



IMEX Association Day

Roundtable sessions

Monday 21 April 2008

Summary of discussions

Committee Management

(Moderator: Doug Price, DMAI)

- § People face a wide range of issues in this area. Discussion revolved around:
 - § How often do committees meet face-to-face
 - § What do you do with people who automatically have to serve on committees
 - § We agreed that most people are more likely to get involved when they can volunteer for committee work that they are passionate about
- § A problem with committees is they seem to come up with more work for the staff to complete
- § In the end, most agreed:
 - § It is best to keep committees focused on work that comes out of your strategic plan
 - § Do not have committees work on too many small projects because this can often lead to busy work for the staff
- § Give them a mission to work on a few large strategic initiatives that can have an impact on the entire organisation
- § Do not let committees come up with their own agenda. Often it leads to failure and frustration.

Corporate Social Responsibility/Green Meetings

(Moderator: Michael Lahey, ICA)

Don't be naïve. Trying to do the right thing by itself sometimes does not work out and has the undesired effect. One may need to balance politics with reality depending on the priority social responsibility has in the organisation. In order to work, there must be at least one champion on the board. Does the organisation approach this topic from a teaching, advocacy, or confronting style? Make initial steps small, careful, and constructive.

Potential ways to initiate this is to have members and the organisation look at their carbon foot print and go to websites where offsets can be purchased. Look at using organic foods for conferences, have members "opt in" for anything on paper as opposed to electronic, develop recycling programs, and consider local foods and lowering the quantity of food ordered to minimize waste.

Organisations must keep in mind that current information is contradictory and not always reliable and "scientific studies" can be used in many non-productive ways.

Delegates ROI

(Moderator Kate Walker, RMAA)

Five levels of ROI measurement:

- Satisfaction
- Learning
- Application
- Impact
- ROI (financial)

Methods for Demonstrating ROI:

- Surveys
- Benchmarks

- Statistics
- Interviews
- Metrics
- Brand identity and loyalty

Importance of ROI:

- Executives want to see ROI benefits
- Will not “support” if no “tangible” benefits

Plan Your Meeting with ROI in Mind

The ideal time to think about an ROI strategy for your meeting or conference is during initial planning. Selecting the appropriate meeting or event to analyse is the first step toward ROI measurement. Meetings designed to provide high levels of training and education are ideal candidates for ROI analysis. Intensive learning and training increases attendees’ knowledge and skill levels, and in turn, enables them to take actions that affect business measures – sales training leads to a more effective sales team that will influence revenue.

Taking Practical Steps to Achieve ROI

The ROI Methodology is based on the study of five levels of measurement (or data collection) that includes:

Level 1 data is reaction data (to the meeting or event), and includes planned action that results from attending an event. For meetings and conferences, this is usually concentrated. Suggestion: Survey your attendees and ask questions that include “Was this meeting useful, necessary, motivational, challenging, and important to your success?”

Level 2 data is based on learning. Assess what your attendees learned. This can include new product information, information about the direction of the association, or a new strategy. In addition, look at other meeting benefits such as, “Did attendees make new, valuable contacts?” This important data regarding learning will translate into value during Level 4 evaluation.

Level 3, collect post-event application data. Use methods such as questionnaires to find out if attendees are doing anything differently as a result of attending a meeting. “Did they implement something? Did they change a process? Are they using some skills or new knowledge that was captured at the meeting? What are they doing differently?”

Level 4 data concerns the impact of what attendees are currently doing and how that activity affects business measures. Here collect data that tells you the consequence of the application. At this Level, ask participants, “Did your productivity go up? Did your cycle times go down? Did the quality of output improve? Did your sales go up? Did customer satisfaction improve?” All of these things have impact on business measures.

During Level 4 convert the collected data to a monetary value.

Level 5, perform the actual ROI calculation. Calculate the financial ROI by looking at the costs vs. the benefits, and then realise the monetary benefits of the meeting. Two steps are required to arrive at ROI. First, convert the data to money, and then compare that to the fully loaded costs of the meeting. For meetings and events, typically examine the benefits and improvements that accrue over a one-year period. One year is a conservative measurement because a meeting or conference can create positive consequences over a much longer period.

- In presentations, make each presenter have three (3) key points at the end that the delegate can take away and use “tomorrow”.
- Ensure include “networking” – measure.
 - Actionable vs. Measurable:
 - Actionable: Satisfaction, learning and application
 - Measurable: Impact and ROI

- Use of technology: Wikis, As part of sessions

Things to Measure:

- § The meeting's lifecycle — Repeatable meetings are greater candidates for ROI; there is less value in measuring ROI for one-time-only events.
- § The strategic focus of the meeting — The closer a meeting's focus is to the strategy of the organisation, the greater its candidacy for measuring ROI.
- § The meeting's role as a problem solver — if the meeting is important enough to correct a major problem/issue for the organisation, it may be important enough to measure ROI.
- § The cost of the meeting — The more expensive a meeting is, the more likely it is a candidate for measuring ROI.
- § The size of the audience — A large annual conference would be a better candidate for measuring ROI than a small regional meeting.
- § Meeting accountability — ROI measurement may be demanded by the ultimate owner of the meeting.
- § Respond to data immediately.

Education Programme Development

(Moderator: Doug Price, DMAI)

Content is determined in a number of ways depending on the type of organisation:

- § mandated by the board
- § chosen by university professors
- § suggested by an education committee
- § hot topics driven by the market (example: supports current professional standards, what is being discussed on member list serve, blogs, etc.)

- § post congress evaluation forms are used for future topic suggestions
- § students suggest topics not currently offered at their university
- § RFP submissions from speakers
- § peer review abstracts

Suggestions on how to find speakers:

- § Only invite back those speakers with excellent ratings
- § Assign a chair person to be responsible for coaching presenters
- § Have more than one presenter in each session for variety
- § Ask education committee members to recommend excellent speakers they see in their travels
- § Find speakers that can speak to what is hot in papers now (use a speakers bureau)
- § Need good teachers / facilitators for workshops that encourage audience participation -- not just lectures
- § Bring in outside industry speakers to take the audience to a new dimension / motivation level

Event Marketing

(Moderator: Sandrine Castres, ILCA)

Heterogeneity of participants (agencies vs associations and size and fields of associations)

Definition of events marketing very variable:

- § Find new membership
- § Fundraising
- § PR
- § Logistics

Objective and concerns are different for final clients / meeting owners vs PCO

- § Event is a marketing tool to “sell” their services, ideas, etc
- § Marketing must aim to have a meeting as profitable as possible

For many participants, the event is a marketing tool for associations

Marketing is the first “victim” of lack of funds

The main concern is: how to measure impact of marketing? (and how to measure the respective impact for participants / sponsors / event owner)

If we cannot measure impact, we cannot improve it

Some ideas: measure number of mails read, visits to different parts of a web

On a general aspect, many participants came to learn and hoped to have someone at the table giving them ideas and concrete solutions

Managing Conflicts

(Moderator: Kate Walker, RMAA)

What is conflict resolution?

Conflict resolution is a process of working through opposing views in order to reach a common goal or mutual purpose.

Conflict – a three part continuum:

- § Hidden conflicts
- § Constructive differences
- § Troublesome disputes

Crucial Conversations:

- § The stakes are high
- § Opinions vary
- § Emotions run strong

We typically handle these conversations by:

- § Avoiding them
- § Facing them and handling them poorly
- § Facing them and handling them well

Responses to Crucial Conversations:

Fight ← or → Flight

or

Silence ← to → Violence

We go to “silence” when we feel unsafe

We go to “violence” when we feel unsafe

Why should we have “crucial” conversations?

- § It will improve our health
- § It will improve our relationships
- § It will enhance our job performance and success
- § It will make a difference

Dialogue

We are “always” in control to change “our” behaviour

Key Components to Conflict Resolution

- § Controlling emotional responses
- § Seeking understanding
- § Identifying needs and common interests
- § Seeking mutual benefit or purpose

Control Emotional Responses:

- § Start with yourself first – the only person you can control
- § Reflect (what story are you telling yourself about the situation)
- § Clarify what you what

Seek Understanding:

- § Master your story
- § Ask for their story (be willing to listen)

Identify Needs and Common Interests:

- § Listen and hear clearly what others need
- § Look for mutuality
- § Use contrasting statements to state clearly what your needs are

Seeking Mutual Benefit or Purpose:

- § Commit to seek mutual purpose
- § Work towards mutual respect
- § Brainstorm strategies
- § Agree where you can
- § If you differ significantly, don't suggest others are wrong, rather, compare your views.

Points to Consider:

- § How did we each contribute to the current situation
- § How can we change it?
- § What can we do about it as we move forward

Don't let the conflict control you – the conflict is not who we are

Six things to keep in mind:

1. Start with yourself – reflect
2. Share your facts
3. Tell your story
4. Ask for their story (and be open to hearing it)
5. Encourage dialogue by enacting mutual purpose
6. Talk, talk, talk.

Key areas to focus on:

- § Organisational reality
- § Existence of conflict
- § Role of conflict
- § Organisational implications of conflict absence
- § Culture and conflict
- § Conflict friendly workplace

Relationships with Global Organisations

(Moderator: Tom Reiser, ISN)

The group discussed the following point:

- How do organisations best establish relationships with global organisations (discussions focused primarily on relationships between (international) organisations and global organisations like UNO or WHO)

and agreed on the following major statements:

- 1.) Organisations need to carefully establish what they really want/need from relationships with global organisations (sometimes the interest is bigger than the gain)
- 2.) A clear plan of approach including objectives, timelines, resources and key players /responsibilities needs to be developed (it was cautioned that approaching and building relationships with global organisations can be time-consuming, costly and frustrating)
- 3.) “Champions” that are well connected (within your organisation or from the outside) are important can be important “door openers” (personal relationships count for much)
- 4.) Partnerships with related (or other fitting) organisations in the approach may increase the chances of success (think outside the box!)
- 5.) Coming back to 1.), and depending on the objectives, it may be more beneficial to seek collaborations with regional or national organisations (rather than global ones)

Sponsorship

(Moderator: Guy Coudert, CICILS)

1. What is sponsorship?

A way to:

- a. Balance an association budget;
- b. Finance a convention budget;
- c. Finance an individual or local event, entrance to the event, local hospitality;
- d. An opportunity to offer scholarship, educational programs, financing a foundation;
- e. As part of a long term relationship with companies in supporting a specific budget.

2. Relationship with companies

This relation needs to be a win-win situation. The company wants to enhance its profile and image or may want to promote a product or both.

The association shall offer an answer to this request.

Promotion of a product is a very specific issue and most associations are reluctant to allow it except if it is part of an exhibition.

3. How prospect and collect sponsorship money?

Call on key potential companies and build a constant relationship with key contacts (Xmas cards for example). Also call on a database.

To understand the needs of the sponsors organize a small committee meeting representing the sponsors to speak with the Association.

One suggestion: sponsorship of specific project by a few companies. Also extend what your association stands for and extend other potential sponsors (pulses/health/mineral water).

Do not forget that a decision made by the head of the company may differ from staff expectations.

4. Finally, use a salesman to sell sponsorship.

Sponsorship

(Moderator: Michael Haley, ICA)

The discussion quickly centered on the need for an organisation to be clear on what a sponsor would gain. While it might be obvious to an organisation, it is rarely clear to the potential sponsor. As well, there was a group consensus on the need for the organisation to have a clearly developed set of guidelines prior to approaching potential sponsors to insure that all are treated the same way and that possible conflicts of interest are minimized.

If an organisation holds its conference in the same location or returns frequently, then local sponsorship becomes more likely. If the conference moves to new locations, local sponsorship decreases. If the organisation uses volunteers to help secure sponsorships, then workshops on how to do this are needed, or they feel so inadequate that they rarely try. Also look at your members to see what they might be able to offer a sponsor (such as free consumer research) in exchange for sponsorship.

Other helpful hints were to work with the local CVB's for possible sponsors, include the need and/or requirement for local sponsorship in the bidding process, be very transparent, and consider sponsored sessions and panel presentations if allowed by your organisation.

Strategic Alliances & Partnerships

(Moderator: Tom Reiser, ISN)

The group discussed the following points:

- How can (strategic) alliances and partnerships be useful ways to achieve an organisation's objectives
- What are some of the key elements of successful (strategic) alliances and partnerships

and agreed on the following major statements:

1. Organisations need to carefully establish what their objectives are for a (strategic) alliance partnership with other organisations (a member benefit, PA, PR, financial benefits, greater negotiating power, etc.)

2. A shared vision and mission (and the right level of diplomacy) are critical in launching (strategic) alliances/partnerships, but the proper (and formal) agreement on the logistical collaboration will sustain them (e.g. Memorandum of Understanding)
3. Expectation management between the partners (but also their respective constituencies) is critical - at the outset but also as the partnership/alliances progresses (communication plays a critic role)
4. In selecting the best alliance partner, organisations should carefully assess how the partners may complement each other, where overlaps may exist (this could lead to efficiencies), what competitive challenges may arise, as well as how the partnership/alliance may/or may not have different advantages/disadvantages in the short and long term
5. Ingredients for successful partnerships/alliances are
 - a) a shared vision
 - b) clear and mutually agreed and measurable objectives
 - c) clear roles and responsibilities and timelines
 - d) trust and transparency
 - e) a win-win set up
 - f) open lines of communication
6. Organisations should think outside the box when it comes alliances partners – sometimes the best partners are not who one thinks of first (this could include commercial partners, associations in other fields, competitors, governments, etc.)
7. Alliances or partnerships may not always have to be “strategic” or “long-term” they may well be more successful when focused on a project/issues and be limited in time
8. Organisations are further advised to set clear Key Performance Indicators and timelines in order to re-assess the success of a partnership/alliance
9. Organisations should more often and openly consider stopping project (or changing partners) if the benefits are no longer there. This needs to be managed carefully and needs diplomacy.

Acronyms:

CICILS – International Pulses Trade and Industry Confederation (“Confédération Internationale du commerce et de l’Industrie des Légumes Secs »)

DMAI – Destination Marketing Association International

ICA – International Communication Association

ILCA – International Liver Cancer Association

ISN – International Society of Nephrology

RMAA – Record Management of Australasia