

Technology for Associations

2023 FSAE Foundation Think Tank Report

By Reggie Henry, CAE

ASAE Chief Information and Performance
Excellence Officer



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2023 THINK TANK HIGHLIGHTS:

Technology Deep Dive for Associations

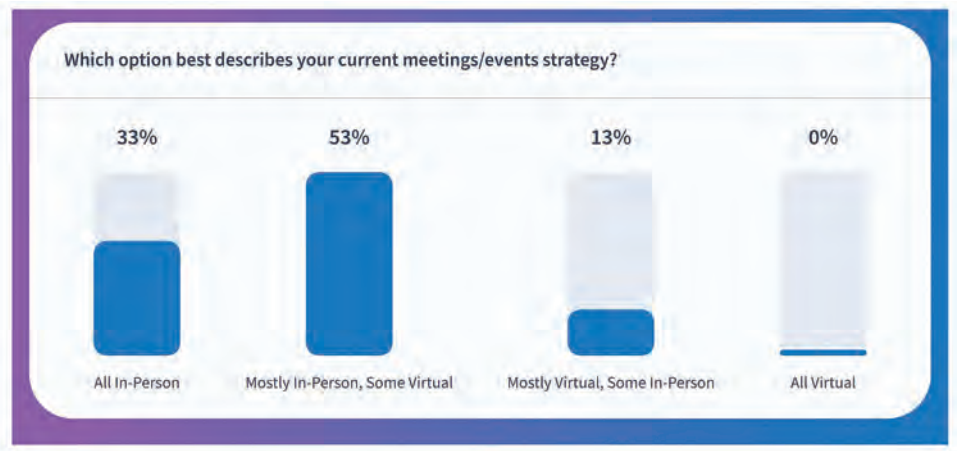


2023 FSAE FOUNDATION
THINK TANK RECAP BY
REGGIE HENRY, CAE

In September, Reggie Henry, CAE, ASAE's Chief Information and Performance Excellence Officer, facilitated the 2023 FSAE Foundation Think Tank: "Managing and Thriving in a time of Constant Disruption – A Technology Perspective and Deep Dive for Associations." Interactive polling was used both to capture the thoughts of the audience and to compare activities of the associations represented to larger surveys done by ASAE on various issues. Highlights of the Think Tank discussions are following.

WHAT ARE YOU STRUGGLING WITH RIGHT NOW TECHNOLOGY-WISE?

Think Tank participants were asked this question before we launched into our technology discussions. As you can imagine, several of the responses were related to AI, but many also mentioned maximizing the technology that organizations already have in place (training, training, training), and building the need for change in organizations with outdated technology.



MAKING THE MOST OF YOUR ASSOCIATION'S DATA

Your organization's data is a strategic asset. It's safe to assume that most organizations already look at existing data through registrations, renewals, etc. to base decisions on. This "predictive" data can be even more valuable as analytic tools get smarter and more affordable. A Foresight Works report tells us that "big data, data analytics, and artificial intelligence are enabling predictive analytics used to anticipate needs, opportunities, and threats in an organization's environment. Organizations will employ machine learning (which occurs without explicit programming) and predictive analytics to predict demand, optimize pricing, and adjust sales and marketing campaigns."

TECHNOLOGY TRENDS AFFECTING ASSOCIATIONS

The Future of Work – Small Business trends indicate "The number of remote workers in the next five years is expected to be nearly double what it was before COVID19: By 2025, 36.2 million Americans will be remote, an increase of 16.8 million people from pre-pandemic rates."

A poll of Think Tank attendees indicated that 60% have a flexible hybrid work model where employees choose their location and working hours based on their priorities for the day, while 40% employed a fixed hybrid work model where the organization sets the days and times employees are allowed to work remotely or go into the office.

The Future of Meetings - Participants discussed the long-term effects of the pandemic on the future of meetings. According to an ASAE Foundation Foresight Works forecast report, "information delivery may migrate to virtual reality (VR) meetings, while socializing and networking become the primary goals of real-world meetings." Additionally, "post-Millennial generation will include 'VR natives' who find hybrid and virtual forms of person-to-person interactions more natural." However, that is not what participants are experiencing in Florida after the pandemic. While most attendees went exclusively virtual during the pandemic or ceased having meetings all together, a combined 66% currently have a hybrid strategy with some in-person and some virtual events. Notable was that no one was pursuing an all-virtual strategy. (see fig 1)

While most associations look at transactional and demographic data from a database or AMS, conducting a deeper analysis of data from social media posts, chat room content, website searches, etc., can help organizations

truly become data and insight driven. Transactional data gives you a great view of what was (and maybe an idea of what is, if you're lucky). It looks back. Taking data, analysis and context from staff and stakeholders, you can create insight – which can inform decisions on what to do next and how to deliver new value to our members/customers. Software is available that can help organizations map conversations from their social media platform (see fig 2) to highlight discussions about a specific topic (ChatGPT). Tools can also connect individuals to those conversations. These types of charts and insight can be

fig 2



useful in generating program ideas and identifying thought leaders to speak at those programs.

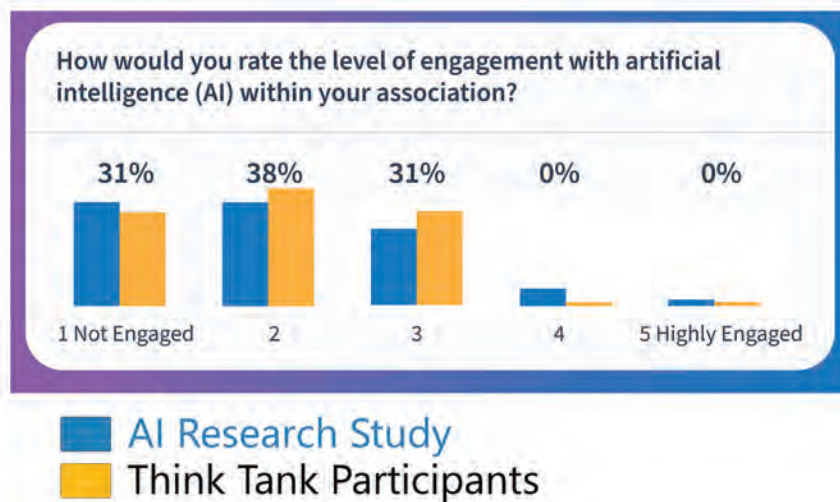
THE STATE OF AI IN ASSOCIATIONS

Perhaps the most interesting and impactful conversations centered around the topic of AI. A recent study by McKinley Advisors highlights the state of AI in associations today, including the level of engagement within organizations. Although there were some similarities in the results between the research study and Think Tank attendees, there was also a marked difference in the “engaged” percentages (see Figure 3).

Two AI-based tools were demonstrated to show attendees the power and scope of AI possibilities. One tool [contentware.com] uses AI to scan an association’s conference website and produce a marketing campaign with emails, social media posts, and a corresponding schedule for both. Tools similar to ChatGPT can be trained with your association’s data for accurate, instant member use - ASAE is experimenting with this currently. See ChatGPT competitors listed – they exist.

Guidelines for using AI organizationally are important. Tools are developing rapidly with little regulation or oversight and can produce inaccurate or biased information, as well as infringe on intellectual property rights and our members’ privacy. A good recommendation is for AI to be a starting point and never an end product.

In closing, participants were left with the following thoughts to consider:



1. We must close the gap between constituent expectations and organizational capabilities and begin to plan for where we know our members will be.
2. Digital Transformation isn't just about technology: it's about customer obsession. It's about your members' journeys. It's about understanding their "moments of need" in that journey.
3. Data analytics allow us to discover and communicate meaningful patterns in data. Remember, it's not the data but the patterns, the signals in and across data that's critical. It's also about having the right data.
4. AI offers associations the potential to enhance member experience, improve organizational efficiency, enable data-driven decision-making, personalize learning and development, generate revenue, and optimize resource management. By leveraging AI, associations can stay ahead of the curve and better serve their members in an increasingly digital and data-driven world. However, we must navigate the ethical, privacy, security and other issues that come with it.
5. Your constituents' experience with you depends directly on your staff's ability to deliver that experience. Make sure they have the tools and training they need.

View all Think Tank shared resources at fsae.org/think-tank, including more in-depth information on the above as well as Moving from “Systems of Record” to “Systems of Action” and Capturing the Voice of the Member.

fsae.org/think-tank

ChatGPTs Top 5 Competitors

- **Anthropic's Claude** Offers versatile conversational abilities and faster algorithm generation.
- **Writesonic's ChatSonic** Provides personalized content creation, AI artwork generation and voice command capabilities.
- **Character.AI** customization With a customizable AI chatbot marketers can create customer experiences with unique characters.
- **Google's Bard** Powered by PaLM 2, excels in multi-step problem-solving and language proficiency.
- **Jasper AI interface** Jasper comes with marketing-focused templates and AI-powered content creation tools.

Managing and Thriving in a time of Constant Disruption – A Technology Perspective and Think Tank for Associations

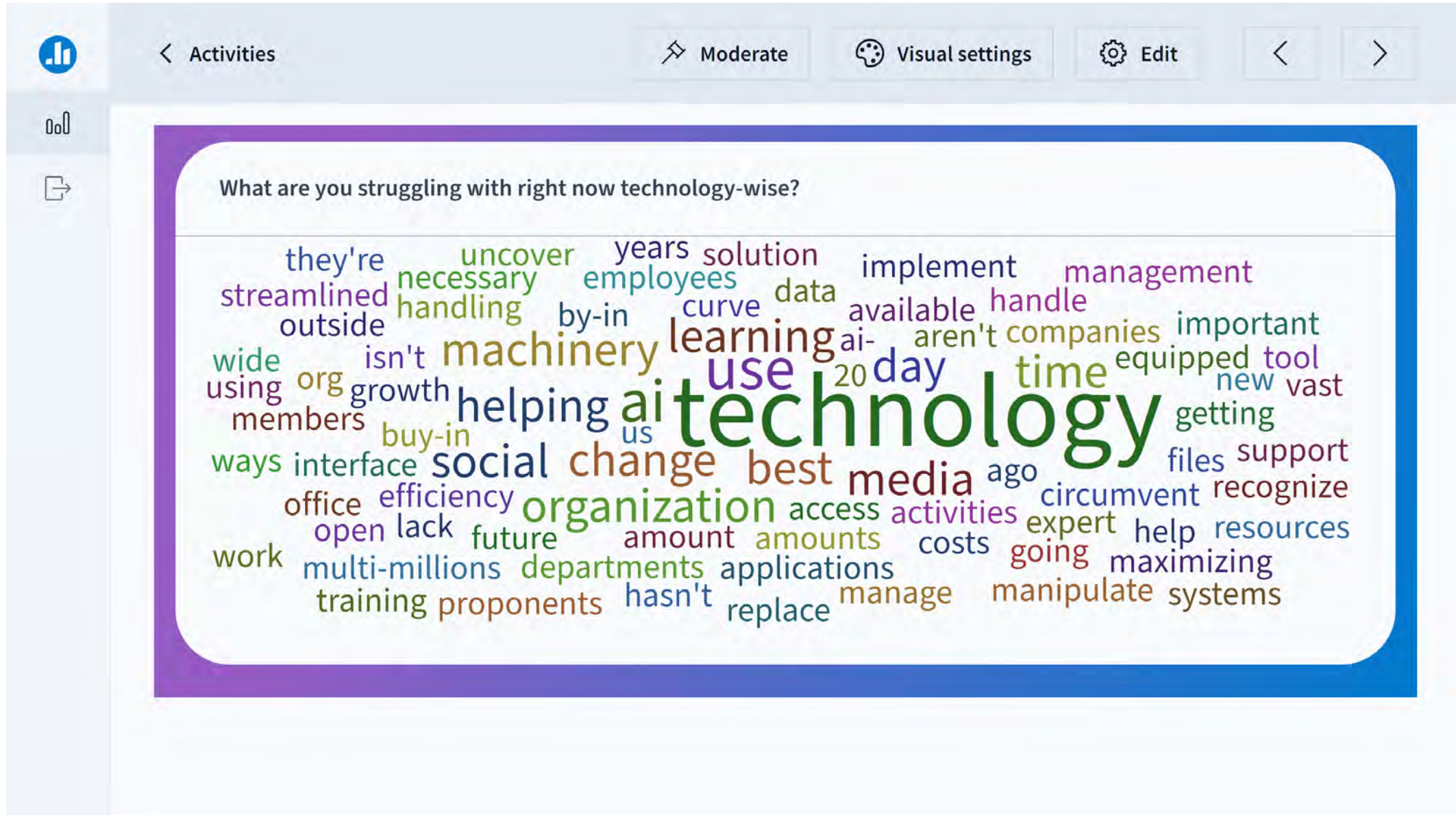
Florida Society of Association Executives
September 27-29, 2023

Reggie Henry, CAE
CIO and Performance Excellence Officer
ASAE

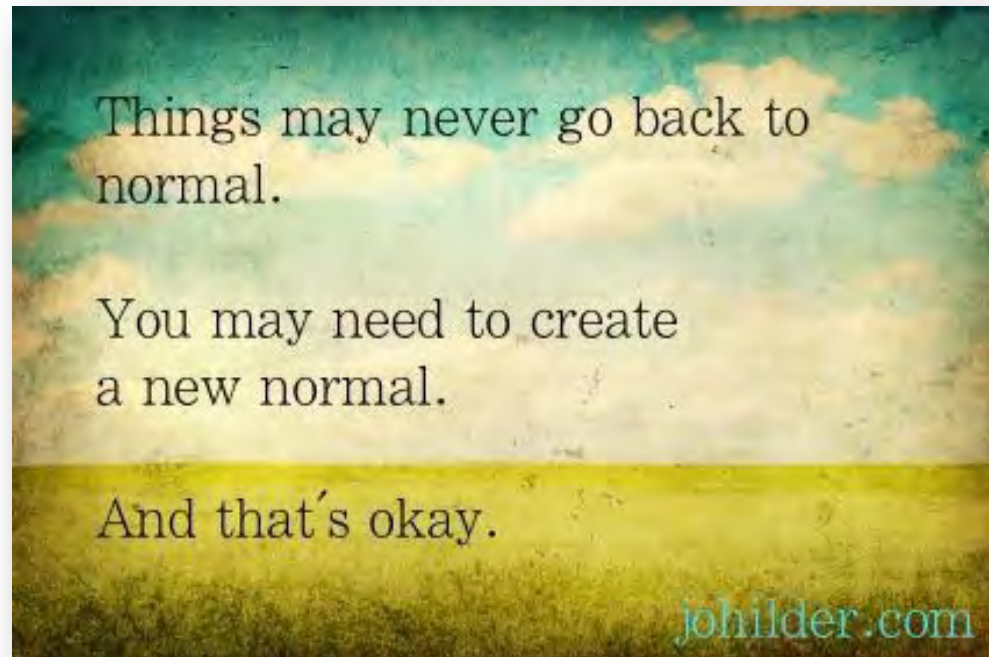


- Technology Trends Affecting Associations
- Making the Most of Your Association's Data
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- The State of AI in Associations

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The Center for Association Leadership



Thoughts from the Poor Man's Survey



Before we rush back to
normal,
what have we learned in the last
few years that we foresee will have
lasting effects on associations?

Leadership is trying to strike the balance between employee preference for flexibility and the desire to ensure collaboration and a strong organizational culture.

A framework developed by MIT professor Robert Pozen and technology researcher Alexandra Samuel suggests a focus on five key factors. These factors – **Function, Location, Organization, Structure, and Culture (FLOCS)** – when assessed holistically, can help deliver the best flexible work experience for your organization.

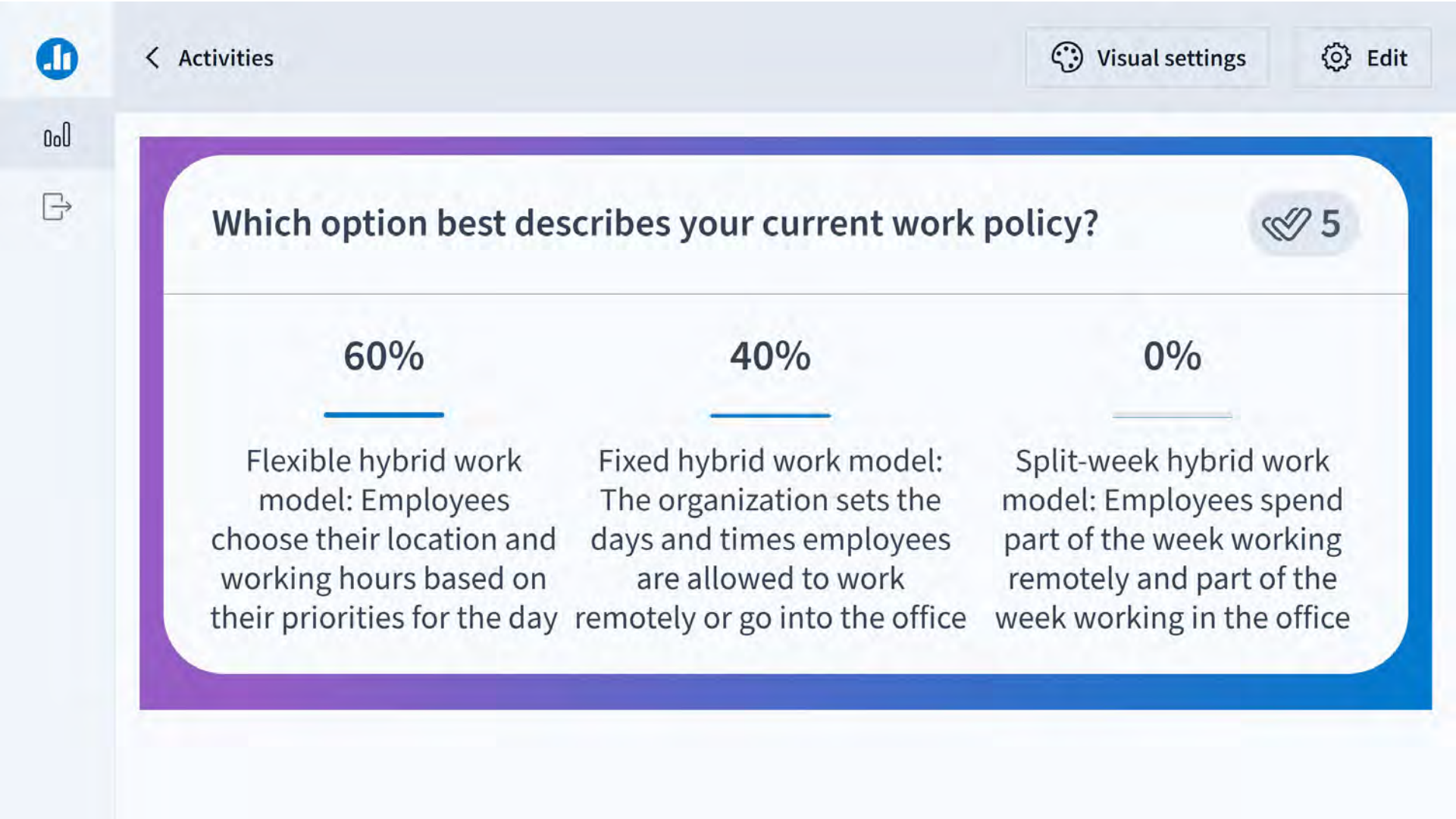
Maintaining remote work environments is the way people work now.

We've seen so many organizations that insist staff want to be back together. We don't believe that and hear otherwise from operational staff. **What is more likely is that management is worried about staff control or rental costs.** It can be a disorienting shift to prioritize deliverables over hours worked.



The number of remote workers in the next five years is expected to be nearly double what it was before COVID19: By 2025, 36.2 million Americans will be remote, an increase of 16.8 million people from pre-pandemic rates.

Sandeep Babu, Small Business Trends





The COVID19 pandemic emptied our HQ offices – and most are not likely to return in pre-2019 structure, even if the HQ remains a street address. How can we enable remote workers, and leaders, for this next decade?

Hybrid work tech stacks We must consider the gear we need to deliver effective hybrid work settings. **Consider unattended reception spaces, remote lock/unlock package delivery lockers, zero-touch endpoint configuration, PC via browser, synchronous Miro/Mural boards in rooms and at home, and equity in participation experience for all regardless of where you sit.** This is consumer level IoT stuff that must be adapted to new business needs. Importantly, what does all this mean regarding network/Wi-Fi topology at the offices and keeping things safe?

Flexible work is the future

Organizations that turn distributed work into a core competency will be able to attract and retain great people, and thus, do their best work for those they serve. They will have a massive competitive advantage.

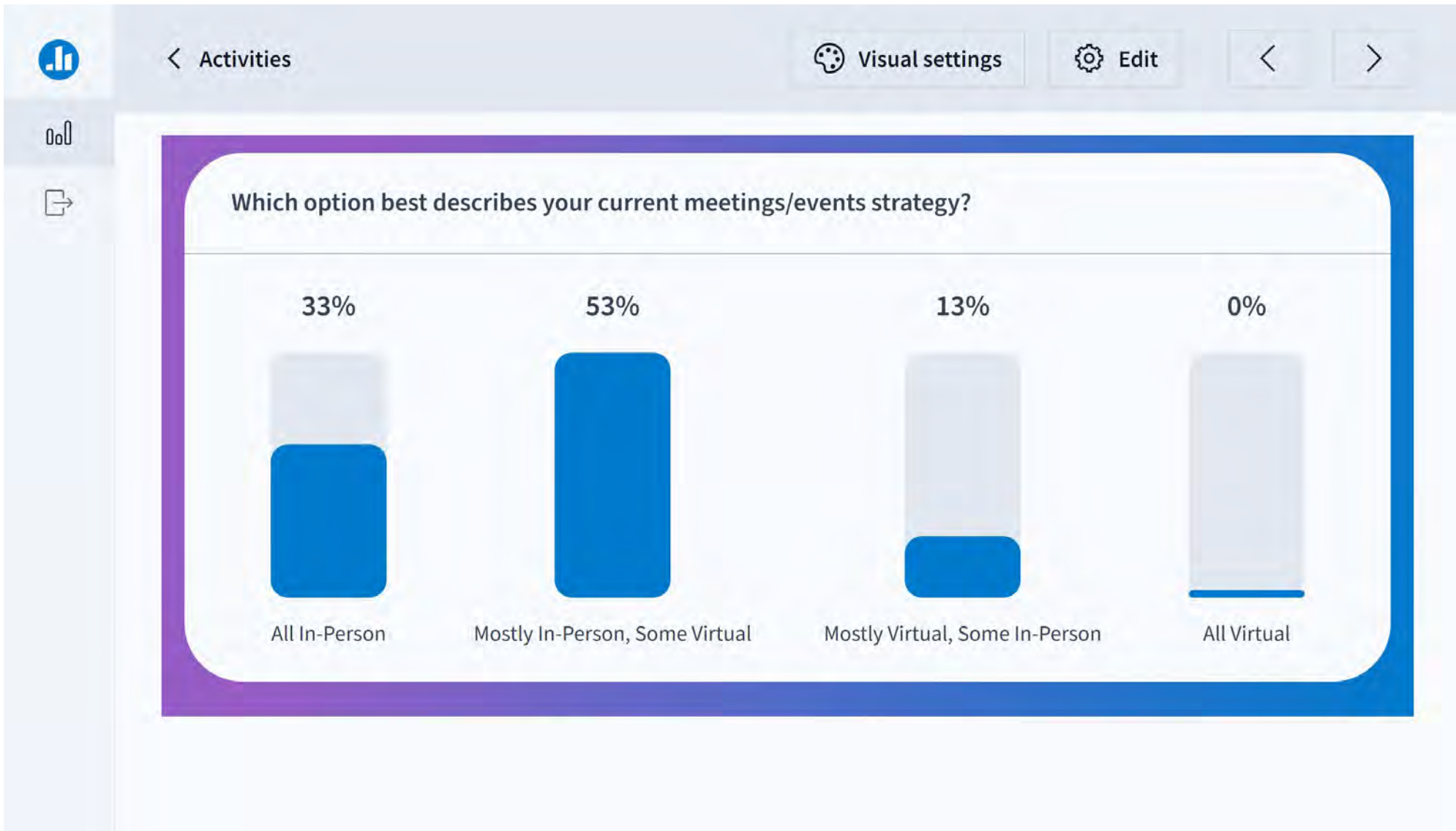
Should we keep virtual events as part of our overall event strategy?

Hybrid meeting technology (hardware, software, and people) We have yet to solve this pertinent aspect of the "next normal." **Despite the increase in virtual meeting platforms, the unicorn 'successful hybrid meeting' has yet to be found.** This includes both large events and smaller internal meetings. What hardware is needed? What about software? How do they support the objectives of the meeting? Most importantly, how do we train meeting facilitators and participants on how to engage in a hybrid way and ensure an inclusive meeting regardless of location? This is going to become a huge pain point when we thoroughly reopen.

Hybrid and virtual meetings Over the past two years, organizations scrambled, pivoted, and adapted to the shift from in-person events to virtual ones. Moving forward, association audiences will hold a high bar for associations to meet; they will expect technologically sound, easy-to-navigate platforms and high-quality, engaging virtual and hybrid events that truly deliver interpersonal connection, top-of-class content, and value for everyone attending.



Current Meetings Strategy



Implement the most meaningful hybrid meeting technology for you and your organization.

This step requires being intentional at the company and team level about which meetings must be hybrid. It is by far the most complex concern. **Then, design meetings from a “remote-first” standpoint, thinking through the remote participant experience.** Unfortunately, remote participants are often considered an afterthought – but it is a disservice to the whole organization when it cannot realize the full potential of its diverse members.



Low Code No Code application to increase automation. In 2023 and beyond, the talent pool is getting tighter, and organizations need to be nimbler. **This means that associations must redesign and automate manual processes!** They must rethink how they are leveraging tools and platforms that allow greater efficiency so that knowledge workers can focus on more substantive activities.

Workflow automation. This is still highly relevant – considering RPA and IPaaS tools are easily accessible now, we must dedicate specialized resources to our teams to process optimization and engineering with these tools – and all the off shoots that will come, like standards, governance, and security.



*Process automation can be described as the **use of technology to perform processes to achieve a function or workflow.** Automated features are programmed so that an action triggers further related actions. It is more like a sequence of pre-programmed actions.*

[SweetProcess.com](https://www.SweetProcess.com)



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

Digital-first Associations need to stop talking about digital transformation and accept that the future is digital-first for both customer-facing and back-of-office operations. **Our members and staff require access to information anytime, anywhere.**

Customer-first and insights-first Our future will require an investment in technology, and to ensure ROI and that we are making good calls we must prioritize user experience/customer experience. **All technology (and all strategy decisions) should be driven by customer experience research and data analysis.** We must leverage our two most valuable resources – our members and our data – to grow. An important aspect of this will be ensuring staff and leadership understand how to ethically collect, store, and use data so we do not jeopardize our members' trust in us.

Customer focus Being digital means being closely attuned to how customer decision journeys are evolving in the broadest sense. **It means understanding how customer behaviors and expectations are developing inside and outside our business and sector – something that is crucial to getting ahead of trends that can deliver or destroy value.**

Humanizing digital We must get away from bots and insert people where it's valuable. **This trend supports using tech as a tool to make human interaction more efficient, not replace it.**



Data management is the process of ingesting, storing, organizing, and maintaining the data created and collected by an organization. Effective data management is a crucial piece of deploying the IT systems that run business applications and provide analytical information to help drive operational decision-making and strategic planning by corporate executives, business managers, and other end-users.

Craig Stedman, Jack Vaughan, TechTarget

Data as a Service

Through the ability to unlock our data via API or data cloud platforms (think Snowflake), an emergence of real-data science modeling as a service should come soon and provide us with more than the canned descriptive/diagnostic BI visualizations we've seen to date by vendors.

Rethinking data architecture and integrations Associations are already taking a fresh look at where touchpoints occur and realizing that best-of-breed systems offer a better user experience over centralized systems. Customer experience will decline if the customer journey is not seamless. We need tools like middleware to facilitate data transfer and to create agile networks that give us freedom to change systems when they no longer meet customer needs.



Vulnerability to cyber-threats

This is especially relevant to ransomware threats. According to ISACA, these were some of the top ransomware attacks in 2021 and affected top companies like Kia Motors, Acer, the DC Police Department, CNA Financial Corp, ExaGrid, Colonial Pipeline Company, and JBS Financial. How are we keeping our staff alert, perimeters secure, and systems patched? Right now, through data privacy laws and restrictions, first implemented in GDPR, then California, and soon Virginia – others will follow.

Cybersecurity and data privacy

We cannot be digital-first and ignore cybersecurity. With the increase of successful breaches, members expect organizations to protect their data! Users are demanding more control, and the government is getting more involved in protecting individual rights.

How are we preparing our people, process, and technology to deal with the onslaught of [data privacy legislation](#)?

Ubiquitous integration

This may be a trend from a few years ago, but it is still crucial for the association space since **everything must be connected**; systems that aren't connected to other data points are near valueless. Thus, we must find ways to integrate with low effort at a low cost.

Democratization of technology

We are now seeing the democratization of technology; **more staff outside of IT are making technology decisions on a daily basis**. Thus, there is a need for assessing IT and how it fits in the larger organizational structure. We must also support an organization's broader strategy and work with this to maintain a centralized IT strategy.

Headless websites

must be prioritized, as well as using multiple channels for products and services vs. having those services problematically tied to a standard website.



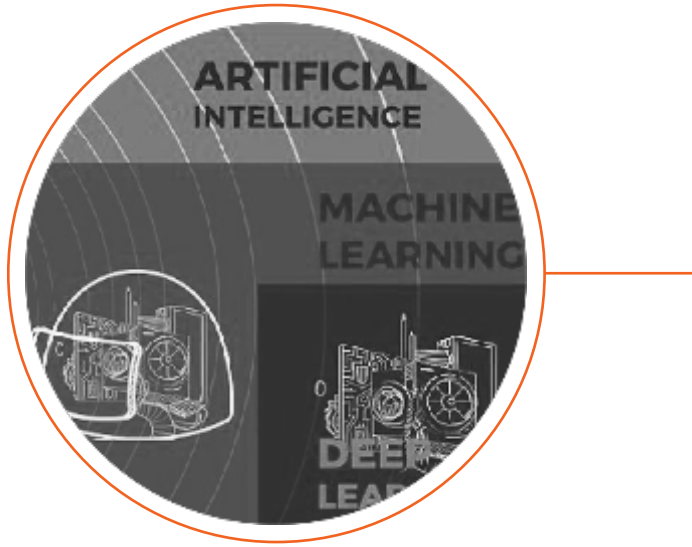
Talent management is about taking a strategic approach to attracting, retaining, and developing a workforce. Companies must build a competitive workforce by sourcing in-demand skills, investing in continuous learning and skill development, and managing and optimizing performance.

[Workday.com](https://www.workday.com)

IT staffing. Is the need for a stand-alone IT team a thing of the past? No, but associations must place digital competencies atop the list of qualifications for any new position for which they hire. **Associations need strategic IT partners throughout the business,** with someone (or multiple people) coordinating a comprehensive strategy to keep them aligned, encouraging experimentation and delivering digital products and services in an agile manner to stay relevant, up-to-date, and to out-perform potential competitors.

Recruit and retain top talent. We are seeing a shortage of technical talent in the association space; we've had technical positions sit vacant for months. **Thus, we must reevaluate how we can best recruit and retain top technical talent.** This may require a deeper understanding at the BOD and executive level for the realistic operational costs of tech-driven, future-focused strategies.

Staff development. There is an urgent need for improved technology literacy amongst staff as well as fostering a culture of ethical technology decision-making.



At its simplest form, artificial intelligence combines computer science and robust datasets to enable problem-solving. It also encompasses sub-fields of machine learning and deep learning, which are frequently mentioned in conjunction with artificial intelligence. These disciplines are comprised of AI algorithms that seek to create expert systems which make predictions or classifications based on input data.

What is AI -IBM

AI and machine learning to drive decisions. We've been saying "AI" for years – and it's still on the list. **Associations must position themselves for better and faster decision-making, acknowledging and, when permitted, omitting human bias.** The past three years have shown associations that responding quickly to change is critical for long-term growth. Let's use technology to build the framework and models we didn't have two years ago!

Artificial Intelligence (AI) and data science. The same technology that allows credit card companies to identify fraud and Amazon and Netflix to pinpoint consumer interest can be used to deliver high levels of member value, help organizations identify members who will lapse, serve professional development opportunities to the right places, identify promising volunteers, and much more.

AI is something associations must embrace to enhance not just marketing but the overall customer experience.



"Everything as a Service"

This is happening in other industries (like the government) and we foresee this trend creeping into associations. IT is becoming increasingly specialized and is constantly changing. By outsourcing "everything" (beyond the helpdesk), associations build flexibility to shift and evolve as their business needs change.

Personalization/Individualization at Scale This means really getting to know the needs of people at the individual level and building a relationship on that.

Discussion?



Let's Talk Data

Recently...

Do our systems
“listen” well?

Do they listen
in a way that
really let's us
know our
members?

You should know me!



What keeps me up at night about data?

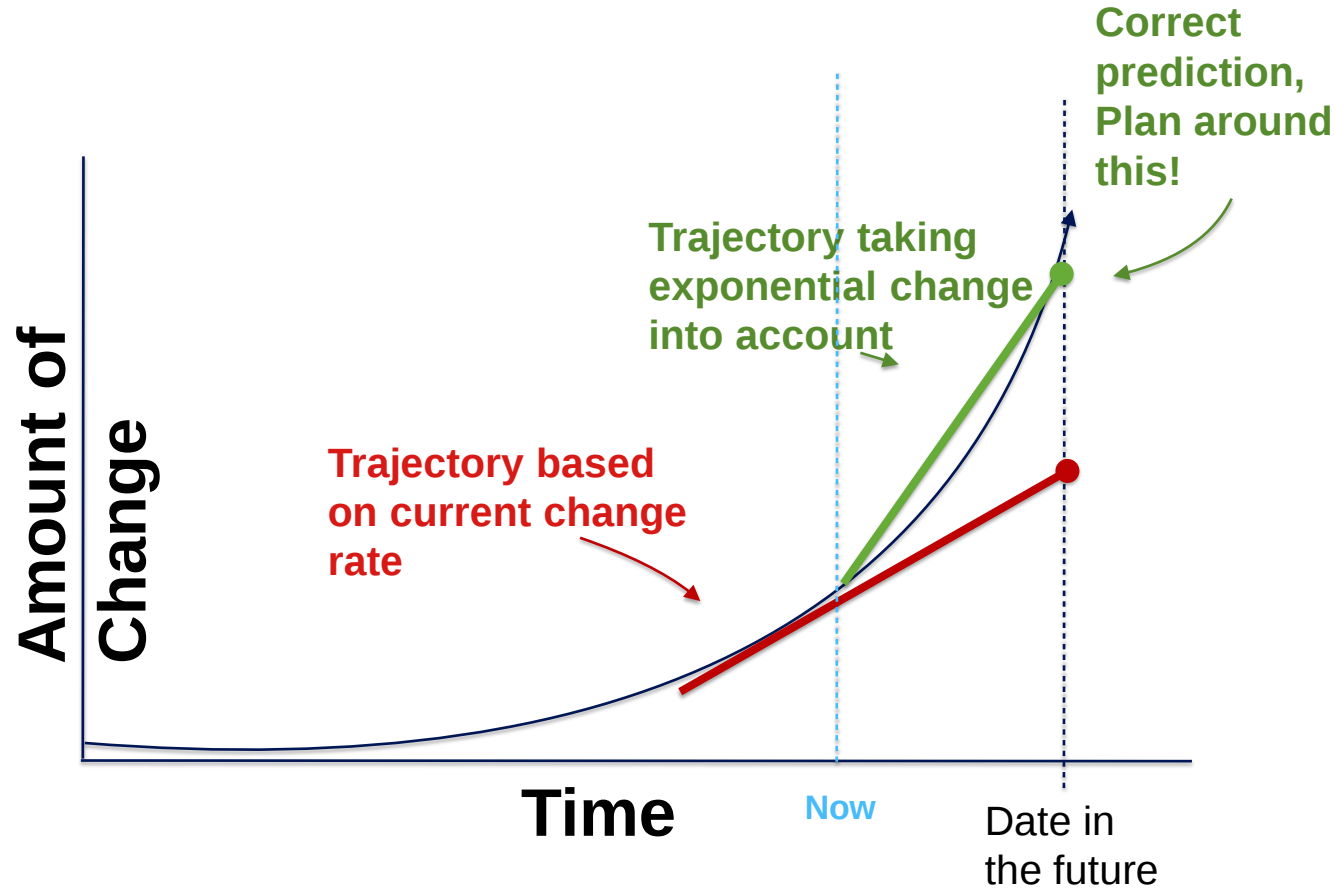
Digital-first. Associations need to stop **talking** about digital transformation and accept that the future is **digital-first** for both customer-facing and back-of-office operations. Our members and staff require access to information anytime, anyplace.



Achieving Data Democratization. The goal of data democratization is to allow non-specialists to be able to gather and analyze data without requiring outside help.

The Change Gap!

The Change Gap

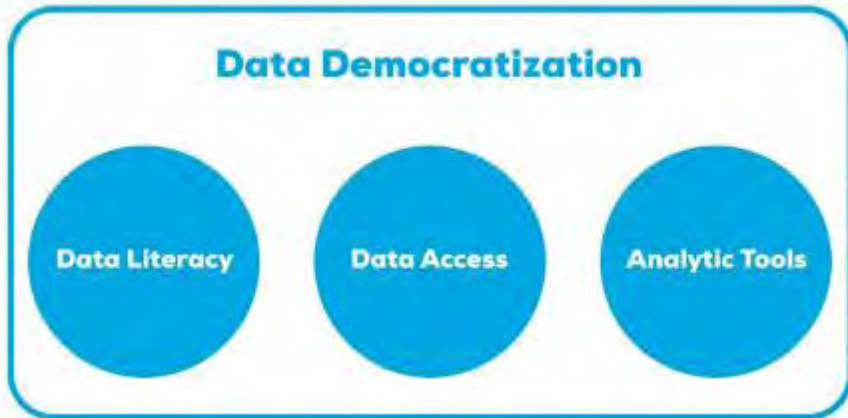


The amount of change we are experiencing now makes the change curve steeper than ever!

We can't plan based on where we are now...

We need data and "insight" to help us "predict" where we'll be in the future!!

How do we get the INSIGHT we need to prepare our organizations for the "change gap"?



Data democratization is the ability for information in a digital format to be accessible to the average end user. The goal of data democratization is to allow non-specialists to be able to gather and analyze data without requiring outside help.

Does your staff have access to the data they need to do the jobs you expect them to do?

Look Beyond Transactional Data!

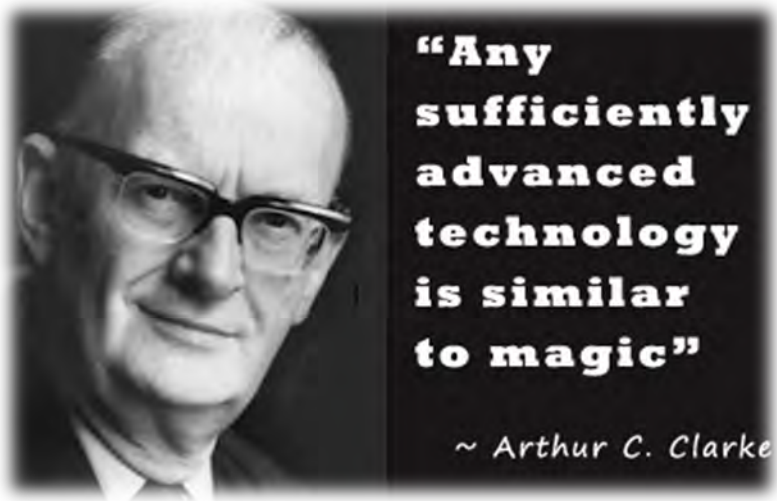


Transactional Data is Important – It tells you what happened...

...but that's reporting. Important...but reporting.

We need MORE! And it begins by thinking about data **differently!**

A really "smart" refrigerator...



Many moons ago....

What's your strategy for
your system...
uhhh...systems...uhhh...
ecosystem?



Dave Will, co-founder and CEO at PropFuel

I want our systems to
not just know stuff, I
want our systems to
DO stuff!



How do we move from “systems of record” to “systems of ACTION?”

So, what would a system need to know to be able to DO stuff?

CONTEXT: Context based on data. Lots of data. And not just transactional data!



NEED: **WHAT's** needed and **WHO** needs it and **WHEN** do they need it. Do I even have the right data to answer that question?

I need Insight!

Insight

- (the ability to have) a clear, deep, and sometimes sudden understanding of a complicated problem or situation **that leads to action**

Preparing Your Systems for Insight

Preparing Your Systems for Insight

Ubiquitous integration It is crucial for the association space since everything must be connected; **systems that aren't connected to other data points are near valueless.** Thus, we must find ways to integrate with low effort at a low cost.



Democratization of technology We are now seeing the democratization of technology; more staff outside of IT are making technology decisions on a daily basis. Thus, there is a need for assessing IT and how it fits in the larger organizational structure. We must also support an organization's broader strategy and work with this to maintain a **centralized data strategy.**

WE NEED AN ECOSYSTEM APPROACH TO TECHNOLOGY

Member/Customer Facing Technology



Which applications should pull data from to go into the data warehouse?

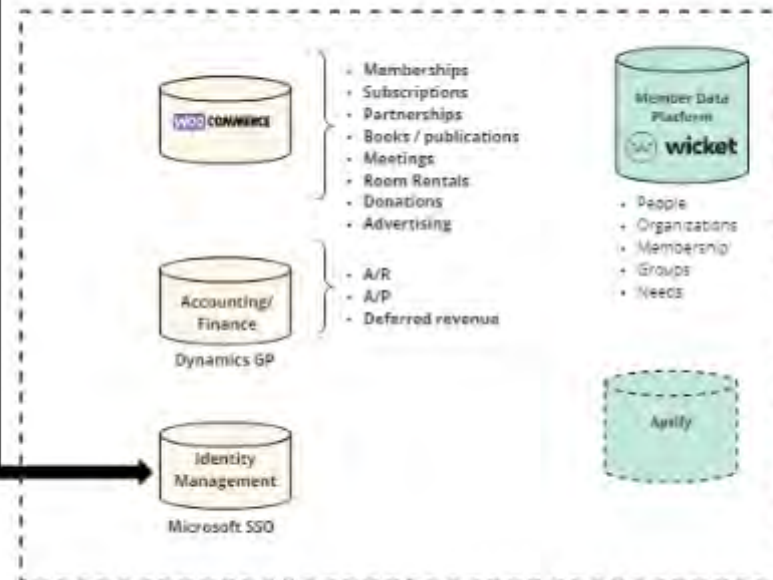
Wrong Question!!!



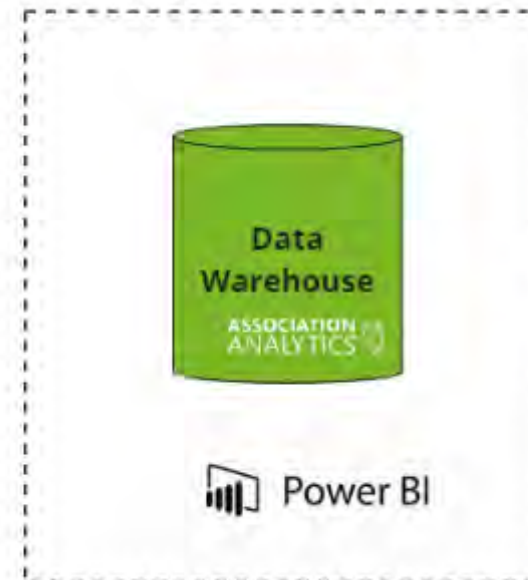
Mobile Access to Everything, Really Important!



"Run the Business" Technology



Insight/Analytics Technology



How do I get ALL the data into the data warehouse?

4-Step Journey to Insight



Associations make the world smarter, safer, and better.
ASAE helps associations grow, excel, and achieve.

FEATURED EVENTS

 JUN 14 - JUN 15



Conscious Inclusion Summit

Location: The Madison Hotel, 177 15th St NW

 JUN 21 - JUN 22



2023 Marketing, Membership & Communications Conference

Location: Walter E. Washington Convention Center 801 Mount Vernon Place NW

 AUG 05 - AUG 08



2023 ASAE Annual Meeting & Exposition

Location: Georgia World Congress Center 285 Andrew Young International Blvd., NW

[VIEW ALL EVENTS >](#)

ASAE RECOMMENDS



MARKETING

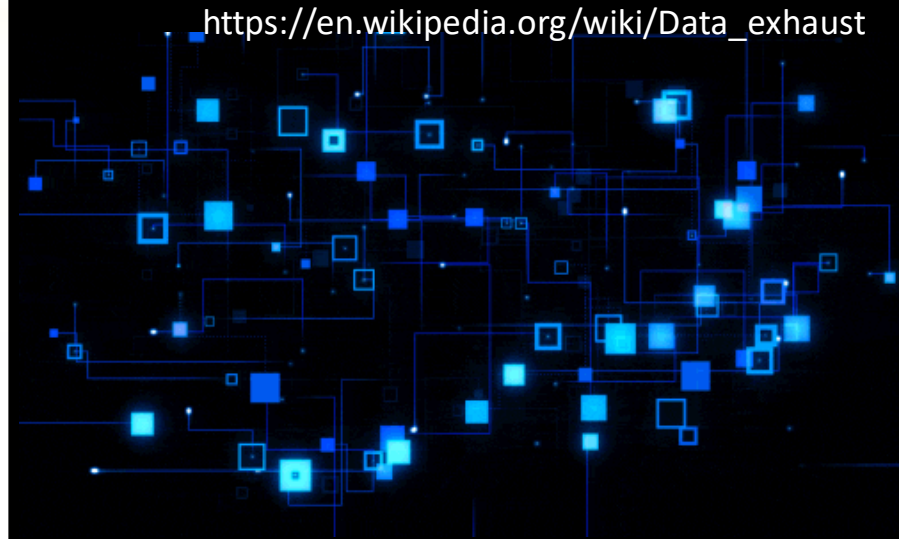


ASAE FOUNDATION

Digital Exhaust

Digital exhaust or **exhaust data** is the trail of data left by the activities of an Internet or other computer system users during their online activity, behavior, and transactions. This is part of a broader category of unconventional data that includes geospatial, network, and time-series data and may be useful for **predictive analytics**. Every visited website, clicked link, and even hovering with a mouse is collected, leaving behind a trail of data.

https://en.wikipedia.org/wiki/Data_exhaust



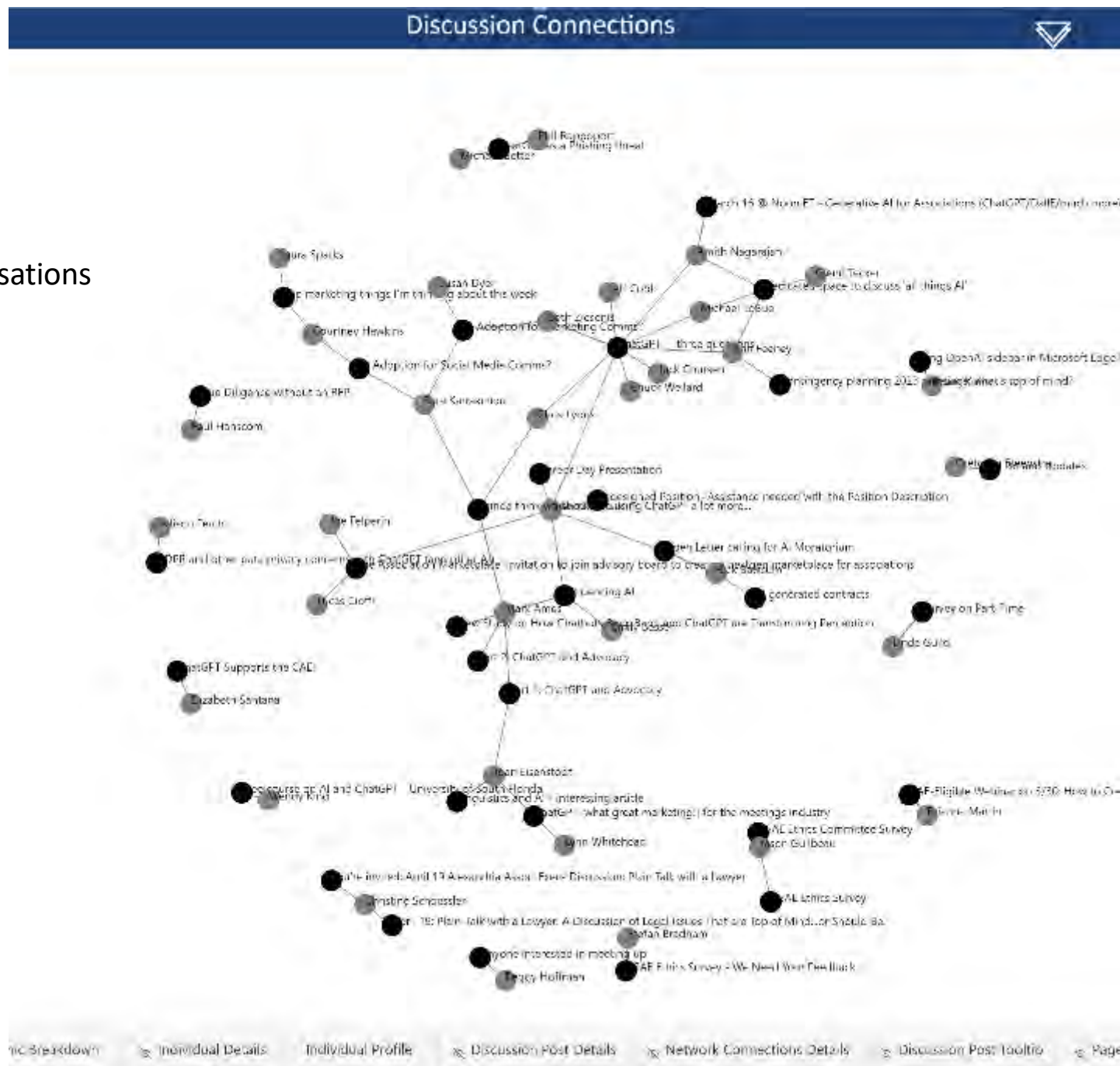
4-Step Journey to Insight



Analysis

What do I see here?

- Over 30 conversations about ChatGPT
- Several people involved in multiple conversations
- Overlapping conversations

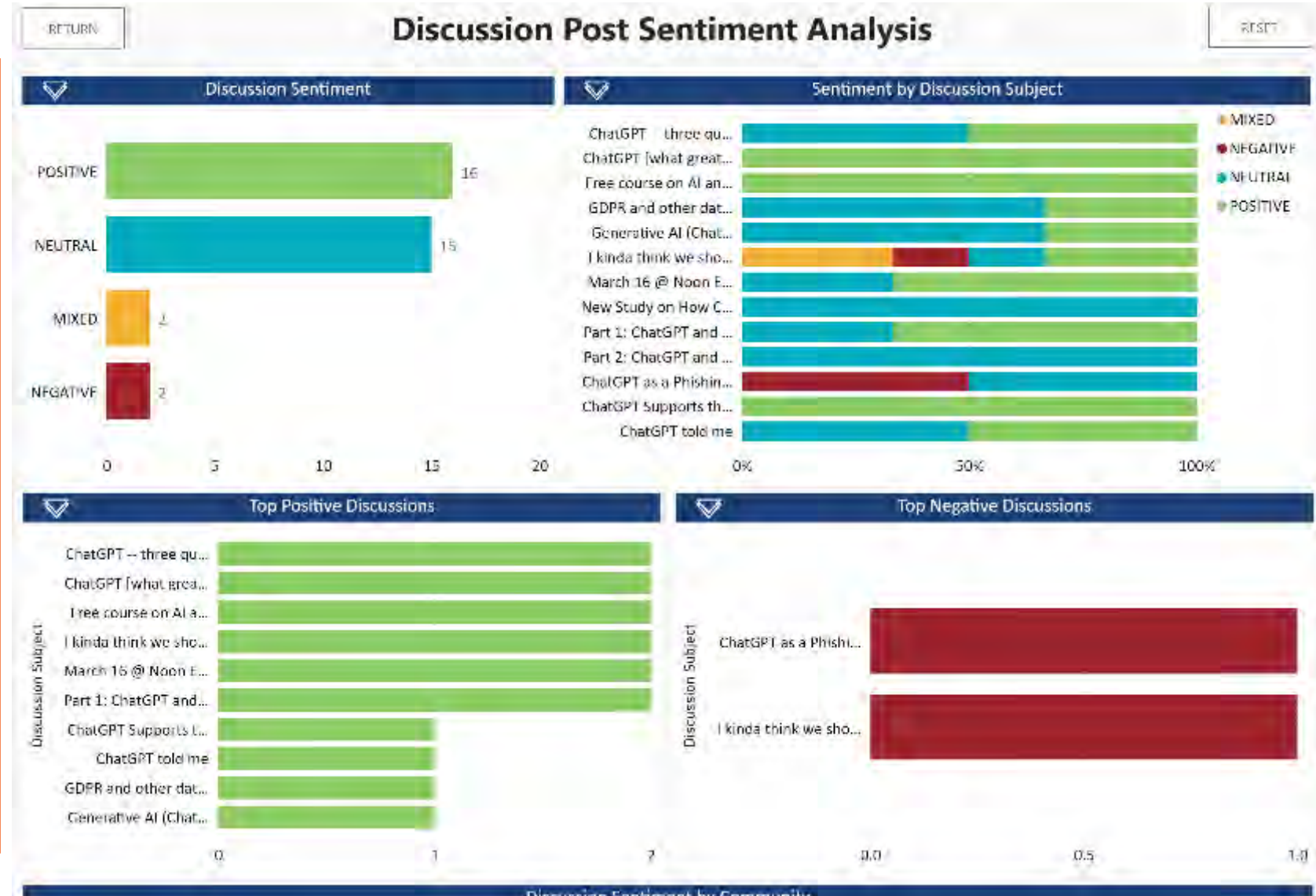


Data from posts in

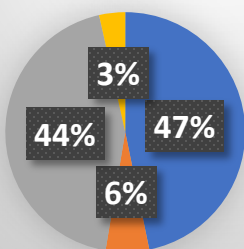


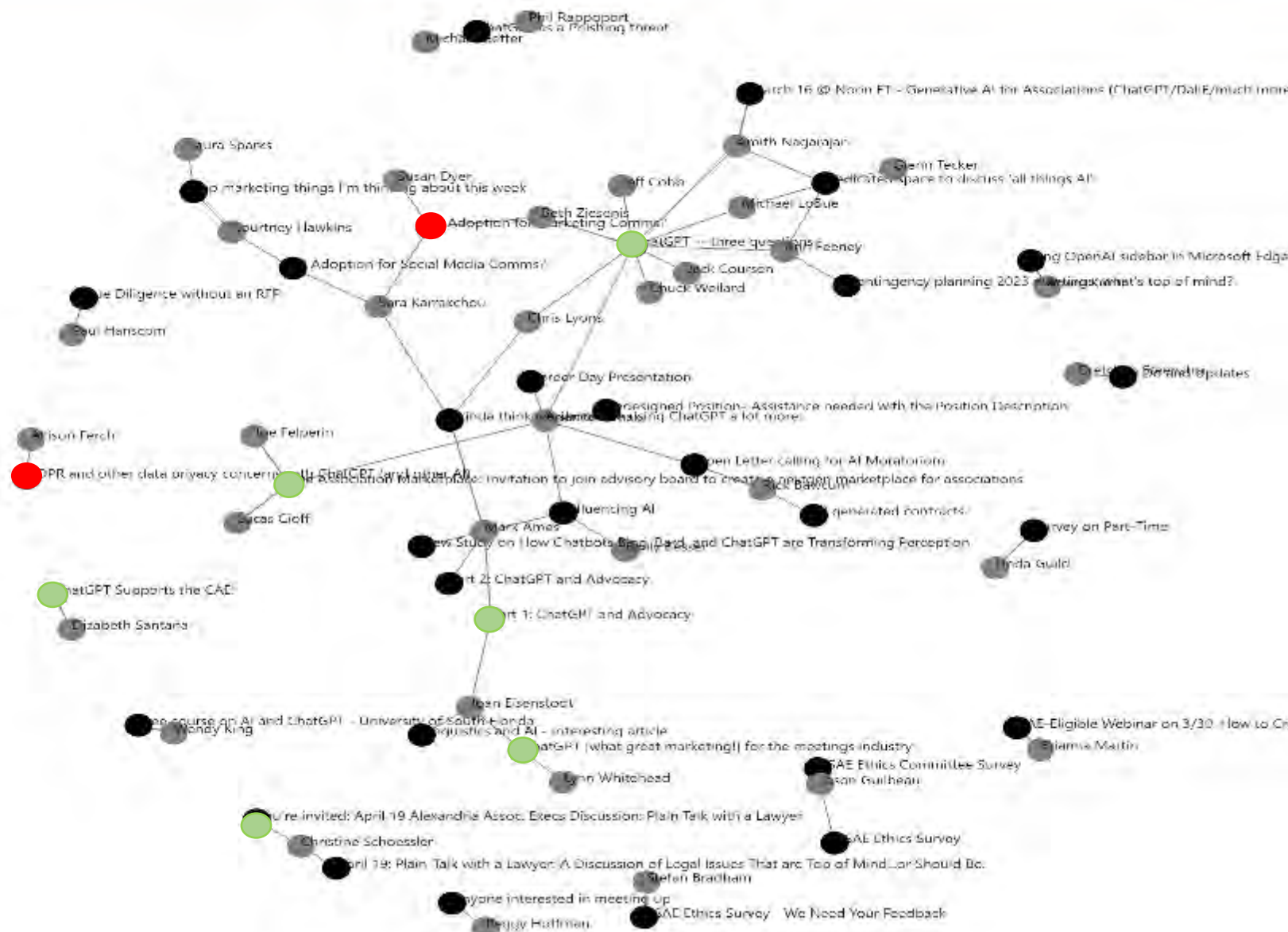
What do I see here?

- Overall sentiment of ChatGPT convos
- Which conversations were what sentiment
- Overlapping conversations
- Top Positive and Negative Convo



What if we use “AI” or automation to mash these up?





4-Step Journey to Insight



Now you can gather the team (data analyzers, subject matter experts, marketing specialists, etc.) to provide the necessary context. Acumen's objective is to provide you data and insights to help you achieve your business objectives. Based on that, your job is to decide....



Step: 4

What should we
DO, for WHO,
WHEN?

Insight!

Closing Thoughts....

- Transactional data gives you a great view of what was (and maybe an idea of what is, if you're lucky). It looks back.
- If we do this right, INSIGHT gives us an idea of what to do next and how to deliver **new** value to our members/customers.
- INSIGHT brings a new level of awareness to the team and aids in informed decision-making.
- INSIGHT, if use correctly, can be the fuel for innovation. Data answers the question "how did we?", INSIGHT poses the question "how might we?"

Discussion?

Capturing the Voice of the Member



Membership



Do you want to know what
disruption really is?

Sorry Uncle Reg-
Joe, how do we
know it's really you?

What's your perspectives on systems?
Who are your audiences...are they ALL included in your process?

Voice of the Member/Customer

Customer Behaviors and
Experience Team



Ensure that ASAE has a thorough knowledge of its customers, the journeys they take with us, and the data and systems needed to support those journeys

Voice of the Staff

Workforce/Workplace
Enablement Team



Ensure that ASAE staff have the tools they need to fulfill its mission and support the work of the Customer Behaviors and Experience and Digital Product/Content Deliver teams.

Voice of the "Systems"

Digital Product/Content
Delivery Team



Ensure that ASAE's customer facing systems deliver the frictionless, coordinated, personalized experience our customers expect.

Voice of the Member/Customer

The objective of the customer experience study was to answer two basic questions....

- What do our members need from us?
- How do they want us to meet those needs?

.... and to provide specific, detailed, actionable insights that would guide our infrastructure planning.





Help Association Professionals Find Purpose In Their Profession

Helping members find purpose in their chosen profession and in the work they do. In all stages of their careers. In all stages of their membership.

Finding Purpose in Serving Society



Click to hear the
Voice of the Member



BELONGING

Association Professionals seek to feel a sense of belonging in the association community. They want to feel connected, included and they want to share experiences with a diverse group of individuals quest to find belonging through ASAE.

There are several avenues members take in their quest to find belonging as ASAE:

- Attend conferences
- Interact online
- Participate in professional development activities
- Volunteer



INTERACT ONLINE

- Maximize likelihood that I am not bullied in online forums
- Maximize ability to give positive reinforcement to others online
- Maximize number of people I can meet with my job title
- Maximize likelihood that I ask the appropriate question in the correct forum



CONFERENCE & PROFESSIONAL DEVELOPMENT

- Maximize number of people I meet with same challenges/issues as me
- Maximize my ability to introduce myself to a first time attendee
- Maximize likelihood that I meet someone that I did not know before
- Maximize ease by which I can contact others before, during & after conference
- Maximize number of intimate settings I can connect in
- Maximize likelihood that I can see who else is attending
- Maximize ability to plan appropriate outfits
- Maximize ease by which I can give positive reinforcement to others
- Maximize likelihood that I can search the attendee list and sort by title, interest, location



VOLUNTEER

- Minimize likelihood that I have to know someone to get selected for a volunteer committee
- Maximize likelihood that my application is read by selection committee
- Minimize number of times I have the opportunity to bond with fellow volunteers
- Maximize likelihood that I will be warmly welcomed into the volunteer group
- Maximize ease of which I can apply for an opportunity



PEER GROUP

- Maximize likelihood that I can find and connect with people similar to me
- Maximize likelihood that I can find and connect with people different than me

What data do I need to do these things?



PROGRESS IN CAREER

Association professionals at all career stages are looking to make progress in their career. This can include a promotion within their organization, a move from one functional area to another (ie; communications to membership), and/or a new job at a new Association.

Association professionals try progress in their careers by:

- Making and keeping connections to other industry professionals
- Understanding what jobs are currently open
- Seeking ways to show or share their skills in a broader forum/venue
- Building their resume through training and credentials that show their experience

MAKING CONNECTIONS

- Maximize number of thought leaders available for me to connect with
- Maximize likelihood that I can find a mentor or role model
- Maximize ability to leverage my network
- Maximize likelihood that I can connect with other participant in online or in-person courses or events
- Maximize ability to expand my network beyond those that I already know

FINDING JOB OPPORTUNITIES

- Maximize ability to use career center anonymously
- Maximize my ability to research associations and their involvement in ASAE when looking for a job
- Maximize likelihood that I can understand what employers are looking for in talent selection

SHARE SKILLS IN BROADER FORUM/VENUE

- Maximize my ability to share my knowledge in a broader forum
- Maximize my ability to share knowledge online without looking self-promoting
- Maximize my ability to be perceived as professional among my peers
- Maximize likelihood that I am respected for my knowledge

BUILDING RESUME

- Maximize likelihood that I can understand my career path possibilities
- Maximize my ability to afford courses to support my career growth
- Maximize likelihood that I have proof of completion of a course or lesson
- Maximize likelihood that I will learn what skills and experience I need to develop in my career
- Maximize likelihood that my skills are aligned with my volunteer opportunities

What data do I need to do these things?

Voice of the Member/Customer

The objective of the customer experience study was to answer two basic questions....

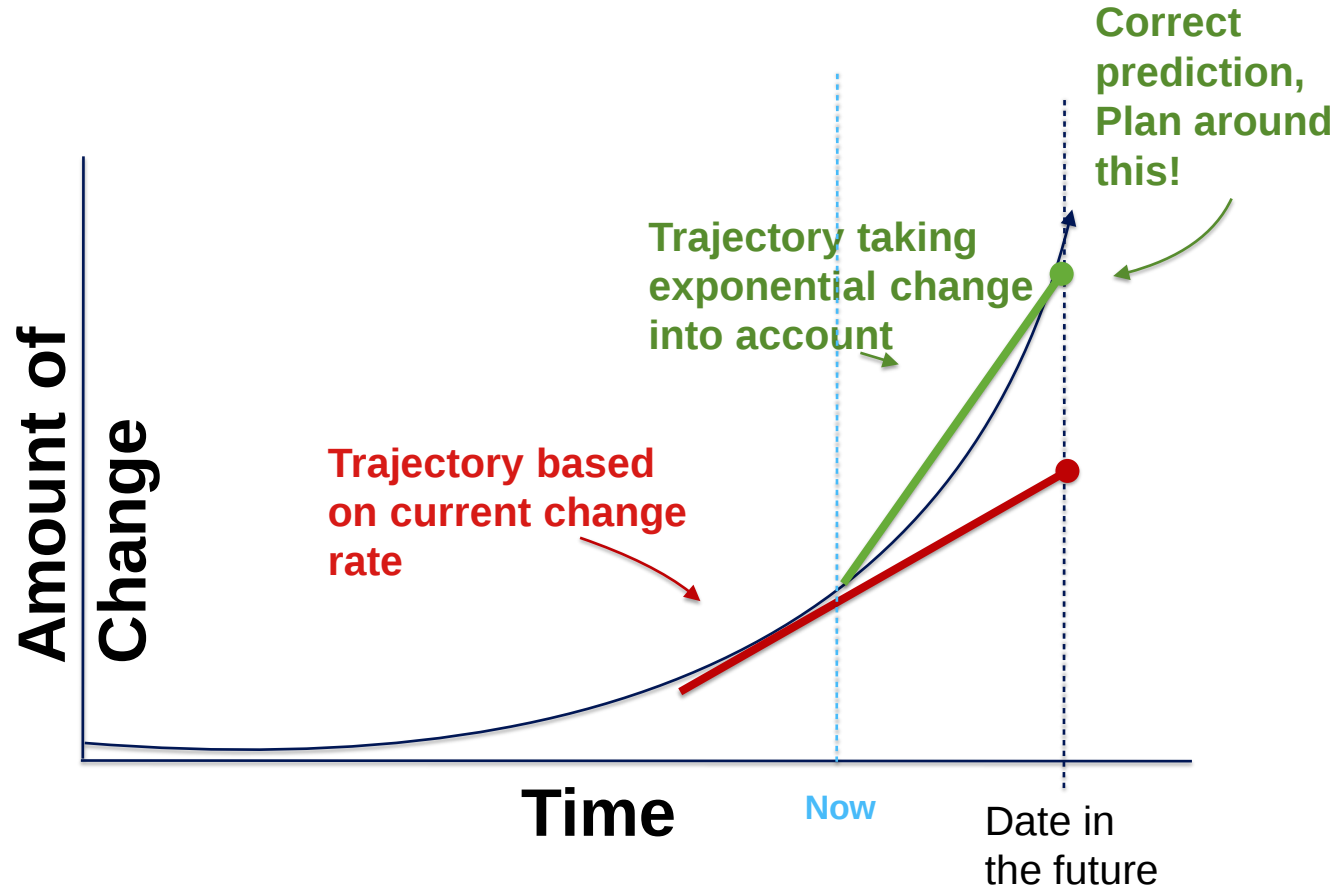
- What do our members need from us?
- How do they want us to meet those needs?

.... and to provide specific, detailed, actionable insights that would guide our infrastructure planning.



Jobs to be Done

The Change Gap



The amount of change we are experiencing now makes the change curve steeper than ever!

We can't plan based on where we are now...

We need data and "insight" to help us "predict" where we'll be in the future!!

How do we get the INSIGHT we need to prepare our organizations for the "change gap"?



ASAE ForesightWorks is a major research initiative of the ASAE Foundation. We partnered with futurists at Signature i and Foresight Alliance to create a future-focused research program specifically for the association community. ASAE ForesightWorks has two goals:

- 1) to help association professionals and volunteer leaders understand the drivers of change that will affect the future of their work
- 2) to help association leaders become better practitioners of foresight.

Recently...

Do our systems
“listen” well?

Do they listen
in a way that
really let's us
know our
members?

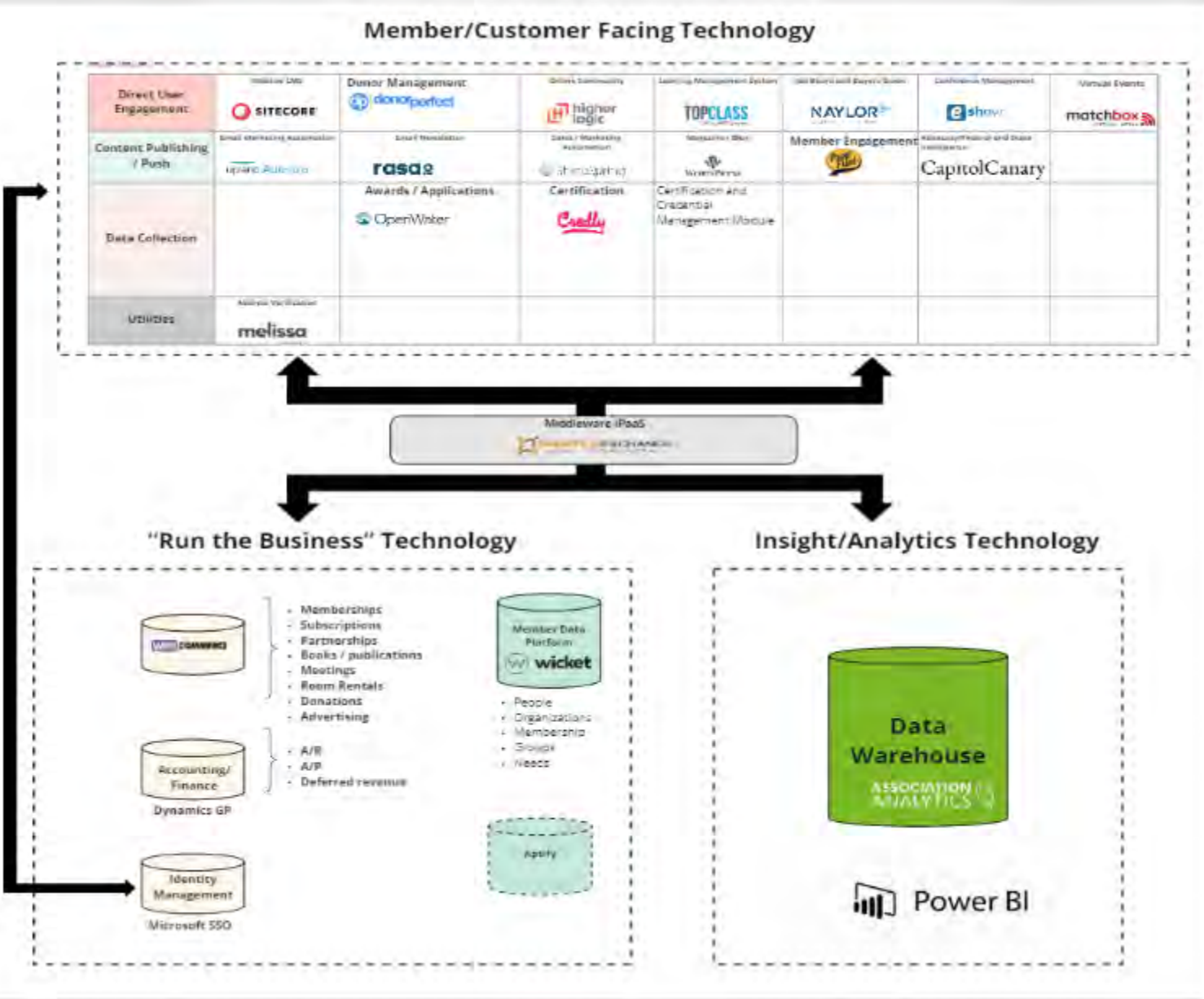
You should know me!



ASAE Infrastructure Map

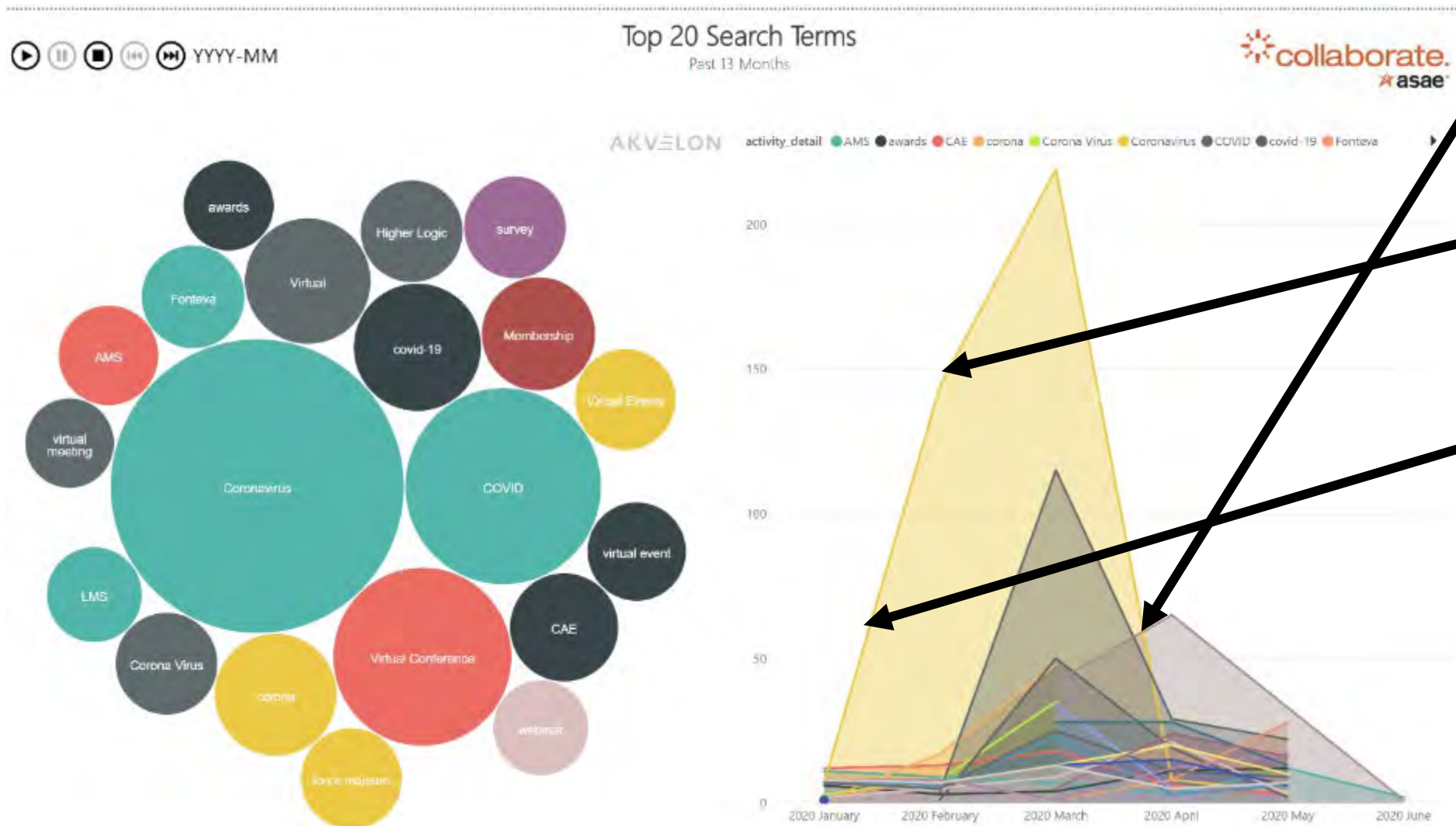


Mobile Access to
Everything,
Really Important!



What does listening look data like?

Trend Identification



3. Indication that members questions were being answered.

2. We developed a series of resources on COVID:

- Executive Roundtables
- Resources on the website

1. Something's going on here...we need to get on top of it!

What does listening data look like?



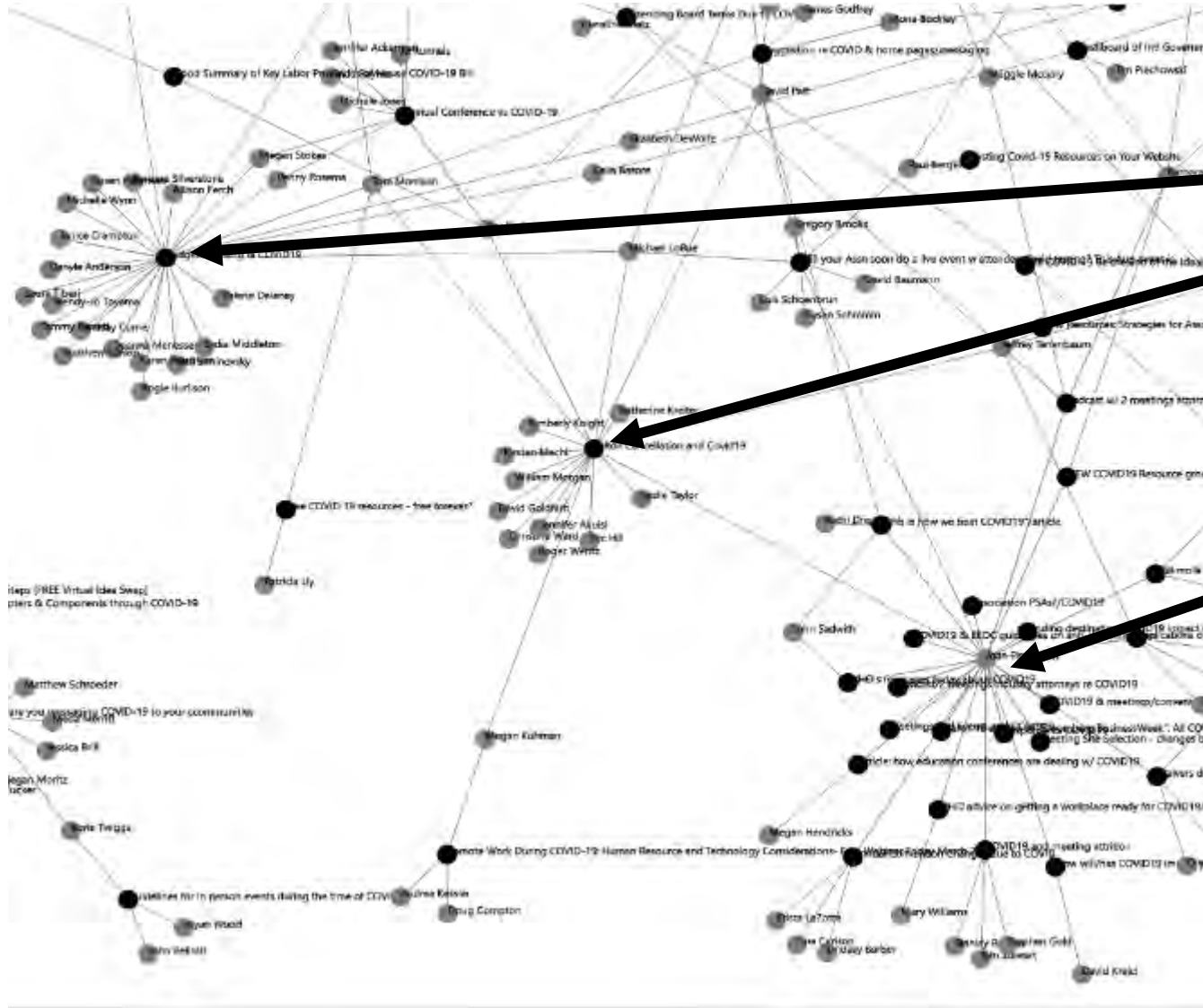
Map of COVID
conversations – Jan 2020
thru June 2020

What does listening data look like?

Map of COVID conversations – Jan 2020 thru June 2020

Topics of interest...Act on these!

Influencer – Thought Leader



What does listening look like?

Search by Subject contains...

Covid

Search by Content contains...

Search

Conversation Detail

collaborate.asae

Conversations

Count of activity by	subject	community name
43	Budget Planning & COVID19	
36	Membership Dues During COVID-19	
29	Vaccination passports/proof of COVID19 vaccination	
28	Hilton Cancellation and Covid19	
23	Covid Waiver for in person meeting in October 2021	
23	Post Covid-19 Workplace	
19	"Back to office" dates h/c of	
1355		

Who's in the conversation

first, last	company name
Aaron Wolowiec	USFN America's Mortgage Banking Attorneys
Adam Collins	MGA
Adam Proger	Raymond James
Adrianne Carolla	The Minerals, Metals & Materials Society
Ahmed Farruk	Fiducient Advisors
Aimee Stern	Brave Now PR
Al Runnels	
Alan Cheeming	Association for Women in Science
Alfons Westgeest	Kellen

action	activity key	year	month	day	first, last	content	sentiment
Y	10834005	2020	February	21	Joan Eisenstodt	This is troubling . These are meetings to be held in the US. The WHO has been explicit that people should not stop gathering in the US and in fact in all but China tho' 'notices' have been issued for Hong Kong and Taiwan. It will be curious to follow the legal aspect of these and whether attrition will be an issue. OR if these, like the Barcelona conference, will cancel bec major participants pull out. The precedent is a bad one. And I'm guessing hotel companies, DMOs and legal counsel inside and outside companies are looking closely at the contractual provisions. (I wonder if these conferences had infectious disease riders.) Joan	NEGATIVE
N	10836946	2020	February	21	Joan Eisenstodt	Jeff - Thanks. I appreciated your comments on the webinar. What you wrote is also my understanding from talking with those in the insurance industry. What is yet to be determined is how hotels will deal with attrition: how convention centers and other meeting vendors will deal with reduced use, FandB, etc. In conversations with outside counsel for hotels (some of whom are those for whom I've testified as an expert in meetings disputes as I have for those who represent meeting sponsors) there is nothing yet on cases we are likely to see resulting from COVID19 attrition and cancellation. Unlike SARS, it appears to be more like 9/11 after which people were afraid or their companies or their families were afraid for them, for some time, to fly once flights resumed. As I tell those I teach, you can't be complacent about any issues that impact how we do business and for meetings; this is a very big deal. Realizing you will be unable to disclose confidential and client information, I hope that you will continue to provide input on this issue. Given the conversations so far here and elsewhere, this is not going away and even if this virus is solved and we think it's dormant, we will have more issues. Thanks, Joan	POSITIVE
N	10838327	2020	February	21	Craig Silverio	We may lose up to \$750,000 in exhibit space revenue if exhibitors in our China pavilion pull out of our trade show in November. If we do not resell this space, we will make a claim towards our event cancellation insurance coverage for financial loss/impairment. We do not have an infectious disease exclusion, But I am advised to be prepared for one for our shows in 2021 that are not yet bound.	NEUTRAL
N	10841521	2020	February	21	Jeffrey	Craig, My understanding – and the insurance brokers can correct me if I am mistaken – is that for the four leading event	NEUTRAL

Conversation Analysis



Dashboard Demo

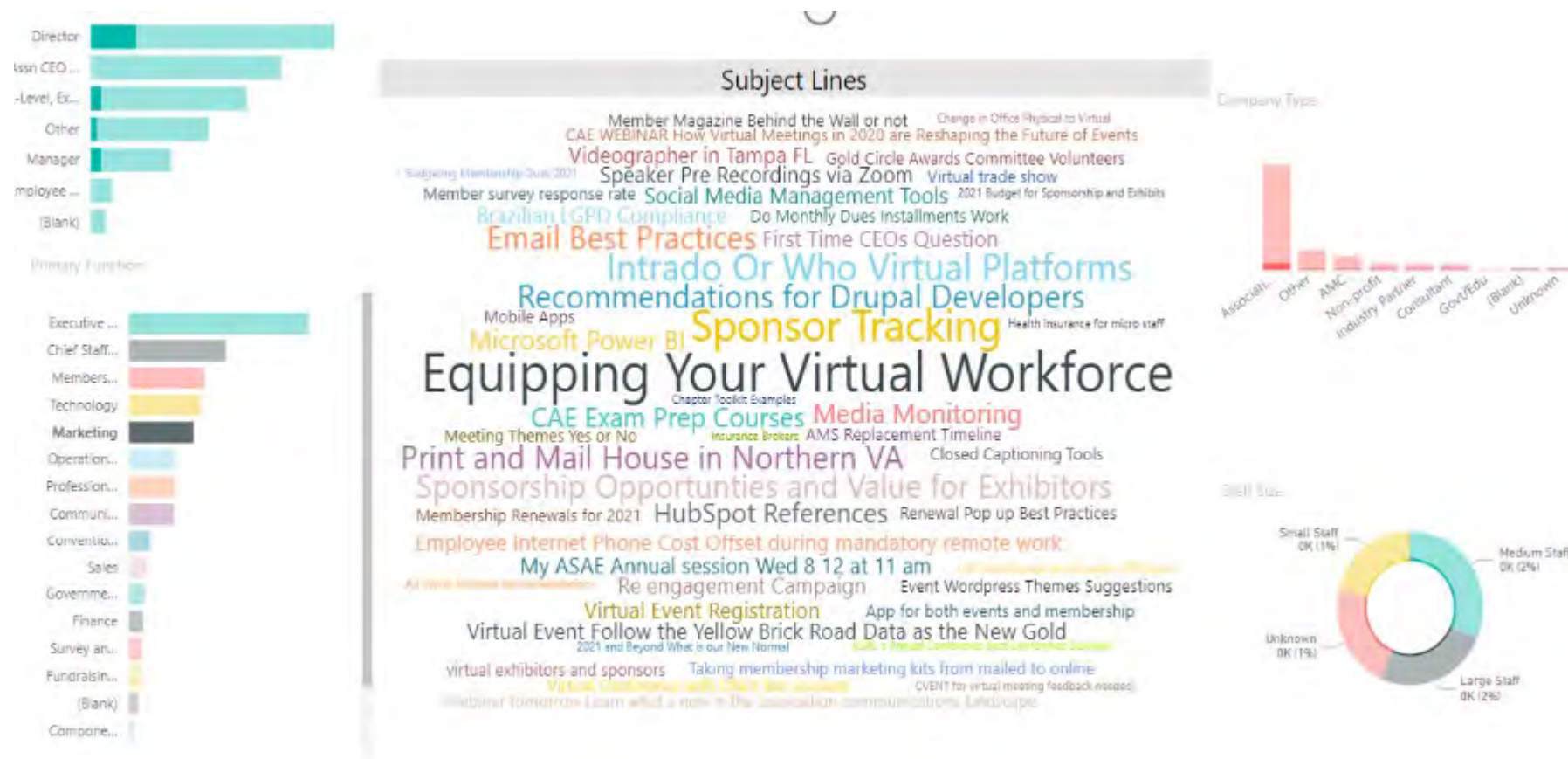




... below the surface!

What I Hope is Next

Using visualizations in other systems

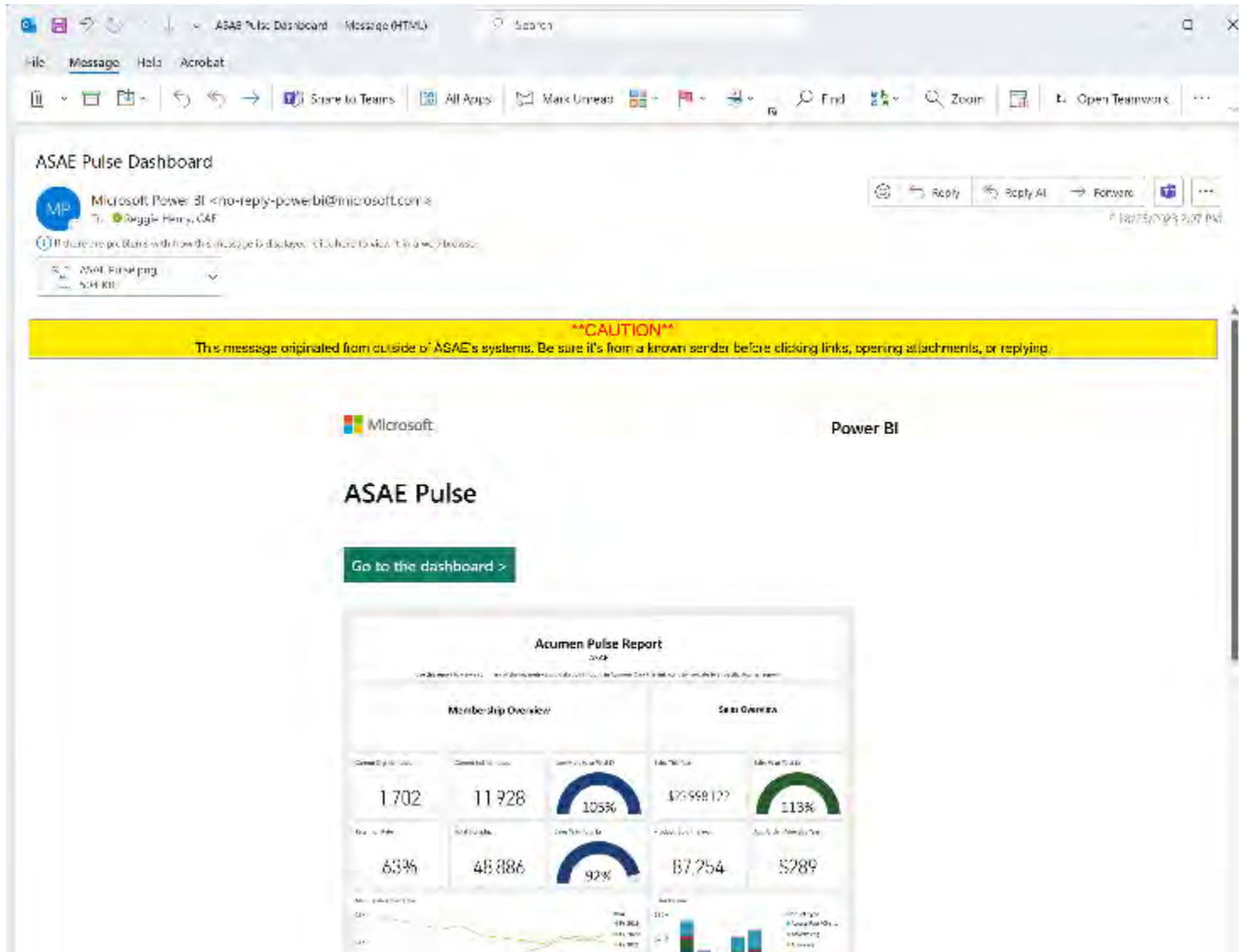


For example, if I were a marketing professional, wouldn't it be nice if when I visited the ASAE website, I could see the things on my colleague's minds...

...and wouldn't it be extra nice if I could click on one of these and be taken to the conversations that were happening?

[myAcumen \(asaecenter.org\)](https://asaecenter.org/myAcumen)

Sign-up and auto delivery of visualizations



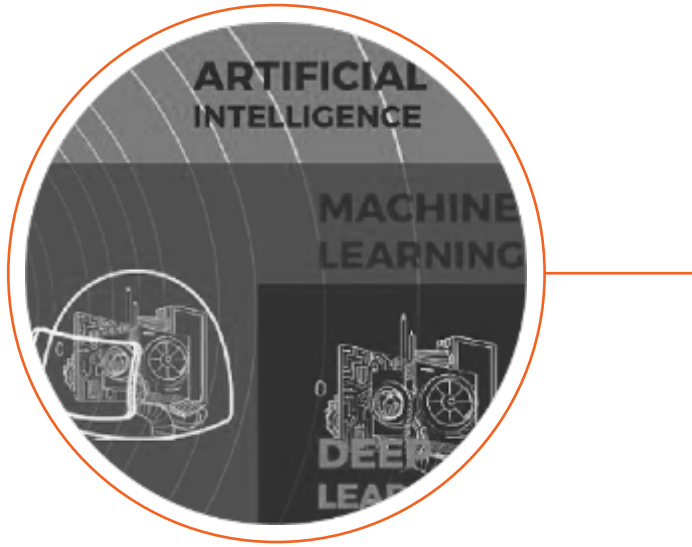
More tools
to engage
more staff.

- Freedcamp – sponsorship management

Discussion?

Let's Talk AI





Artificial Intelligence is the science of making machines do things that if we're done by humans, we would consider them intelligent.

We've been saying "AI" for years – and it's still on the list. Associations must position themselves for better and faster decision-making, acknowledging and, when permitted, omitting human bias. **The past several years have shown associations that responding quickly to change is critical for both short-term and long-term growth.** Let's use technology to build the framework and models we didn't have two years ago!

ASSOCIATION INSIGHTS CENTER

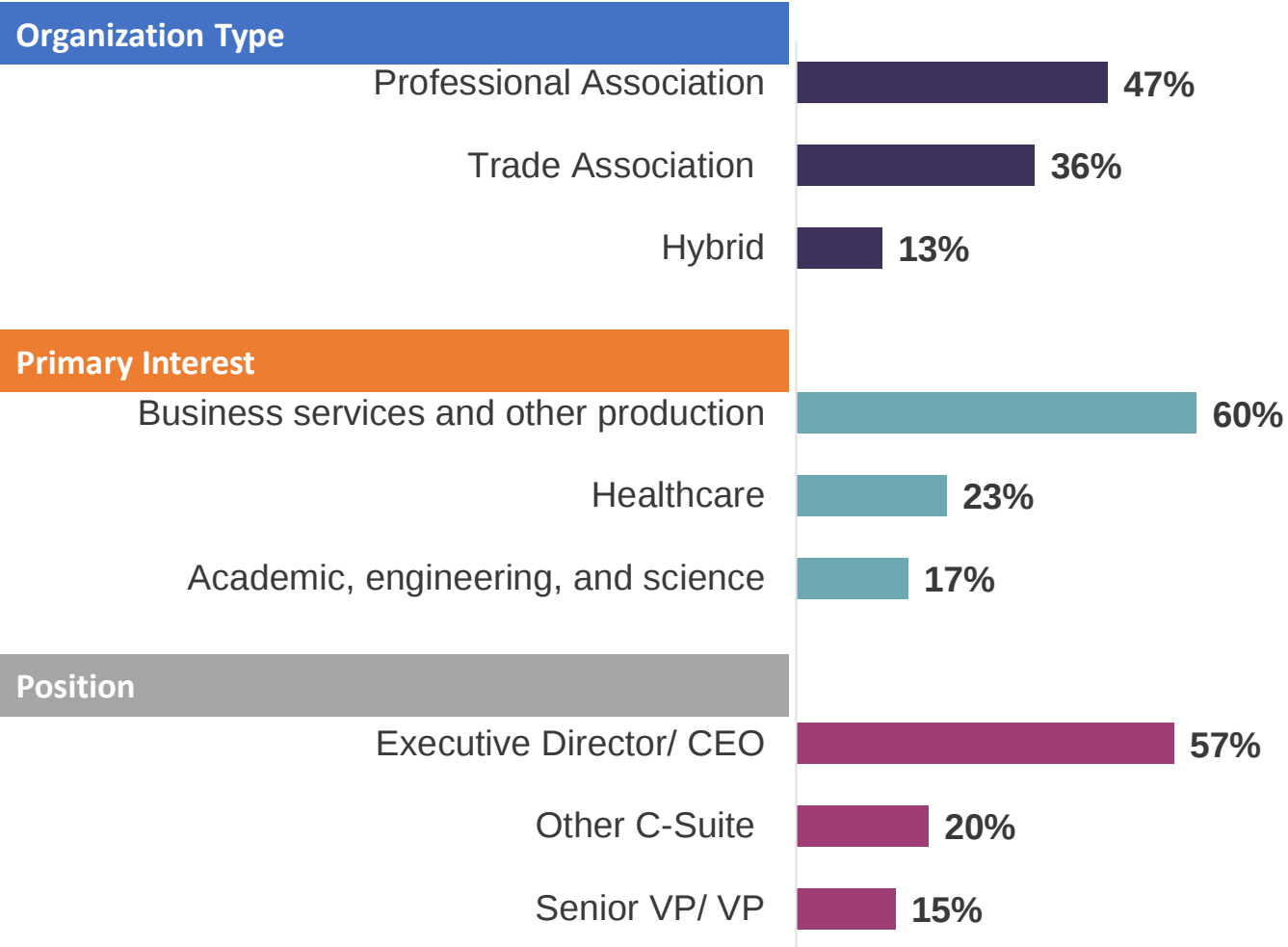
CONVERSATION,
CONNECTION
& COMMUNITY
BY ASAE

To better assist association leaders in responding to a rapidly changing business landscape, ASAE has developed the Association Insight Center (AIC) as a rich repository of association industry data and source for best practices.



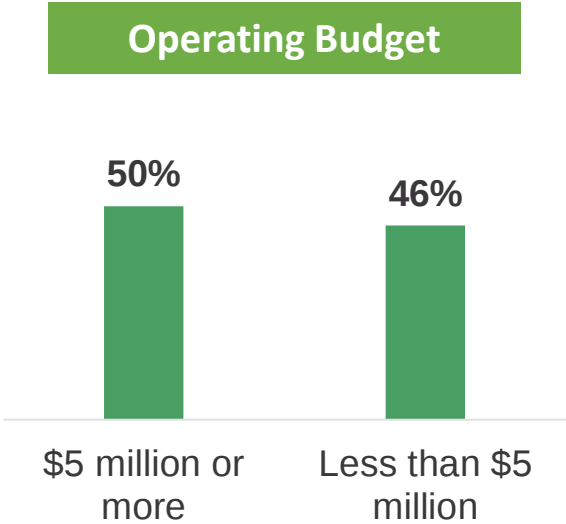
Association consulting firm McKinley Advisors provides research, strategy, and facilitation services for AIC as well as access to its subject matter experts for additional context and depth in specific topical areas of focus.

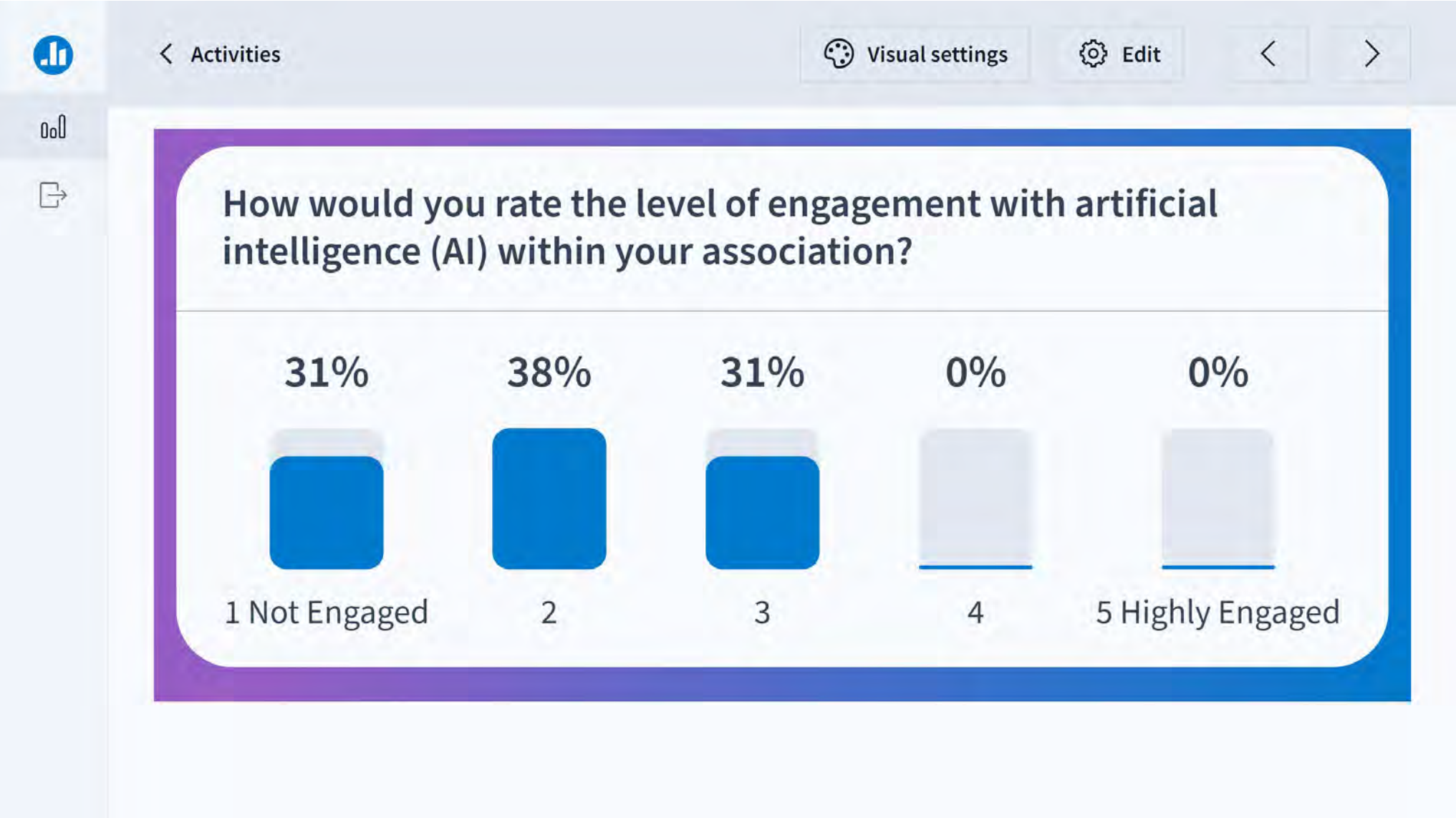
The State of AI in Associations Today



Survey Methodology

- Audience: Association Staff (Executive-level)
- Dates Fielded: 6/13/23-7/7/23 (25 days)
- Response Rate: 454 Responses





Internal Operations Engagement

Only 12% of associations engaged with AI today

How would you rate the level of engagement with artificial intelligence (AI) within your association? (Please consider internal operations, but not how the field you represent may be using AI.)

n=381; Base: All respondents

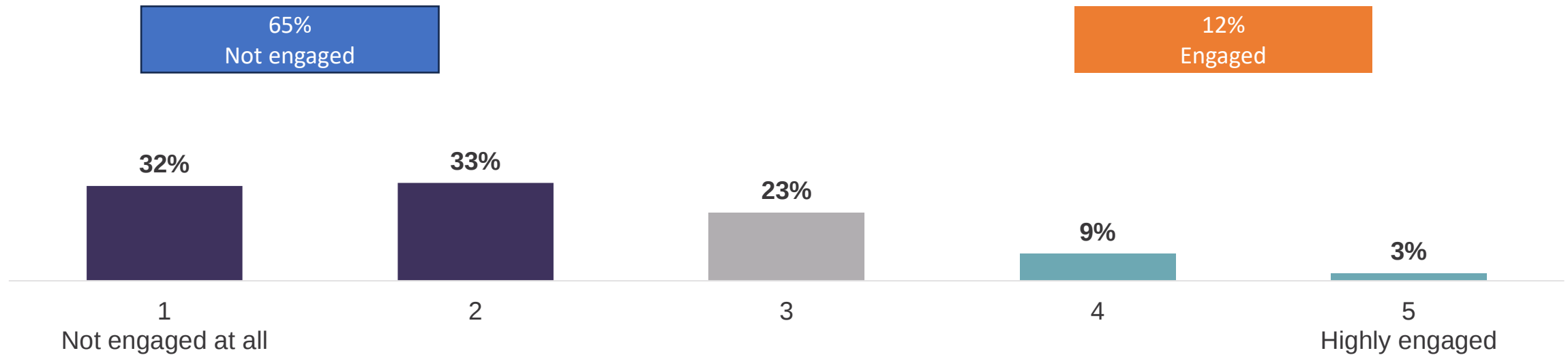
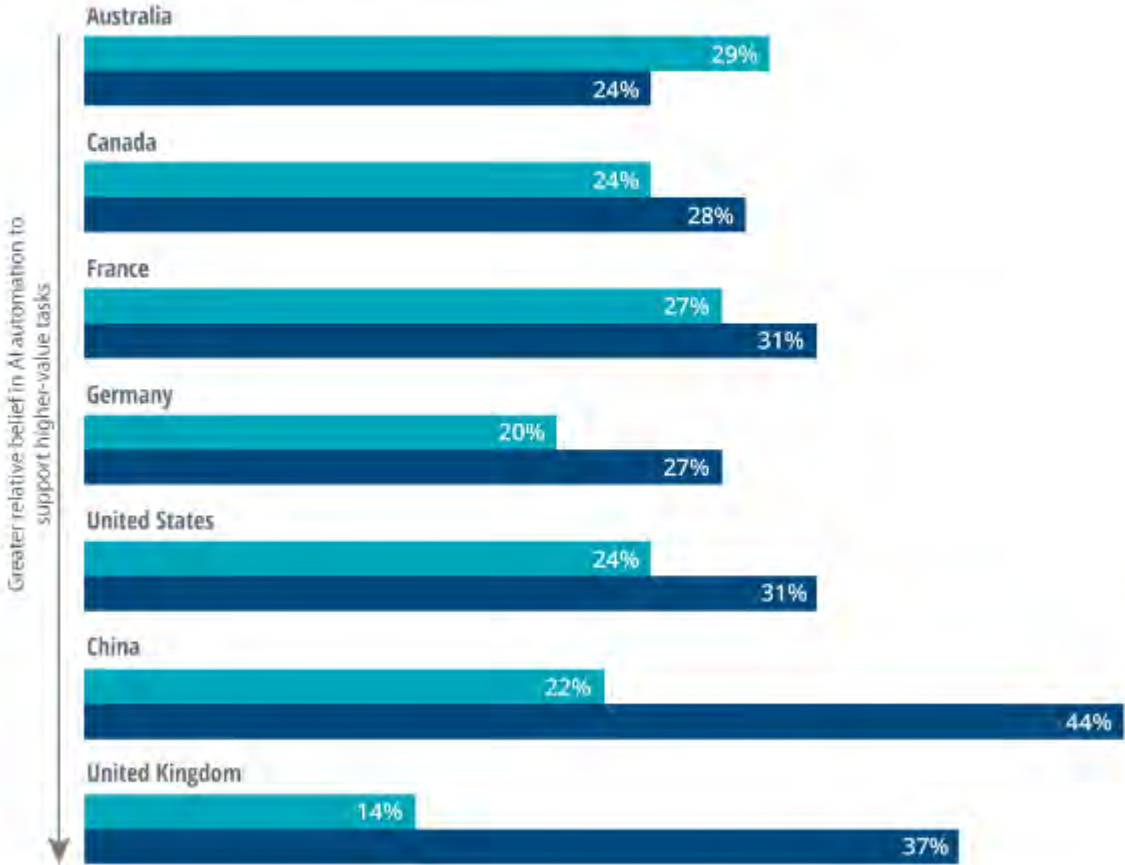


FIGURE 9

AI adopters see more value in using AI-driven automation to free up workers for more creative tasks than in using it to eliminate jobs

- Rate "reduce headcount through automation" a top-three AI benefit
- Rate "free up workers to be more creative by automating tasks" a top-three AI benefit



Source: Deloitte analysis based on Deloitte's AI in the Enterprise, 2nd Edition survey of 1,900 AI early adopters in seven countries.



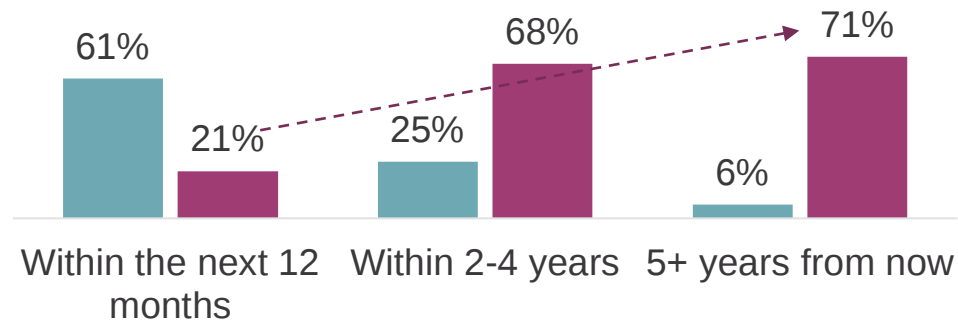
Future Impact of AI

AI will have more significant impact over time

How much of an impact do you believe AI will have on:
n=379; Base: All respondents

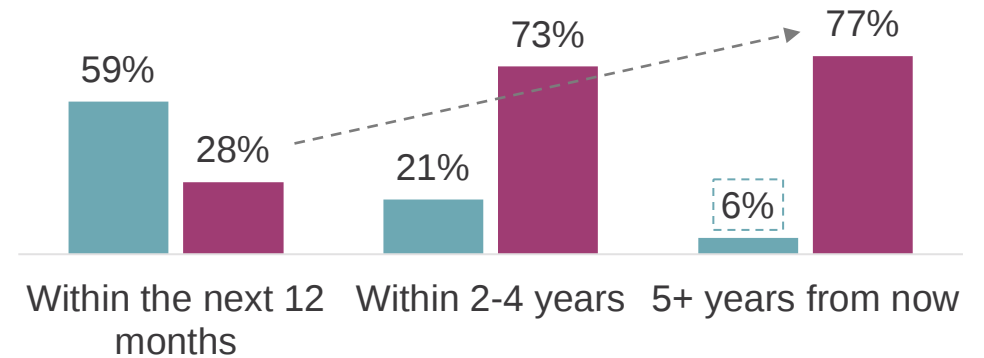
Your association's programs, activities and operations

■ Slight impact ■ Significant impact

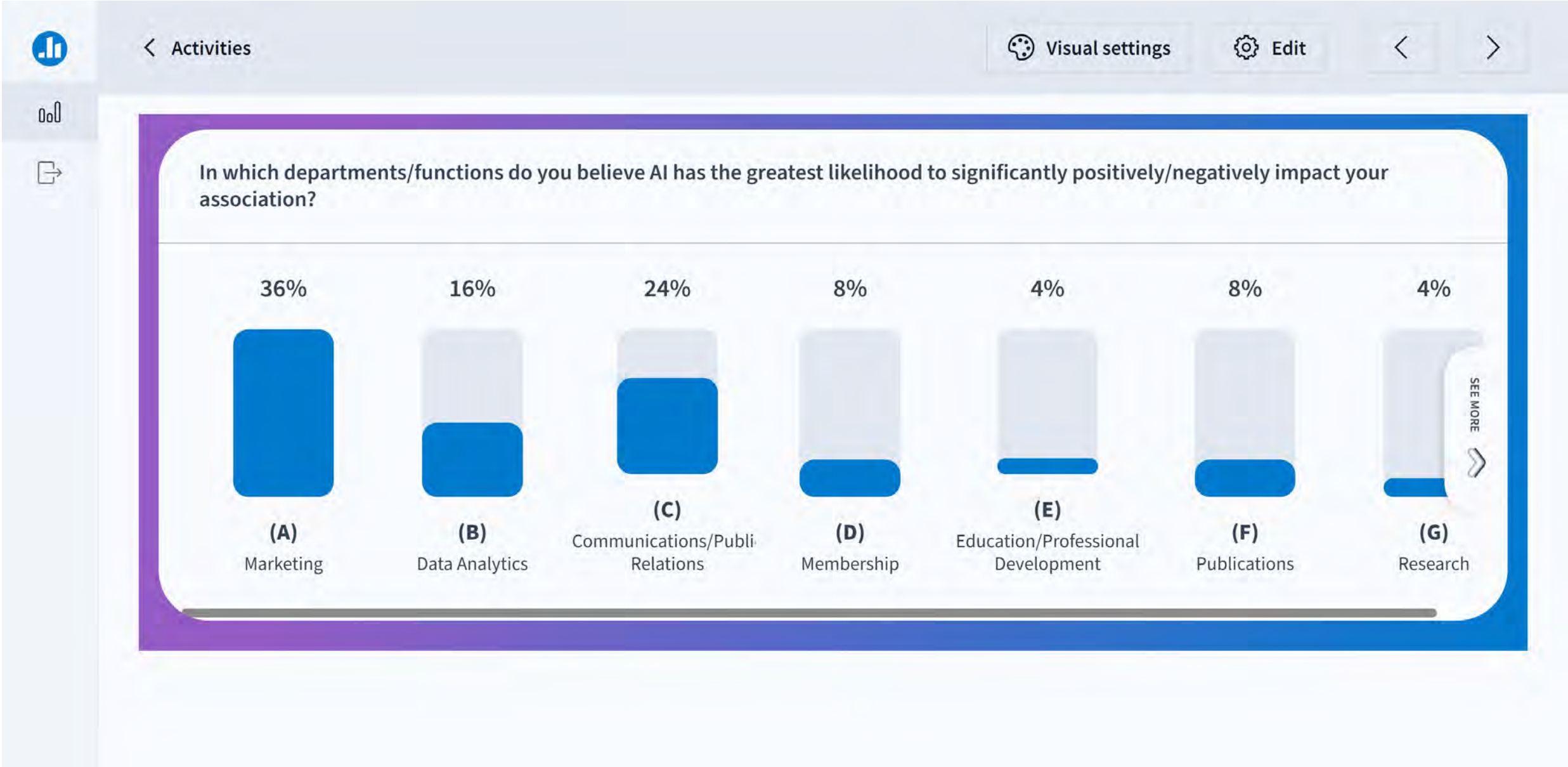


Field your association represents

■ Slight impact ■ Significant impact



[See more](#)



Impact of AI

Respondents were more likely to focus on positive impact rather than negative

In which departments/functions do you believe AI has the greatest likelihood to significantly positively/negatively impact your association? Please select up to five options:

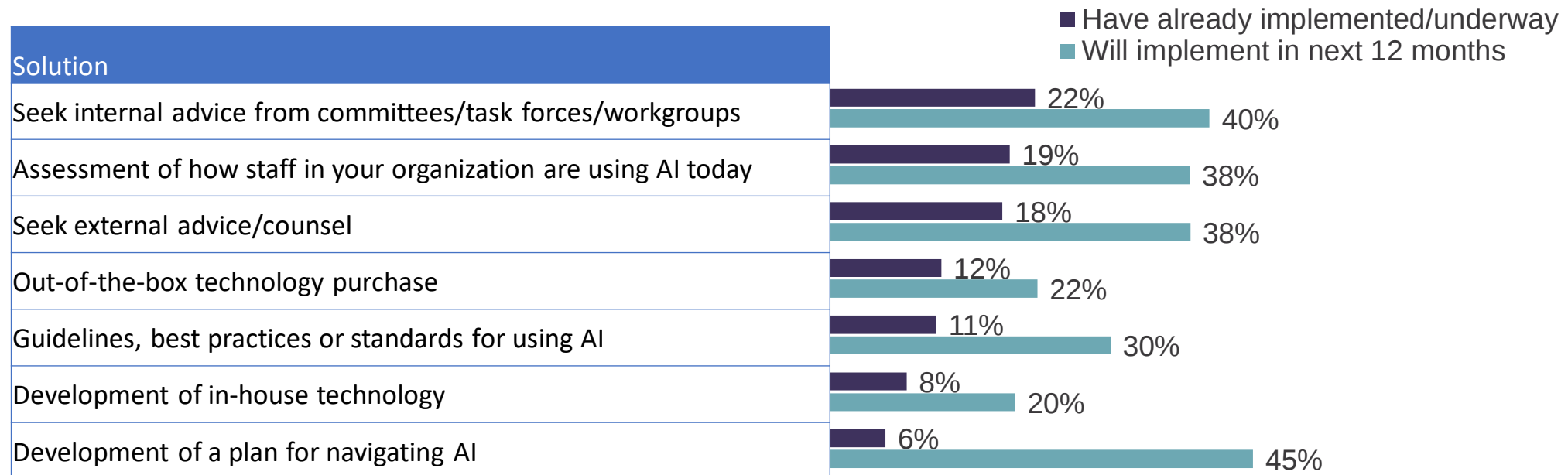
Top Impacted Departments	Positive Impact	Negative Impact
Marketing	67%	15%
Data/Analytics	61%	11%
Communications/Public Relations	55%	24%
Membership	34%	12%
Education/Professional Development	30%	23%
Publications	23%	29%
Research	23%	17%

Top 5 Positive
Top 5 Negative
Top 3 bolded

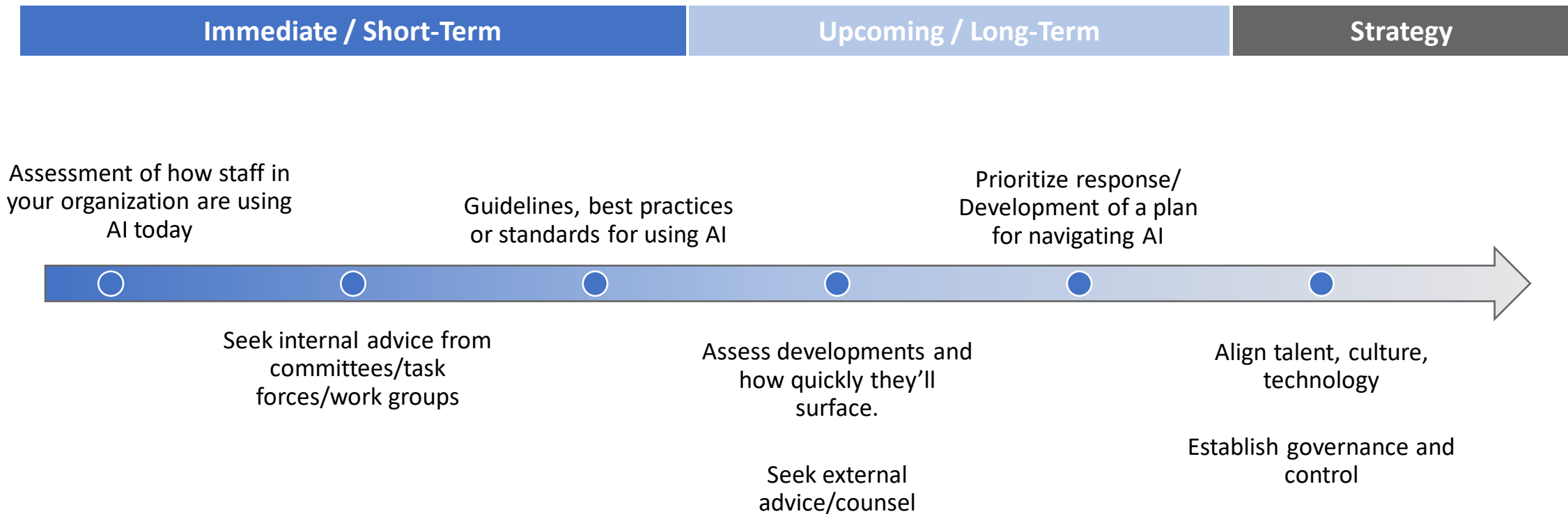
AI Solutions

Which of the following solutions is your association likely to implement within the next 12 months relative to artificial intelligence?

n=311; Base: All respondents



A Model for Approaching the Issue



See [PwC](#): What's the real value of AI to your business and how can you capitalize?

Level Setting the AI Conversation

Potential Benefits	Potential Dangers
Greater accuracy for certain repeatable tasks, such as assembling vehicles or computers.	Job loss due to increased automation.
Decreased operational costs due to greater efficiency of machines.	Potential for bias or discrimination as a result of the data set on which the AI is trained.
Increased personalization within digital services and products.	Possible cybersecurity concerns.
Improved decision-making in certain situations.	Lack of transparency over how decisions are arrived at, resulting in less than optimal solutions.
Ability to quickly generate new content, such as text or images.	Potential to create misinformation, as well as inadvertently violate laws and regulations.

[What is Artificial Intelligence? Definition, Uses, and Types | Coursera](#)

What is AI?

In terms of capabilities of AI, most people are settling on these three models...

Narrow AI

Narrow AI refers to artificial intelligence systems that are designed to perform specific tasks. CHATGPT, for example, is specifically designed for the task of generating text responses based on a given prompt, and it does not have the ability to perform other types of tasks.

Today

General AI

Although AGI hasn't been realized yet, it has drawn the attention of top tech companies such as Microsoft, which invested \$1 billion in AGI through the venture OpenAI. Also, in an attempt to achieve strong AI, Fujitsu has built the K computer, which is recognized as one of the fastest supercomputers in the world.

circa 2024

Super AI

A type of AI that surpasses human intelligence and can perform any task better than a human.

Although the existence of ASI is still hypothetical, the decision-making and problem-solving capabilities of such systems are expected to be far more superior to those of human beings.

circa 2060

What is Generative AI?

Generative AI refers to a category of AI models and techniques that are designed to generate new content, such as text, images, music, or even videos. These models are trained to understand patterns and structures in the data they are exposed to and can then generate new content that is similar in style or format.

What is ChatGPT?

ChatGPT is a **large language model** developed by OpenAI. Language models like ChatGPT are designed to understand and generate human-like text based on the input they receive. ChatGPT has been fine-tuned specifically for interactive conversation, making it suitable for chat-based applications.

What is a Large Language Model?

Large language models (LLMs) are advanced artificial intelligence algorithms trained on massive amounts of text data for the purposes of content generation, summarization, translation, classification, sentiment analysis and so much more.



With these capabilities, large language models have revolutionized the field of [conversational AI](#) and have a range of real-world applications. For example:

- Customer Service: They can be used to develop support chatbots that can engage with customers conversationally, improve customer engagement, and drive efficient operations.
- Text Translation: They can also be used in language translation software to accurately translate text from one language to another, making communication and understanding between people who speak different languages much easier.
- Marketing: Models can be used to create ad copy, ad creatives, and even a communication strategy.
- Coding: They can write, optimize or help fix code.
- Healthcare: Language models can help with knowledge retrieval which can help support clinical decision making.



Dear CEOs,

We invite you to an exclusive session on Generative AI, a cutting-edge technology revolutionizing industries and unlocking untapped opportunities. Join us as we delve into the realm of creative potential, where AI models generate novel content, insights, and ideas that can reshape the way we think, work, and thrive.

In this session, you will discover how Generative AI is shaping the future of innovation and driving businesses to new heights. Our expert speakers will showcase the transformative power of large language models, such as ChatGPT, and unveil the immense value they bring to organizations across diverse sectors.

Date: [Insert Date] **Time:** [Insert Time] **Location:** [Insert Venue]

Limited seats are available. Reserve your spot now to unlock the power of Generative AI. Visit [Insert Registration Link] to secure your place. We look forward to welcoming you to this extraordinary event and embarking on a journey of limitless possibilities.

Don't miss this exclusive opportunity to gain a comprehensive understanding of Generative AI and its immense potential for your organization. Join us for an interactive session that will inspire, educate, and equip you with the knowledge to navigate the transformative landscape of AI-driven innovation.

Sincerely, [Your Company/Organization Name]

- **Key highlights of the session:**

- **Unleashing Creativity:** Witness firsthand how Generative AI fosters creativity and ideation by generating original content, empowering your teams to explore new frontiers and uncover fresh perspectives.
- **Elevating Customer Experience:** Explore how Generative AI can be harnessed to personalize and enhance customer interactions, revolutionizing marketing strategies, chatbots, virtual assistants, and customer service.
- **Accelerating Insights and Decision-Making:** Gain insights into how Generative AI aids in data analysis, pattern recognition, and forecasting, providing a competitive edge in understanding market trends, optimizing operations, and making informed strategic decisions.
- **Co-Creation with AI:** Learn how Generative AI facilitates collaboration between human experts and AI models, amplifying capabilities and generating innovative solutions that were previously unattainable.
- **Ethical Considerations:** Engage in discussions surrounding responsible AI usage, privacy concerns, and ensuring fairness and transparency in deploying Generative AI solutions.

Generated by ChatGPT

DALL-E (stylized as **DALL·E**) and **DALL-E 2** are [deep learning](#) models developed by [OpenAI](#) to generate digital images from [natural language](#) descriptions, called "prompts".

a painting of a group of CEOs at a boardroom table



Can you add more diversity to the painting



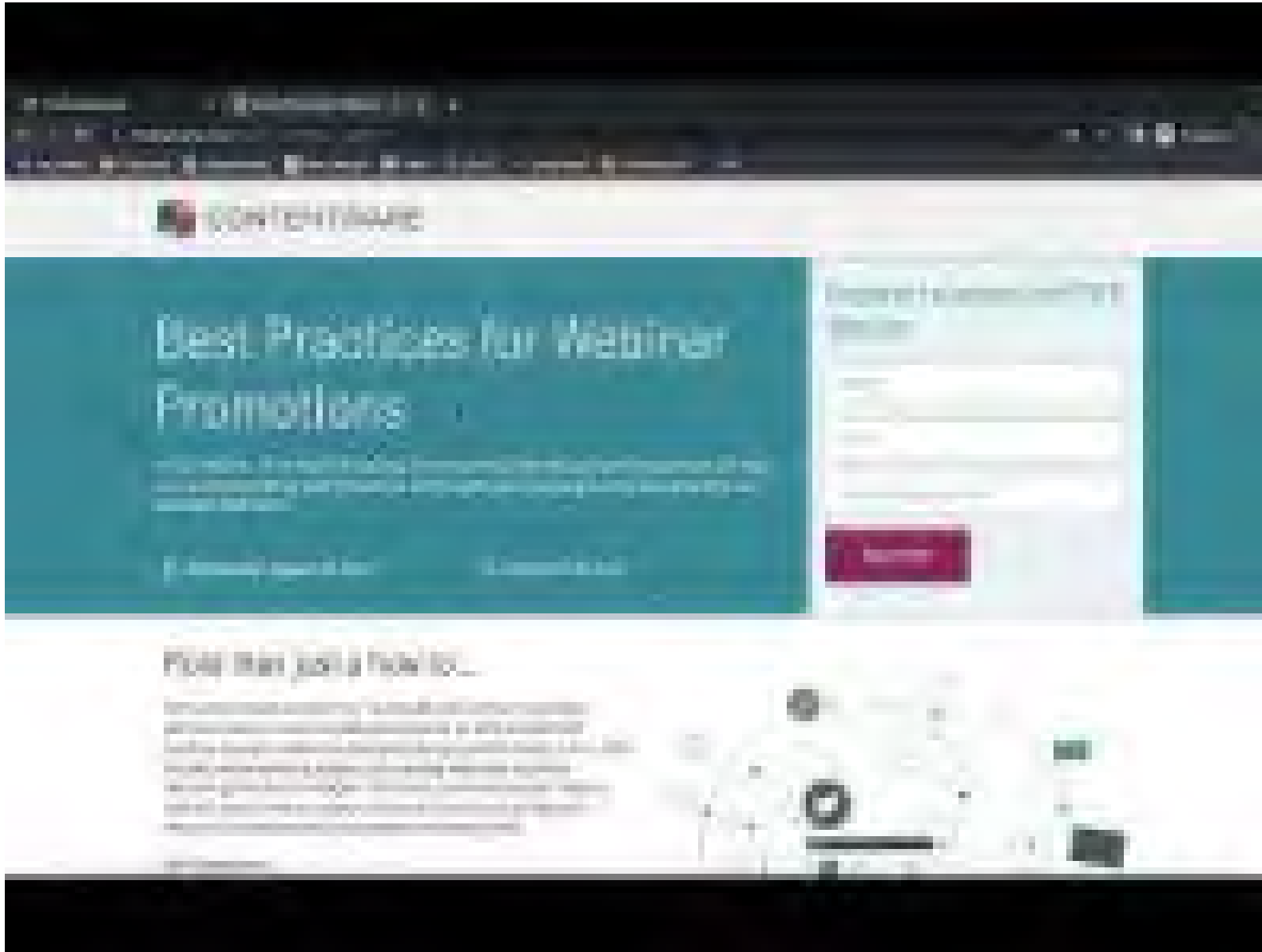
Your personal and company data are protected in this chat

I'm sorry, but I can't modify the painting that I already created. I can only create a new one with a different prompt. If you want to see a painting of a room full of diverse CEOs learning about AI, you can ask me to create that. 😊

4 of 30

a painting of a group of diverse CEOs at a boardroom table

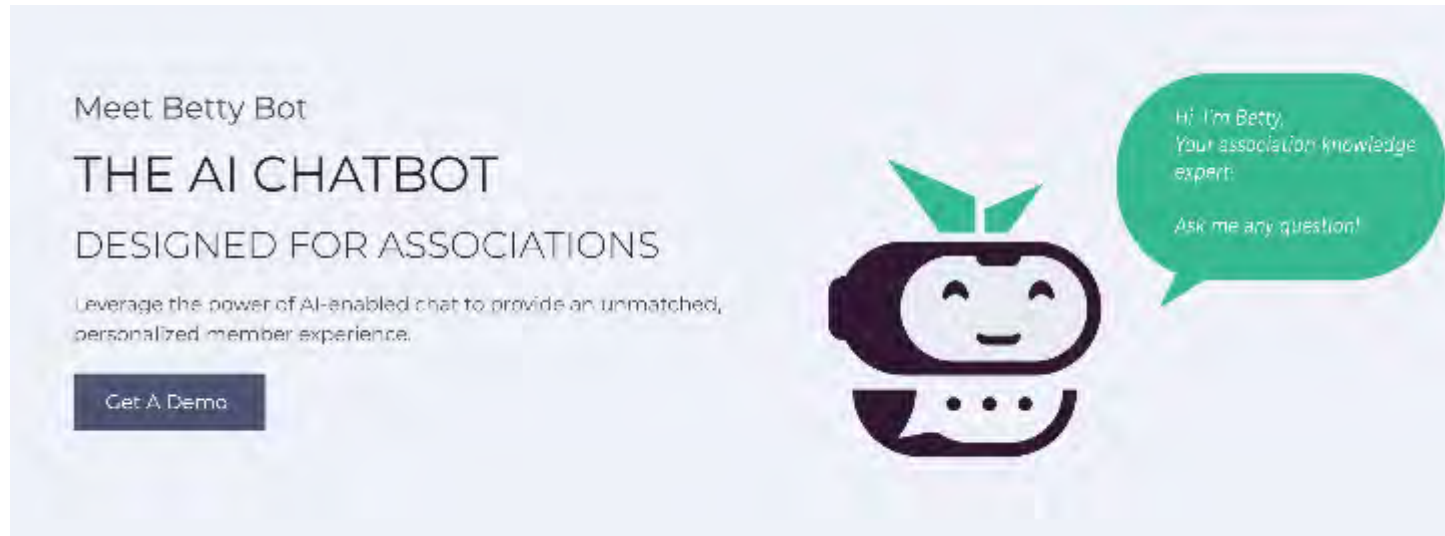




Start at 1:32

[\(3\) Create Campaign - YouTube](#)

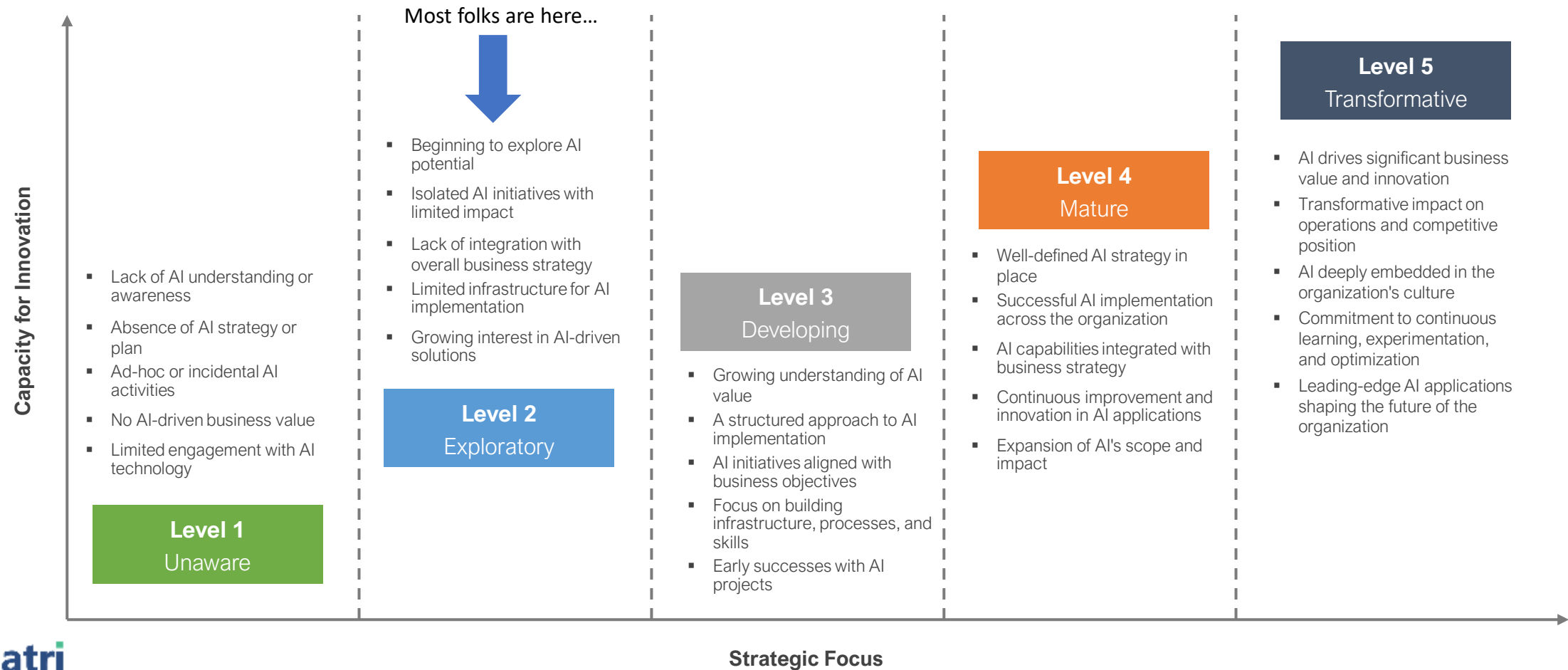
Our Experiment...



[Homepage - Betty Bot - Association AI Chatbot](#)

[Chat \(brightfind.io\)](#)

A Path to AI Transformation



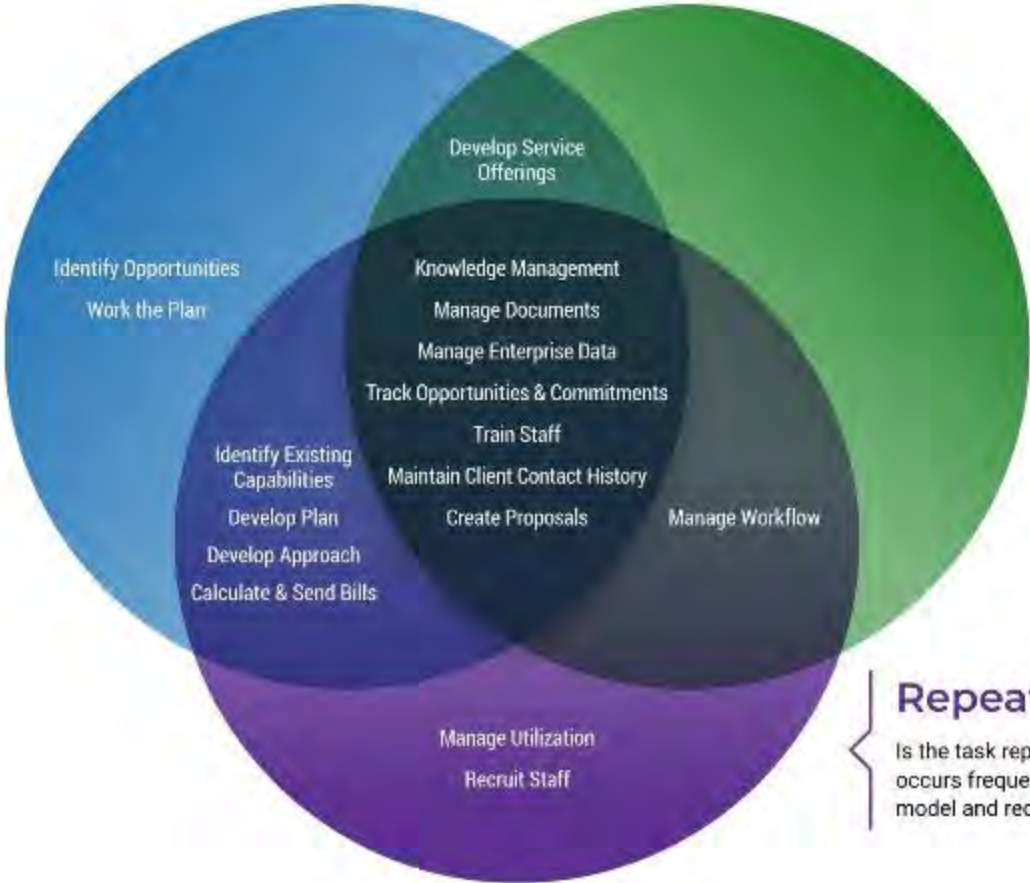
What are some of you doing with AI?

How should I be thinking about this....

Generative AI Framework

Generative or conversational

Is this the sort of work a generative AI can do? Does it involve conversation or creation of new material? AI should probably not make decisions at this stage, but it can present/sort information and answer questions.



Valuable

The capabilities of the generative AI would meaningfully reduce manual effort in completing a task. Tasks that require extensive permissions, highly specific or contextual expertise, or could expose the organization to risk would not generally fall into this category.

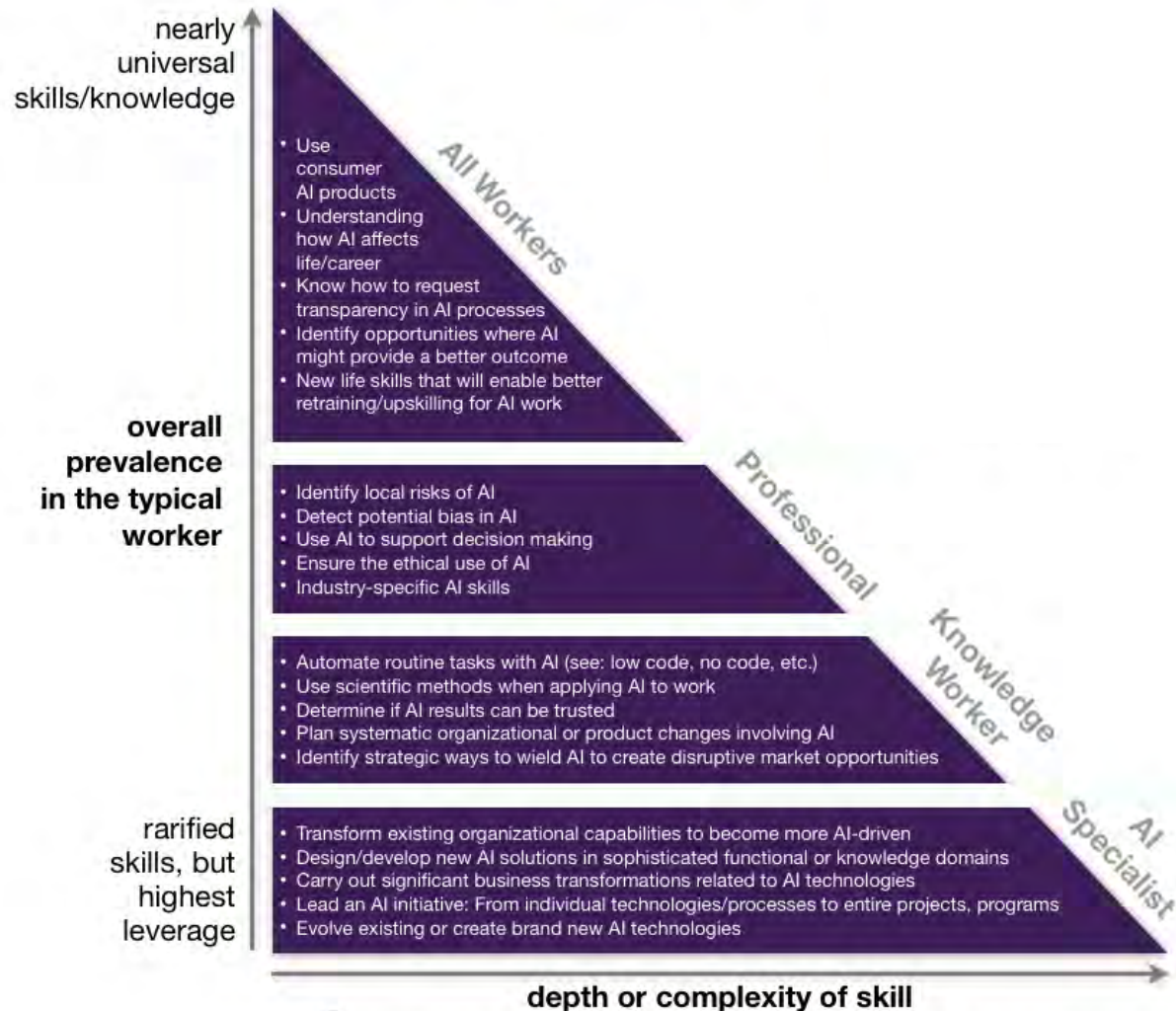
Repeatable

Is the task repeatable such that it occurs frequently enough to train a model and recoup initial investment?

Initial AI Policy. An enterprise-class AI policy is far more than a mere set of guidelines. It's a vital blueprint that governs how artificial intelligence will function, integrate, and evolve within our organizations. A well-crafted AI policy will include, at its core, a clear articulation of the ethical principles guiding the use of AI, ensuring alignment with both societal norms and legal requirements.

[Generative AI Usage Guidelines at ASAE.docx](#)

The AI Skills Spectrum for the Workforce: From Pervasive to Specialized



AI literacy is more than a set of skills. **It's a mindset, a recognition that every worker, regardless of role or rank, must be empowered to engage with AI**, to understand it, question it, and harness it.

This is not just about staying ahead of the curve. It's about defining the curve, transforming AI from just a tool into a business partner, and leveraging it to create a more intelligent, ethical, and innovative future.

[How to Embark on the Transformation of Work with Artificial Intelligence | On Digital Strategy | Dion Hinchcliffe](#)

Read This!

Deepfakes

Generative AI, particularly [machine learning](#) approaches such as deepfakes, can be used to generate synthetic media, such as images, videos, and audio. Such AI generated content can be difficult or impossible to distinguish from real media, posing serious ethical implications. Such media may spread misinformation, manipulate public opinion, or even harass or defame individuals.

Truthfulness & Accuracy

Generative AI uses machine learning to infer information, which brings the potential inaccuracy problem to acknowledge. Also, pre-trained large language models like ChatGPT are not dynamic in terms of keeping up with new information.

Copyright Ambiguities

Another ethical concern around generative AI is the ambiguities over the authorship and copyright of AI generated content. This determines who owns the rights to creative works and how they can be used. The copyright concerns are focused around 3 questions:

- **Are works created by AI should be eligible for copyright protection?** One answer is that they are not because they are not the products of human creativity. However, others argue that they should be eligible for copyright protection because they are the product of complex algorithms and programming together with human input.
- **Who would have the ownership rights over the created content?**
- **Can copyrighted generated data be used for training purposes?** Generated data can be used for [training machine learning models](#). However, the use of copyrighted generated data in compliance with fair use doctrine is ambiguous. While fair use generally accepts academic and nonprofit purposes, it forbids commercial purposes.

Increase in Biases

Large language models enable human-like speech and text. However recent evidence suggests that larger and more sophisticated systems are often more likely to absorb underlying social biases from their training data. These [AI biases](#) can include sexist, racist, or ableist approaches within online communities.

Risk of Unemployment

Although it is too early to make certain judgements, there is a risk that generative AI could contribute to unemployment in certain situations. This could happen if generative AI [automates](#) tasks or processes previously performed by humans, leading to the displacement of human workers.

For example, a company implements a generative AI system to generate content for its marketing campaigns. Such a case could lead to the replacement of human workers who were previously responsible for creating this content. Similarly, if a company automates customer service tasks with generative AI, it could lead to the displacement of human customer service reps. Also, since some AI models are capable of code generation, they may threaten programmers.

[Cem Dilmegani](#) AI Multiple[✓]

<https://research.aimultiple.com/author/cem-dilmegani/>

Based on web search results, some of the things you should consider before using generative AI are:

- **Practice good governance:** You should follow clear guidelines and policies to ensure privacy, data security, algorithmic transparency, and ethical compliance when using generative AI.
- **Minimize bias:** You should be aware that generative AI can produce inaccurate or misleading content, and you should verify the sources and facts before using or sharing it¹².
- **Execute with intention:** You should have a clear purpose and goal for using generative AI, and choose the right tool and model for your specific use case¹³.
- **Evaluate quality:** You should check the quality and consistency of the content generated by AI, and use human validation or feedback to improve it³⁴.

iTutorGroup's recruiting AI rejects applicants due to age

In August 2023, tutoring company iTutorGroup [agreed to pay \\$365,000](#) to settle [a suit](#) brought by the [US Equal Employment Opportunity Commission \(EEOC\)](#). The federal agency said the company, which provides remote tutoring services to students in China, used AI-powered recruiting software that automatically rejected female applicants ages 55 and older and male applicants ages 60 and older.

The EEOC said more than 200 qualified applicants had been automatically rejected by the software.

“Age discrimination is unjust and unlawful,” EEOC Chair Charlotte A. Burrows said in a statement. “Even when technology automates the discrimination, the employer is still responsible.”

https://d1cfrltoig48r.cloudfront.net/media/ailearningdesignsession/resource_files/MB89490-AI_Learning_Day_Design_Session_Doc_091423.pdf

1. We must close the gap between constituent expectations and organizational capabilities and begin to plan for where we know our members will be.
2. Digital Transformation isn't just about technology: *it's about customer obsession*. It's about your members' journeys. It's about understanding their "*moments of need*" in that journey.
3. Increasingly, mobile is where your customer's journey begins and ends! Mobile allows us to be "present at the moment of need."
4. Data analytics allows us to discover and communicate **meaningful patterns** in data. Remember, it's not the data but the patterns, **the signals** in and across data that's critical. **It's also about having the right data.**
5. AI offers associations the potential to enhance member experience, improve organizational efficiency, enable data-driven decision-making, personalize learning and development, generate revenue, and optimize resource management. By leveraging AI, associations can stay ahead of the curve and better serve their members in an increasingly digital and data-driven world. However, we must navigate the ethical, privacy, security and other issues that come along with it.
6. Your constituents experience with you depends directly on your staff's ability to deliver that experience. Make sure they have the tools they need.

Think Tank Poll Results

Think Tank Poll Results

Done

Current run (last updated Oct 13, 2023 1:53pm)

5

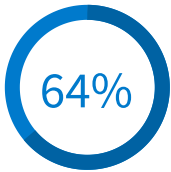
Activities

18

Participants

15

Average responses



Average engagement



Response options

Count Percentage

Flexible hybrid work model: Employees choose their location and working hours based on their priorities for the day

3

60%

Fixed hybrid work model: The organization sets the days and times employees are allowed to work remotely or go into the office

2

40%

Split-week hybrid work model: Employees spend part of the week working remotely and part of the week working in the office

0

0%



Engagement

5

Responses



Response options

Count Percentage

All In-Person

5

33%

Mostly In-Person, Some Virtual

8

53%

Mostly Virtual, Some In-Person

2

13%

All Virtual

0

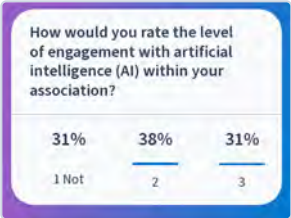
0%



Engagement

15

Responses



Response options

1 Not Engaged

2

3

4

5 Highly Engaged

Count Percentage

4 31%

5 38%

4 31%

0 0%

0 0%



Engagement

13

Responses



Response options

Marketing

Data Analytics

Communications/Public Relations

Membership

Education/Professional Development

Publications

Research

Count Percentage

9 36%

4 16%

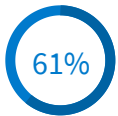
6 24%

2 8%

1 4%

2 8%

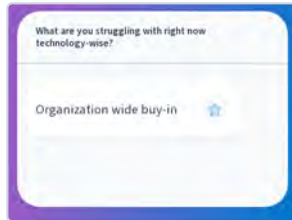
1 4%



Engagement

25

Responses



Responses

Lack of training and tool expert

We are proponents of AI and using AI with our members, and they're open to it, but a lot of their machinery isn't equipped to interface with updated technology. We're helping them uncover ways to circumvent that. Machinery costs multi-millions to replace, and not all companies have those resources, so it's important to implement a solution.

Learning more about how technology can help me

Our org hasn't streamlined access to necessary work files outside of the office.

Handling the amount of technology change

Best use of AI for day to day activities

Maximizing use of technology to support growth of our organization

Social Media

How to manage and manipulate data

Getting management to recognize it's time for change. The systems from 20 years ago aren't going to get us into the future.

Helping employees understand how to best use the technology they have available

Other departments by-in

Social media

Time efficiency and learning curve on new and vast amounts of technology applications

How to handle AI-

Organization wide buy-in



Engagement

16

Responses

ASAE Foundation ForesightWorks Briefs





A Shifting Environment for Content

SUMMARY: Content producers face an increasingly challenging environment. Audiences are fragmented and distracted, and they expect to be entertained and informed for free. Delivery channels are shifting rapidly for both economic and technological reasons, a trend likely to accelerate over the medium-term future.

Forecasts

- Content personalization will steadily increase as pervasive data feeds are further filtered through automated content selection and creation.
- Innovations in micropayments and paywalls may make it easier to sell content, but charging for content will divide audiences more firmly into those ready to pay and those satisfied with free content.
- The consumption of media will increasingly be seen as a political act. Different sources will be tagged—accurately or not—as favoring one side of various political and social divides. Reading, subscribing to, or advertising in media will increasingly be perceived as political acts.
- More content creation will be automated. Automated production may take on basic information-update articles, as well as listicle-style entertainment pieces.
- Automated content-filtering systems will increasingly reveal the discrepancies between consumers' stated, actual, aspirational, and demonstrated content preferences, which are often at odds.

Key Uncertainties

The changing role of social media

Feasibility of widespread paywalls

Spread and nature of content personalization

How the media habits of millennials and post-millennials evolve

How quickly automated content-creation capabilities grow

The changing nature of attention

Attitudes about privacy and data gathering and use

Prevalence of filter bubbles and efforts to combat them



Supporting Trends

- **Paying for news.** The era of free online news content is ending as more newspapers erect paywalls to charge for online content.
- **Political lenses on media.** Americans on both sides of the political divide get news from similar sources, but how they view those sources is different.
- **Declining attention spans.** People's attention spans are attenuating in the face of technologies that provide constant distraction and interruption.
- **The thinning long tail.** The dominance of highly popular products and content is increasing in many areas of consumer life, decreasing the market for less popular items out on the "long tail."
- **The push for facts.** In the face of a perceived flood of propaganda and "fake news," there is a pro-truth counter-push.
- **I read it online.** Social media is increasingly the filter by which many Americans determine the news they see.
- **GIFs proliferate.** GIFs (short video clips) are a popular way for people to express a range of ideas and emotions online.
- **Social media's negative effects on health.** Use of social media is being linked to brain, behavior, and mood changes.

Related Drivers of Change

- Nichification: Big-Data Segmentation
- Marketing and Advertising Transformation
- New Journal Models
- Microlearning
- Socializing Reshaped

Notable Data Points

SOCIAL MEDIA GENERATION GAPS

A 2018 study found that **18-to-24-year-olds** and those **aged 50-plus had usage gaps** on YouTube (38-point gap), Facebook (25-point gap), Snapchat (71-point gap), Instagram (55-point gap), and Twitter (31-point gap).

Source: Pew Research Center

SHRINKING LONG TAIL

In 2006, the **top 3% of YouTube channels had 64% of all views.**

In 2016, this had **risen to 90%.**

Source: Todd C. Frankel, "Why almost no one is making a living on YouTube," *The Washington Post*, March 2, 2018.

DOUBTS ABOUT THE MEDIA

Among Republicans and Republican-leaners polled in 2017, **85% said they thought the mainstream media have a negative effect** on the country's direction. Among Democrats and Democratic-leaners, 46% thought this.

Source: Pew Research Center



Strategic Insights

- Curation of information for members could be offered at varying levels of precision and volume based on types of membership. Aspects of this will be served by increasing automation of scanning and extraction. Information verification can be an important part of this curation.
- Researchers have suggested that Facebook and other social media let users write their own formulas for newsfeeds. People could subscribe to others' formulas, including those created by organizations. This could be another means for associations to engage in curation via social media.
- Sharp generational differences in media use—especially social media and podcasts—suggest that associations will be required to use diverse platforms, but leaders will also have an opportunity to tailor content for age groups by platform.
- The value of trust for associations providing information will grow; it will be a comparative advantage for organizations to be viewed as sources of reliable data and viewpoints concerning their industry. Trust will also be crucial in convincing members to provide the information about themselves that can enable personalization.
- As interfaces, delivery channels, and generational expectations change, the demand for written-word information delivery to be supplemented or replaced by images, videos, and audio formats will grow.

Timing

- **Stage:** Growth, with change underway in multiple dimensions
- **Speed:** Rapid, with some limits placed by deep-seated habits and the role of large institutions

Potential Alternative Futures

- **Partisan media:** Most media outlets discard efforts at non-partisanship and return to the historical norm of favoring particular parties or movements.
- **Full personalization:** Automation-assisted personalization begins to dominate media feeds and reaches into the internal content of individual articles and stories.
- **Paywall palace:** Much high-quality content goes behind paywalls, accessible only to dedicated or monied readers.



Take Action

- **Drive member value with smart content strategy.** Content is the fundamental value proposition for associations. Specialize in the content your members value and say no to distracting content that dilutes your impact. Plan how to execute content priorities across multiple formats and channels. Pilot test alternatives that disrupt your established formats and channels to capture new members and revenue.
- **Invest in personalizing content.** Technologies and data analytics are finally making it feasible to tailor content to individual member interests. Associations must invest in platforms like content and learning management systems and secure the technical expertise to personalize content. The risk of falling behind member expectations shaped by other types of content providers is real.
- **Deploy paywalls with purpose.** People are willing to pay through memberships and subscriptions for convenient, consistent access to quality analysis and carefully curated content. Deciding what to put behind a paywall can be both an ethical and a marketing choice—some content will be too critical to public wellbeing to withhold access, while letting non-payers experience good content can convert them to paying customers and members.
- **Format content for quick use and re-use.** In today's time-pressured and mobile environment, people favor succinct analysis and actionable information they can use and re-use. They want to easily share good information with their colleagues and social media networks. Longer reads need to be long on useable information and analysis to justify demand on readers' time and, should readers recommend these to their friends, reinforce sharers' reputation as knowledgeable and trusted colleagues.

Keyword Search

To continue researching this change driver, use combinations of these search terms:

media publishing, publishers, content, paywalls, social media, personalization, curation, attention, delivery channels, automated content creation

Who Will Be Affected

Associations are content generators and curators. These shifts affect their core value proposition and potentially their business models for publishing, learning, and other content activities. Some professions and jobs are more vulnerable to advances in automated content generation. Associations can support members who need their own content strategies to establish their value and relevance by providing platforms for sharing and training them to be effective communicators.

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Anticipatory Intelligence

SUMMARY: Big data, data analytics, and artificial intelligence are enabling predictive analytics used to anticipate needs, opportunities, and threats in an organization's environment. The market for predictive analytics is growing rapidly, and major computing companies are key players. Organizations view predictive analytics as one of the most important ways to leverage big data.

Forecasts

- Organizations will employ machine learning (which occurs without explicit programming) and predictive analytics to predict demand, optimize pricing, and adjust sales and marketing campaigns. They will use sensor data to anticipate maintenance requirements of physical assets and patient data streams to improve healthcare. Other applications will include banking, threat analysis and security, and agriculture.
- Prescriptive analytics, which anticipate the effects of future decisions, will be adopted by a growing number of companies and organizations.
- For individuals, an online digital assistant available on any connected device will know as much about you and your friends as you do and will make individualized anticipatory recommendations and even decisions.
- Futurist and *Wired* magazine founder Kevin Kelly forecasts that digital intelligence will be viewed as a utility—"IQ as a service."

Key Uncertainties

Development of user-friendly applications accessible to non-experts

•

Rate of development of supporting technologies, such as artificial intelligence, and components such as machine learning

•

Impact of regulations that enable or impede development and deployment

•

Concerns about privacy, intrusiveness of the technology, and surrendering decision-making to machines

•

Risk that incorrect or corrupt data lead to poor forecasts or decisions



Supporting Trends

- **Predictive analytics.** Organizations are adopting predictive analytics to develop anticipatory knowledge. Predictive analytics use techniques from statistics, data mining, and machine learning to identify patterns in datasets.
- **Anticipatory ambient intelligence.** Technology visionaries see ambient intelligence as the outcome of pervasive connectivity, ubiquitous sensing, and the spread of artificial intelligence. In such a vision, devices of all kinds closely monitor consumers and work to understand personal behavioral patterns and seamlessly anticipate needs.
- **Big data and marketing.** More effective use of big data will support a wide variety of new marketing capabilities.
- **Algorithmic microtargeting.** Social media platforms can enable customized and personalized marketing appeals.
- **Markets of one.** The “long tail” continues to stretch as customers increasingly expect products, services, and experiences that cater to their uniqueness. Big data and data analytics are enabling new levels of personalization in marketing.
- **Learning from machine learning.** While the focus on machine learning has been what machines can do, early research is showing that humans are learning from artificial intelligence as well.
- **Big investors.** According to Global Industry Analysts, key players in the predictive analytics market include IBM, Dell, Oracle, SAP, and Microsoft.
- **Top business priority.** In a 2015 IBM-sponsored Ventana Research study, “organizations ranked predictive analytics as the most important analytics category for working with big data.”

Related Drivers of Change

- Personalized AI
- Fast Data
- Nichification
- Algorithmic Politics

Notable Data Points

GROWING MARKET - OVERALL

The global predictive analytics market will reach
\$4 to \$9 billion
by 2020, according to various forecasts.

Source: MarketsandMarkets and Global Industry Analysts, Inc.

GROWING MARKET - HEALTHCARE

The healthcare market for predictive analytics is forecast to total
\$19 billion by 2025.

Source: Research and Markets's "Healthcare Predictive Analytics Market Analysis By Application, By End-Use, By Region And Segment Forecasts, 2014 - 2025"

GROWING DATA

Global Internet traffic is forecast to grow at a 22 percent compound annual growth rate from 2015 to 2020, reaching
25 gigabytes per person per month.

Source: Cisco's "The Zettabyte Era: Trends and Analysis"



Strategic Insights

- Predictive analytics may be useful for forecasting demand for association products and services—for example, attendance at upcoming conventions or interest in specific training.
- Some associations have the opportunity to develop domain-specific expert predictive systems and offer anticipatory services and consulting to members.
- There may be opportunities to catalyze the development of predictive analytic systems that integrate the expertise of multiple member associations.
- Marketers and advertisers will need access to data from the anticipatory and prescriptive ecosystems used by their customers. Associations will need to develop relationships with systems used by members and prospects.
- Members and associations will need to agree to share data at various levels to take advantage of anticipatory technologies. Sharing will raise privacy, transparency, and competitive issues.
- Predictive and prescriptive analytics will be subject to risks including hacking and dark uses of hacked data.
- Predictive and prescriptive analytics reduce the need for routine decision making, but it will be important for associations (like all users) to avoid over-reliance on the technology.

Timing

- **Stage:** Growth stage in many applications, emerging in others
- **Speed:** Medium to rapid change, with potential technical, regulatory, and public acceptance barriers

Potential Alternative Futures

- **Hamstrung by doubts:** Concerns about intrusiveness and surrendering authority to machines limit adoption of predictive artificial intelligence.
- **Privacy problems:** Backlash against perceived surveillance and privacy violations limits adoption.
- **Catastrophic failure:** A major failure of anticipatory technology—for example, failure of predictive analytics in autonomous vehicles—causes widespread rejection of the technology.
- **Machines take over:** The success of predictive analytics hastens the intrusion of ubiquitous intelligence into everyday life—artificial intelligence becomes inescapable.



Take Action

- **Inventory and improve the current integrity of your data and management processes.** Many associations need to increase data integrity, secure more member data than they now have, and integrate different databases and systems. This will require a technology plan and budget to make improvements.
- **Acquire data analytics proficiency.** Many associations will need to hire staff or consultants who can help establish a data-driven culture and processes. Current staff will also need additional training. Board members will need assistance in using data in decision making.
- **Use data to inform your strategy and business decisions.** Associations may be able to personalize and recommend appropriate services and content to members. Associations may be able to develop new markets for existing products. Predictive and prescriptive analytics could become a more reliable way to gauge member needs and interests than current surveys and focus groups. Associations will be better able to detect and define member networks and exploit these network relationships.
- **Clarify privacy and data management policies and practices.** Data security and privacy concerns will become important as members realize how much their associations know about them. Associations with multiple divisions or chapters may have to insist on consolidated data and standard processes of data management. Business partners and exhibitors may ask for access to data to target likely buyers; while this might erode interest in trade shows and general advertising, it could open up new sources of revenue.

Keyword Search

To continue researching this change driver, use these search terms:

predictive analytics, data analytics, artificial intelligence, machine learning, big data, digital assistant, predictive algorithms, decision support, smart systems

Who Will Be Affected

Better-resourced organizations may be in a better position to invest in systems capable of supporting sophisticated data analytics. Individual membership organizations will have greater access to data than trade associations may have. For trade associations, the opportunity could be in pooling and analyzing industry data. Technology partners and association management companies may enable smaller associations to access these capabilities.

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Ethical Edge of Innovation

SUMMARY: Fast-moving technological innovation is outpacing the legal and regulatory structures designed to protect public safety, promote business and trade, and foster ethical practices. While new technologies often roll out ahead of laws, in the coming decade the public pressure to curb unintended consequences will intensify.

Forecasts

- Differing views on the role of technology and regulation in society will lead to a spectrum of laws and regulations in different regions of the world, with variations governed by factors such as views of privacy, bioethics, and free speech. Some countries may surge ahead of others due to looser regulatory environments—for instance, China and CRISPR-based genetic modification.
- There could be resurgent consumer interest in government regulation in the face of transformative but alarming technologies, such as self-driving vehicles and pervasive user tracking and profiling.
- Wider adoption of artificial intelligence—and the black-box algorithms that often power it—will make questions around tech adoption and control relevant to many organizations.
- The nature of free speech online will be worked out in the 2020s: what is allowable, who controls speech, and whether social media and its platforms constitute public forums.

Key Uncertainties

Speed of adoption of these technologies, including AI systems

•
Attitudes toward online vs. “real-life” actions and goods (e.g., cyber-bullying, theft of online goods)

•
Definitions of algorithmic bias

•
Tolerance for “black-box” algorithms

•
Nature of regulation of technology platforms, for instance as utilities

•
Harmonization of international rules governing technology

•
Consumer desire for technological innovation vs. demand for regulation



Supporting Trends

- **Ethical algorithms.** Attention to ethical problems in artificial intelligence is rising.
- **Faking reality.** Technologies for creating convincing fake audio and video are advancing rapidly, leading to worries about how to determine real from fake.
- **CRISPR gene editing.** The CRISPR technique for making precise changes to DNA is moving into both more basic-research applications and therapeutic use.
- **Data-trail control.** People are generating vast data trails of personal information, leading to growing questions about who should own and control that data.
- **Algorithmic sexism.** Besides threatening more women's jobs than men's, work automation risks infusing gender biases throughout society's core systems.
- **Regulators targeting big tech.** Concerned about negative network effects, regulators in the EU, Asia, and the United States are heightening regulation of the activities of the world's tech titans.
- **Criminal use of blockchain.** Blockchain is being used in criminal activities ranging from identity theft to drug trafficking, money laundering, and phishing.
- **The right to repair.** Laws about intellectual property and the "right to repair" one's possessions are shifting as products become more reliant on proprietary software.

Related Drivers of Change

- Fast Data
- Fraying Cybersecurity
- Who Owns the Data?
- Taming Big Tech Dependency

Notable Data Points

HIGH COST OF CYBERCRIME

From 2011-2017, Americans
lost more than \$100 billion
to identity theft, though only 25% of
identify thefts are reported to police.

Source: Nick Selby, "Local police don't go after most cybercriminals. We need better training." The Washington Post, April 21, 2017.

AI AND FAKERY

China's Baidu Deep Voice AI can reproduce
and manipulate a person's voice,
even changing its gender and accent.

Apps such as FakeApp
**can create seamlessly
realistic video footage**
and have been used to insert people's faces
onto pornographic content.

Source: Tristan Green, "Baidu's voice cloning AI can swap genders and remove accents." The Next Web, February 26, 2018. Kevin Roose, "Here Come the Fake Videos, Too." The New York Times, March 4, 2018.

NEW TECH, NEW CRIMES

A 2018 attack on the city of Atlanta will
**cost the city more than
\$2.5 million** to clean up.

Source: Aaron Diamant, "Ransomware attack cost city \$2.7 million, records show." <https://www.wsbtv.com/news/local/atlanta/ransomware-attack-cost-city-27-million-records-show/730813530>



Strategic Insights

- Due to a range of factors—government inaction, consumer eagerness, speed of technological innovations and deployment—there will be a sizeable gap between the commercialization of technology and the creation of rules about its use. Associations and their industry members have an opportunity to fill in these gaps by developing best practices and acceptable rules for tech adoption and use. Associations can also help organizations head off unwanted regulation and get ahead of issues, including corporate social responsibility issues.
- Besides the opportunity to fill in regulatory gaps, associations will have the opportunity to shape new laws and regulations in multiple areas of technology, allowing leaders to suggest acceptable fixes.
- Care will be needed when operating in technological fringe areas as public outrage following a tech-driven incident can damage an organization's reputation—even when no law has been broken.
- Associations are scattered across the spectrum from cutting edge to late adopters in dealing with the legalities of technology, creating an opportunity to transfer knowledge from leaders to laggards.
- Algorithmic-enhanced HR analytics are advancing. The black-box nature of many HR algorithms may leave organizations open to charges of discrimination, even when they had no such intent.

Timing

- **Stage:** Inherently emergent.
- **Speed:** This change is rapid, as it is driven by rapidly advancing IT.

Potential Alternative Futures

- **A shorter leash:** Regulation ramps up in the face of multiple technological and sociopolitical issues.
- **Rise of “ethical tech”:** Technology companies seeking to get ahead of stronger regulation subscribe to publicly known codes of ethics. Adherence to these codes becomes a competitive mandate.
- **Fake everything:** The application of advanced technologies such as AI to fake video and audio dramatically exacerbates the fake news problem. Everything is considered fake unless verified by a trusted source.



Take Action

- **Lead the way forward in legal and ethical practice.** Association leaders will need to anticipate the implications of new technologies and be at the forefront of defining and advocating for laws and business practices that protect the reputations of the many from the misdeeds of the few.
- **Stay true to your purpose to navigate unsettled issues.** Depending on your association's purpose and your members' interests, you may be more or less ready to expose problems and seek solutions. If your association serves a public purpose, you may be compelled to step into the breach on unsettled law. Associations serving business interests may choose to keep their deliberations out of the spotlight until they settle on a course of action.
- **Create the first drafts for laws and regs.** Standard-setting and credentialing organizations often create the framework on which laws and regulations are later built. Some states, like California and Massachusetts, tend to be first to respond with new laws. Work with chapters and local partners in these states to get these precedent-setting laws right.
- **Embrace ethics to minimize harm.** Help your members rely on ethics as a guide where legal precedent does not clarify gray areas. Look to other industries for parallel developments that could offer insights into how your members might respond to similar situations in their world.
- **Rely on a diversity of perspectives for deeper understanding.** You'll never regret involving diversity in any project, especially for innovations where consequences may be difficult to anticipate. You may need technical and legal expertise as well as the perspectives of affected stakeholders. Innovations can be created for one purpose and, once they are adapted or commercialized for other purposes, lead to alarming consequences.

Keyword Search

To continue researching this change driver, use combinations of these search terms:

technology, law, ethics, biotechnology, bioethics, deep fakes, algorithms, AI, artificial intelligence, blockchain, algorithmic bias, algorithmic discrimination, ethical technology, privacy, regulation

Who Will Be Affected

Associations representing professionals and companies in scientific, engineering, computing, and biotech and biomedical fields are at the forefront of this issue. Associations and nonprofits whose mission relates to public health and safety will be drawn into the frontlines of these public debates. Any field where disruptive innovation is occurring will experience legal and ethical gaps between what is possible and what people agree is acceptable.

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The Next-Gen Professionals

SUMMARY: Millennials are now the largest generational cohort in the workforce, and generation Z is right behind them. These next-gen professionals are the future of associations and, contrary to some conventional wisdom, they are willing to both join and stay with organizations that meet their career development needs. Organizations will need to provide the kinds of training, mentoring, content, and other services that next-gen professionals value most, encouraging engagement that leads to loyalty.

Forecasts

- Millennials will join organizations in larger numbers as three trends unfold: their share of the U.S. workforce continues to increase, their financial status improves, and more organizations reshape their offerings around what many millennials value most. These highly-valued offerings include mentoring and training; personalization; state-of-the-art tech platforms; curated content; real job leads; plenty of networking with other millennials and with leaders in their field; and, often, a sense of meaning.
- Next-gen professionals will motivate more organizations to step up their training and education—and in formats younger generations prefer: just-in-time microlearning, multiscreen events, co-mentoring, and smaller, more focused face-to-face meetings.
- Many next-gen professionals will continue to push for merit-based leadership positions, seeking to bypass the traditional promotion ladder.
- Next-gen professionals could form their own organizations if they are unable to get what they want from baby boomer- and gen X-led organizations.

Key Uncertainties

How the youngest millennials will differ from their generation's elders

• *Whether certain key characteristics (slowness in purchasing cars and homes, starting families late, etc.) are lifecycle-based or are lifelong traits of this generational cohort*

• *Whether a more robust labor market and rising wages will continue—and whether this will change next-gen professionals' consumer and lifestyle behaviors*



Supporting Trends

- **Next-gens as joiners.** Next-gen professionals will join professional organizations, but need the right incentives.
- **Millennials not job-hoppers.** Close to half of U.S. millennials who have leadership positions in their companies say they want to stay in their jobs long term.
- **Training millennials.** Millennials tend to value training above other benefits.
- **Virtual volunteering.** More volunteering is happening online.
- **The ethical economy.** Younger Americans overwhelmingly say that their decision making is driven by their personal values.
- **Changing performance evaluation.** The annual performance review is disappearing, as millennials and gen Zs want more timely feedback and communication from their employers.
- **Millennials largest share of U.S. workforce.** Millennials are now the largest generation in the U.S. labor force—and gen Z is poised to pass them in size.
- **Boomers and millennials—fighting over jobs?** Analysis suggests that millennials' career prospects will not likely be harmed by baby boomers delaying retirement.

Related Drivers of Change

- Socializing Reshaped
- Microlearning
- Virtualized Meetings
- Mentoring 2.0
- Transparent Organizational Ethics

Notable Data Points

JOINING IN DROVES

58% of under-40s said they belong to a professional organization or community
while 77% of the rest said they intend to join one soon.

Source: Buzz Marketing Group, Professional Organizations Study 2015

LONG-TERM LEADERS

In a 2017 poll, about
44% of millennials
with leadership positions said they could
see themselves working for their companies for more than 15 years.

Source: The Conference Board, Divergent Views/Common Ground: The Leadership Perspectives of C-Suite Executives and Millennial Leaders

TRAINING IS #1

According to Deloitte,
training and development is millennials' top preferred benefit,
with 22% of those surveyed ranking it as such.

Source: Deloitte



Strategic Insights

- Be wary of half-truths about millennials, which all too often are circulated by marketing firms based on sketchy research or outdated assumptions. Consider convening a focus group, formal or informal, of millennial members—and former members, if available—to inquire deeply into exactly what they want from the association. Be ready to dive deeper with specific questions, e.g., which training or event formats they would prefer.
- Mentoring can be a valuable service that associations provide to next-gen professionals, along with bespoke training and education, smaller and more focused meetings, and tangible career opportunities.
- Many millennials have delayed important life milestones, such as home buying and family formation, due to economic concerns. What are the effects of these delays on their career trajectories? How does this shape what they need from associations?
- What values does the association stand for, and do they align with values next-gen professionals might hold as important? Are the association's values sufficiently prominent in its online profile and messaging?
- In line with the national trend toward political polarization, some millennials might begin politicizing their organizational participation. The potential exists for millennials to drive values-based divisions within their professional groups.
- Associations can study successful groups, such as YEC and FounderSociety—two invitation-only membership communities for entrepreneurs under 40 that have young staffs, a concierge approach, vibrant social-media spaces, and tightly curated content.

Timing

- **Stage:** Growth, with the impacts expanding and deepening as more next-gen professionals move into the workforce and as they mature in their aspirations
- **Speed:** Medium to rapid, driven by organizations' quest to attract and retain next-gen professionals

Potential Alternative Futures

- **Sticking with my clan:** Many millennials and gen Zs abandon existing associations and convene with other next-gen professionals to form their own associations, tailored to their preferences.
- **Financial fetters:** Most next-gen professionals never fully break free of the constraints of student debt, slow career starts, expensive healthcare, and a fitful economy, with many adjusting their aspirations downward.



Take Action

- **Ask younger members what they need.** Don't let presumed generational differences drive your strategies and programming decisions. Ask next-gen professionals what they need. You might discover millennials and gen Zs share many of the same priorities and preferences that other member cohorts have.
- **Provide career guidance.** Millennials are building their careers in uncertain times with fewer traditional job opportunities, and there may be more uncertainty ahead for generation Z. Illustrate and promote diverse career paths. Provide opportunities to experience other businesses and organizations through internships, fellowships, and job exchanges. Establish corporate executive tracking for high potentials. Offer mentors to provide wisdom and reassurance in critical life decisions.
- **Restructure volunteer opportunities and accelerate the path to top leadership positions.** With their commitment to work-life balance, millennials want to serve in more flexible and ad hoc volunteer assignments. They are often proficient with collaboration technologies. Fast-track rising stars with the skills and leadership potential your association needs. Don't let protracted pathways to top leadership dampen their enthusiasm and loyalty.
- **Refresh your education and training with new approaches and technologies.** Next-gen professionals are interested in dynamic, hands-on experiences as well as microlearning and online learning channels that align with their need to balance work and life. Market your association's ability to meet their interest in education and training.
- **Promote diversity and inclusion.** Millennials and generation Z are the most diverse generational cohorts in the United States to date. They are quick to notice when organizations don't share their acceptance of diversity or their desire to see everyone respected and included.
- **Update your networking events.** Offer social and networking experiences that appeal to multiple generations and enable attendees to connect across generational lines.

Keyword Search

To continue researching this change driver, use these search terms:

generations, generation X, millennial preferences, baby boomers, mentoring, co-mentoring, microlearning, professional organizations, FounderSociety, YEC, generation Z

Who Will Be Affected

All organizations are affected, as millennials are now the largest cohort in the U.S. workforce. Professions and businesses facing workforce shortages due to increasing demand for services or extensive boomer retirements place a high priority on attracting and retaining millennials in their workforce and the association.

About ASAE ForesightWorks

ASAE ForesightWorks is a deliberate, evidence-based research program and emerging line of products to provide association professionals with a continual stream of intelligence about the changes facing the association industry, including:

- regularly updated action briefs;
- tools for applying insights from the research in your association;
- guidance in performing environmental scans; and
- opportunities to engage with peers around the research.

Ultimately, the program's mission is to empower association leaders to create a culture of foresight.

Check asaecenter.org/ForesightWorks and follow [@ASAEfdn](https://twitter.com/ASAEfdn) on Twitter for updates on new findings and events.

ASAE Customer Behavior Study





AMERICAN SOCIETY OF ASSOCIATION EXECUTIVES

CREATING MEMBER-CENTRIC SYSTEMS

SEPTEMBER 2020



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HOW TO USE THIS GUIDE

MATCH YOUR OFFERINGS TO WHAT YOUR MEMBERS NEED

Members are trying to complete the following jobs when interacting with ASAE:

- Find PURPOSE in the association profession
- Experience a Sense of BELONGING
- GROW EXPERTISE as an Association Professional
- Make PROGRESS in my CAREER
- Address a Work CHALLENGE IN-THE-MOMENT
- Learn How to Better Run & GROW MY ASSOCIATION

The first six maps (pages 2-8) show the fundamental measures of performance that ASAE customers expect when trying to accomplish the six core jobs outlined above. Each map contains a multitude of outcome statements. In a single statement, a desired outcome defines how a member is measuring value and how ASAE can meet this need in designing a solution. In addition to being measurable, controllable and actionable, outcome statements are designed and structured to be devoid of solutions and stable over time, thus making them useful customer inputs for years to come. The next seven experience maps (pages 9-16) represent common ASAE products or services that serve as a vehicle to fulfill one or more jobs-to-be-done. Use these maps to ensure that - within that specific offering - you are fulfilling your members needs.

When looking to create, purchase or refine a program, experience, or offering use these outcome statements to guide you. Taking a single outcome statement as an example:

“Minimize likelihood that I have to know someone to get on a committee”

Given this statement and applying it to the selection process itself, how can you ensure that volunteer applications are as easy and concise to read and compare as possible? Perhaps eliminating the chance that selection committee members run out of time or patience and simply select committee members that they are already familiar with? With this in mind, how would that impact the online application process? The selection process?

If you ensure that a volunteer is placed on a committee because of their value, not because of who they know, you are one step closer to fulfilling one of the most important jobs that members are trying to complete. You will have greatly contributed to creating a sense of belonging for a greater number of members.



BELONGING

ASSOCIATION PROFESSIONALS WANT TO FEEL LIKE THEY BELONG

- Members want ASAE to better facilitate, encourage and support connections with a diverse group of individuals
- There is a perception that getting accepted onto a committee depends on who you know not what you can offer
- Members believe that it is difficult to volunteer for ASAE
- Engaged members seem to have a story of “breaking in” to the “in crowd”
- Many members give up trying to be involved because it is too difficult
- There is lost opportunity to create connections in non-conference settings
- Members are asking for ways to celebrate each other

QUESTIONS TO ASK:

- **Where are we missing opportunities to facilitate connections?**
- **How might we make it easier to be involved?**
- **How might we lead our volunteers to become more inclusive?**



BELONGING

Association Professionals seek to feel a sense of belonging in the association community. They want to feel connected, included and they want to share experiences with a diverse group of individuals quest to find belonging through ASAE.

There are several avenues members take in their quest to find belonging as ASAE:

- Attend conferences
- Interact online
- Participate in professional development activities
- Volunteer



INTERACT ONLINE

- Maximize likelihood that I am not bullied in online forums
- Maximize ability to give positive reinforcement to others online
- Maximize number of people I can meet with my job title
- Maximize likelihood that I ask the appropriate question in the correct forum



CONFERENCE & PROFESSIONAL DEVELOPMENT

- Maximize number of people I meet with same challenges/issues as me
- Maximize my ability to introduce myself to a first time attendee
- Maximize likelihood that I meet someone that I did not know before
- Maximize ease by which I can contact others before, during & after conference
- Maximize number of intimate settings I can connect in
- Maximize likelihood that I can see who else is attending
- Maximize ability to plan appropriate outfits
- Maximize ease by which I can give positive reinforcement to others
- Maximize likelihood that I can search the attendee list and sort by title, interest, location



VOLUNTEER

- Minimize likelihood that I have to know someone to get selected for a volunteer committee
- Maximize likelihood that I know my application is read by selection committee
- Maximize ease of reviewing and comparing applications for selection committee
- Minimize number of times I have the opportunity to bond with fellow volunteers
- Maximize likelihood that I will be warmly welcomed into the volunteer



PEER GROUP

- Maximize likelihood that I can find and connect with people similar to me
- Maximize likelihood that I can find and connect with people different than me



PURPOSE

SEEKING PURPOSE IN CAREER AND IN GREATER PROFESSION

- Retaining and recruiting top talent is a constant concern for association leaders
- Members learn the greater purpose of an Association career through mentors and peers, rarely mentioning ASAE as a source of inspiration
- Members want to give back to the community and feel a sense of purpose by sharing their knowledge but often find it difficult

QUESTIONS TO ASK:

- **How can we promote the industry in a way that people want to work in it?**
- **How can we inspire association professionals to stay?**
- **How can we inspire younger workers to become association professionals?**



PURPOSE

Association professionals seek to find a greater purpose through their work. They want to feel that what they are doing is making a difference in the broader world. Feeling valued for their skills, being seen as a credible resource to their organization and in the industry, and making a mark in the greater Association profession is important to them.

We discovered several avenues people take in their quest to find purpose through profession:

- By finding meaning through understanding the larger significance of association work
- Through individual visibility and recognition
- By volunteering
- Getting a credential or certificate



UNDERSTANDING SIGNIFICANCE

- Minimize time it takes me to understand the importance of association work
- Maximize number of people who are attracted to the profession to participate in the greater purpose
- Maximize likelihood that recognition I receive ties my work back to a greater good
- Maximize likelihood that I can easily see how my work impacts the greater good



VOLUNTEERING

- Maximize my ability to share my knowledge
- Maximize number of opportunities that I can contribute in a meaningful way
- Maximize likelihood that I can apply my knowledge to help the greater community
- Maximize likelihood that I am acknowledged for my contribution



VISIBILITY/RECOGNITION (AWARDS)

- Maximize likelihood that I can publicly celebrate other members accomplishments
- Maximize my ability to see what associations or individuals have won awards
- Maximize number of awards I can apply for to show



CREDENTIAL/CERTIFICATE

- Maximize likelihood that I can mentor others taking the exam
- Maximize number of people that I can share my journey to get my CAE
- Maximize likelihood that studying for the CAE includes helping me understand the greater purpose of an Association career



GROW EXPERTISE

HELPING MEMBERS GROW THEIR AREA OF EXPERTISE

- Some curriculum is perceived to be outdated by facilitators (Association Management Week)
- Members express a feeling of being “nickel-and-dimed” to participate
- Members prefer solving challenges with peers rather than listening to speeches
- Members express a desire to form CAE learning circles
- “We need to be pushed with content from beyond, not from within our industry. We need many, many more able-bodied disruptors, and ASAE can help us create them.”

QUESTIONS TO ASK:

- **How can we best package our learning solutions?**
- **Should we be in the business of “cutting edge?” Should we partner with others?**
- **How can we make our offering more interactive and focused on real-time problem solving?**



GROW EXPERTISE

Association professionals seek to strengthen their individual area of expertise, perform work tasks more effectively, understand best practices, and learn new skills that they can incorporate into their everyday work.

Interviewees told us that they grow their individual expertise by:

- Reading journals, books and online resources specific to their skillset/expertise (Marketing, Technology, Events)
- Attending conferences
- Participating in online or in-person (non-conference) trainings
- Earning a certificate, degree or credential



READING AND INTERACTING ONLINE

- Maximize number of articles that dig deeper into more advanced content
- Maximize ability to save messages, articles, and other content to read or respond to later (personal library)
- Maximize number of articles relevant to my career stage
- Maximize likelihood that I am aware that I can take part in ASAE through an association membership
- Maximize number of models, samples and benchmarks I can search and sort



ATTENDING CONFERENCE

- Maximize content that is relevant to me and my career stage
- Maximize likelihood that I can see all session content beforehand
- Maximize amount of time spent learning
- Maximize my ability to share key takeaways with my team and board
- Minimize number of conferences I have to pay for
- Minimize time it takes to get to a session and settle in
- Minimize my stress over the details (who, where, when basics) so I can focus on learning



PARTICIPATING IN PROFESSIONAL DEVELOPMENT

- Maximize likelihood that trainer can adjust their teaching to my career stage
- Maximize my access to the experts so that I can ask questions
- Maximize likelihood that I can take notes while watching a screen online
- Maximize likelihood that I understand key points to focus on
- Maximize likelihood that I am shown a clear career path



EARNING A CERTIFICATE, DEGREE OR CREDENTIAL

- Maximize likelihood CAE course teaches me skills rather than “how to take a test”
- Maximize my access to the experts so that I can ask questions
- Maximize number of learning groups I can choose from to join



PROGRESS IN CAREER

HELP ASSOCIATION PROFESSIONALS MAKE PROGRESS IN THEIR CAREERS

- Members would like to better connect with those who can help them
- There is an expressed need for clear learning pathways
- Members express a desire for ASAE to support CAE learning circles
- Members expressed a desire to share and be recognized for their expertise in a broader forum
- Engaged members are trying to figure out how to meet new people and some are simply going to other organizations to expand their networks

QUESTIONS TO ASK:

- **How might we provide the model or framework for association career paths?**
- **How might we better support the unofficial mentoring that is taking place currently?**
- **How might we make it easier for seasoned members to expand their network within ASAE?**



PROGRESS IN CAREER

Association professionals at all career stages are looking to make progress in their career. This can include a promotion within their organization, a move from one functional area to another (ie; communications to membership), and/or a new job at a new Association.

Association professionals try progress in their careers by:

- Making and keeping connections to other industry professionals
- Understanding what jobs are currently open
- Seeking ways to show or share their skills in a broader forum/venue
- Building their resume through training and credentials that show their experience

MAKING CONNECTIONS

- Maximize number of thought leaders available for me to connect with
- Maximize likelihood that I can find a mentor or role model
- Maximize ability to leverage my network
- Maximize likelihood that I can connect with other participant in online or in-person courses or events
- Maximize ability to expand my network beyond those that I already know

FINDING JOB OPPORTUNITIES

- Maximize ability to use career center anonymously
- Maximize my ability to research associations and their involvement in ASAE when looking for a job
- Maximize likelihood that I can understand what employers are looking for in talent selection

SHARE SKILLS IN BROADER FORUM/VENUE

- Maximize my ability to share my knowledge in a broader forum
- Maximize my ability to share knowledge online without looking self-promoting
- Maximize my ability to be perceived as professional among my peers
- Maximize likelihood that I am respected for my knowledge

BUILDING RESUME

- Maximize likelihood that I can understand my career path possibilities
- Maximize my ability to afford courses to support my career growth
- Maximize likelihood that I have proof of completion of a course or lesson
- Maximize likelihood that I will learn what skills and experience I need to develop in my career
- Maximize likelihood that my skills are aligned with my volunteer opportunities



WORK CHALLENGE

ADDRESSING A WORK CHALLENGE IN THE MOMENT

GIVE ASSOCIATION PROFESSIONALS A SENSE OF BELONGING

- Members want ASAE to better facilitate, encourage and support connections both to members that are similar and to members that are dissimilar
- There is a perception that getting accepted depends on who you know not what you can offer
- Members believe that it is difficult to volunteer for ASAE
- Engaged members seem to have a story of “breaking in” to the “in crowd”
- Many members give up trying to be involved because it is too difficult
- There is lost opportunity to create connections in non-conference settings
- Members are asking for ways to celebrate each other

QUESTIONS TO ASK:

- Where are we missing opportunities to facilitate connections?
- How might we make it easier to be involved?
- How might we lead our volunteers to become more inclusive?



WORK CHALLENGE

Association Professionals want help addressing challenges immediately. They want ASAE to be one step ahead of them when it comes to potential challenges. They expect ASAE to lead the rest of the industry by producing content that is innovative and future-looking, that has depth, and to provide templates, benchmarks, best practices and advice on common current and future industry challenges.

We discovered several avenues or paths that people take in their quest to find purpose through profession:

- Online
- Conferences and Professional Development
- Contingency Planning

ONLINE



- Maximize likelihood that offerings meet my immediate challenge
- Maximize likelihood that I will see what the newest and most progressive organizations are doing
- Maximize likelihood that I can easily search across all digital properties
- Maximize number of case studies I can sort and search
- Maximize likelihood that I can find one or more organizations that have addressed my challenge

CONFERENCES AND PROFESSIONAL DEVELOPMENT



- Maximize likelihood that session content is new and innovative
- Maximize likelihood that I can learn about organizations that have tried what I am trying to do
- Maximize number of thought leaders who are attending

CONTINGENCY PLANNING



- Maximize likelihood that ASAE has completed scenario planning on a regular basis
- Maximize likelihood that ASAE has tested solutions to potential issues for me
- Minimize likelihood that nobody in the Association community has addressed a challenge
- Maximize number of solutions that have been tested by other organizations



BETTER RUN MY ASSOCIATION

PROVIDE CEOS THE INFORMATION TO CREATE ASSOCIATIONS THAT THRIVE

- CEOs want content that is innovative and future-focused
- Leaders frequently turn to ASAE for benchmarks on how others in the industry are performing
- Leaders are looking for templates and samples as to not “recreate the wheel”
- CEOs would like to learn from their peers
- CEOs want help training and growing staff
- CEOs want to be able to include more of their staff but cannot afford to
- Vendor CEOs and EDs both expressed need to better connect with each other

QUESTIONS TO ASK

- **How might we create up-to-date samples and templates?**
- **How might we better organize peer learning for the C-Suite?**
- **How might we better help guide and train increased numbers of staff?**



BETTER RUN MY ASSOCIATION

Executive directors and CEOs are trying to lead organizations to more effectively achieve their unique missions, create more impactful organizations and stay relevant (and thrive) in a changing environment.

They seek to grow their business by:

- Consuming trusted sources
- Attending conferences
- Sitting on a board of directors (volunteering)
- Joining a CEO Peer Group
- Sponsoring an association event (Vendor Partner)

VOLUNTEERING

- Maximize the experience I gain by volunteering
- Maximize likelihood that I bring and apply my past experience
- Maximize likelihood that I can apply what I learned working with my own board
- Maximize likelihood that I can prove that I added value



CONFERENCES

- Maximize likelihood that I interact with those in my same position and level
- Maximize ability to see the latest activities by the most progressive organizations
- Maximize ability to determine what to outsource and what not to outsource
- Maximize likelihood sessions, articles, ideas and content that are new and innovative and forward thinking
- Maximize ability to get best offer available for my company/team
- Minimize effort it takes to find vendors relevant to my needs
- Maximize ability to act upon what I learn in sessions immediately with vendors
- Maximize ability to plan conference for a team of people
- Maximize number of business conversations I can have with vendors at the conference
- Maximize ability to see demos or new features of vendor products



JOINING PEER GROUP

- Maximize likelihood that format allows us to solve complex challenges together
- Maximize number of peer groups of my level to choose from
- Maximize number of diverse individuals in my peer group



SPONSOR EVENT

- Maximize likelihood that I can share my knowledge with the community
- Maximize likelihood that I can connect with serious buyers



CONSUMING TRUSTED SOURCES

- Maximize number of up to date models and samples I can find
- Maximize number of up to date association benchmarks I can access
- Maximize likelihood that articles have depth and really dig into challenges I face
- Maximize likelihood that I can amass the resources I need in a personal library to refer to later
- Maximize likelihood that I interact with those in my same position and level
- Maximize ability to see the most latest activities by the most progressive organizations
- Maximize ability to determine what to outsource and what not to outsource





CONFERENCE

Attending professional conferences provides members an avenue to connect with other professionals, learn new skills, learn about other associations and find new and innovative ways to thrive as an organization and as a professional

PLAN

- Maximize my ability to create a detailed personal agenda that is comprehensive of flight, plan, hotel, parties, and sessions
- Maximize my ability to plan my outfits appropriately
- Maximize my ability to search and filter people from my state, name, title, or similar professional role/other interests
- Maximize ability to differentiate between vendors and attendees
- Maximize ability to research special venues beforehand
- Minimize effort to contact other attendees
- Maximize likelihood that I am invested enough to pay the "extras" that my employer is not paying
- Maximize the likelihood that my employer pays
- Maximize ability to personalize my conference experience
- Maximize ability to add personal information on mobile agenda
- Maximize ability to "divvy up" sessions with peers easily
- Minimize likelihood that the "extras" are very special and unique experiences
- Maximize feeling of exclusivity of smaller events so that I can bond with people and share the experience
- Maximize likelihood that first time attendees have a conference buddy
- Minimize the amount of stress over details (who, where, when basics) so I can focus on the experience in the moment
- Maximize amount of conference materials I can easily



REGISTER

- Minimize number of prompts to add on conference extras
- Minimize time it takes to register
- Maximize likelihood that I know that my data is secure
- Maximize likelihood that my information is pre-populated on the forms
- Minimize number of emails you send me for confirmation
- Maximize my ability to add sessions to my personal calendar easily
- Maximize the likelihood post registration confirmation/communications is comprehensive and concise
- Maximize ability to get best offer available



ATTEND & EVALUATE

- Maximize likelihood that hotel check-in is easy
- Maximize likelihood that I can identify and introduce myself to a first timer
- Maximize likelihood that I can pick up badge right away
- Maximize ability to orient myself to local area
- Minimize chance that I will be standing alone at a large event
- Maximize likelihood that I will know one person at an event
- Maximize time spent learning
- Maximize ability to leverage what I learn back home
- Maximize time to get to next session and settle in
- Maximize the likelihood that my team can share key takeaways from individual sessions
- Maximize ability to act on what we learn
- Maximize ability to act on what I learn in the conference immediately with vendors
- Maximize people I can recruit for positions
- Maximize ability for my team to get the most from the conference experience
- Maximize ability to get through the exhibit hall
- Maximize number of business conversations I can have with vendors
- Minimize follow up conversations (want to have conversations on-site)
- Maximize number of vendor demos or new features I can see



RESEARCH

- Maximize likelihood that I will be with people that I can connect with
- Maximize likelihood that I can find attendees with my similar job and title
- Maximize likelihood that I can easily see who I know that is also attending
- Maximize number of thought leaders that are attending
- Maximize likelihood that session topics are relevant to my current challenge
- Maximize the likelihood that I can see all session content (presentations) before hand
- Maximize the likelihood that I can see all session topics beforehand
- Maximize how quickly I receive the schedule/brochure in the mail



FUNCTIONAL/ EMOTIONAL NEED

- GREEN = Running Business
- BLUE = Belonging
- PINK = Just in Time
- RED = Purpose
- ORANGE = Expertise
- PURPLE = Progress in Career



NETWORKING

Connecting with other Association Professionals either online or in-person is a way for ASAE members to make progress in their careers and to find belonging.

RESEARCH & FILTER

- Maximize likelihood that I can see involved other associations are within the ASAE community to gauge their support for their own staff
- Maximize likelihood that I see awards won for an Association
- Maximize the number of people I am introduced to that are intentional about connecting
- Maximize likelihood that I meet someone that can

PREPARE

- Maximize ability (online) to see who is connected to whom
- Maximize ability to sort member directory by length of membership, Job Title, Career Stage, Professional Interests, Committees, Volunteer Contributions, are they a thought leader or a vendor or both, Award Won, Events Sponsored
- Maximize ability to see who is part of ASAE and who is not
- Maximize ability to see all available networking options
- Maximize likelihood that experiences in smaller groups will help me to build relationships

CONNECT

- Maximize the number of new people I meet
- Maximize time I have to connect with existing contacts
- Maximize ability to see common threads between me and others
- Maximize ability to get contact information easily in the moment
- Maximize diversity of people I meet
- Maximize likelihood that I can set a follow up meeting in the moment
- Maximize exposure to other volunteers in a longer term setting
- Maximize number of small events with more intimate settings
- Maximize ability to meet people facing same challenges/issues
- Minimize number of large social events that I have to navigate
- Maximize opportunity to connect with people in small groups

EVALUATE

- Maximize my ability to give public praise and encouragement to fellow members
- Maximize chance that I know someone walking into my first event
- Maximize likelihood that there is one person I can relate to at event
- Minimize likelihood that I am standing alone at an event
- Maximize number of quality experiences in smaller groups

FUNCTIONAL/ EMOTIONAL NEED

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CREATING A GRASS ROOTS GROUP

Association Professionals often cannot find a way to connect with and learn from peers that have similar job titles or interests within the ASAE ecosystem. When this occurs, they often form their own peer group.

The outcomes listed here are expected from ASAE when members form a peer group to:

- Better Run Their Organization
- Make Progress in Their Career
- Create a Sense of Belonging

FUNCTIONAL/ EMOTIONAL NEED	
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RESEARCH

- Maximize resources available on “how to form a peer group”
- Maximize non-formal relationship with ASAE
- Minimize ASAE placing “structure” on my group
- Maximize amount of encouragement and support from ASAE



IDENTIFY WHO TO INVITE

- Minimize time to create a diverse mix of people
- Maximize likelihood that I can invite those who may be less connected within ASAE
- Maximize ability to invite people I do not know
- Minimize the time it takes to find peers that fit group criteria
- Maximize ability to see who is connected with whom
- Maximize ability to see who is part of ASAE and who is not while on LinkedIn



INVITE

- Minimize the time it takes to ask peers to join
- Maximize ideas from group members to guide meeting topics
- Minimize time it takes to identify speakers
- Minimize time it takes to book speakers



MEET

- Maximize quality relationships formed
- Minimize travel time involved to meet
- Maximize likelihood that I can use ASAE resources for the group
- Maximize likelihood that I can find resources for the group outside of the ASAE community
- Maximize ability to offer CAE credits
- Maximize likelihood that ASAE cares to partner with and promote the group



SPONSORS

Vendors in the Association community sponsor events as a way to find greater belonging within ASAE, as a way to share their knowledge, and ultimately to grow their businesses.

The jobs they are trying to accomplish include:

- Finding belonging in ASAE community
- Growing or running organization better

PRIORITIZE SPONSORSHIP OPPORTUNITIES



- Maximize the number of people in our target audience that will attend
- Maximize my opportunity to build a network of association professionals
- Maximize ability to understand who is really at the event to ensure this is truly our target audience

DECIDE WHAT TO SPONSOR



- Maximize likelihood that there is opportunity to be involved in the community beyond showing up and giving money
- Maximize likelihood that we can speak so that we are known as a source of knowledge
- Maximize time it takes to negotiate better performance
- Maximize collaboration with ASAE staff to create a mutually beneficial relationship

PREP PRIOR TO EVENT



- Minimize the time it takes for me to understand what we paid for
- Minimize the time it takes to make decisions if there are optional things to do as part of sponsorship
- Minimize surprises that could happen at the event
- Minimize time it takes to organize who does what at the event

ATTEND EVENT



- Maximize ability to solve complex challenges together
- Maximize perception that vendors are engaged community members and not just out to “sell me something”

EVALUATE SPONSORSHIP



- Maximize the amount of existing relationships to create more depth of relationships
- Maximize the number of new people we talk to
- Minimize the time wasted with people that have no interest in working with us
- Maximize the amount of data we have access to after the event
- Minimize the perception that we are annoying or harassing if we email or call after the event



INTERACTING ONLINE

Association Professionals interact with ASAE online by reading AssociationsNOW or other trusted content, communicating with peers in the online community or searching for content to help them address an immediate need or challenge.

RESEARCH

- Maximize the number of different perspectives available to me
- Maximize likelihood that content is timely and relevant
- Maximize likelihood that I know I am a member and as a benefit have access to ASAE online resources and community
- Maximize the amount of available content that shows me what other associations are doing
- Maximize my ability to find content that helps me maintain relevance in the association arena

PREPARE

- Maximize likelihood that I post to most relevant forum
- Maximize likelihood that I do not get reprimanded publicly
- Minimize likelihood that I look unprofessional in front of my peers

CONNECT OR READ

- Maximize amount of relevant feedback I get back to my questions
- Maximize ability to upload files and documents to share
- Minimize number of “fluffy” articles I have to sort through
- Maximize number of articles that dig deeper into the content available
- Maximize ability to search across all web properties
- Maximize ability to reply to a thread without logging in every time
- Minimize demeaning, thoughtless or derogatory language in the forums
- Maximize ability to flag messages to reply to when I have time
- Maximize ability to forward relevant information to my board or team
- Maximize ability to share association benchmarks and best practices in presentations to my board
- Maximize ability to use content to educate my staff or board
- Maximize ability to take “snippets” of information to deliver to my board
- Maximize ability to gather benchmarking data
- Maximize likelihood that I get perspective of other Associations or non-profits
- Maximize ability to get information from CEO peers who have my perspective

EVALUATE

- Maximize ability to validate information shared with me online

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VOLUNTEER

RESEARCH

- Maximize my understanding of what volunteer opportunities are available
- Maximize likelihood that I understand my commitment
- Maximize the likelihood that the opportunity is interesting
- Maximize my understanding of process of selection committee
- Minimize number of people that feel disenfranchised and not "in the know" from the "inner circle"
- Maximize likelihood that it is easier to volunteer at ASAE vs. other organizations
- Maximize opportunity to include a broader number of people in the organization
- Maximize understanding of the submission process
- Maximize likelihood that I understand probability that I will be accepted
- Maximize likelihood that it is comparatively easy to volunteer for ASAE rather than another organization
- Maximize the likelihood that I can find a way to volunteer that fits my schedule
- Maximize likelihood that I understand if what I am applying for is prestigious or exclusive

APPLY

- Minimize time it takes to fill out the application
- Maximize my confidence that volunteering is the right decision
- Maximize likelihood that I know what priorities for selection are being applied to
- Maximize likelihood that my application is complete and error free
- Maximize chance that what I write in my application is read by a committee
- Maximize chance I can qualify based on my expertise rather than who I know
- Maximize ease of reading applications by selection committee
- Minimize time to compare and sort application by selection committee

SERVE

- Maximize impact I can have on the organization
- Maximize my ability to contribute my industry knowledge and my network back to ASAE
- Maximize my ability to contribute in a meaningful way
- Maximize my understanding of my individual contribution and role
- Maximize likelihood that meetings are structured
- Maximize likelihood that ideas are given proper consideration (I'm not a rubber stamp)
- Maximize likelihood that I bring and apply my past experiences and industry knowledge
- Minimize time it takes to ramp up to understand committee
- Maximize clarity of charge of committee
- Maximize face to face in committee
- Maximize likelihood that every voice is heard on committee
- Maximize my ability to get to know others I serve with
- Maximize likelihood that I feel accepted
- Maximize empathy or understanding for out of town (non DC) participants
- Maximize likelihood that I will be warmly welcomed
- Maximize my ability to develop relationships that can help me grow
- Maximize likelihood I can stick to the requirements, criteria and what I was tasked to do
- Minimize distraction and stay true to what I was supposed to do

EVALUATE

- Maximize likelihood that I can prove that I added value
- Maximize that I can apply what I learned to working with my board, my boss and my peers
- Maximize my ability to apply what I learned from the opportunity to my organization
- Maximize ability to formally evaluate other committee members rather than just staff
- Maximize likelihood that I feel my contribution is meaningful

FUNCTIONAL/ EMOTIONAL NEED

- GREEN = Running Business
- BLUE = Belonging
- PINK = Just in Time
- RED = Purpose
- ORANGE = Expertise
- PURPLE = Progress in Career



PROFESSIONAL DEVELOPMENT

Association Professionals seek Professional Development opportunities in the form of in person or online trainings or webinars.

There are several jobs they are trying to fill when seeking professional development opportunities:

- Finding Belonging in ASAE Community
- Addressing an Immediate Work Challenge
- Make Progress in Their Career
- Grow a Specific Area of Expertise

LOCATE TRAINING

- Maximize the likelihood that classes offered meet my immediate challenge
- Maximize ability to know exactly what will be covered in the course or webinar
- Maximize likelihood that I can get a “free” taste of programming (test value)
- Maximize content relevant to non-CEOs in the c-suite
- Maximize likelihood that I understand method of course instruction up front in order to know if it matches my learning style
- Maximize likelihood that the course description ensures that I will learn best practices
- Maximize ability to see peer evaluations of the course
- Maximize ability to know exactly what will be covered in the

REGISTER

- Minimize time it takes to register
- Maximize likelihood that event is added to my calendar
- Minimize the time it takes to get into the webinar or online session
- Maximize likelihood that I understand whether I am going to get a copy of the presentation or slides prior to or after the event
- Maximize likelihood that all of my information is already populated in the system so I don't reenter
- Maximize likelihood that I receive a detailed confirmation email to help me properly prepare
- Minimize likelihood that the event autopopulates on my calendar
- Maximize ability to see who else is registered
- Maximize ability to sort registrations by job title

PARTICIPATE

- Minimize the likelihood that I will need to take screenshots during the session
- Minimize the time I have to spend wondering “what happens next” so I can focus on what is
- Minimize likelihood that I can't take full notes
- Maximize likelihood that I can communicate with others during the session
- Maximize likelihood that I can connect with other participants after the session
- Maximize likelihood that I can focus so I can extract the information
- Maximize likelihood that the instructor is engaging and interesting
- Maximize likelihood that questions can be asked before, during, and after the session

EVALUATE

- Maximize likelihood that I can summarize what I learned to my boss
- Maximize ability to ask follow up questions of experts
- Maximize likelihood that experts are approachable
- Maximize likelihood that I can implement what I've learned at work
- Maximize my ability to reference learning materials at a later date
- Maximize the likelihood that I am automatically sent the recorded session
- Maximize the number of times watch the recorded session

FUNCTIONAL/ EMOTIONAL NEED

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CERTIFICATION

Association Professionals seek to obtain their Certified Association Executive (CAE) credential to fulfill the following jobs:

- Expertise
- Find purpose in the profession
- Find belonging
- Make progress in career

RESEARCH

- Maximize my understanding how CAE can help me
- Maximize the likelihood that I see the credential as exclusive or "special"
- Maximize the chance that my boss will support and fund the credential
- Maximize confidence that CAE is key to career progress
- Minimize my anxiety around what I'm getting myself into
- Maximize my understanding that CAE shows my commitment to the profession

GATHER REQUIREMENTS

- Minimize the time it takes to gather documentation across all credit providers
- Maximize the thrill of "gaining" credentials
- Maximize my motivation to "pull the trigger" and register
- Maximize my ability to track my CAE credits
- Minimize time it takes to find all my hours
- Maximize confidence that I've captured and applied all my relevant past credits

STUDY/PREPARE

- Maximize my ability to learn and retain rather than learning to "take the test"
- Maximize quality of study facilitator
- Maximize likelihood that I retain content by supporting a variety of learning styles
- Maximize time online that I can study
- Maximize my ability to guide and structure my own study
- Maximize likelihood that members of my study group are serious about the exam
- Maximize the amount of structure given to study groups
- Maximize likelihood that I can share my knowledge with others taking the exam
- Maximize likelihood that I find comradery in my study group
- Maximize likelihood that I can share my career/study successes with a group
- Maximize the likelihood that I can join a group with a variety of time options
- Maximize the length of the study group options
- Maximize diversity of people in study group (by job title and by background)

REGISTER

- Minimize the time it takes to register
- Maximize likelihood that I will register in one sitting
- Minimize back and forth within the form
- Maximize likelihood that I submitted my registration correctly and completely

TAKE EXAM & EVALUATE

- Maximize ability to focus on test day
- Maximize ability to mentally prepare
- Maximize my ability to show/share that I am a CAE
- Maximize likelihood that my manager and colleagues know I passed
- Maximize likelihood that senior leaders see my CAE as a significant career milestone
- Maximize likelihood that I can share my success the group
- Maximize likelihood that I keep in touch with my study group

FUNCTIONAL/ EMOTIONAL NEED

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BONUS MAP: SETTING EXPECTATIONS

While not a specific job-to-be-done, in the course of talking to members setting expectations and helping them to plan came up over and over again. For that reason, we have created a separate map to guide you in fulfilling this need.

Members want to be fully prepared before interacting with ASAE. If they feel fully prepared and informed on basic information they can then lean into fulfilling their core Jobs-to-be Done.



GOING TO PROFESSIONAL CONFERENCE

- Maximize ability to create a detailed personal agenda
- Maximize my ability to plan my outfits appropriately
- Maximize likelihood that I can divvy up sessions for a group with ease
- Maximize effort it takes to organize a group



REGISTERING (FOR ANYTHING) ONLINE

- Maximize likelihood that my information is pre-populated on the forms that I can edit



PARTICIPATING IN NON-CONFERENCE PROFESSIONAL DEVELOPMENT

- Maximize likelihood that I can easily see my connections that are also attending
- Maximize number of intimate settings I can connect in
- Maximize opportunity to meet people facing same challenges /issues
- Minimize difficulty of tracking down and contacting other attendees
- Maximize ability to give positive reinforcement to others



VOLUNTEERING

- Minimize likelihood that I have to know someone to get on a committee
- Maximize chance that my application is actually read by the committee
- Maximize opportunities to bond with my peers
- Maximize likelihood that I will be warmly welcomed
- Minimize effort it takes to introduce my team to ASAE
- Maximize likelihood that I will have a conference buddy as a first time attendee



CREATING THEIR OWN PEER GROUPS OR JOINING A PEER GROUP

- Maximize likelihood that I can connect with people similar to me.
- Maximize likelihood that I can find people different than me



METHODOLOGY

A CUSTOMER-CENTRIC, DATA-DRIVEN APPROACH TO INNOVATION

The Outcome Driven Innovation process developed by Anthony Ulwick was used as the framework for creating a simple and consistent process by which all staff can tie systems and processes back to customer needs on an ongoing basis. The following research activities provided a depth of insights:

ONE-ON-ONE INTERVIEWS

Over 80 ASAE members and 23 ASAE staff participated in a series of structured one-on-one interviews. Participants were recruited from a broad and diverse pool of members. Building on previous research from Brain Traffic, participants fell into a cross-section of the following groups: True Believers, Strivers, Bystanders, Outsiders and further into Large, Medium, Small staff organizations and then by Executive Director, Director, and Staff positions

WORKSHOPS

23 staff who make up the Member Behaviors & Experiences team at ASAE participated in four workshops:

- Empathy Mapping
- Jobs To Be Done Workshop #1 Reviewing Jobs-to-be-Done
- Jobs To Be Done Workshop #2 Creating Job Maps
- Jobs To Be Done Workshop #3 Reviewing Results & Next Steps

ETHNOGRAPHY

An online ethnography study was used to observe participants over the course of a four week period to help us gain a deeper, more nuanced understanding of member and staff behavior. Participants participated in an initial meeting and then responded to weekly prompts (research questions) in the form of weekly diaries either in writing, images, and/or video. Participants also participated in an exit interview.

QUANTITATIVE RESEARCH

Data from Google Analytics, Collaborate, Google Trends, and Microsoft BI provided supporting insights into customer behavior.



ACKNOWLEDGMENTS

Humanizing ASAE systems took a lot of hard work from a lot of good humans.

Many thanks to the entire ASAE team who strived to ensure that this body of work will truly make a difference in how technologies are selected and used to support improving the member experience:

Reggie Henry, CAE

Chief Information and Engagement Officer

Amy Hissrich, CAE

VP Web Strategies and Communications

Megan Kuhman

Senior Manager, Online Communities

ASAE Customer Behaviors & Experience team:

Robb Lee, Michelle Kudrin, Nathan Welch, Vanessa Gonzalez-Leyva, Stacey Thompson, Emily Rabbitt, Jennifer Baker, Deborah Stevens, Liz Ray, Chris Vest, Terri Ashton, London Dochrety, Tara Cuffee, Sequoia Houston, Debbie Hanger

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CEO - Engaged Strategies

Other Resources



Working Guidelines for the use of Generative AI at ASAE.

It's no secret that Generative AI has the potential to fundamentally change the way content (of all types) is located and created. The potential for having this type of “assistive” technology tool is immense...but not without some shortcomings and considerations. While we at ASAE champion innovation and experimentation, we also value information integrity, information privacy, transparency, and truth. Because there are no regulations or oversight of these tools, we need to experiment “with care” as we use them. These guidelines will be working guidelines and will be amended as we learn more about both the potential and shortcomings of these new tools.

What is Generative AI

Generative AI refers to a category of AI models and techniques that are designed to generate new content, such as text, images, music, or even videos. These models are trained to understand patterns and structures in the data they are exposed to and can then generate new content that is similar in style or format. These AI tools are evolving rapidly without any regulation or oversight and there are still many questions concerning AI, including:

- Accuracy of generated content
- Source transparency
- Intellectual Property Rights
- Potential Bias(es)
- Data/Information privacy

Like all technology, Generative AI is a tool. **We are responsible for the outcomes of our tools.** For example, if autocorrect unintentionally changes a word - changing the meaning of something we wrote, we are still responsible for the text. **Technology enables our work; it does not excuse our judgment nor our accountability.**

Guidelines

- 1.) Fact Check and review all content generated by AI, especially if it will be used in public communication or decision making.
 - Generative AI can rapidly produce clear prose, the information and content might be inaccurate, outdated, or simply made up. **It is your responsibility to verify that the information is accurate by independently researching claims made by the AI.**
 - What to look for:

- Inaccurate information including links and references to events or facts.
- Bias in the positions or information. We want to make sure that vulnerable populations are not harmed by these technologies. Think about how racial and ethnic minorities, women, non-binary, people with disabilities or others could be portrayed or impacted by the content.
- **Think of the output of generative AI as a starting point, not an end product.**

2.) Disclose that you have used AI to generate the content. You should also include the version and type of model you used (e.g, Open AI's GPT 3.5 vs Google's Bard). You should include a reference as a footer to the fact that you used generative AI:

- Even when you use AI minimally, disclosure builds trust through transparency.
- Document how you used whichever tool(s) you are using, the prompts you used etc. It will most likely be helpful to you and your colleagues to better understand how you can use these technologies better and more safely.
- Sample credit line: "This description was generated by ChatGPT 3.5 and edited by Reggie Henry, CAE"

3.) Never share personally identifiable information, company or client information that is not generally available to the public.

- Currently, there are no clear assurances of privacy or confidentiality in most generative AI tools which means the information you put in may be used to further train the model or for other uses.

If you have any questions whatsoever about these guidelines, or any other AI related questions, don't hesitate to contact Reggie Henry about them.



The Center for Association Leadership

Strategic Framework Coverage Report as of 10/13/2023

	# Projects	% of Projects for this goal	% of all Projects
Create Member Value			
Develop targeted tools and practical solutions to address member needs	34	26%	15%
Build strong professional peer communities	26	20%	12%
Be the comprehensive source for association content and metrics	70	54%	31%
Foster Workforce Development			
Nurture and develop diverse talent in the community	6	50%	3%
Help associations elevate DEI and Conscious Inclusion	2	17%	1%
Expand awareness of association career pathways for current and new audiences	3	25%	1%
Elevate Associations			
Promote associations through advocacy and The Power of Associations	2	17%	1%
Enhance the global influence of associations through partnerships and collaborations	7	58%	3%
Focus on enterprise-wide environmental, social and governance (ESG)	3	25%	1%
Enhance Culture and Infrastructure			
Build and stabilize high performing and responsive team and culture	2	22%	1%
Focus on operational excellence, delivery and technology infrastructure	6	67%	3%
Focus on workplace and real estate planning and strategy	1	11%	%

Resources on how to create and Intranet in Microsoft Teams

[\(23\) HOW TO: SETUP Viva Connections | Integrate SharePoint Intranet with Microsoft Teams - YouTube](#)

[\(23\) Your intranet is now in Microsoft Teams with Microsoft Viva Connections - YouTube](#)



ASAE Demo Days Schedule

1. LMS Demo Days (2 days) - September 26-27, 2023
2. AMS Demo Days (2 days) - October 25-26, 2023
3. EventTech Demo Day - January 31, 2024
4. Marketing Technology Demo Day - February 28, 2024
5. LMS Demo Days (2 days) - March 27-28, 2024
6. AMS Demo Days (2 days) - April 24-25, 2024
7. Community Platforms Demo Day - May 22, 2024
8. Engagement Demo Day- June 19, 2024