

# DRIVING RAPID TECHNOLOGICAL CHANGE

A COLLECTION OF INSIGHTS  
FROM **SURGE** SPRING



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# INTRODUCTION



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

**SURGE Spring** 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 ideas. 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 delves into the session, *Driving Rapid Technological Change*. It includes themes from the speakers' conversation, snapshots of ideas from our guest speaker, contributions from attendees, links to further resources, and more.

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

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01

# FEATURED SPEAKERS



**Mark Kibble**  
**Senior Technology Manager,**  
**American Ceramic Society**

**Mark Kibble** MCSE, CDPS, has a passion for technology and is currently using that passion to move the American Ceramic Society forward with his innovative thinking as their Senior Technology Manager. He has more than 15 years' experience in the Association Technology space and is a member of the American Society of Association Executives, NimbleAMS Advisory Board, and Apple Developers Group, as well as being the leader of a group of 325 IT Pros in the Central Ohio Area.





### **Tori Miller Liu**

**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.





## René Shoner

**Managing Director of Technology Initiatives, American Industrial Hygiene Association**

**René Shoner** is the Managing Director of Technology Initiatives at the American Industrial Hygiene Association (AIHA). With over 20 years of professional experience in association management demonstrating the ability to manage projects, budgets, and teams, René has proven leadership developing and implementing IT solutions to support strategic business initiatives, as well as effective oversight of day-to-day operations. René holds a Master of Education degree in Higher Education Administration from the University of Toledo and a Bachelor of Business Administration degree in Human Resource Management from Kent State University. She also received the Certified Association Executive (CAE) certification in 2004.





## **Rhea Steele**

**COO, Council for the  
Accreditation of Education  
Preparation**

**Rhea** uses her strategy, governance, and facilitation expertise to build high performance teams that anticipate business needs and deliver against organizational goals. An action-oriented leader, she ensures her team works across the organization to carry out mission-centric projects and stay on the lookout for opportunities to improve processes and policies. She uses her more than 13 years of experience in associations, non-profits, education, and museums to cultivate a dynamic, transparent, and inclusive culture. She graduated from the University of Colorado with a bachelor's in Fine Arts and Anthropology and a master's in Museum and Field Studies.





02

**GUEST SPEAKER**



**Guillermo Ortiz de Zarate**  
**Chief Innovation & Information  
Officer, NCARB**

Born and raised in Buenos Aires, Guillermo has been leading the development and implementation of technology for companies in industries such as engineering, urban development, healthcare, banking, international commerce, marketing, and government for over 25 years. Guillermo joined NCARB in April 2007. In February of 2017, he was promoted again to Chief Information & Innovation Officer, leading not only the Information Systems department, but also the development of new sources of revenue through the commercialization of NCARB's technology and the implementation of an innovation framework. Guillermo holds a BS in Information Technology and an MBA from the Carey School of Business at Johns Hopkins University.



# 03

## LAYING THE GROUNDWORK FOR ORGANIZATIONAL CHANGE

*How our communication choices can pave the way for transformation.*

## **BY RHEA STEELE**

**Language matters.** It matters for many reasons; not least because when different perspectives and priorities collide, the way we communicate can set the stage for moving forward. Thinking carefully about language and communication when implementing a culture shift in your association can help establish and cement the tone of the change, and turn a potentially challenging situation into an opportunity for learning and development.

**I often use language as a tool to spark cultural transformation.** In one organization, as I was undertaking a turnaround of the IT department, I asked my team to never again use the words “user error” when referencing support tickets and working with staff. This small linguistic tweak had a fundamental impact. Eradicating the term allowed each interaction to become a learning opportunity for the user, and a chance for the IT department to support them. This led to IT-staff interactions becoming a mechanism for **strengthening the relationship** between IT and the rest of the association.

The IT department is often the first line of orientation when a new employee arrives at an organization. This interaction can be used to adjust the organizational culture at a grassroots level. An IT person is usually there on the new employee’s first day to introduce the tools and technologies they will need to use. **This can be a powerful opportunity to set the cultural tone of the organization – not just around technology.** During the orientation, IT or other staff can present the new employee with expectations that are aligned with the desired organizational culture. This could be the systems you use, how staff collaborate, or the way core values are supported. **Using the orientation in an intentional way can help the new team member to settle immediately into good habits, and drive cultural change among existing staff.**

Communication is important throughout the staff onboarding journey. To assure employees value the strategic role of IT, team members should create a supportive and respectful relationship between the association and technology. For example, in their first couple of weeks, encourage new employees to stop by to ask questions instead of making them submit support tickets. Let them know no question is too simple or small, and that you have time to help them figure things out. Once they are familiar and comfortable in the organization, they can start submitting tickets. Some of the best insights and innovations can come from listening and understanding how staff are responding to a project or a problem. **Laying the groundwork early lets them know that you are interested in working together.**

The benefits of this mutual and supportive relationship will resonate across the association in ways that impact culture and strategy writ large. As leaders and team members build a foundation of mutual listening - where everyone knows perspectives are valued, relevant, and honestly considered - we can assure successful organizational and technological change. **The IT department can play a critical role in improving the capacity of the organization or association, and the constituents it serves.**

## From the Chat: Language and Communication

*Solving organization-wide problems requires becoming multilingual.*

“Associations are increasingly using data to make critical decisions, but **many association staff struggle to speak the language of data, while technology people have trouble translating membership speak.** This causes trouble when one group uses a term and the other does not fully understand what they really want. The simplest example is to ask the question, how many members do we have? To a data person, this is typically all people with an active membership. But during a membership drive, the association professional may really want to know who has paid for this year.

“As more associations move to a hybrid membership model, where individuals or organizations can become members, this becomes even more complicated. If an organization membership applies to all staff, do those people all get added into the count? The best solution to this issue is for each organization to **talk about what specific terms mean to their organization.** Then as business practices change make sure the organization updates their definitions. Taking the time to do this helps both sides do a better job communicating what is needed.

“Another common miscommunication comes from a program manager asking for additional data to be added. The most common of these is asking for the gender or generational split for a group after the initial data is reviewed. Data analytics software is making this process much easier, but it is still easier to include the data from the beginning than to add it later. Again, **communications is the best solution here:** if your association agrees on the typical data points that will be used, it becomes easier to gather the data and prevents the end user from needing to ask for changes later in the process.”

- Allen Lloyd -

**“Association professionals need to be multilingual;** we need to understand our respective departments, but also understand the organization as a whole and how the pieces work together. They need to look beyond their own language—their own job—and get to know what other people and departments do in the organization. This will then help them understand not just how all the pieces form the whole, but how all the pieces can work together to advance the organization.”

*- Aldo Maragoni -*

# 04

## LEADING BY EXAMPLE: HOW PASSION CAN DRIVE TECHNOLOGICAL CHANGE



*If you want to change minds, you need to show people how!*

**BY MARK KIBBLE**

**Changing minds has both an intellectual and an emotional aspect.**

Intellectually speaking, it is of course important to present people with facts, figures and data to encourage them to commit to a transformative project. On an emotional level however, when it comes to implementing cultural change, your own passion can play an enormous role. If you want to drive change in your organization, you need to show that you are passionate about it – and that others should be passionate about it, too. **The infectious nature of passion, along with the fact that culture starts at the top, means that leading by example is a crucial aspect of any change-driving mission.**

What does this mean for implementing technological change? It means a couple of things. First of all, it means that **IT needs a seat at an executive level.**

Not just because that puts them in a position to instigate the sort of mindset transformation that trickles down, but also because everybody needs to buy into a technological decision. While traditionally a decision might be made in an IT department and fed to the wider organization to figure out for themselves, rapid and robust technological change demands immediate buy-in across the association, and for every department to feel like they are part of the change themselves. The skills required to get this executive seat include the ability to prove, through your behavior and passion, how your ideas for change include and impact the organization as a whole.

Second, **passion means changing your focus.** Rather than initially focusing on the nuts and bolts of how things get done, passion can direct us towards the bigger picture: **the actual business deliverable that we need to achieve.** The journey to get there is important, of course, but we need to start off committed to the destination. I even have a swear jar in our meetings about changes to our website and AMS, and anybody who makes a comment about having to do something a certain way, sacrifices a dollar to the jar. **People need to start thinking about what has to happen, before concerning themselves**

**with how** – because as the mindset changes, and as the passion sets in, new possibilities for the ‘how’ will also emerge.

It also means **not losing sight of your vision**. When it comes to technology, there will always be something to fix, some sort of hole to fill in, or some problem to address. Of course we have to attend to the issues that emerge in real time, but we should not think that just because there are occasional glitches in a system, that we cannot start working on larger cultural change. **It’s absolutely possible to embark upon changing your technological culture without having to wait for your systems and processes to be in the smoothest, most sophisticated state before you start.**

Passion is contagious. Being passionate about technological change does not mean being blind to concerns: in fact, it means approaching an idea with such an openness and vigor that you can address concerns head-on. Ultimately, you cannot bring about change without showing your own ability to change: **so live it, breathe it, and lead by example.**

## From the Chat: Business Objectives and Team Culture

*Clarifying and simplifying the objectives behind any project, and solidifying them into your team culture, helps change to spread and stick.*

"I embed in my IT team's culture that they start from a point of inquiry and there's no yes/no dichotomy. **I still treat every individual situation as a learning opportunity** and expect my team to do so as well. For example, I was walking through opening and saving documents in SharePoint with a staffer this morning. Doesn't matter if they don't want to use the system. Everyone around them is using it and they have to learn."

- Rhea Steele -

"The answer to most business problems, and the reason it often comes back to culture, is to **simplify**. If leaders have the courage to keep objectives simple it helps people focus. Do a small amount of things really well rather than a bunch of things for the sake of it. This type of focus has a huge upside and not many downsides. Work gets put off because it's not sexy or easy. Simplifying makes you better and stronger rather than showing weak spots. It also reduces what staff members have to do and allows them to get really good at something. **That sense of personal achievement and sense of having less to do will improve culture.**"

- Emery Wolfe -

"Often we associations create complexity by creating too many products and product lines and making them accessible only through additional platforms. **We bolt on new things to buy and use without thinking of the holistic experience.** We need to be tough on ourselves."

- Garth Jordan -

# 05

## DISTRIBUTING IT DECISION- MAKING ACROSS DEPARTMENTS

*Why we should be relinquishing ownership and encouraging dialogue.*

**BY TORI MILLER LIU**

**In most modern organizations, we're seeing a distributed technology decision-making model.** The IT department is no longer the only place where technical decisions are being made, and we are not going to regain full control (nor should we want full control).

This can be a good thing. When technology infuses every corner of an association, employees are more likely to be tech literate and to leverage their knowledge to get the most out of systems. They are also more likely to be innovative.

**Instead of fruitlessly struggling to regain control, we should be looking for opportunities to collaborate.** Collaborative relationships require the sort of transparency and openness that can inspire long-term and effective change.

The IT department should not hide behind the Wizard of Oz' green, velvet screen, trying to exert authority behind the scenes, but should focus on building trusting and consultative relationships with other business units. This is a powerful opportunity to orient ourselves inter-departmentally around the strategic plan and organizational mission, letting the business needs of the association drive all our decisions.

At my association, ASHA, we avoid having the IT department be a project owner. While we have general oversight over technology within the association, it's important that the business owners are driving projects. This has an impact on our systems, of course, but also affects the way we make decisions and participate in projects.

**Our goal should be to protect, not control.** We are there to support business owners and help them achieve their goals while also ensuring new systems or development comply with our information security policies and industry regulations. By asking project owners what they think, and creating this foundation of trust, people can feel empowered rather than alienated by IT strategy and implementation.

**Relinquishing ownership is one way to mitigate the tensions that sometimes exist between IT and other departments.** IT strategy should be a collaborative effort directed by actual business needs rather than siloed politics.

In my organization, I am using formal and informal cross-departmental conversations to establish a dialogue, share strategies, and discuss new ideas.

**It is from this position of open dialogue and distributed control that we can begin to see how individual concerns, plans and passions coincide, and how at the heart of it all is – or should be – a focus on our larger organizational endeavor to help our members and the communities they impact.**

## From the Chat: Change Management

*What should we be focusing on when managing change? Attendees emphasize the importance of expanding our perspectives.*

"Where our internal technology system comes in direct contact with member or volunteer usage, **we are often so focused on the function of the technology that we forget about the experience.** So, yes, if they push the right buttons they will get the answer, but is that input sequence intuitive? For someone who is a tech late adopter? For a digital native? Does the association continue to explore how the output will be used so it is produced in a way that simplified the end user experience? Is it meant to be shared on social media, in an email, or plugged into a slide? We can only answer these questions if we incorporate user experience testing and feedback as an ongoing part of all of our technology processes – not just in development but after launching and through maturity."

*- Lowell Aplebaum -*

"The trick is to change your focus from putting out fires to working on the important projects that will prevent the fires in the first place. This comes from the time management idea in The Seven Habits of Highly Effective People: divide your time in four quarters, x axis being things that are important – not important, y axis being urgent – not urgent. The work in the 'urgent and important' quadrant is essentially putting out fires. **We should be trying to prioritize 'important but not urgent' so as to prevent the fires strategically, by preventing the root cause.** In IT, it is very common to see IT people as firefighters. You call them because your computer isn't working, they apply a solution to the symptom - running around from user to user applying the same technique rather than looking at the underlying problem."

*- Guillermo Ortiz de Zarate -*

“To me personally, it is of critical importance (and entirely possible) to **shore up the prospective value loss that can be associated with participant turnover during culture change** by working to properly transition people. A culture change strategy that anticipates or relies on significant turnover as either a part of, or consequent of, the change rapidly becomes incalculably expensive. Having witnessed the successful transition of entrenched and resistant organization cultures (and personalities) in several instances with extremely minimal or nonexistent turnover, I would never proceed another way. It is the old mindset, not the adherents of it, that needs to leave.”

- *Graham Harvey* -



**06**

**DEMYSTIFYING  
AI: Q&A WITH  
GUILLERMO ORTIZ DE  
ZARATE**

*Don't be afraid of using automation to ease customer service interactions.*

**Associations everywhere are using AI to make their processes more efficient.** We've all heard by now of the **radical potential of AI**, but it can be hard to connect the dots from these big ideas to small practical steps. We want to demystify AI to make it accessible to techies and Luddites alike!

Recently, we heard about a new tool being deployed by NCARB to automate their customer service interactions. **Zendesk** is a software designed to provide fast and efficient customer service using an evolving knowledge base. We posed some quickfire questions to Chief Information and Innovation Officer, Guillermo Ortiz de Zarate, to get to the bottom of how NCARB implementing AI, what drove them to do it, and what are the expected results.

### **| AssociationSuccess.org: How does this AI technology work?**

Guillermo Ortiz de Zarate: "The technology uses a Knowledge Base (KB) which you maintain by writing articles that answer common questions, like FAQs. You can use this KB to answer manually by linking to the article in your response. Or through taxonomies, you can set the system to automatically answer the question straight away. The system chooses a few articles that look like they might answer the question and sends it to the user, asking them if the articles helped answer the question. If they click yes, the machine learning algorithm takes note of the success and uses it in the next iteration. We receive thousands of simple questions through our website that could be easily automated, so we are working on the KB articles right now."

### **| How do you expect the implementation of ZenDesk improved efficiency?**

"Probably over 90 percent of the questions that come to us through our website are repetitive and super simple. **The problem is the 10 percent that are super complicated.** We prefer to spend time taking care of those and let the system automate the others."

### | *Have you come up against any barriers so far?*

“One barrier has been improving our Knowledge Base. The articles must be good enough that we trust the system to send them automatically. The other barrier has been the anxiety that automation causes some team members. It’s hard for people that are accountable for the customer experience to let go of that responsibility, even if it means less work. **It is a process.**”

### | *What made you choose Zendesk?*

“We were working with Zendesk in our IT Helpdesk department to begin with. We started working on migrating the entire Customer Service department to the same tool when we learned they were launching the answer bot.”

### | *What advice would you give other associations looking to adopt AI-powered tools?*

“You don’t have to adopt AI across the board all at once. **Maybe you start out by automating some of the smaller channels of communication.** Then you can measure a couple of things, like the impact it has on efficiencies and effectiveness in providing customer service, and the impact on sentiment. Do users feel the experience is better or worse? Use that data to inform how you migrate other queues or touch points.”

07

# FURTHER RESOURCES

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

- [Article](#): Technology: The Communication Enabler
- [Blog](#): Your Nerdy Best Friend
- [Blog](#): GigaOM
- [Book](#): Seven Habits of Highly Effective People: Powerful Lessons in Personal Change
- [Cloud Provider](#): Microsoft Azure
- [Customer Service platform](#): Zendesk
- [Online courses for basic code](#): Coursera
- [Project Management tool](#): Basecamp
- [Project Management tool](#): Asana
- [Volunteer Management Tool](#): Lineup

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