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TECH IS POWERED BY THE PEOPLE

A Collection of Insights from
SURGE Co-Creation



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Community Brands is the leading provider of cloud-based association software. Through innovation and technology, the company empowers more than 100,000 clients and partners to succeed faster, grow stronger and achieve social good. Two of our fastest growing Membership Management solutions include Nimble AMS (built on Salesforce) for mid-large sized associations and YourMembership AMS for small associations.

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Thanks to our partners, who convene to further
the association profession!



INTRODUCTION

The following pages house the results of an industry-wide virtual collaboration.

SURGE Co-Creation assembled association professionals from across the globe to harness collective knowledge, through a virtual conference focused on transformative ideas and designed to maximize social learning.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own thoughts. We have now assembled some of the best insights from these conversations into a body of knowledge for the benefit of the entire association community.

This eBook, one of the eleven-part SURGE series, delves into the session *Tech Is Powered by the People*. It includes themes from the speakers' conversation, snapshots of ideas from guest speakers, contributions from attendees, links to further resources, and more.

Thank you to all who participated – and if you missed it, go to the **SURGE Co-Creation** [event page](#) to watch all the sessions for free, at your leisure!

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01

FEATURED SPEAKERS





Heidi Weber MBA, CAE

*Executive Director, Alpha Omega
Dental Fraternity*

Heidi Weber, MBA, CAE, is the leader and facilitator of the Alpha Omega International Dental Fraternity (AO) located in Rockville, Maryland. AO is the oldest dental and medical organization with 5,000 international members in 10 countries. As the Executive Director, she has been a change agent and has championed mission-driven programs to benefit the healthcare community.

With more than 15 years' experience in nonprofit and corporate organizations, Heidi has provided leadership and strategic management to both professional and trade societies and their members and boards.

Heidi is a member of the Association Forum of Chicago, American Society of Association Executives (ASAE), American Association of Medical Society Executives (AAMSE), and the Nonprofit Technology Network (NTEN). Heidi earned her Certified Association Executive (CAE) designation from ASAE in January 2017 and is a member of the ASAE Technology Council. Contact Heidi at hweber@ao.org.





Melinda Starkweather CMP

Principal, Starkweather Association Services

Melinda Starkweather, co-founder of Starkweather Association Services, has been providing innovative technical and strategic services to associations, political campaigns and non-profits since 1991.

After guiding a number of groups through YourMembership.com implementations, she became interested in “the people side of change” and dove into change management training, getting certified as a Change Management Professional.

Change management techniques provide critical tools to move association staff more quickly from uncertainty to commitment. Starkweather Association Services uses custom tools to help groups assess their risk, identify strengths and develop strategies to navigate change.

Starkweather’s change management services have evolved into their own component, now called Cirrus Change.

Additionally, Starkweather provides services to move our associations through the capability maturity model to reduce risk, create continuity of knowledge and operational efficiency.

Highlights:

- Working with associations and the YourMembership platform since 2006, structuring custom workflows and solutions for clients, as well as evaluating work flows to establish best practices and IT optimization.
- Created custom documentation for YourMembership, along with Starkweather’s custom training process.
- Effective communicator, marketer, researcher and entrepreneur working in the political, non-profit and private sectors since 1989.
- Creative problem solver who focuses on the human-side of technological change with the Cirrus Change™ tool-set, created from 20+ years of experience in the technological change sector.





Dave Will

CEO, PropFuel

While working for SAP, a multi-billion dollar software company, nearly 20 years ago, Dave Will was advised to “walk faster and smile less, because perception is reality”. Dave took this feedback to heart and started a business based on the antithesis of this advice. 14 years later, Dave successfully sold Peach New Media, an LMS for associations, which is now part of Community Brands. Since then, Dave and former Peach, Cameron Aubuchon, built a Feedback Automation Platform called PropFuel and they’re here again to help associations improve member engagement and build stronger relationships through conversation marketing.





Tori Liu CAE, MBA

*Director of Information Systems, American
Speech-Language-Hearing Association*

Tori Miller Liu is the Director of Information Systems at the American Speech-Language-Hearing Association. She is a technology leader with extensive experience in association management, strategic planning, information systems, and data analytics. Tori is a past member of the ASAE Technology Section Council and a founding member of Association Women Technology Champions group. She is a Certified Association Executive and holds an MBA from George Washington University.



02

GUEST SPEAKERS





Danielle Duran Baron

Executive Director, Commission on Accreditation of Athletic Training Education

Danielle Duran Baron is the Executive Director of the CAATE, Commission on Accreditation of Athletic Training Education, the national accreditor of professional, post-professional and residency athletic training programs. She joined the organization in September 2018. Prior to that, Danielle was the Chief Marketing Officer at ABET, the global accreditor of college and university programs in STEM disciplines. In that role, she directed the organization through an award-winning rebranding initiative and managed the efforts of the marketing, communications and events staff to reflect ABET's global scope and to reach an increasingly diverse audience.

Bringing 20 years of global experience in communications, branding, marketing, events and business strategy, Danielle has worked in the nonprofit, private and government sectors in the United States and overseas. A journalist by training, her work has been published in the United States, Europe and Latin America.

When not working or volunteering, she enjoys spending time with her family, traveling and teaching her sons Portuguese. Danielle has a bachelor's degree in communications and international relations from Randolph-Macon Woman's College, a master's degree in journalism from New York University and an executive MBA in marketing from Ibmecc Business School, in Rio de Janeiro. She is also a Certified Association Executive (CAE) and an ASAE Diversity Executive Leadership Program (DELP) Scholar. A native of Brazil, she is fluent in English, Portuguese and Spanish and conversant in French and German.



03

BECOMING A CHAMPION OF TECHNOLOGICAL INNOVATION



By Heidi Weber, MBA, CAE

I've always embraced technology, and I've pushed that forward in every position I've been in. Today's technological advancements present many possibilities and solutions for organizations. Although most people can agree that there is always room for improvement, there are limitations and doubts surrounding the idea of bringing in new technology into operations and changing the way things work. Fortunately, there are ways to encourage people to embrace the world of opportunities presented by technology.

BE A CHEERLEADER

Using a cheerleader or champion approach to encourage innovation and new solutions to old problems can be a great way to get buy-in. People mimic the behaviors of others, especially when they see somebody being passionate about technology. Depending on what you're doing and how you're doing it, that openness to incorporate technology in strategizing and problem-solving can rub off on other stakeholders in the association. Take it a step further and make sure you're able to explain logically why your idea will benefit the members, the mission, goals, and strategic direction. That's how you get buy-in. This may be a lofty idea, but I've seen it work.

Whatever your ideas are, make sure you do your homework and stay informed. I've been in my association for about eight years, and if I bring something technological to my board, I've already researched it, I'm going to be a champion of it, and I'm going to explain why it's going to strategically benefit the organization. The flip side is that if you have a board that's not very technologically adept, which may depend on what industry they're in, you need to be more prepared. You might need metrics, reports, and other reassuring information that this thing you are proposing is going to work.

INSTINCT, TRUST, AND CONFIDENCE

Bringing new ideas, technological solutions, and initiatives to inspire a more innovative mindset sound great, but you'll need to keep in mind the priorities of your association and what problems to address first. How do you go forward? This will sound amazingly unscientific, but I think a lot of it has to do with instinct. In the association world, the term foresight has been bounced around quite a bit, and so a lot of us are thinking: What will

we look like in two to three years? So how do I look at that? I think that instinct, trust, and confidence are three concepts that I use because I wear a lot of hats in the organization. When implementing initiatives, a lot is driven by the budget, resources, metrics, and reports. Sometimes, you can find a straightforward tool that's going to set up a strategic pattern for the next couple of years. I found a tool, we're testing it out, and it's a very inexpensive one that will organize the governance for the organization.

I'm isolated sometimes in a small association, but my world opens when I attend an industry event whether it is AMS Fest, ASAE Tech, or SURGE. Networking is critical in gathering knowledge and insights on what is possible. It is my firm belief that shifting the culture around technology really starts with the chief executive officer. It's their responsibility to move the culture forward and allow team members' ideas to be heard, work on what they need to work on, and give them the space to work on it. A CEO must be the cheerleader who shifts technology into the organizational culture and uses instinct and trust to build confidence in technology decision making.

FROM THE CHAT

“With our small budget and staff, we invest in tech to provide us with time so we can do more with less.”

- Allen Lloyd -

“I find my hardest challenge is teaching or providing the knowledge to executive staff to how to use data in business decisions. We get caught up in the data and never land on a solid track to move down or where to start.”

- Mark Kibble -

“It always seems to cycle back to looking at the wider view and not jumping to decision making based on what looks cool. . .but rather overall needs from a strategic priorities plan.”

- Randi Sumner -

“I think many associations equate tech with new websites or AMS, not the smaller, less expensive tools that help you do your work more efficiently.”

- Nikki Golden -

“There are lots of places where tech can be inserted or enhanced in organizations, from simple social scheduling platforms to project management tools.”

- Aldo Maragoni -

04

**IMPROVING THE
RELATIONSHIP
BETWEEN PEOPLE AND
TECHNOLOGY**



By Melinda Starkweather

When trying to bring in new technology into an organization, it is guaranteed that you will be met with resistance, because any sort of change often is. **You need that buy-in from people first**, otherwise there's going to be struggle in incorporating the technology into operations. This is why there needs to be a focus on the people, on sharing information they might be missing, and understanding their needs and concerns. The solutions you want to bring in have to work for the organization, and also meet individuals' needs. Sometimes, instead of simply on-boarding new technology solutions, a more strategic cultural solution is necessary.

ADDRESS CONCERNS

Everyone who works in the organization needs to buy into the technology-incorporated strategy before it is implemented. In organizations for which I've helped bring in technology, I've seen staff members who dug in their heels and wouldn't cooperate with it because they just didn't buy into it; they didn't believe it. In some cases, they felt like it might impact their job security because something that was suddenly being automated was going to be taking over their jobs. You have to **help everyone understand that they're going to have a role** and that the technology will be **facilitating what they do** and what the organization does.

IDENTIFY THE AGENTS OF CHANGE

You want to evaluate staff who are to give ideas a try, and identify them as allies in change. People who see the value in technology are **typically agile. They're learners—they're open to learning, they're open to upscaling and they are also service-oriented.** They want to meet the needs of their organization. While there are some people who are more naturally agile, agility can be taught; it can be learned. I have run into organizations that have created a culture that's non-agile but that said, within that culture, there have been very agile people who were bursting to get out and fix and improve things. And then within more agile cultures, there have been some holdouts that are used to their processes and doing things the way they've always done them. What I think is really interesting is that age isn't necessarily a factor. I've seen people in their 60s and very close to 70 who are learning agile project management, and who are excited to change. And then I've seen people who are younger, who are maybe in their 20s and 30s and just don't feel like upscaling—they're comfortable where they are. So, it may be a varied group from which you need to identify the agents of change.

USE A CHANGE TEAM

Once you've identified the people with the right mindset to adopt new technology solutions, organize and orient them to help manage the change project. Establish regular meeting times to identify people who need help.

You need people from **different levels within the organization**. When it comes to really small organizations, then obviously you wouldn't need many people; your change team might be made of two individuals. They just need to understand people in different departments and at different management levels. Larger organizations will need several individual with different skills (IT, HR, QA) and connections to different departments.

What does it mean to be in the change team? It means **listening to people**—listening for resistance and grumbling. Discontented staff may bring feedback and issues that those at the executive level might not be aware of. One of the biggest reasons for resistance is **staff feeling like the new technology is going to negatively impact the culture and service**. An issue that impacts member experience needs to be explored and addressed.

If assembled correctly, the change team will become a trusted resource who can listen to and acknowledge concerns that may otherwise create resistance. Some problems may be technical, some emotional, some personal preference, and some relate to learning new work flows. The change team becomes an army on the ground, identifying ways to help staff feel comfortable and confident with the new system. **No leader can manage change alone.**

FROM THE CHAT

“70% of change Management fails because of failure of leadership buy in.”

- Catherine Tehan -

“One way you can make the argument for more space is the cost of not having mental space and space to resolve emergent problems.”

- Tori Liu -

“One example that is more outsourcing than tech. We started farming out our design work. There are sites that allow you to hold a competition for your work and it is very economical. We spent \$200 to design 2 new banners that would have taken us hours and produced a less awesome result. Little things like this allow us to focus on members.”

- Allen Lloyd -

“If everyone’s fully booked, you have no time or mental space to ask questions, experiment, innovate, think creatively.”

- Elizabeth Engel -

05

ALIGNING VISION WITH TECHNOLOGY



By Dave Will

When it comes to becoming a more innovative organization and leveraging today's technological advancements for the overall betterment of the association and its operations, it all starts with the vision. Just look at how the tech stack comes out of the organization's vision and their strategic plan. It might be very well worth borrowing **philosophies from outside the industry**. When you look into associations and entrepreneurship, for example, there's this battle between how risky we want to be versus how agile we want to be; associations generally aren't big risk takers. However, there's no reason associations can't adopt a more **entrepreneurial mindset** and use certain valuable methodologies for their benefits.

When I've asked association execs how they come up with their vision and key objectives, the answer I get most of the time is "Our ED tells us" or "The important stuff floats to the top every year and our leadership decides what's important." This is not good enough. If you look at entrepreneurs, they use a few methodologies for planning and execution that involve **creating a vision, mission and values and communicating them often and clearly to employees and customers**. Additionally, they have a structured method for breaking the vision down into **small digestible bites** and attacking it little by little with a well documented execution process.

Meena Dayak and her ACE (Associations Catalyzing Entrepreneurship) group is a really good example of a group of association executives that are taking entrepreneurial philosophies and applying it to associations. I definitely think it's worth taking a page out of their book.

There are a few systems that businesses use, and most of them will force an organization to look at every aspect of their "business" and form an understanding for **where they are, where they want to be and how to get there**. If you're thinking about processes, and how to create a long term vision and then the steps to get there, a couple examples of these methodologies are *Traction*, by Gino Wickman and *Scaling Up* by Verne Harnish. Additionally, Cameron Herold has a very simple solution called *The Painted Picture*.

Similarly, most associations don't give much thought to culture in relation to incorporating new technology in processes and operations. But with a strong culture, your team will be more productive, happier and naturally more innovative with their approach to creating value for the members. Not only will member retention go up as a result of creating a great culture, but your staff retention will remain high as well. Few organizations think

about creating a great working environment for their staff. If associations want to behave more like entrepreneurial minded businesses, then they'll need to embrace the idea of **structured strategic planning and creating culture by design.**

All these systems create a vision that applies to every aspect of the organization. This is the foundation of the tech stack. From here it's much easier to identify what solutions, technological and otherwise, are important and what they need to do well.

FROM THE CHAT

“Application overload is real – only seek solutions for problems you know exist. Don’t jump on a techy bandwagon unless it works for your organization.”

- Amy Brooke -

“We’re building an elearning space for our members to create 15 min elearnings. Love the tool we use (Thinkific) and love the collaboration (which includes content learning method development and share of registration income).”

- Carolyne B. Thompson -

“We’re in the midst of resolving shadow IT, or as my boss calls it, ‘technology plate of spaghetti’.”

- Melissa Patterson -

“Don’t overlook the benefits of examining process; sometimes tech is not the tool needed for the problem being solved.”

- Dennis Sadler -

006

BUSTING MYTHS ABOUT INCLUSIVE LEADERSHIP



By Danielle Duran Baron

A topic that has been on my mind a lot lately is inclusive leadership. I know there's a lot being said about diversity inclusion, but inclusive leadership goes way beyond that. It's about treating all team members fairly and respectfully, and not only the people who may look like you or think like you or even the people that are only willing to say what you want to hear.

Inclusive leadership is about bringing people in and **making them feel valued and giving them a safe space to express themselves and contribute**. As a leader, it's crucial that all team members feel welcome to do that. When it comes to inclusive leadership, there's no box to check, there's no quota to meet.

Some may believe that having different people from different races or nationalities makes your organization inclusive, but that's a myth. If there's no way for them to contribute, if there's no path, then there's no inclusion. As a leader, you must be **intentional in your actions** to create a sense of belonging among your team.

HOW CAN YOU PRACTICE INCLUSIVE LEADERSHIP?

Inclusive leadership starts with **humility**—the ability to learn from criticism, accepting different viewpoints while seeking insights from others to overcome our own limitations—but it certainly doesn't stop there.

It also requires courage to speak up and challenge the status quo, which sometimes means ruffling some feathers and making some people uncomfortable. Being an inclusive leader and a change agent sometimes will invite criticism from others, so it's important to stick to your values, **as change requires patience and perseverance**.

It is essential to show your commitment. You need to tell people why it matters to you personally, and you also need to walk the walk. Inspirational talks are wonderful, but they're not enough. It takes action, sometimes even at your own expense. You must give people on the fringes a chance to speak up even if it means at times giving up your own turn. Bring people from the outside into your inner circle or department, and look around to see if you're in fact making a difference.

Transparency matters. Don't miss the opportunity to not only share your successes but also your challenges, as you will probably have to tweak your approach along the way. Always invite feedback, as there is always room for improvement.

Cultivate curiosity and keep an open mind. Inclusive leaders understand that people are different and are able to treat them fairly as the unique individuals that they are, while recognizing they are also part of the group. Bringing in a wide array of perspectives from diverse groups will certainly contribute to **smarter ideation and mitigate the risk of groupthink and poor decision-making.**

As relationships in the workplace become increasingly more complex, you should always think about ways you can model inclusive leadership around the team and foster a better work environment. Invite them to sit at the table to co-create your next conference, your board meeting or even your magazine article. You can start small, but don't forget to celebrate the small successes and the milestones along the journey.

07

FURTHER RESOURCES



During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about empowering people through technology. We've compiled them into a list here.

- [Book](#): The Lean Startup: How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses by Eric Ries
- [Book](#): Scaling Up: How a Few Companies Make It. . .and Why the Rest Don't by Verne Harnish
- [Book](#): Traction: Get a Grip on Your Business by Gino Wickman
- [Capterra](#): is an online peer review site that aims to help businesses find software solutions for almost every process of a business.
- [G2](#): Let's you compare the best business software and services based on user ratings and social data. Reviews for CRM, ERP, HR, CAD, PDM and Marketing software.
- [ReviewMyAMS](#): is a trusted place where executives can speak openly and honestly about their experiences with their AMS.
- [ReviewMyEventApp](#): a site dedicated to verified, honest reviews about event app platforms.
- [ReviewMyLMS](#): bringing honest, vetted reviews and greater transparency to the LMS buying process for market-facing learning businesses.
- [Buffer](#): is a software application for the web and mobile, designed to manage accounts in social networks, by providing the means for a user to schedule posts and analyze their results and engage with their community.
- [HubSpot](#): is a developer and marketer of software products for inbound marketing and sales.
- [Box](#): is a secure platform for content management, workflow, and collaboration.
- [Smartsheet](#): is a work execution platform you need to move from idea to impact – fast.
- [Todoist](#): A popular a to do list app and task manager.
- [Chronus](#): is a mentoring software enables people to learn and grow from each other to create a positive impact.
- [Power BI](#): See your company's data in new ways with interactive data visualization BI tools from Microsoft Power BI.
- [Thinkific](#): allows you to create online courses and membership sites and feel confident that you've got the easiest technology and the best support in the industry.
- [NetForum](#): is an all-in-one association management system (AMS) is packed with features to accommodate any growing organizations needs.



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