



Navigating the Tech Landscape

Insights for Association Leaders

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- 1. Security & Legal Considerations
- 2. Connectivity – Building a Digital Ecosystem
- 3. Actionable AI
- 4. CEO Homework





Security & Legal

Insights for Association Leaders

- Phishing
- Scaping
- Data Security

Phishing

A cyberattack where scammers impersonate legitimate organizations or individuals.

The goal is to trick people into revealing sensitive information, such as passwords or financial details.



Transfer Event: Novi AMS Weekly Meeting - Inbox • pete@noviams.com

Delete Report Block Rules Phish Alert Reply Reply All Forward

Transfer Event: Novi AMS Weekly Meeting 😊 ↶ ↷

calendar@noviams.com <calendar@noviams.com> Today at 8:20 PM

To: Pete Zimek, CAE

would like to transfer ownership of Novi AMS Weekly Meeting to you.

To accept ownership click <https://noviams.com/calendar/google/224509>

I would like to transfer ownership of this event.

is trying to reach you - Inbox • pete@noviams.com

Delete Report Block Rules Phish Alert Reply Reply All Forward

Unverified is trying to reach you Today at 8:25 PM

via Microsoft Teams <noreply@teams-microsoft.us>
To: Pete Zimek, CAE

Microsoft Teams

Hi Pete,

Your teammates are trying to reach you in [Microsoft Teams](#)

mentioned you

Review and comment please: <https://teams-microsoft.us/roadmap.pdf>

Reply in Teams



Delete Report Block Rules Phish Alert Reply Reply All Forward ...

Unverified invited you to collaborate on the Novi AMS-Visual-Assets library

😊 ⏪ ⏩

via Adobe Creative Cloud <message@adobe-file-share.com>
To: Pete Zimek, CAE

Today at 8:25 PM



Adobe Creative Cloud

invited you to collaborate on the **Novi AMS-Visual-Assets** library

Hi Pete! All Novi AMS brand logos, color, icons, etc. are kept here for your use. Let me know if you have any questions or feedback.

[Start Collaborating](#)

This library was shared with pete@noviams.com. If you can't access the library, you may have multiple Adobe profiles linked to this email address. Try switching to your other profile to see if you can access it. [Sign in help](#)



Content Scraping

The the process of extracting data or information from a website.

This is typically done using automated tools or scripts that crawl web pages and retrieve specific content, such as text, images, or other media.



What percentage of website traffic comes from automated bots?

What percentage of website traffic
comes from automated bots?

42%

What percentage of website traffic
comes from automated bots?

42%

62% of bot traffic
is malicious

What do they want?

- Member Directories
- Upcoming Events
- Event Registrants
- Blog articles & industry knowledge



Why do they do it?

- “Because it’s fun”
- Blog articles & industry knowledge
- Steal & sell data
- Hotel scams
- Test stolen credit cards
- Denial of Service
- Social Engineering



How do they do it?

- Automated bots
- By hand
- By joining as a member



How do Software & IT Professionals fight content scraping?

- CAPTCHAs
- Throttling
- Monitor Logs
- Honeypots
- Web Application Firewalls



How can Association Professionals
fight content scraping?



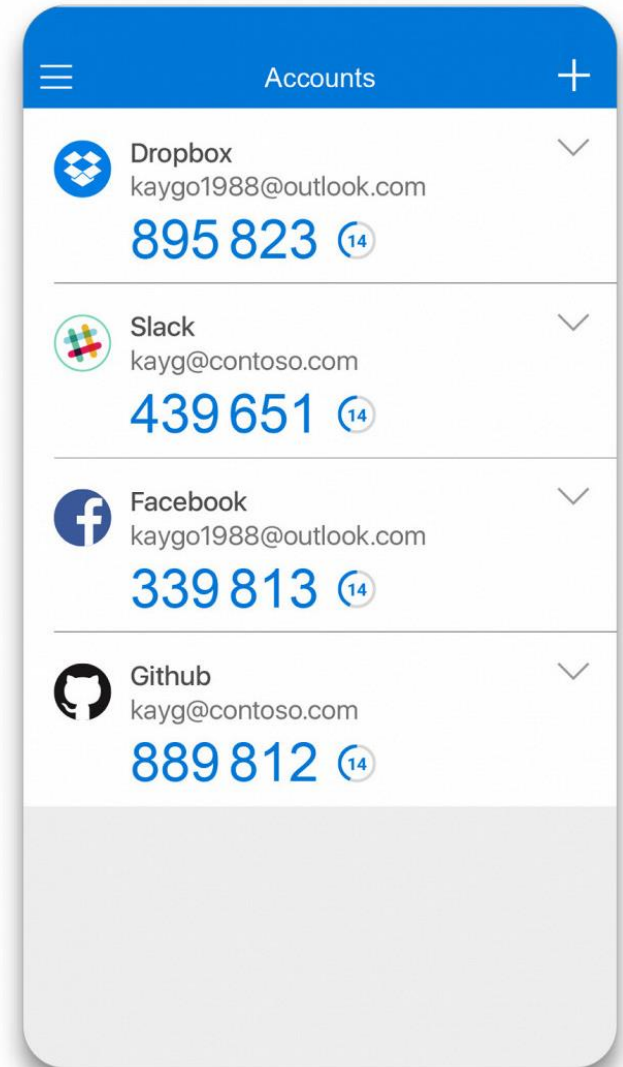
How can Association Professionals fight content scraping?

- Multi-Factor Authentication





Microsoft Authenticator

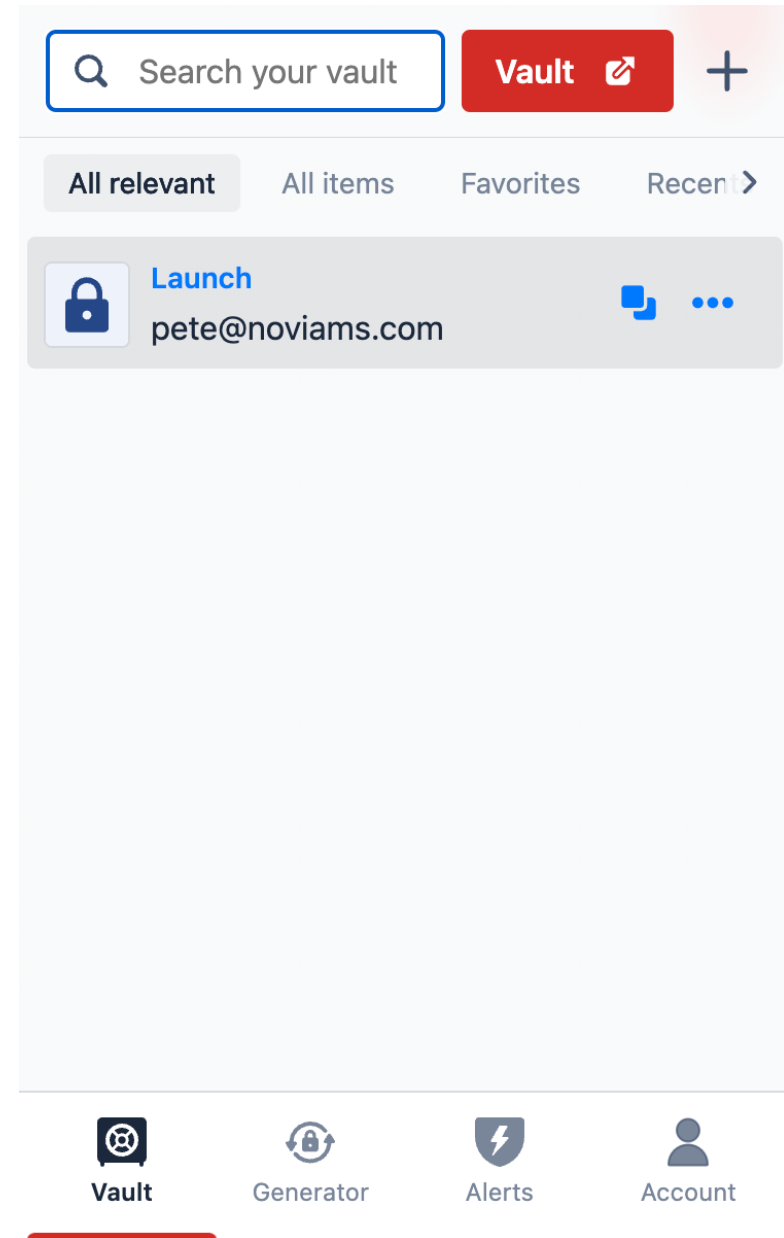


How can Association Professionals fight content scraping?

- Implement Multi-Factor Authentication
- Use Strong Password Policies



LastPass...



How can Association Professionals fight content scraping?

- Implement Multi-Factor Authentication
- Use Strong Password Policies
- Conduct Regular Employee Training (and testing)



KnowBe4

Phishing

 Hide Industry Benchmark Data

Phishing Security Tests - Last 6 Months

25 Clicks, 0 Replies, 1 Attachments Opened, 0 Macro Enabled, 0 Data Entered, 0 QR Codes Scanned, 0 Callback, 0 Callback Data Entered, 164 Reported



Your Organization


Account Average Phish-prone % **6.6%**

Last Campaign Phish-prone % **0%**

Industry Benchmark Data

Show in chart

— Industry Phish-prone % **21.1%**

Industry Technology 

Organization Size Small (<250 users) 

Program Maturity 90 Day 

How can Association Professionals fight content scraping?

- Implement Multi-Factor Authentication
- Use Strong Password Policies
- Conduct Regular Employee Training (and testing)
- Verify Before Acting



Recent Signups

AE Tip™



Batch actions ▾

Filter by name

Filter ▾



<input type="checkbox"/>	NAME	TYPE	DATE	PAYMENT STATUS	MEMBER TYPE (DESIGNATED)	MEMBER STATUS	EMAIL	ACTION
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>	Steven Watson		9/26/2024	Not Billed	Affiliate: Professional Applicant	Applicant	steview75...@gmail.com <i>This email is using a popular free email provider. Review before you approve.</i>	Create Membership ▾

3. For invoices [REDACTED] and over, the team member making the request must confirm with the Office Manager via zoom. Unless it's a recurring payment or a payment that has been authorized before
 - a. The team member making the request should be the one initiating the video call with the Office Manager, if available. If not, the Office Manager will reach out before processing the invoice
4. For invoices [REDACTED] and over, Office Manager will confirm with [REDACTED] via zoom. Unless it's a recurring payment or a payment that has been authorized before

How can Association Professionals fight content scraping?

- Implement Multi-Factor Authentication
- Use Strong Password Policies
- Conduct Regular Employee Training (and testing)
- Verify Before Acting
- Data Governance



Let's Discuss: How can we fight this?

- Implement Multi-Factor Authentication
- Use Strong Password Policies
- Conduct Regular Employee Training (and testing)
- Verify Before Acting
- Data Governance





Connectivity – Building a Digital Ecosystem

Insights for Association Leaders

- Evaluating Technology Partners
- SSO & API
- Designing Your Ecosystem



Open



Closed

- Get an invoice as PDF
- Query an invoice
- Read an invoice
- Send an invoice
- Sparse update an invoice
- Full update an invoice

- Item
- JournalCode
- JournalEntry
- JournalReport
- JournalReportFR
- Payment
- PaymentMethod
- Preferences
- ProfitAndLoss
- ProfitAndLossDetail
- Purchase
- PurchaseOrder
- RecurringTransaction
- RefundReceipt
- ReimburseCharge
- SalesByClassSummary
- SalesByCustomer
- SalesByDepartment
- SalesByProduct

The invoice object

ATTRIBUTES

Id **String**, *filterable*, *sortable*

★ Required for update Unique identifier for this object. Sort order is ASC by default.

read only
system defined

Line [0..n] **Line**

★ Required Individual line items of a transaction. Valid **Line** types include **SalesItemLine**, **GroupLine**, **DescriptionOnlyLine** (also used for inline Subtotal lines), **DiscountLine** and **SubTotalLine** (used for the overall transaction). If the transaction is taxable there is a limit of 750 lines per transaction.

SalesItemLine
[Show child attributes >](#)

GroupLine
[Show child attributes >](#)

DescriptionOnlyLine
[Show child attributes >](#)

DiscountLine
[Show child attributes >](#)

SubTotalLine
[Show child attributes >](#)

SAMPLE OBJECT

```

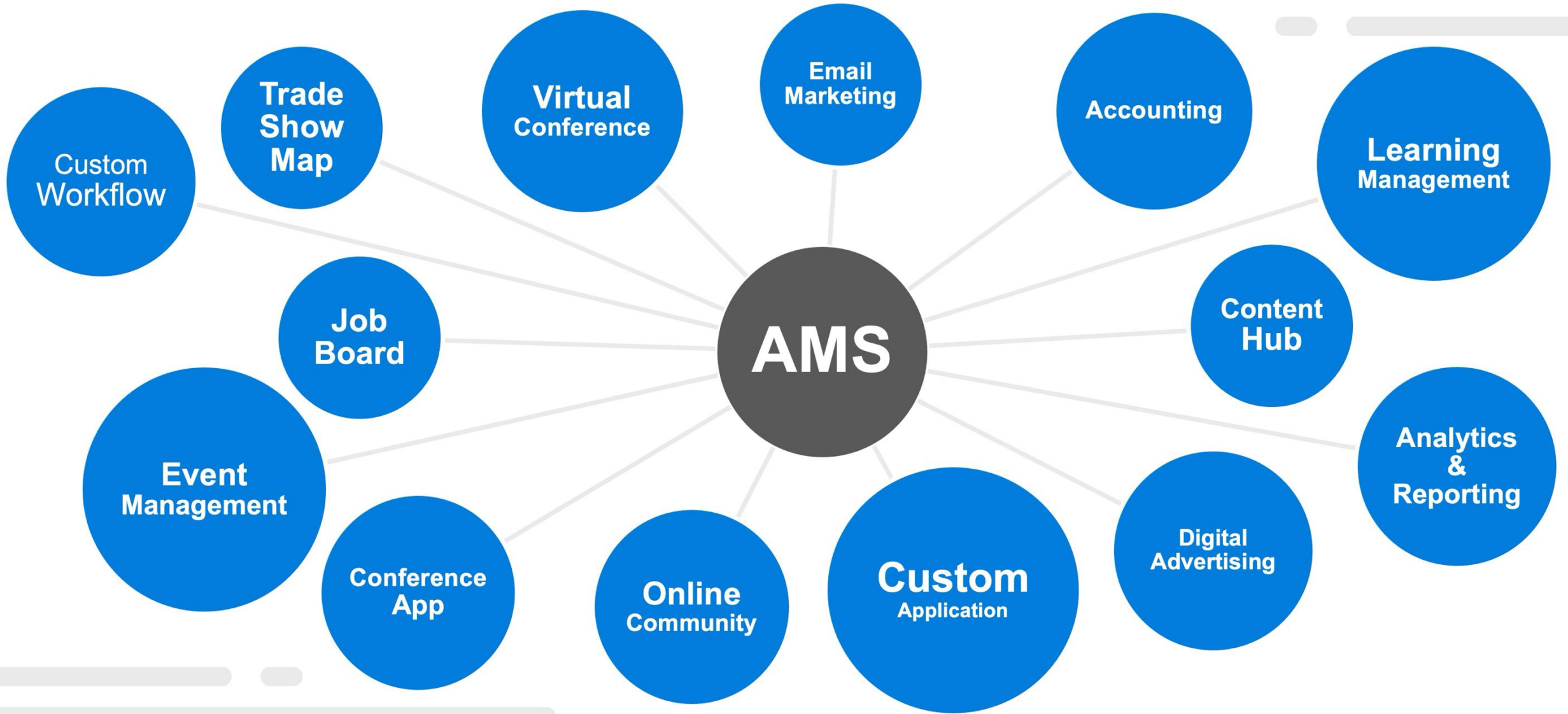
1 - {
2 -   "Invoice": {
3 -     "TxnDate": "2014-09-19",
4 -     "domain": "QBO",
5 -     "PrintStatus": "NeedToPrint",
6 -     "SalesTermRef": {
7 -       "value": "3"
8 -     },
9 -     "TotalAmt": 362.07,
10 -    "Line": [
11 -      {
12 -        "Description": "Rock Fountain",
13 -        "DetailType": "SalesItemLineDetail",
14 -        "SalesItemLineDetail": {
15 -          "TaxCodeRef": {
16 -            "value": "TAX"
17 -          },
18 -          "Qty": 1,
19 -          "UnitPrice": 275,
20 -          "ItemRef": {
21 -            "name": "Rock Fountain",
22 -            "value": "5"
23 -          }
24 -        },
25 -        "LineNum": 1,
26 -        "Amount": 275.0,
27 -        "Id": "1"
28 -      },
29 -      {
30 -        "Description": "Fountain Pump",
31 -        "DetailType": "SalesItemLineDetail",
32 -        "SalesItemLineDetail": {
33 -          "TaxCodeRef": {
34 -            "value": "TAX"
35 -          },
36 -          "Qty": 1

```

Create an invoice

- Have at least one **Line** a sales item or inline subtotal.

Request URL



Why do associations need an ecosystem?

- **Specialization:** Each software provider focuses on one function, leading to more feature-rich tools.
- **Flexibility:** Replace pieces as needed.
- **Innovation:** Add green-field technologies as they emerge.
- **Cost Effectiveness:** Invest in the pieces that will drive the most value for your staff and members.

How do we connect software to form a cohesive ecosystem?

- Native
- Custom
- Middleware
- “No Code” Automations

Native Connections

- Built-in connections between software applications, provided directly by one of the vendors.
- **Benefit:** Well-tested, established & easy to implement
- **Drawback:** Not as customizable

Evaluating Native Connections

- Ask for a demo of the connection – does it do what you expect?
- Read the help documentation
- Ask for references
- Ask your peers
- Ask the partner who didn't create the integration

Custom Connections

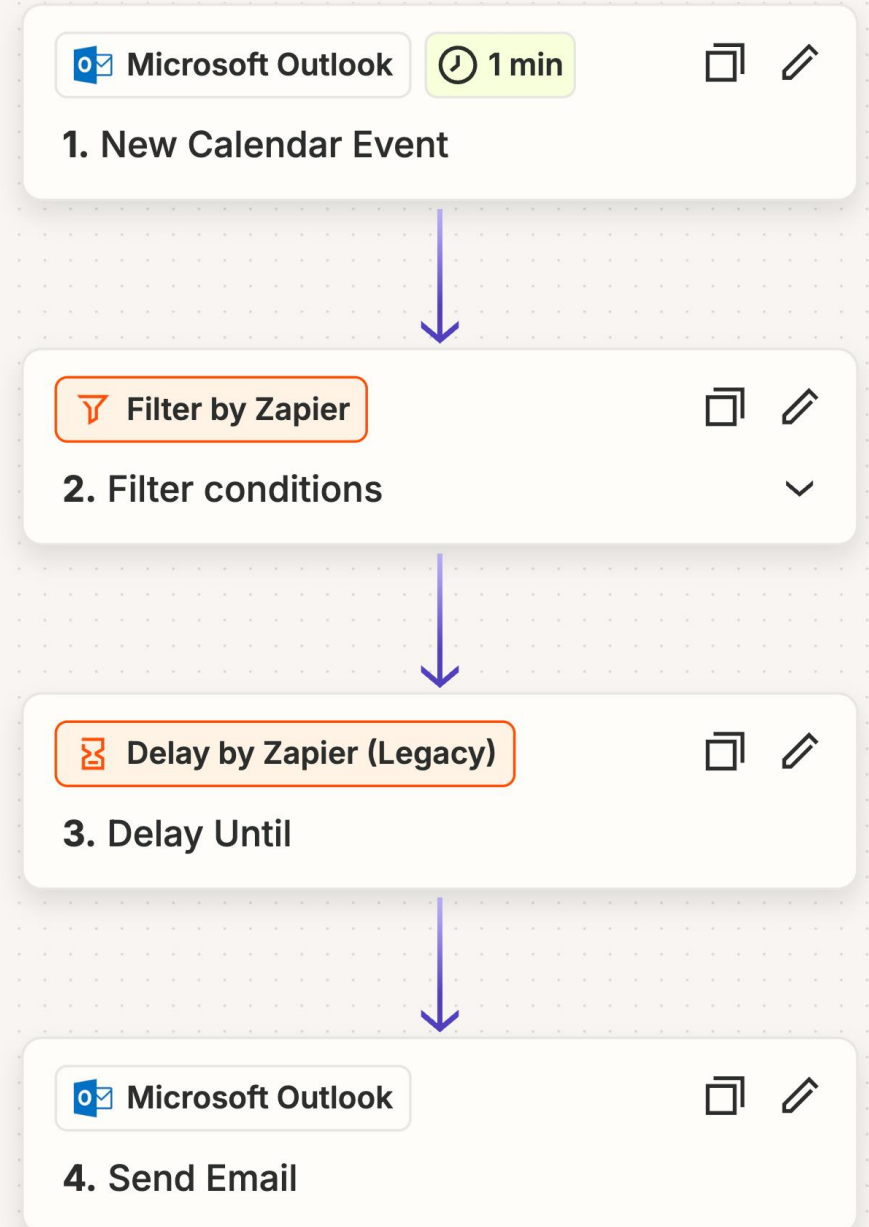
- Tailored connections to meet specific business needs
- **Benefit:** The API is the only limit
- **Drawback:** Requires development resources to implement.
- **Remember:** Software changes, so you'll need to keep this updated.

Middleware

- Connects to two systems and acts as a bridge between them.
- **Benefit:** Buying a “product” instead of custom development
- **Drawback:** Often the same price as custom connections yet with more limitations

No Code Automations

- Users can connect apps and automate workflows without writing code.
- **Benefit:** Accessible to non-developers
- **Drawback:** Can lack the depth of custom solutions & may not be as “fool-proof”



Let's Discuss:

- What should be the CEO's role in choosing between integration options?
- What types of work should be automated?



Actionable AI

Insights for Association Leaders

- AI Note Takers
- Generative AI / ChatGPT
- Chat Bots

Actionable AI

Systems that provide insights, recommendations, or data-driven outputs that can be directly implemented or acted upon.

It emphasizes AI's ability to deliver practical, real-time solutions or decisions that drive meaningful outcomes.

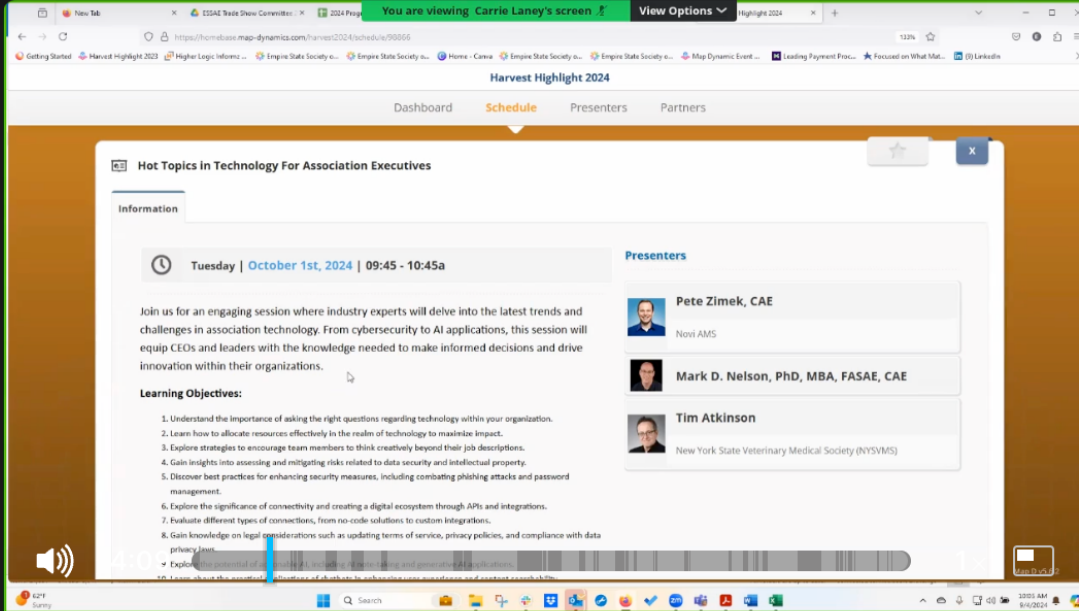


AI Note Takers

 **zoom** AI Companion

FATHOM 

 **Read**



SUMMARY TRANSCRIPT ASK FATHOM

General

Copy Summary

Meeting Purpose

Finalize plans for the technology session at Harvest conference on 10/1, including content, format, and speaker roles.

Key Takeaways

- Session will focus on 3 main learning objectives: understanding emerging tech trends, evaluating tech solutions, and creating a digital ecosystem
- Content divided into 3 areas: security (Pete), connectivity (Tim), and actionable AI (Mark)
- Format will use slides for structure, with speakers presenting from podium

Finalize Plan for Tech Session at ...

Sep 4, 2024 Add to Folder

Share

Visible to All Teams

ATTENDEES Send Recording

- Carrie Laney
- Tim Atkinson
- Mark R Nelson
- Pete Zimek

RELATED
 Novi Advisory Group
 Most Recent Meeting • September 20, 2024

ACTION ITEMS
 Extract Action Items from Transcript

- SCREEN SHARING
- Carrie started screen sharing @ 1:36
 - Carrie started screen sharing @ 5:20

Finalize Plan for Tech Session at Harvest 10/1 - Carrie Laney's Zoom Meeting - September 04

View Recording: <https://fathom.video/share/z9bjJwG1RnCsuqQzwqm8kvnese7XPM5r>

Meeting Purpose: Finalize plans for the technology session at Harvest conference on 10/1, including content, format, and speaker roles.

Key Takeaways

- Session will focus on 3 main learning objectives: understanding emerging tech trends, evaluating tech solutions, and creating a digital ecosystem
- Content divided into 3 areas: security (Pete), connectivity (Tim), and actionable AI (Mark)
- Format will use slides for structure, with speakers presenting from podium and panel table
- Session will conclude with "homework" for attendees on technology policy audits

Topics

Session Content and Structure

- Reduced learning objectives from 10 to 3 based on feedback about being too broad
- Decided to focus on security, connectivity, and actionable AI as main topics
- Legal/policy considerations to be woven throughout rather than a separate section
- Will include a "homework" section at end on technology policy audits for attendees

AI Note Takers

- Document 1:1 conversations with members in your AMS
- Revisit decisions or issues raised in past discussions.
- Quickly catch up after missing a meeting
- “This is the AI app that has made the most difference.” – Tim Atkinson



Generative AI / ChatGPT

Provides insights, recommendations, or data-driven outputs that can be directly implemented or acted upon.

Emphasizes AI's ability to deliver practical, real-time solutions or decisions that drive meaningful outcomes.



Generative AI / ChatGPT

We are giving a presentation to a group of association CEOs. The presentation is called "Navigating the Tech Landscape." One of the sections is called "Actionable AI." Within that section, we want to highlight ChatGPT. Please provide 2 sentences describing chat gpt.



 Memory updated

ChatGPT is an advanced language model developed by OpenAI that uses artificial intelligence to understand and generate human-like text based on the prompts it receives. It can assist with tasks such as answering questions, drafting content, and automating routine communications, making it a powerful tool for enhancing productivity and member engagement in associations.



Generative AI / ChatGPT

- Don't upload confidential information
- Confidential information includes member contact information
- Prompts are important
- Check the work
- Experiment



Let's Discuss:

- Should note takers be allowed into your virtual committee meetings? Can they be used to create minutes?
- How can ChatGPT get an association in trouble?



What is the most important takeaway from the session that we are planning?




The most important takeaway from the session is that associations need to conduct a thorough technology policy audit to address key legal, security, and governance considerations around emerging technologies like AI, APIs, and data privacy.

Some key points:

- Associations need clear policies on acceptable use of technologies like ChatGPT to protect intellectual property and data.
- They should evaluate technology vendors for factors like open APIs, data security, and long-term viability.
- Governance around technology decisions and responsibilities needs to be well-defined at the board/executive level.
- Associations should consider forming a technology committee to stay on top of these evolving issues.

The overall message is that associations can no longer take a passive approach to technology - they need to proactively manage the risks and opportunities. The technology policy audit is the critical first step.

 [Associations need data protection policies @ 25:06](#)

 [Associations should have AI usage policies @ 27:37](#)



Homework: Policy Review

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- Legal
- Governance
- Technology Procurement
- Operational

Policy Review

- Legal
 - Terms of Service
 - Privacy
- Governance
 - Member Directories & Contact Information
 - Personally Identifiable Information
- Operational
 - Passwords & MFA
 - AI Use





“You want to ask the tough questions before someone else comes along and asks the tough questions of you.”

-Mark D. Nelson, PhD, MBA, FASE, CAE



Download a sample privacy policy & AI use policy.

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