

ASSOCIATION WEST · NEXT WAVE

SLOW DOWN TO SPEED UP

How smart associations build capacity before they burn out

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OPENING

TODAY'S AFTERNOON

1:30

START

2:45–3:15

BREAK

4:30

END



Grab your worksheet packet.

SHOW OF HANDS

“If one of your key employees left tomorrow, could you pick up their job without disrupting member services?”

Most associations don't have a capacity problem. They have a **systems problem.**

WHAT EFFICIENCY MEANS

Not cutting corners.

Not rushing your work.

Not doing more with less for its own sake.

OPENING

TWO ORGANIZATIONS, ONE APPROACH

THE PROOF

ATLIS

Young, remote, small staff

Zero internal emails

Four-day workweek

THE HARDER CASE

NSPE

A federation, six months in

19,000+ members

40 staff

THE FRAMEWORK

FOUR LEVERS, ONE LOOP

01

Workflows

02

Decision rights

03

**Communication
norms**

04

Tech stack

THE LOOP PICK ONE → MAP IT → TEMPLATE IT → REPEAT

OPENING

WHAT YOU'LL LEAVE WITH

01

Your friction hot spot

02

**One mapped
workflow**

03

A 30-day plan

TURN & TALK

**“What’s one thing your
team does that feels
harder than it should?”**

60 seconds each.

TALK TIME

2 min

2:00

BACK TOGETHER AT

1:40

START

RESET

ALL FOUR LEVERS

FRICTION CHECK

Where does your friction live?

01

Workflows

02

Decision rights

03

**Communication
norms**

04

Tech stack

THE LOOP PICK ONE → MAP IT → TEMPLATE IT → REPEAT

FRICTION CHECK

Rate each of the 16 statements from 1 to 5 in its box. Go with your gut.

1 Not at all true	2	3	4	5 Completely true
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WORKING TIME

8 min**8:00**

BACK TOGETHER AT

1:49

START

RESET

SCORE IT

Add your four scores per lever. Circle your highest lever.

4–8

LOW

9–14

MODERATE

15–20

HOT SPOT

WORKING TIME

3 min**3:00**

BACK TOGETHER AT

1:52

START

RESET

TABLE TALK

**Name your hot spot and
one statement that stung.**

Everyone at the table shares.

TALK TIME

7 min

7:00

BACK TOGETHER AT

2:00

START

RESET

LEVER 1

WORKFLOWS

01

NOW

Workflows

02

Decision rights

03

**Communication
norms**

04

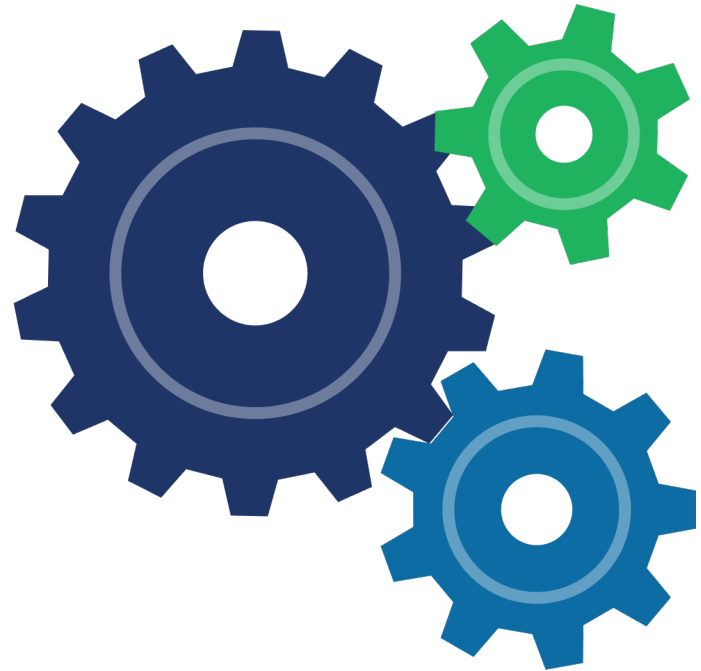
Tech stack

THE LOOP PICK ONE → MAP IT → TEMPLATE IT → REPEAT

LEVER 1 · WORKFLOWS

SYSTEMS THINKING

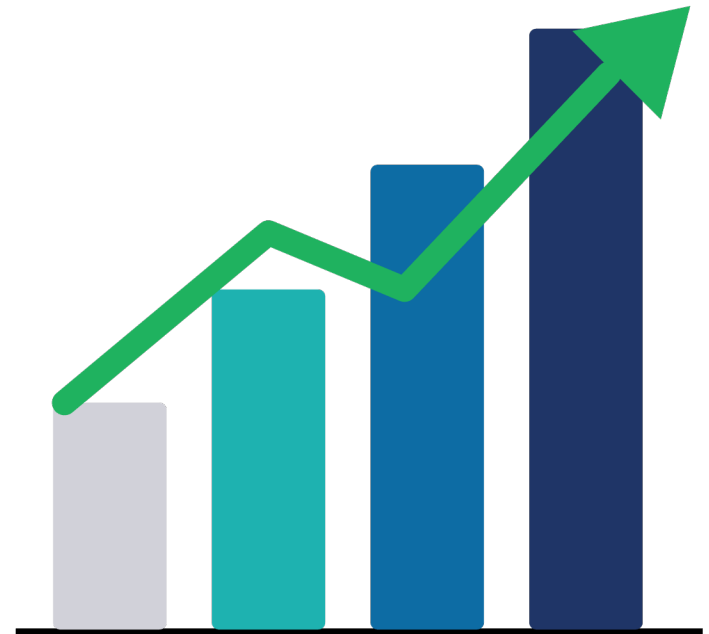
Every task, stakeholder, and resource is a gear. A delay in one ripples through the rest.



LEVER 1 · WORKFLOWS

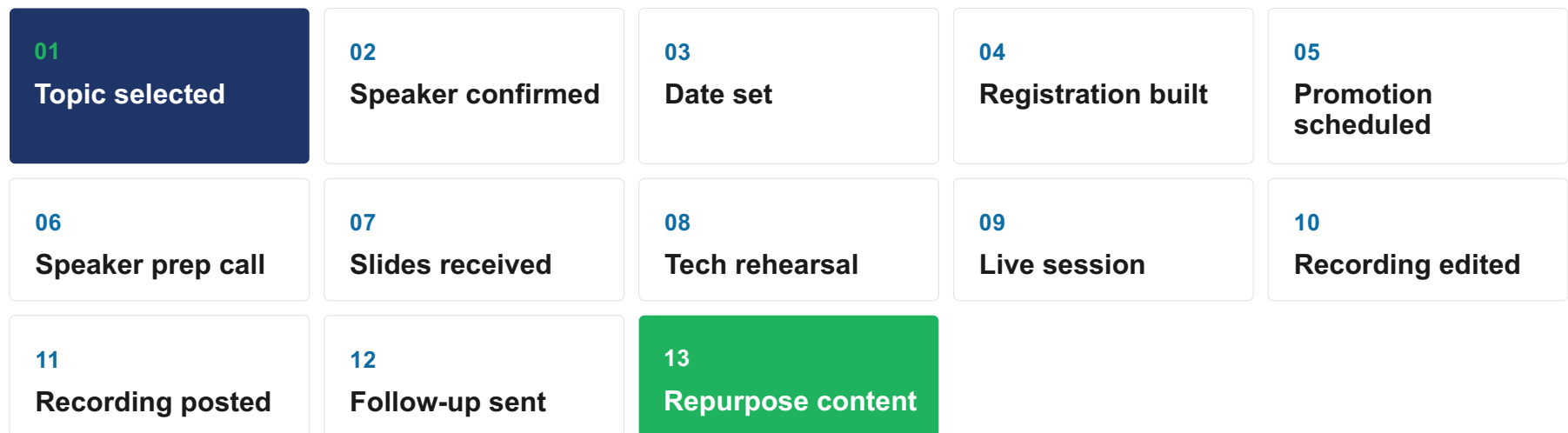
THE ATLIS STORY

Growing fast, remote, tech-forward. We unpacked the problem instead of hiring for it.



LEVER 1 · WORKFLOWS

A MODEL WORKFLOW: WEBINARS



LEVER 1 · WORKFLOWS

NOW BREAK IT UP

Phases

Promote

Owners

Marketing lead

Assets and templates

Promo email template

Relative due dates

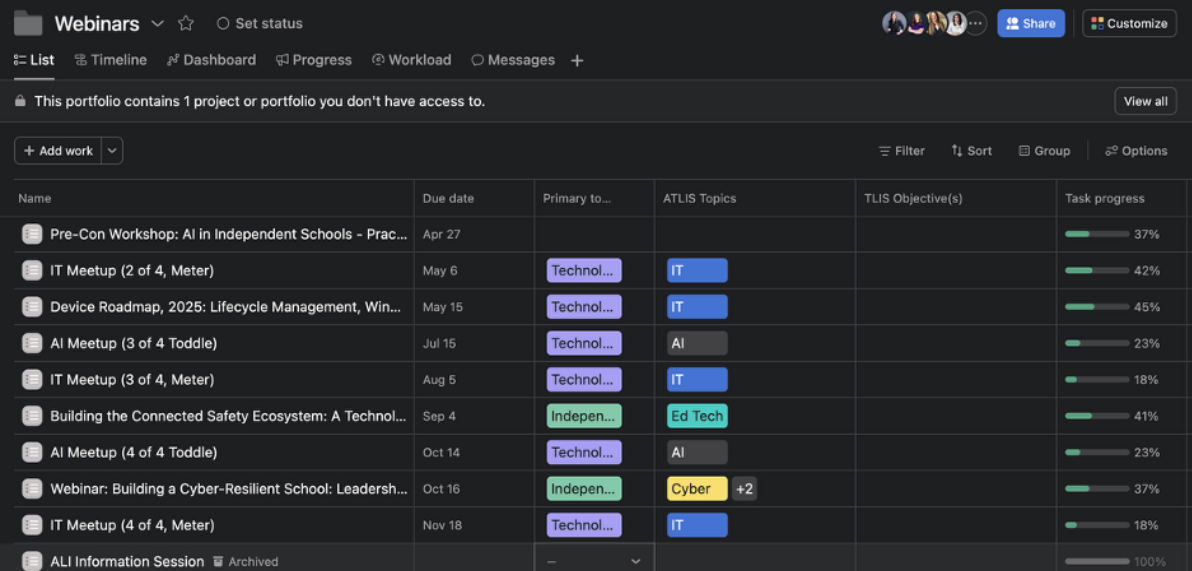
21 days before the session

THE TEMPLATE IN ACTION

01

PORTFOLIO

Every webinar lives in one portfolio, with dates, topics, and progress at a glance.



The screenshot shows a Jira portfolio view for a project named 'Webinars'. The interface includes a top navigation bar with options like 'List', 'Timeline', 'Dashboard', 'Progress', 'Workload', and 'Messages'. Below the navigation bar, there is a message stating 'This portfolio contains 1 project or portfolio you don't have access to.' and a 'View all' button. The main content area displays a table of webinar projects with the following columns: Name, Due date, Primary to..., ATLAS Topics, TLIS Objective(s), and Task progress. The table lists 10 projects, each with a progress bar and a percentage value.

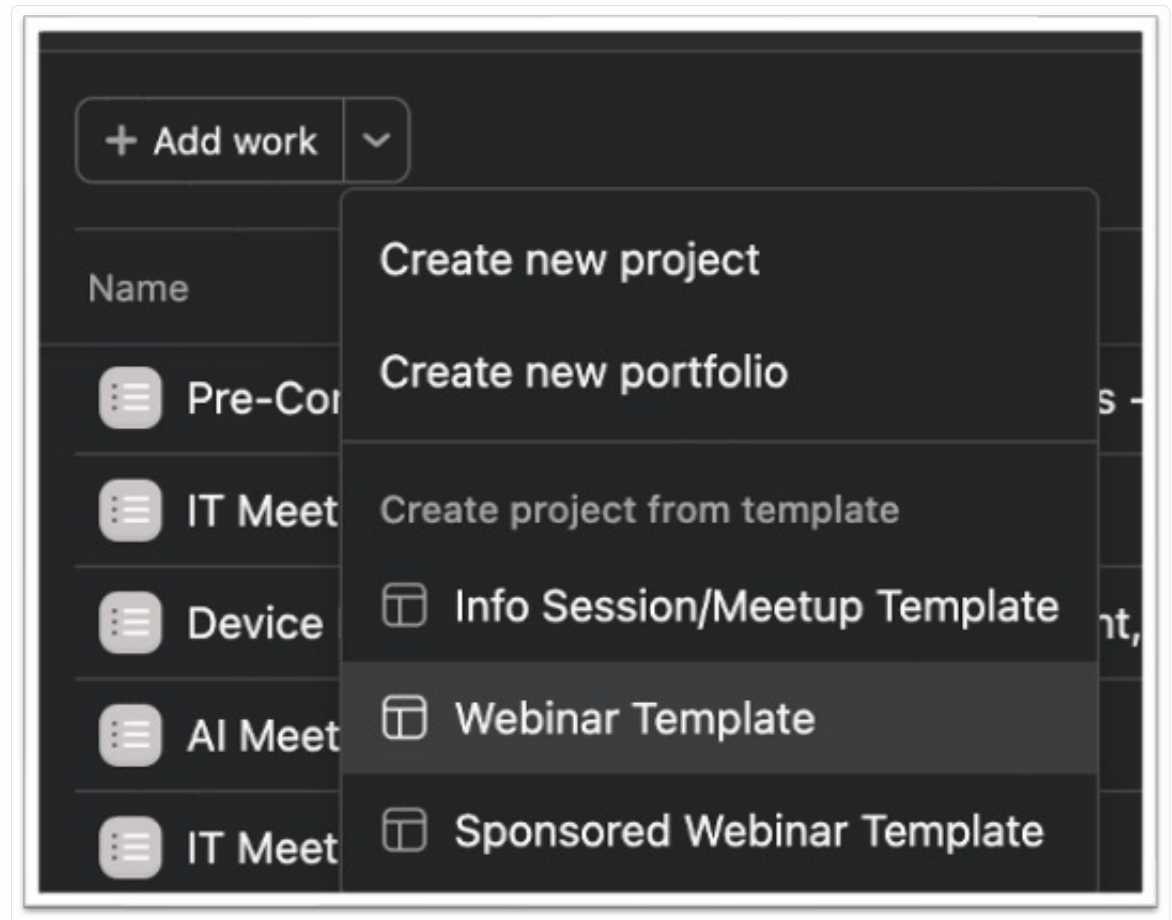
Name	Due date	Primary to...	ATLAS Topics	TLIS Objective(s)	Task progress
Pre-Con Workshop: AI in Independent Schools - Prac...	Apr 27				37%
IT Meetup (2 of 4, Meter)	May 6	Technol...	IT		42%
Device Roadmap, 2025: Lifecycle Management, Win...	May 15	Technol...	IT		45%
AI Meetup (3 of 4 Toddle)	Jul 15	Technol...	AI		23%
IT Meetup (3 of 4, Meter)	Aug 5	Technol...	IT		18%
Building the Connected Safety Ecosystem: A Technol...	Sep 4	Indepen...	Ed Tech		41%
AI Meetup (4 of 4 Toddle)	Oct 14	Technol...	AI		23%
Webinar: Building a Cyber-Resilient School: Leadersh...	Oct 16	Indepen...	Cyber +2		37%
IT Meetup (4 of 4, Meter)	Nov 18	Technol...	IT		18%
ALI Information Session Archived					100%

THE TEMPLATE IN ACTION

02

CREATE FROM TEMPLATE

A new webinar starts from the template, not a blank page.

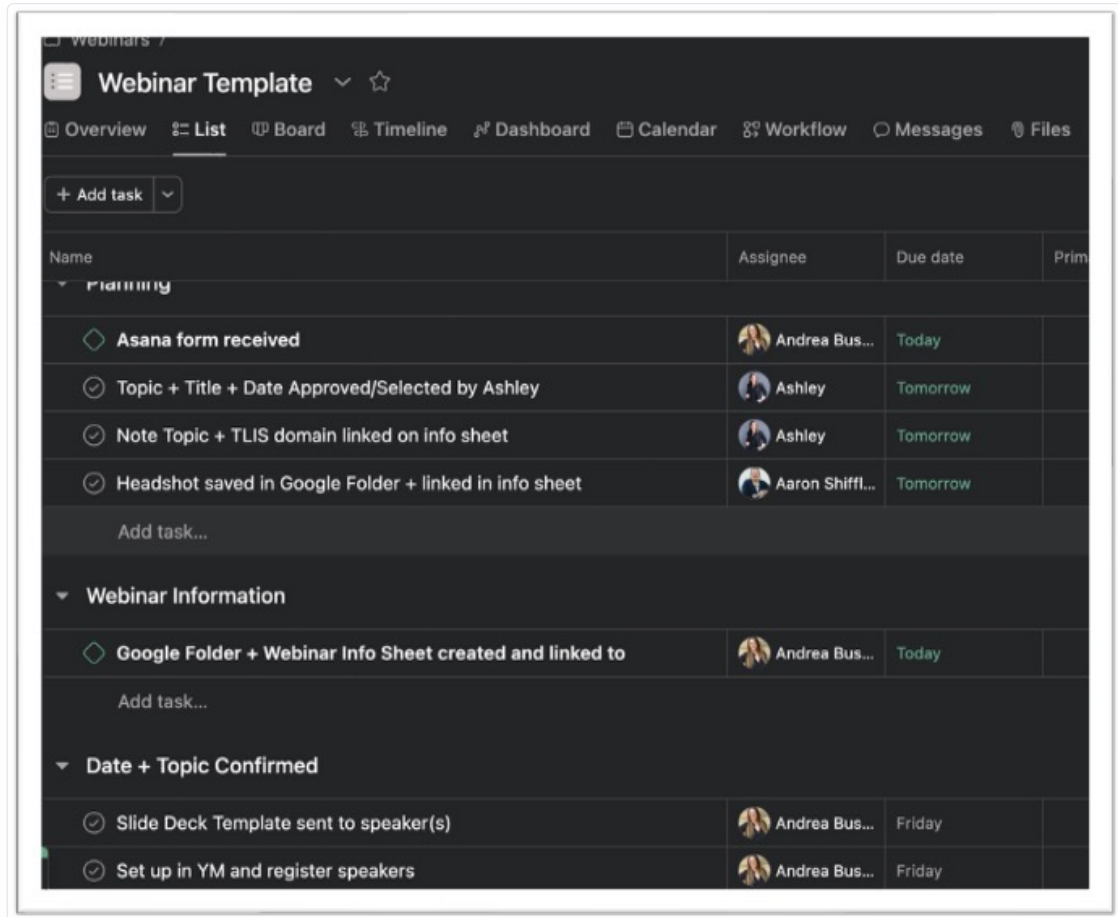


THE TEMPLATE IN ACTION

03

TASKS WITH OWNERS AND DATES

Tasks generate grouped by phase, with owners and relative due dates already set.



THE TEMPLATE IN ACTION

04

INSTRUCTIONS IN EVERY TASK

Each task carries its own step-by-step instructions, so anyone can pick it up.

The screenshot shows a Trello board titled "Webinars / Webinar Template". The board has a tab labeled "List" and a sub-tab "Webinar Template". The task list on the left includes:

- Headshot saved in Google Folder + linked in info ! Tomorrow
- Webinar Information
 - Google Folder + Webinar Info Sheet created and lin Today
- Date + Topic Confirmed
 - Slide Deck Template sent to speaker(s) Friday
 - Set up in YM and register speakers Friday
 - Add webinar to staff calendar - invite speaker(s) - inc Friday
 - Marketing 5 Friday

The right panel shows the description for the task "Slide Deck Template sent to speaker(s)". The description includes a list of steps:

1. Navigate to this [Google folder](#)
2. Make a copy of the file called 'ATLIS WEBINAR PPT template_make a copy'
3. Rename it to match the webinar name & save into the webinars specific folder.
4. Click 'Share'. Change the permissions to "anyone with the link" has editing access

Below the list is a screenshot of a Google Drive interface showing a file named "ATLIS WEBINAR PPT template_make a copy". A red arrow points to the "Share" button, and a red box highlights the "General access" section, which is set to "Anyone with the link" and "Can edit". A red text overlay says "This is the correct setting".

5. Copy link and embed in email where indicated.

At the bottom of the panel, there is a section for "Add a comment".

LEVER 1 · WORKFLOWS

START MESSY

F



3 YEARS

C-

How long our conference workflow took to get from an F to a C-.

THE BUS TEST

Could anyone jump in and find what they need?

LEVER 1 · WORKFLOWS

NSPE: SHOW, BUILD, SHARE

All 40 staff, one day.

-
- | | | |
|----|--------------|---------------------|
| 01 | Show | Real examples |
| 02 | Build | Time with your team |
| 03 | Share | Show the room |
-

You're getting the 25-minute version.



LEVER 1 · WORKFLOWS

PICK ONE WORKFLOW

Webinars

**New member
onboarding**

**Sponsor
management**

**Podcast
production**

ADVANCED

Events

LIST EVERY STEP

Start to finish, 8 to 15 steps. Include outsourced steps, and circle them.

#	STEP
1	
2	
3	

WORKING TIME

12 min

12:00

BACK TOGETHER AT

2:29

START

RESET

GROUP AND ASSIGN

Group your steps into phases. Give each phase an owner, an asset, and a due date.

PHASE	OWNER	ASSET	DUE (RELATIVE)
			"3 days after joining"

WORKING TIME

8 min

8:00

BACK TOGETHER AT

2:37

START

RESET

TURN & TALK · FIND THE GAPS

**“Where would this break
if the owner were out for
two weeks?”**

Swap maps with a partner. Note the gap at the bottom of page 2.

TALK TIME

5 min

5:00

BACK TOGETHER AT

2:42

START

RESET

BREAK

Back at

3:15

Keep mapping if you're on a roll.

BREAK TIME
30 min

30:00

START

RESET

ONE LEVER DOWN

WELCOME BACK

01

DONE

Workflows

02

Decision rights

03

Communication
norms

04

Tech stack

THE LOOP PICK ONE → MAP IT → TEMPLATE IT → REPEAT

LEVER 2

DECISION RIGHTS

01

DONE

Workflows

02

NOW

Decision rights

03

Communication
norms

04

Tech stack

THE LOOP PICK ONE → MAP IT → TEMPLATE IT → REPEAT

LEVER 2 · DECISION RIGHTS

Work stalls waiting for approval, or gets redone when the wrong person weighs in late.

FOUR ROLES FOR EVERY DECISION

Decides

One name

Consulted

Before the decision

Informed

After the decision

Delegated

With guardrails

LEVER 2 · DECISION RIGHTS

NSPE: THE DESK AUDIT

Every role, matched to value.

**Design roles around real value,
not historical habit.**



DECISION RIGHTS GRID

List three decisions that regularly stall. Pick one you could delegate and set its guardrails.

DECISION	DECIDES	CONSULTED	INFORMED
1			
2			
3			

WORKING TIME

10 min

10:00

BACK TOGETHER AT

3:33

START

RESET

LEVER 3

COMMUNICATION NORMS

01

DONE

Workflows

02

DONE

Decision rights

03

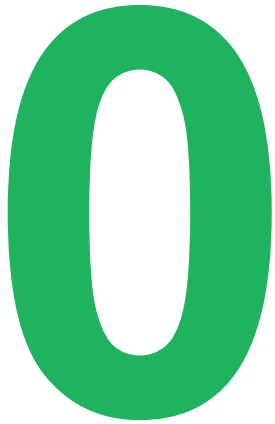
NOW

Communication
norms

04

Tech stack

THE LOOP PICK ONE → MAP IT → TEMPLATE IT → REPEAT



LEVER 3 · COMMUNICATION NORMS

ZERO INTERNAL EMAILS

How a small staff killed staff-to-staff email, and what it unlocked.

LEVER 3 · COMMUNICATION NORMS

CULTURE BEFORE TECHNOLOGY

WHAT WE LEARNED

Tech alone doesn't solve it.

WHAT WE CHANGED

Staff meetings focused on efficiency, not projects.

LEVER 3 · COMMUNICATION NORMS

ASSIGN, DON'T FORWARD

01

Fewer internal emails

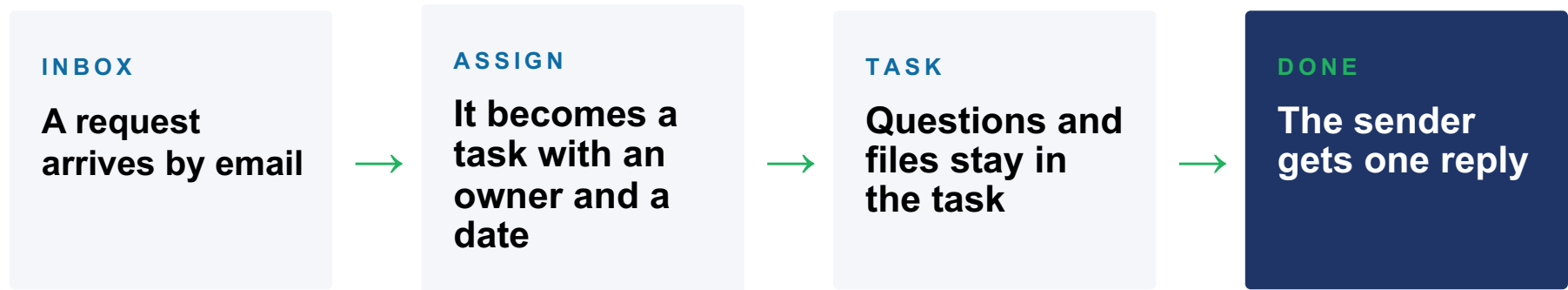
02

The inbox is for members, partners, and volunteers

03

A system for assigning, not forwarding

OUR FLOW



LEVER 3 · COMMUNICATION NORMS

READY TO START?

01 Commit to culture first

02 Coach each other and refine

03 Go all in, or don't bother

CHANNEL GUIDE

For each type: where does it go, and how fast should someone respond?

TYPE	WHERE IT GOES	RESPONSE TIME
Task		
FYI		
Quick question		
Urgent issue		
Decision record		

WORKING TIME

12 min

12:00

BACK TOGETHER AT

3:53

START

RESET

TURN & TALK

Share the one norm
you'd most want your
team to adopt.

One minute each.

TALK TIME

2 min

2:00

BACK TOGETHER AT

3:55

START

RESET

LEVER 4

TECH STACK

01

DONE

Workflows

02

DONE

Decision rights

03

DONE

Communication
norms

04

NOW

Tech stack

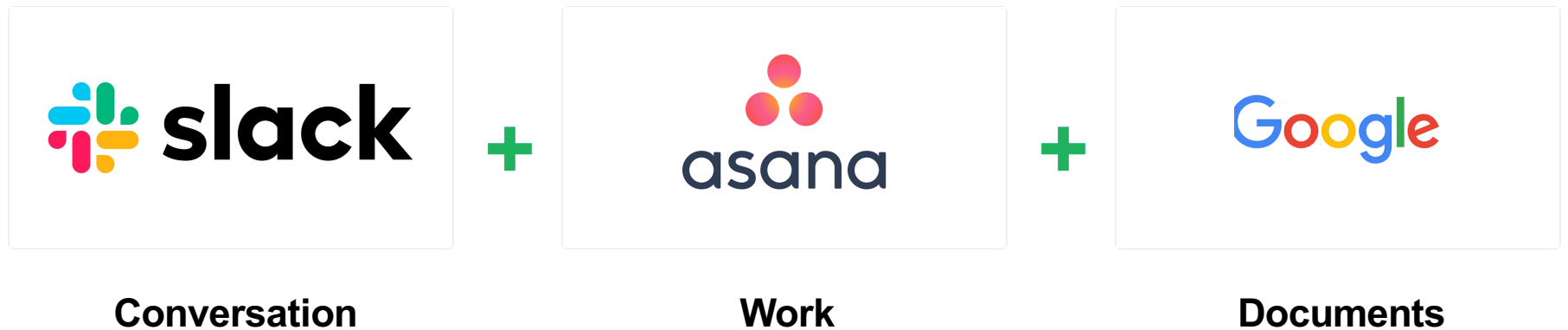
THE LOOP PICK ONE → MAP IT → TEMPLATE IT → REPEAT

LEVER 4 · TECH STACK

A tool layered on a broken workflow just makes the friction faster.

LEVER 4 · TECH STACK

THE ATLIS TECH EQUATION



A few tools, each with one clear job.

LEVER 4 · TECH STACK

NSPE: ONE SYSTEM, THEN CLEAN UP

FIRST

**Asana as one system
for all our work**

THEN, FILE CLEAN-UP

**Digitize
Purge
Organize**

LEVER 4 · TECH STACK

THE QUICKEST WIN: FORMS AND AUTOMATIONS

A form submission creates the project, with answers already filled in.

The screenshot shows the 'Add form' interface of a form builder. The main area displays a form titled 'Test' with a description 'Add form description'. Below the title are two input fields: 'Name' and 'Email address', both marked with a red asterisk. A blue button at the bottom of the form says 'Drag another question here'. On the right side, there is a sidebar with two tabs: 'Form content' and 'Settings'. Under 'Form content', there is a section titled 'Questions' with a list of question types: 'Single line text', 'Paragraph text', 'Number', 'Single-select', 'Multi-select', and 'Date'. At the bottom of the interface, there are three buttons: 'Delete form' (red), 'Send feedback' (blue), and 'Publish' (blue).

STACK AUDIT

List your tools and the job each one does. Then mark each one:

Keep

Combine

Cut

Use fully

WORKING TIME

10 min

10:00

BACK TOGETHER AT

4:12

START

RESET

ALL FOUR LEVERS

MAKING IT STICK

01

DONE

Workflows

02

DONE

Decision rights

03

DONE

Communication
norms

04

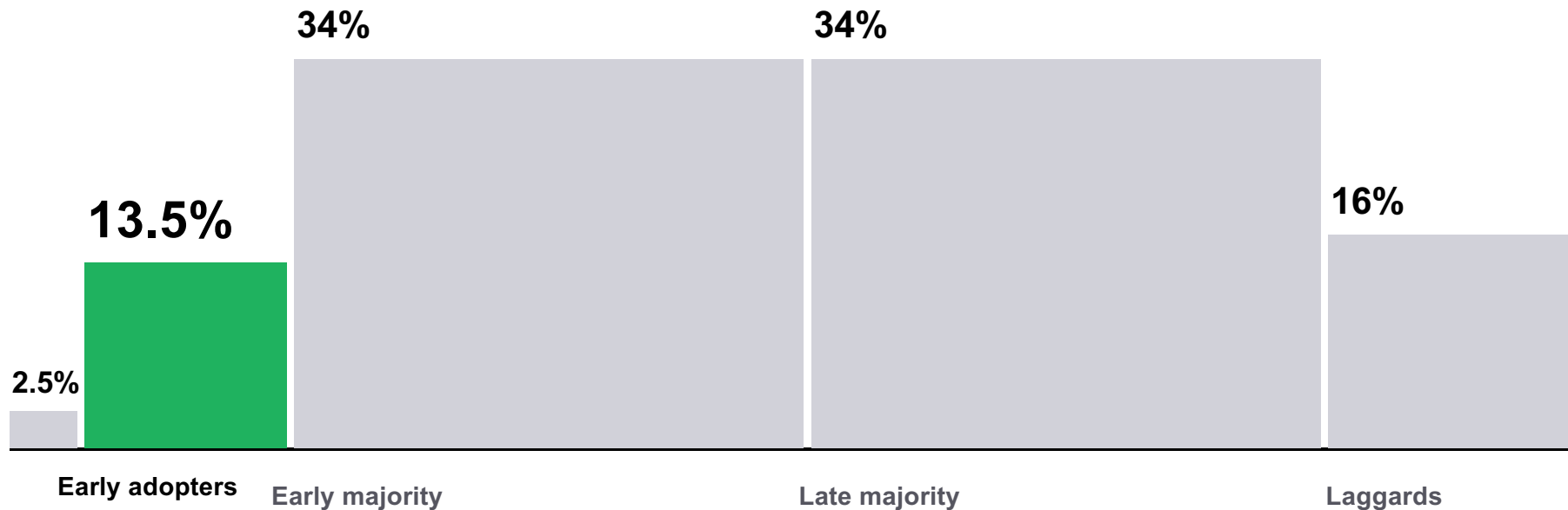
DONE

Tech stack

THE LOOP PICK ONE → MAP IT → TEMPLATE IT → REPEAT

MAKING IT STICK

FIND YOUR EARLY ADOPTERS

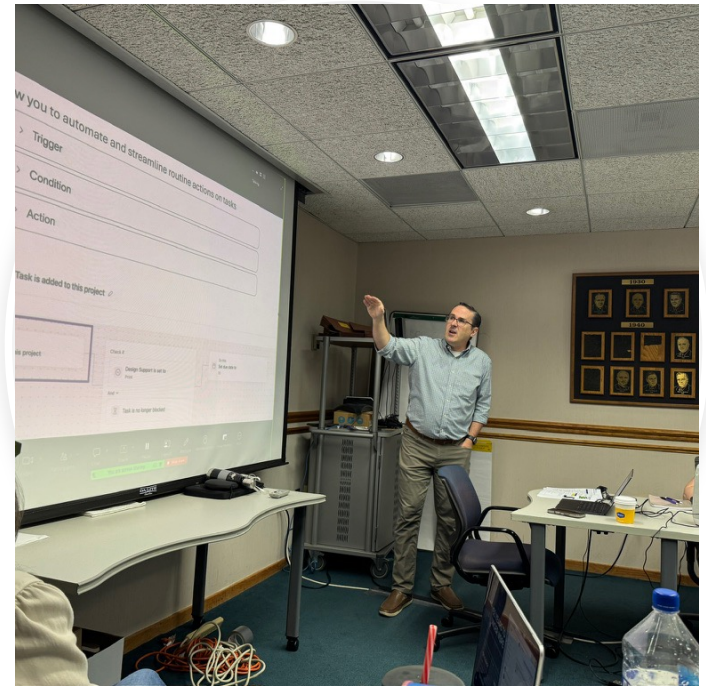


Innovators 2.5%. The sweet spot is the early adopters.

MAKING IT STICK

NSPE: THE SHARE-OUT EFFECT

When teams showed what they built, early adopters pulled the room forward.



MAKING IT STICK

SET GOALS, GIVE GRACE

“Our webinar process will be automated by the end of the quarter.”

Train often

Experiment

Make it a team effort

30-DAY COMMITMENT

Fill in all four, plus your first step and a check-in date. Then tell a neighbor your first step.

My hot spot

My one change

My early adopter

How I'll know it's working

WORKING TIME

7 min

7:00

BACK TOGETHER AT

4:25

START

RESET

CLOSING

FIVE TAKEAWAYS

-
- 01** Systems, not capacity
 - 02** Pick one, map it, template it, repeat
 - 03** Name who decides
 - 04** Culture first, tools second
 - 05** Start messy and give grace
-

CLOSING

WHAT IT MADE POSSIBLE AT ATLIS

0

internal emails

4

-day workweek

30%

YOY membership
growth

95%

renewal rate

<1 yr

to launch a
certification

ASSOCIATION-WIDE GOALS · FY27–FY29

THREE YEARS TO A STRONGER NSPE

YEAR ONE · FY27

EFFICIENCY

Freeing up capacity so tools do the repetitive work.

YEAR TWO · FY28

VALUE

Redirecting that capacity to what matters most to members.

YEAR THREE · FY29

SUSTAIN

Making this way of working our new normal.

We free up capacity, we point it at the work that matters, and we make that our new normal.

STAY IN TOUCH

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