inaugurated the “Virtual State Leadership Summit” and “back-to-school” events in April and May 2020 respectively, and both were so successful that they will now be annual events. SNA staff also saw an opportunity to accelerate both staff and member digital literacy via these new virtual events.

“Our members have a range of educational backgrounds and tech skills, and many of them don’t spend all day sitting in front of a computer. As an organization, one of the struggles we’ve had is that not all our members are comfortable in a virtual environment. The pandemic helped fast-forward us into digital spaces, providing the

chance for us to help our members digitally transform themselves,” said Rhea Steele, SNA’s chief of staff. “We’ve been able to transform what we offer to members now that they’re finally ready, and it has helped us transform ourselves internally, shifting our approach to more of a ‘digital native’ foundation.”

The first opportunity to entirely re-envision an event came with SNA’s state associations, for its annual spring national leadership conference. SNA’s component leaders were already familiar with their learning management system (LMS) and webinar platform, which, according to Steele, “allowed us to create a two-day ‘born digital’ event for them, where we intentionally focused on crisis leadership, the knowledge our component leaders needed right then to be successful running their state associations.”



The event exceeded expectations for turnout, and the SNA staff realized, as Steele put it, “that people would actually show up for a virtual event,” in part, because the content, focusing on crisis leadership, was perfectly aligned with the moment. Recognizing the power and reach of virtual events, and using the lessons learned from the state event, in April 2020 SNA conceived of “Stronger Together,” a five-part learning series with two sessions the first week, two sessions the second week, and the final session two weeks later.



# School Nutrition Association: Stronger Together, Rebuilding Together

Because “Stronger Together” was going to run as a back-to-school planning event in June 2020, “we got board approval, put together a budget, brought in a facilitator to educate us in good practices for virtual events, and recruited 25 speakers in one month,” said Lewi. The event attracted more than 700 attendees, with a full complement of sponsors.

Did anything go wrong?

“Of course!” said Lewi. “We had a power outage. We had attendee authentication issues. Fortunately, we had brainstormed everything that could go wrong before the event, so, although our team was swamped on the back end, we were able to respond and fix things without the attendees noticing on the front end. The chaos was stressful, but also kind of a fun challenge—’what can we pull off in real time?’—and we’ve been able to develop a solid set of tested processes and procedures as a result.”

Lewi also noted, “We’ve had to completely reorient our process for professional development. We’re now offering much shorter blocks of content that get right to the point. The topics are highly relevant to what’s going on in the field right now, because the agenda isn’t being planned a year in advance. We also moved to the Zoom platform so we could better accommodate virtual networking and chat functions.”

To date, SNA has hosted five virtual events. “We take what we learn each time and iterate to improve for the next one” said Steele. “Not all of our staff are digital natives, but, for those who are, it’s been freeing to be able to create content and innovate in a space that was digital from the start. We aren’t trying to back in-person content or events into a digital format.”

The “born digital” events have been a resounding success. SNA will host a second multi-day, fully virtual back-to-school event, “Rebuilding Together” in May 2021.

## THANK YOU TO OUR 2020 SPEAKERS!





## School Nutrition Association: Stronger Together, Rebuilding Together

The LMS that SNA launched in July 2019 now has more than 17,000 active users who view more than 25,000 webinars a year. “Because everything in our digital platform is so trackable—we monitor everything from who registers versus who attends to real-time content assessments that allow us to adjust on the fly—we can point to a ton of metrics to know we’ve been successful. We also know immediately if anyone’s having a problem and can fix it right away, which improves the attendee experience,” said Lewi. “Anecdotally, I’m hearing feedback from attendees of our online events like: ‘This is the best money I’ve ever spent on training in my life’ and ‘I connected with people better and learned more than at any other conference I’ve ever attended.’”


“This has also opened the floodgates to our ability to collaborate internally,” added Steele. “We’re telling ourselves different stories about what we can accomplish together now.”

What advice would Lewi and Steele have for other associations looking to do something similar?

“You mean other than, ‘Don’t start your virtual event first thing Monday morning, because if something breaks over the weekend, your tech team might not notice in time to fix it before the event is scheduled to start?’” asked Lewi. “Make sure to allocate ample time for speaker prep, so they can practice and get comfortable in a new format.”

Steele concluded: “Transparency with your organizational leadership—both board and C-suite—is critical to success. Keep everyone in the loop about what you’re doing and why, what has and hasn’t worked and why, and what you’re going to do differently next time as a result. Get comfortable with ‘working out loud,’ rather than keeping everything secret until the ‘big reveal.’ Make sure your staff knows that you’re taking risks, and because of that everything is not necessarily going to go perfectly, and that’s OK. The goal is to get something out there, listen to the feedback you get, do something with it, and use it to iterate and get better the next time.”

### About SNA

The School Nutrition Association is a national, nonprofit professional organization representing more than 50,000 members who provide high-quality, low-cost meals to students across the country. Recognized as the authority on school nutrition, SNA has been advancing the availability, quality, and acceptance of school nutrition programs as an integral part of education since 1946. 

# Questions for Reflection

Digital transformation is critical for associations right now. Your approach to and progress toward digital transformation will likely mean the difference between your association dying a slow death over the next few years (or a quick death during the next pandemic-size disruption) and your association continuing to lead your field and provide value to your members far into the future.

How do you know where you are on your journey toward digital transformation? The following questions can help you and your team figure that out—and decide where you'd like to go next and how you're going to get there.

- Consider the difference between *digitized* and *digital* (*Willingness to Explore: An Interview with Martin Mocker*, pages 4-7). Is your goal to improve infrastructure and processes using better technology or to fundamentally change how you work?
- If your “operational backbone” is lagging (you’re not yet digitized), what is a reasonable roadmap to bring it into the 21st century?
- Once you have your “operational backbone” addressed (you’ve successfully digitized), what do you need to do to shift to a member-centric approach to using technology to provide new programs, products, and services (going digital)?
- What are you doing to actively learn about your members’ and other audiences’ most important goals and most pressing problems and to share that knowledge across silos in your association?
- How has the pandemic changed those goals and challenges? Which changes are likely to persist post-pandemic? What are you doing now to prepare to meet those changing needs?
- How are your audiences’ expectations being shaped by their digital consumer experiences? How is that impacting decisions about resource investments within your association?
- Are you missing out on opportunities because your internal decision making is too slow, cumbersome, bureaucratic, or ineffective? What needs to change in your culture to actually take advantage of new technologies or tools?
- What is your current culture pattern? Could you change it even if you wanted to? What do you need to do to build up your internal culture management capacity?
- How can you establish a digital mindset across all the departments and areas of your association, focusing on things like customization, user needs, and innovation?
- What is your level of digital maturity? What is your level of culture maturity? What would you like them to be? What is your plan for getting there?
- How can you best educate your board of directors and other volunteer leaders about the possibilities inherent in digital transformation, so they are prepared to make informed decisions about resource allocation?
- What are you doing to actively encourage generating and sharing new ideas, rapid prototyping, experimentation, testing, and iteration within your association?

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## About Maddie Grant

Maddie Grant, is an expert culture designer and digital strategist who focuses on helping organizations unlock the power in their culture and navigate culture change. She has specific expertise in digital transformation and generational differences in the workplace.

She has explored the language of workplace culture for several years through her books, co-authored with her partner in business and life Jamie Notter, including *Humanize: How People-Centric Organizations Succeed in a Social World* (2011), the Amazon category best-seller *When Millennials Take Over: Preparing for the Ridiculously Optimistic Future of Business* (2015) and the *Non-Obvious Guide to Employee Engagement* (2019).

Maddie and Jamie co-founded her consulting firm PROPEL (formerly known as Human Workplaces), a culture consulting and performance coaching firm that helps purpose-driven organizations better understand and align their culture with what makes them successful. They also created the WorkXO culture assessment (acquired by QuestionPro in 2018). You may also know Maddie as the former editor of SocialFish, one of the most visited and respected blogs about the digital age written for nonprofit and association executives (2007–2018).

## About Elizabeth Weaver Engel

Elizabeth Weaver Engel, M.A., CAE, chief strategist at Spark Consulting LLC, has more than 20 years of experience in association management. Although her primary focus has been in membership, marketing, and communications, her work has been wide-ranging, including corporate sponsorship and fundraising, technology planning and implementation, social media and internet strategy, budgeting, volunteer management, publications, and governance.

Spark provides strategic membership and marketing advice and assistance to associations that have the willingness and capacity at both the staff and board levels to ask themselves tough questions and take some risks in service of reaching for big goals. Forget settling for incremental growth by making minor changes to what you're doing—we're going to uncover and solve the root problems that are holding your association back!

Elizabeth combines a focus on asking the right questions and finding and implementing creative solutions with a broad understanding of the association sphere. Throughout her career, she has excelled at increasing membership, revenue, public presence, and member satisfaction while decreasing costs through a focus on the efficient and effective use of data, staff, and technology to serve organizational goals and constituents.

Prior to launching Spark, Elizabeth consulted in online campaigns and marketing and internet and social media strategy for Beaconfire Consulting and in a wide range of subject areas in association management in the not-for-profit consulting practice at RSM McGladrey, Inc. She has also served associations directly in a variety of positions, including director of member services and IT, director of marketing and sponsorship, vice president of marketing, and acting CEO.

Elizabeth is a certified association executive (CAE) and holds a master's degree in government and foreign affairs from the University of Virginia.