TECH TOOLS

NE/SAE THINK TANK | JUNE 2021

ABOUT THE THINK TANK

NE/SAE's June 2021 Think Tank focused on the technology and tools used by association professionals and industry partners. Attendees had the opportunity to share their favorite tech tools with the group as well as to ask questions and learn about new tools from their peers. This resource outlines the technologies that members have found helpful, continued technology challenges, and opportunities for the future.

KEY DISCUSSION POINTS

At the start of the session, participants were asked to do the following:

- Share their favorite association technology

- Share a new technology solution they have found helpful

- Share an area in which their association is still searching for the right technology solution

KEY THEMES

The following themes emerged during this month's conversation.

Engaging Virtually with Staff. The COVID-19 pandemic created the need for many associations to immediately shift staff from working together in an office to working remotely. Participants discussed the tools that make this transition easier. With traditional in-person offices beginning to reopen, associations must now determine which office schedules and formats will work best for their staff and their members and the technology needed to maximize staff connection and efficiency.

Working With Boards and Committees. Participants voiced their desire for technology solutions that let them more easily communicate and collaborate with their Board and Committee members.

KEY THEMES (CONTINUED)

Automation. All participants discussed the desire for technology platforms that allow for increased automation, in areas such as membership notifications, dues renewals, financial transactions, and individualized member content. One participant shared an example of a technology that automatically sends birthday and anniversary messages to members. Members have been very appreciative of this small gesture. Participants discussed that with increased automation the need for the manual and paper-based systems would decrease. With much of the workforce still remote, automation is crucial to working effectively.

Events, Meetings, and Trainings. Technology solutions focused on events, meetings, and trainings will remain vital to associations. Some participants expressed that they are looking for ways to reoutfit their current office space to better allow for livestreaming and remote participation. Many participants remarked that the expenses related to delivering hybrid learning can provide new opportunities for associations to partner regionally to share services and costs.

Advocating Virtually. With statehouses and capitols closed throughout the pandemic and some still restricting visitors, associations need to be able to efficiently and effectively provide advocacy virtually.

Community Platforms. Providing members with an opportunity to engage and collaborate with others can decrease phone calls and emails for association staff because it provides a venue for members to ask questions and learn best practices from each other. When association staff see recurring themes in member inquiries and needs, community boards provide a space for staff to reach more members at one time. Participants discussed that associations must consider the rules, best practices, and antitrust statements required for operating these kinds of community platforms.

ASAE's Community Board, *Collaborate,* is a space for members to participate in discussions and receive feedback and resources from other professionals. The Rules and Etiquette section of Collaborate can serve as an example for associations when creating best practices around their own community boards. Associations should also be mindful of legal issues that can arise with community boards. An example of an antitrust statement can be found in Collaborate as well.

Read More Here.

KEY THEMES (CONTINUED)

Scheduling and Calendar Management. Participants discussed the need to have technology solutions that decrease the administrative time needed to schedule meetings. Members have found certain solutions that are helpful in scheduling one on one meetings but continue to look for more robust options when it comes to scheduling meetings for larger groups.

Budget and Time Considerations. Associations must to meet the needs of members who want to continue virtual participation with those who want to return to in-person learning, while also balancing the cost and budgetary realities that come with delivering multimodal learning. Some tools that association professionals discovered as potential solutions were not financially feasible. Participants discussed that even when technology platforms meet a need, the amount of staff time necessary to manage the platform can negate the return on investment for the association.

TOOLS AND SOLUTIONS

Participants shared several tools and technologies that could be used by other association management professionals to address the key themes discussed above.

Note: The tools and solutions listed above were identified by participants of the Think Tank. NE/SAE does not endorse these companies and makes no representations, warranties, or guarantees as to, and assumes no responsibility for, the products or services provided by them.

Board and Committee Management

- Onboard Learn More
- Shareparency Learn More

Calendar Management and Scheduling

- Calendly Learn More
- Doodle Learn More

Communications

- Adestra Learn More

Conferences, Learning, and Networking

- Cengage Learn More
- Map Dynamics Learn More
- Remo Learn More
- ViewStub Learn More
- Wonderme Learn More

Feedback, Polling, and Surveys

- Ideanote Learn More
- Mentimeter Learn More
- Poll Everywhere Learn More
- Survey Monkey Learn More

TOOLS & SOLUTIONS (CONTINUED)

Finance

- Bill.com Learn More

Meetings and Presentations

- Microsoft Teams Learn More
- Zoom Learn More

Member Management

- MemberClicks Oasis Learn More
- Zen Desk Learn More

Project Management

- Basecamp Learn More

LOOKING FORWARD

Associations will continue to look for technology tools and solutions that allow them to provide increased value for their members and work more efficiently with their staff while balancing the need for these solutions to be budget-friendly and not overly burdensome for staff.

NE/SAE members are encouraged to share new solutions that they find with their fellow members throughout the year at our Think Tanks, conferences, and events.

ABOUT NE/SAE THINK TANKS

NE/SAE Think Tanks are monthly virtual discussion opportunities for members to discuss timely topics, assess emerging trends, and share challenges and success stories with one another.

Registration is FREE for members, but pre-registration is required. MORE INFO.

The next Think Tank will be held on Tuesday, July 27, 2021 and the topic is Creating a Cohesive Culture. If you have additional ideas for topics you would like to discuss in a Think Tank please email us at office@nesae.org.

ABOUT NE/SAE

The New England Society of Association Executives is the association for associations in New England! Our members are individuals involved in the management of professional societies and trade associations as well as their suppliers. Members represent associations of all sizes and include CEOs, Executive Directors, Membership Directors, Meeting Planners, and other areas of association administration. Industry partners represent hotels, conference centers, function facilities, CVBs, webinar companies, AMS providers, lawyers, lobbyists, exposition companies and other providers of services to the association community.

ne/sae

NEW ENGLAND SOCIETY OF **ASSOCIATION EXECUTIVES**

4 Lan Drive, Suite 310, Westford, MA 01885
office@nesae.org | 978-364-5059