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FINDINGS FROM THE 2018 DIGITAL TRANSFORMATION ASSESSMENT (DTA) STUDY & RESEARCH PROJECT FOR ASSOCIATIONS

Digital Transformation Assessment (DTA™) for Associations

A REVOLUTION IN ASSOCIATION MANAGEMENT

By Ellen Moore, Thomas G. Loughlin and Don Dea

SUMMER 2018

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"DTA tackles a vast and complex opportunity and provides a framework for thinking and action... digital transformation is a journey with multiple milestones that are refined and revised successively as technologies, social engagement, and regulatory advancements evolve."

-CARLA BALAKGIE

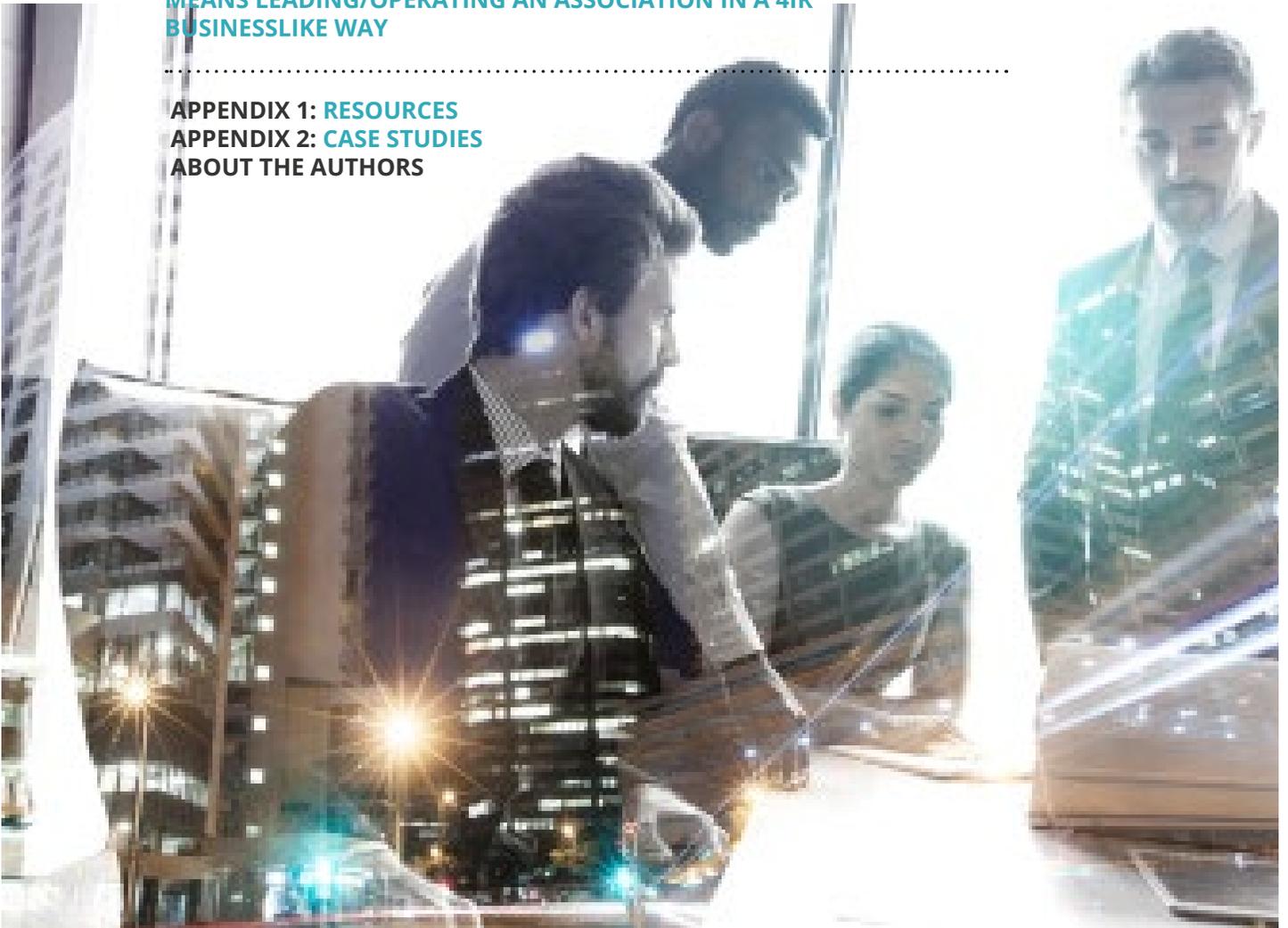"The focus on customer is important, as that's often the key to strategy in a digital age."
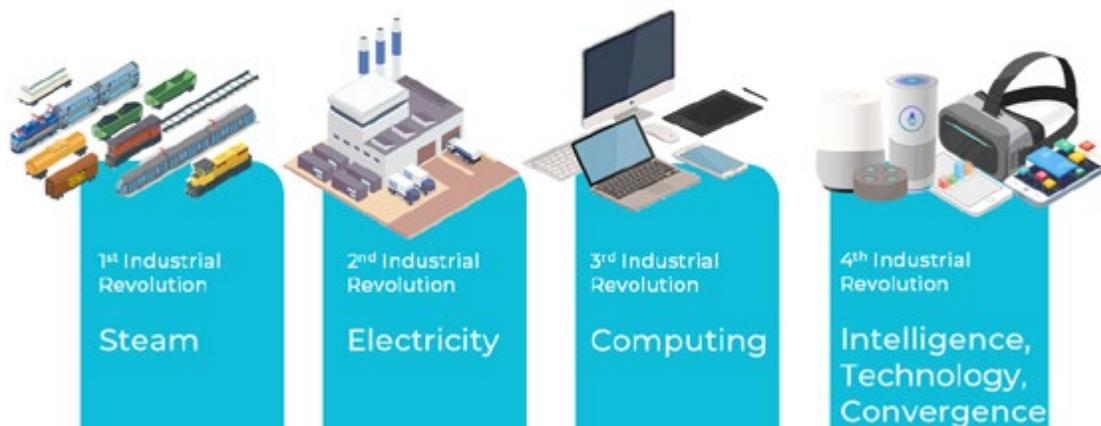
-ANH PHILLIPS

Contents

What Is Digital Transformation?

Industry 4.0 or 4th Industrial Revolution (4IR): Over generations, the cause and effect of technology and society has been characterized as Industrial Revolution. Each era was characterized by massive change with broad impact and consequence. This far-reaching term was used because of the dramatic impact that new technologies and their application to industry had on society and the workforce. Whole new industries were created and the lives of millions were transformed in each Industrial Revolution.

FOURTH INDUSTRIAL REVOLUTION

Next-generation technologies are rapidly transforming economies and the way we relate...
To each other, products, services, companies, and institutions.

1st Industrial Revolution — Steam

2nd Industrial Revolution — Electricity

3rd Industrial Revolution — Computing

4th Industrial Revolution — Intelligence, Technology, Convergence

The first Industrial Revolution came about through the invention and propagation of steam as a source of power. Steam was followed by the second Industrial Revolution of electricity, mass production, and communications. The third revolution is characterized by computerization and digitization. Each new revolution is built upon what came before and achieves a step increase in scope, scale, and impact. The period we are now in is the fourth industrial revolution. It is characterized by the convergence of computing capability (processing, Artificial Intelligence, machine learning, etc.), big data, automation, robotics, and materials. Industry 4.0 or 4IR has evolved into a global movement reaching into every corner of the planet as technology resources are applied for commercial and social purposes.
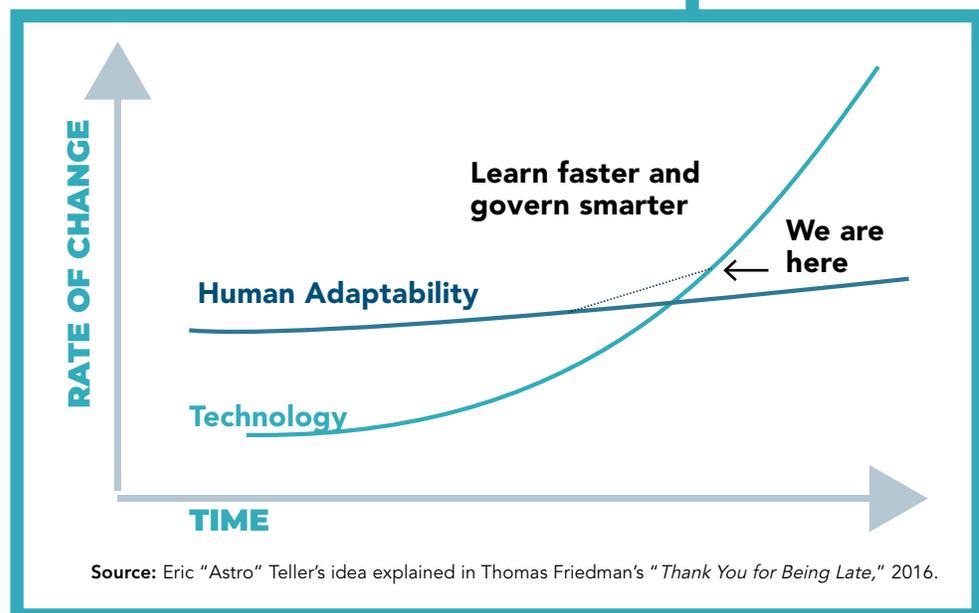
While the previous industrial transitions occurred linearly and then geometrically, the fourth industrial revolution is evolving at an exponential rate. The result is that we live in a period where the impact and velocity of change is unprecedented. The effect is that traditional models of business and engagement can be disrupted and rendered obsolete almost overnight.

Digital Transformation (DT) ensures that organizations of all types (including associations and not-for-profits) are capable of responding to the opportunities and threats related to significant and rapid change.[1] DT is the convergence of digital technologies applied to organizational activities, processes, competencies, customer needs data, intelligence and models yielding significant efficiencies, and service and market opportunities for associations and not-for-profits.

> **Digital transformation is not about technology.**
> **It is about STRATEGY, LEADERSHIP, and new ways of THINKING**
>
> -David Rogers
> Researcher, Author
> "The Digital Transformation Playbook"

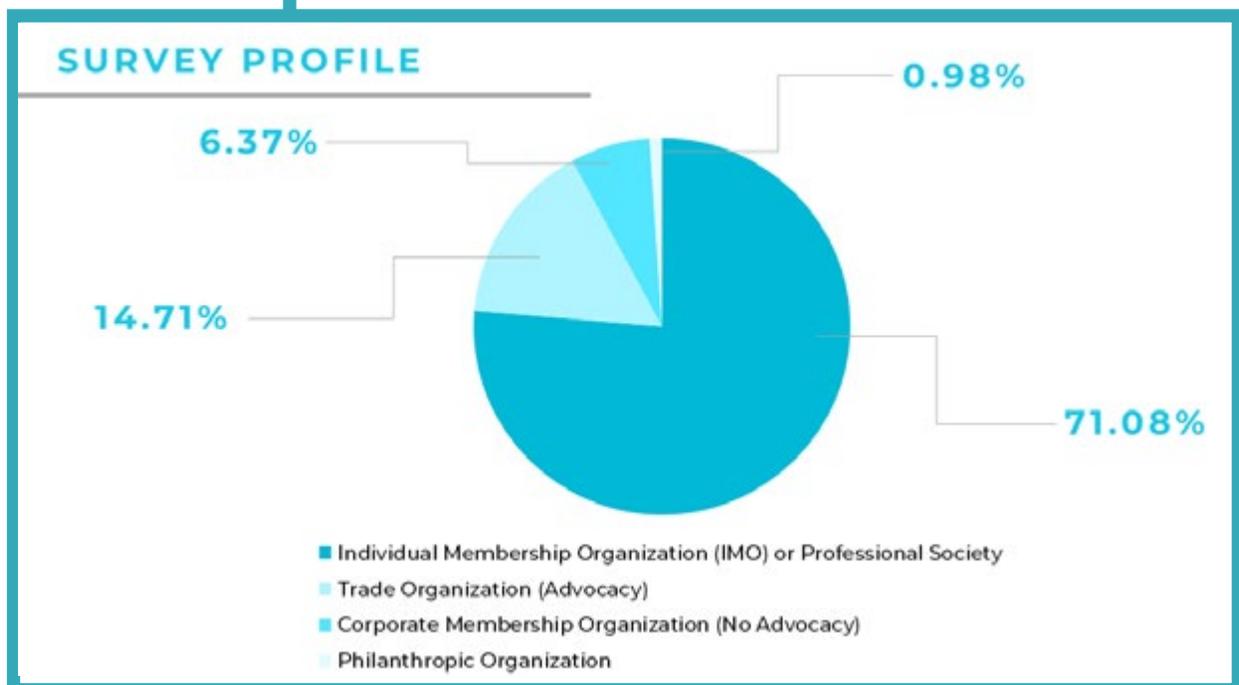**Source:** Eric "Astro" Teller's idea explained in Thomas Friedman's "*Thank You for Being Late*," 2016.

1. MIT Sloan- Your Company Doesn't Need a Digital Strategy

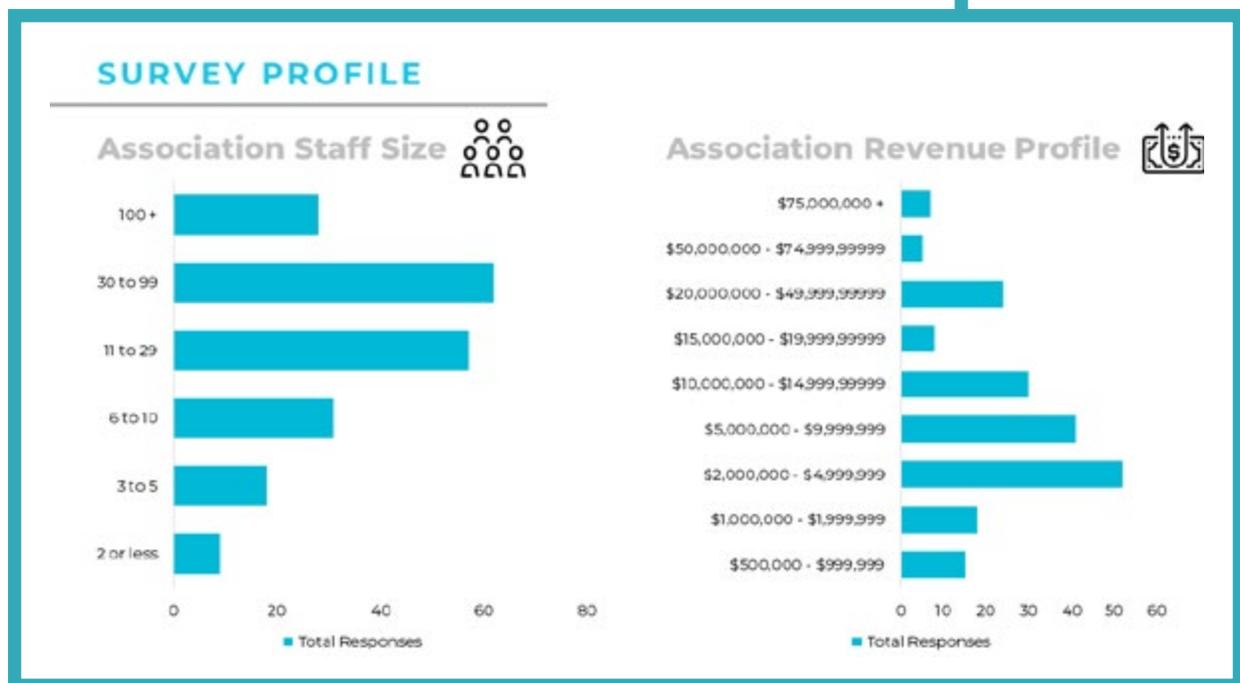# IS YOUR ASSOCIATION READY FOR DIGITAL TRANSFORMATION?

What is your association's/society's state of Digital Transformational Readiness today? We developed the Digital Transformation Assessment (DTA), which is a research-based assessment tool and model that will help you evaluate where your organization stands in this critical strategic endeavor.

The first DTA survey was conducted in early 2018 with a survey sent to hundreds of association executives and leaders. The sample was drawn from both Individual Membership Organizations (IMOs) and other professional societies as well as trade organizations. Nearly two-thirds of the respondents were from the IMO/professional society category with 15% representation from Trade organizations. While there were strong similarities, there were some notable differences among the groups. There were more than 275 responses resulting in the study of 204 organizations.

As we developed the survey structure and approach, we considered how businesses in our world of associations and societies are dealing with their own industry disruption and journey of transformation.

SURVEY PROFILE

- Individual Membership Organization (IMO) or Professional Society
- Trade Organization (Advocacy)
- Corporate Membership Organization (No Advocacy)
- Philanthropic Organization

0.98%
6.37%
14.71%
71.08%

We considered other models from **Deloitte[2], McKinsey[3], Forrester[4], Capgemini[5]** and others to build a list of competencies for association transformation that made sense given the current state. We validated and tested our assumptions with a pilot group of thirteen organizations in various stages of their own digital journey. To further validate our assumptions and gain more insight into what organizations are doing, we developed seven case studies of organizations that are maturing at a faster pace than other associations. (See Appendix 2.) Ultimately, we built a "readiness framework" in the form of a Digital Transformation Assessment (DTA) for associations, which we are sharing to help organizations (executive staff, boards, and members) re-imagine and begin to prioritize a transformed future.

SURVEY PROFILE

Association Staff Size

100+	
30 to 99	
11 to 29	
6 to 10	
3 to 5	
2 or less	

0   20   40   60   80

■ Total Responses

Association Revenue Profile

$75,000,000 +
$50,000,000 - $74,999,99999
$20,000,000 - $49,999,99999
$15,000,000 - $19,999,99999
$10,000,000 - $14,999,99999
$5,000,000 - $9,999,999
$2,000,000 - $4,999,999
$1,000,000 - $1,999,999
$500,000 - $999,999

0   10   20   30   40   50   60

■ Total Responses

2. Deloitte
3. McKinsey
4. Forrester
5. Capgemini

Executive Summary

Digital Transformation (DT) reflects how firms are responding to the significant shifts taking place in the external environment. It may be more accurately described as the business transformations underway in response to powerful new capabilities (and threats) such as digital marketing, big data, artificial intelligence, machine learning, and the like. Firms in all fields that work to inculcate these emerging capabilities into their culture and work-flows may initially struggle yet we believe they will thrive at the end of the day by remaining focused on their overarching goals and strategies.

Understanding and leveraging a new mix of digital technologies, culture, talent, and their accelerating impact across associations/societies in a strategic and prioritized way will present and ensure a future that supports and advances the organization's mission, resiliency, and relevance. Associations are competing in a new frontier; our associations/societies and stakeholders face enormous challenges ahead, notwithstanding Amazon's ambitions to sell everything to everyone. Unlike the past, associations cannot afford to "stay the course" and merely follow the broad trends. DT is a business imperative in today's competitive association landscape.

To ignore DT as a fad or not relevant to associations is not an option. This is similar to challenges facing businesses today, because, after all, associations are small to mid-sized businesses. Approaching DT with foresight and anticipation allows the organization to actively shape its future before it is disrupted, turning change into advantage.[6]

HOW TO USE THIS RESEARCH REPORT

Associations as a business class have unique characteristics. Though as not-for-profit organizations they are mission-driven and serve the public good by definition, they have a membership component which adds a complex dimension. Membership in itself is simply a defined group of individuals with a common interest, and associations represent the formal organization of that group.

6. Burrus, *The Anticipatory Organization*

Associations form and sustain around a group to grow and enhance knowledge, professionalism (often including credentialing), enable networking, engagement, and connections at meetings (across engagement modalities), while at the same time representing the membership/constituency to advocate for positions and beliefs.

To the association, members are the primary consumers of their goods and services, but the role of members goes beyond that. Members are often very deeply involved as volunteers sustaining an association. They may engage in anything and everything from governance to program development and delivery. The impact on the member is a strong personal connection with their association creating a sense of identity, emotional connection, and propriety. This creates an environment where both the operations management and even the culture is shared between the professional staff and membership/volunteers.

The model of member engagement with their association has been the foundation of the association for many years. It has worked. Associations have thrived and grown with the expansion of the economy through the 20th Century and into the 21st. The challenge, however, is that the essential characteristics that define the association can become impediments of existential proportion in the current era defined by rapid change and the transformative, immediate access to information, insights, content, and knowledge that have been their hallmark. The organizations that are succeeding in transformation are evolving quickly and think beyond members by creating real ecosystems of value for their **customers** (including members).

Here are just a few of the challenges facing associations:

- **Accelerating rate of change of the external environment.** In serving members, associations are naturally attuned to their wants and needs. The challenge is that the environments in which the members work is shifting at a rate faster than the members themselves. By focusing on the member, the association is inherently behind the primary market. The gap between the association and the primary market will continue to grow as the external environment shifts at an accelerated pace.

- **Membership/constituency is changing.** Simply stated, the generation described as "Millennials" is not comprised of traditional joiners. This in itself is a threat to a member-based organization, but in the shared leadership/operations

model of the association it may be catastrophic. When seasoned members/volunteers are ready to move on, there is an inadequate supply of new members, thus forcing a recycling of older members. This further isolates a member-centric organization from the relevance and needs of the next generation and perhaps a broader global marketplace. The corollary effect is that the mature, recycled members will continue to embrace technology solutions as specific, evolutionary improvement, but will likely miss more significant digital and mobile trends that digital natives (i.e., Millennials) embrace naturally.

- **Technology shift.** If one element of the 4th Industrial Revolution is fundamentally clear it is that convergence, data, Artificial Intelligence (AI), the Internet of Things (IoT), etc., require an "ecosystem" or platform approach as continuous innovation, digital offerings, and intelligent insight will necessitate resilient and connected data, platforms, standards, and applications. The current generation of ecosystem capabilities such as Apple, Google, Salesforce, Microsoft, Open Source, and Blockchain will continue to expand and evolve. More work on expanding understanding and approach in this area will be further amplified in future research.

- **Complexity of business environment.** There are many challenges to running a business today. Everything from enterprise risk management to cyber security to digital marketing all live large in the minds of executives across the board. While it is challenging under the best of circumstances, it is a far greater challenge to manage in an environment where authority and accountability are not always clear as in the shared leadership model that associations operate in today. These challenges are exacerbated by the turnover characteristic of association boards. The current environment places new demands on association governance for agility, adaptability, innovation, trust, speed, and risk management.

This report is designed to give association leaders the knowledge and critical tools to assess their own digital readiness capabilities while providing resources to continue to align and transform the organization. Ultimately, we anticipate this insight will provide the tools to support organizational growth and enable societies to thrive in this period of uncertainty.

1. It's more about transformation than digital

This report demonstrates how leading associations are succeeding in this era of rapid change. The authors have conducted exhaustive interviews with organizations that are in command of the tools, environment, and culture necessary to ensure success. The information is curated into key findings and behaviors that can be executed readily.

The secret formula that the benchmark organizations share is that there is no secret formula. Quite simply, the organizations that are in command of the moment are managing their associations in a businesslike (4IR) way. This translates into organizations where the culture is built on an obsession with customer needs and is supported with open, agile operations that continuously innovate and execute. Ongoing change (along with managed risk and uncertainty) is welcomed and expected.

DT is a journey with multiple milestones that are refined and revised successively as technologies, social engagement, and regulatory advancements evolve. Key pillars in this journey are achieving operational excellence in delivering customer/ member engagement, solutions, and service while leveraging strategic platforms that enable agile delivery and innovative offerings. These innovative offerings advance the mission and continuously sustain relevancy and resilience of the association/ profession/sector. Success is no longer as simple as building and launching a monolithic "member-centric" solution.

2. Digital Transformation Assessment (DTA) for associations tool

This report will guide the association leader through the implementation and use of the DTA for associations tool. Through the use of the tool, the association can determine its own maturity, conduct a gap analysis, and formulate a path forward.

The tool provides a basis for engaging key constituents including volunteer leaders and staff in meaningful discussions and actions.

Key Research Findings

LEADERSHIP MATTERS

Of the nine characteristics we studied, **leadership is the most critical.** This was further reinforced by the pilot group and the case study responses. Digitally mature organizations today have CEOs and executive leadership teams heading up DT. **DT can't be delegated; leadership is non-negotiable.** The executive team owns it and intentionally drives it internally and at the Board level. There was a strong sense of commitment and team cohesion and investment by the CEOs of those organizations responding to more advanced transformation in their organizations. This does not mean the CEO is doing everything; they are engaged, consistently showing support and walking the talk. The data indicated executive leadership teams proceeding with their transformation have formed an alliance in this area and enjoy each other and the adventure (and success) that comes with significant efforts around preparing for disruptive forces and business transformation.

WHAT CEOs ARE SAYING:

Digital Transformation can't be delegated; leadership is non-negotiable.

Comparing the pilot group and the overall survey respondents, we recognized a notable difference in the leadership domain in particular, and in the key competencies falling under leadership.
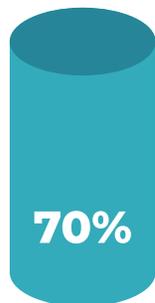
Seventy percent (70%) of the pilot respondents indicated they had incorporated digital into their strategy and have begun to allocate R&D dollars to innovation and digital transformation. Just 48% of the overall respondents indicated the same.

Ninety four percent (94%) of the pilot respondents indicated they had incorporated digital into their strategy to guide decision making as compared to just 27% of the overall respondents.

Have incorporated digital into their strategy and have begun to allocate R&D dollars to innovation and digital transformation
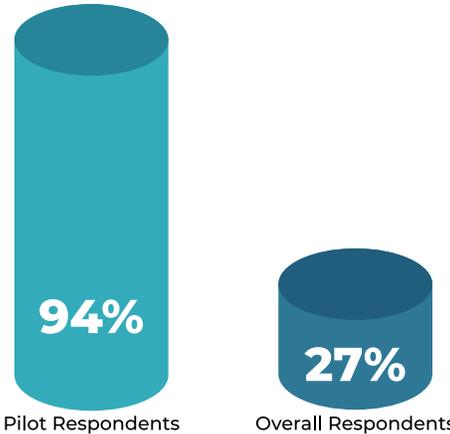
70%

48%

Pilot Respondents

Overall Respondents

When asked whether their organization allocates R&D funding in support of new "innovation" initiatives with the intent to drive digital transformation, 69% of the pilot respondents strongly agreed or agreed with the statement and just 48% of the overall survey participants responded similarly.

Today, digital leaders need to be **productive disruptors who question the status quo** and can envision a new world for the organization/profession/industry. You could say with DT, the executive or leadership team is the most critical factor of success for the organization. The implications of these necessary and expanded skills for digital leaders on the association community are significant and likely will impact executive-level hiring and development for the next decade.

For additional insights into future association leadership competencies, the *Association Leadership 2020 report* provides insights into significant challenges facing association CEOs now and in the future.

Have incorporated digital into their strategy to guide decision making

94%
Pilot Respondents

27%
Overall Respondents

Allocates R&D funding in support of new "innovation" initiatives with the intent to drive digital transformation

69%
Pilot Respondents

48%
Overall Respondents
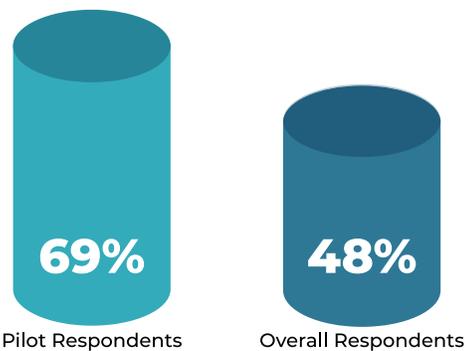
LEADERSHIP MATTERS

Digital leaders are innovative and inquisitive, exhibit transformative vision, are open to new thinking, are disruptively entrepreneurial, are willing to go against the grain, cut through red tape, demonstrate new perspectives on emerging business models and transforming the customer (member) experience, relatable, able to inspire, motivate and foster collaboration.

It is the leadership starting with the CEO and a cohesive executive team that drives digital transformation

THE DT JOURNEY WITHIN THE LEADERSHIP DOMAIN

	Early	Emerging	Establishing	Future Ready/ Digitally Mature
Leadership Domain **What Organizations Do Along The Journey**	Aware and supportive of Digital Transformation, but not actively linking activity Contemplating first steps in the process	Aware and intentional about linking digital activity and platforms and people (members, customers and teams)	Using data from digital environment to drive performance and impact Embrace need to digitize current businesses and innovate in support of new digital models	Deliberate anticipation of strategies and capabilities required to improve organizational performance and drive digital behaviors Willingness to make bold (digital) moves in support of digital transformation
DTA Audit – Leadership Domain **What The Association Environment Looks Like**	We're aware and supportive of DT We're not yet connecting the digital dots Exploring and considering our first digital steps	We have heightened consciousness and intentions linking digital activities, platforms and people	We embrace the need to transform and innovate using new digital tools, options and models We're using digital data to drive performance and deliver outcomes	We're using anticipation to improve organizational performance and drive digital behaviors We exhibit a willingness to make bold (digital) moves in the organization in support of digital and business transformation

In the overall survey, only 60% of the overall survey respondents indicated they had confidence in their leadership team exhibiting the necessary skills to implement digital change. In the pilot group, 100% of the respondents indicated support and confidence in their leadership teams to embrace and exhibit the skills necessary for digital transformation. People are the key to DT.

CULTURE MATTERS

Another key characteristic that organizations exhibit as they mature is that they have an evolving culture. This was identified as one of the most difficult areas to master among pilot survey and case study respondents. We repeatedly heard from respondents that it's the people in an organization that will execute and drive digital changes and support an obsessive focus on customers. Creating an environment where your people are engaged, feel empowered, and have been inspired to make a difference in the lives of the customers and members they serve and support is critical.

In many ways, in this period of rapid and significant change, **you can say culture is the new strategy.** Organizations need both culture and strategy together because you can't have strategy and execute it well without the supporting culture. Organizations that focus on values, assumptions, and behaviors and put people (staff and customers) first are on the best path to transformative success. Some organizations reported they've flattened communications and organizational structures to lead to more innovation as some of the early steps they've taken to move toward transformation. Others have indicated unbundling old structures and operating in transparent and collaborative ways are practices that help to prepare for transformation. Many organizations underestimate the staff they have and have yet to inspire the kind of mindset (or create a culture) that will make DT effective. Gaining a clear understanding of the current and evolving culture of the organization in the context of the DT imperative provides perspective to the leadership and will inform further opportunities to shift cultures as a path forward. Shifting culture is an iterative process and will not happen overnight. Without the right people with the right mindset and skills to execute – including a willingness to embrace change as a business imperative – any progress you make with process and technology (by going "digital") will be short lived. It will be unsustainable progress. To digitally transform your organization, PEOPLE and TALENT MATTER!

PEOPLE ARE LOYAL TO CULTURE NOT STRATEGY

Some groups have already begun to add the key elements of collaboration and teamwork into the performance review process making their teams accountable for these critical behaviors while embedding them into the culture.

PRIORITIZATION AROUND THE CUSTOMER/MEMBER

Our research showed a new compelling commitment and often obsession around the customer. Looking beyond members, the customer expands the reach of the organization. Then a laser focus on their wants and needs with a customer-first mindset is necessary today. This requires insights and data that many organizations are just gathering or assimilating. This obsessive mindset permeates the organization and helps create a rallying point for staff and volunteers to be available and accessible to customers at their moment of need. This may include examining your accessibility and the approach the customer must take to find and reach the organization. Ultimately, the goal is to create a frictionless experience for customers/members.

Several respondents expressed this new approach as creating an ecosystem of value around the customer/member. The process of customer/member prioritization includes compiling data and assumptions that can be used to form strategies and plans that will lead to more value.

The pilot respondents indicated 85% agree/ strongly agree with "the organization has clearly defined methods and the technology to create value for all key stakeholders…" and only 57% of the general survey respondents had similar levels of agreements.

Leaders enable a culture that fosters digital practices including enabling multi-disciplinary teams. DT is a TEAM SPORT and people matter.

Agree the organization has clearly defined methods and the technology to create value for all key stakeholders…

85%
Pilot Respondents

57%
Overall Respondents

Association Digital Transformation Assessment (DTA) Framework

Associations naturally vary in size and complexity. Size can be measured in membership, annual revenue, staff size, reserves, reach, etc. And, though these metrics can vary widely from association to association, there are a number of fundamental characteristics that are shared. Associations share similar aspects of membership engagement, governance, and not-for-profit tax status that can all impact operational and even cultural elements that are characteristic of mission-driven organizations.

The research demonstrates that the nine common domains of DT apply to organizations of all sizes and complexity. This was also confirmed by the case study work where both the progress and challenges associated with transformation transcended association size and complexity.

The similarities characterized in the research make it possible to construct a framework that is useful to associations of all sizes and complexity.

The Association DTA organizes the nine domains into three sections – Leadership, Operations, and Outcome.

DTA FRAMEWORK

- **Digital Urgency:** The organization recognizes the threats vital to organization. Processes and services with the acceleration of technology's compression on the business.

- **Leadership:** Executive/senior management leaders exhibit key characteristics of agility, flexibility, and collaboration; they embrace change and innovation with appropriate risk tolerance. These are experienced leaders executing daily business.

- **Governance:** Clear communication of strategy, new models are considered to make for a nimble organization with a value differentiation.

- **Culture:** Teams are cross-functionally empowered, not siloed, work collaboratively and learn from each other. Experimentation, entrepreneurship and continuous learning is encouraged to enable innovation.

- **Workforce/Talent:** Puts people at center of digital by investing in education and learning; providing opportunities for people to develop and contribute to digital. Clearly identified roles and digital responsibilities for staff and volunteers.

- **Operational Excellence/ Management:** Organization continues to reinforce its digital vision and plans in communicating well internally and externally; clearly define and communicate success metrics and KPIs; prioritizes investments and aggressively budgets

- **Customer Engaged/Informed:** Allows digital agenda to be driven from outside-in; encouraging input and involvement in design; customer connectivity – improved customer experiences and organization engagement; customer-centric ecosystem based on dynamic market conditions and customer journey

- **Data-driven Decisions and Insights:** Systematically gathers and analyzes data and business insights to continuously inform and enhance the strategy; data used to support channel and key metrics to steer strategy, etc. Data-driven decision making embedded throughout organization

- **Products/Services and Features:** Recognizing traditional products and services can be disrupted and may benefit from broader audience; rapid deployment often skipping pilots, regular evaluation of products and services with intent to sunset obsolete items; organization looks out and ahead re-imagining the organization building on mission and value.

THERE ARE THREE KEY COMPONENTS OF THE ASSOCIATION DTA FRAMEWORK.

1. **Domains:** The nine domains representing the fundamental characteristics represent a cross-section of the organization and provide a meaningful reference point by which to measure readiness. The domains define the vertical axis of the framework.

2. **Leadership... Operations... Outcomes Ecosystem:** The nine domains fit within three larger buckets and the interaction and interdependence reflect the ecosystem. **Leadership** charts the course with strategy and translates that strategy into the **operation** which ultimately puts the result in the hands of the member/consumer demonstrating **outcome** (sales, impact, etc.) At each stage, feedback is collected and processed leading to ongoing enhancement and revision. The continuous interaction of these elements is the ecosystem.

3. **Relative Maturity:** The stage of maturity for each domain ranges from "Early" to "Future Ready" representing the horizontal axis of the framework. Each domain can be characterized on its own to establish a baseline; gaps can be identified to help management determine a path forward that makes sense for their organization.

FOR A MORE COMPREHENSIVE EXPLANATION OF THE DTA FRAMEWORK PLEASE SEE **APPENDIX 1**

USING THE ASSOCIATION DTA FRAMEWORK

The challenge of the moment is that DT can be overwhelming. The Boards and executive staffs are trying to make sense of the myriad of opportunities and threats associated with transformation, and are trying to deploy their limited resources in a way that makes the most sense with greatest impact and lowest risk for their organization. Decision making is hampered by the lack of a common understanding and even the sometimes ambiguous impact and outcomes of one approach versus another.

The bottom line is that leadership may be ready to move but gets hung up in making the trade-offs in risk versus outcome.

The DTA Framework can help address these issues. The framework can be a tool to establish a baseline for the organization by sharing a common language and providing executive leadership with tools to prioritize areas of focus in the transformative journey. Using the baseline as a starting point, the organization can conduct a gap analysis and then establish a path forward that makes sense.

It goes without saying that no model is perfect and that results are not guaranteed. The framework can, however, serve as a means of establishing a common understanding of the association's current position and path forward. Please see Appendix 2 for case studies of organizations that successfully used the framework.

Successful Digital Transformation Means Leading/ Operating an Association in a 4IR Businesslike Way

The association model has endured (and thrived) for generations. The essence of the model is the strong affinity of members for a shared purpose. We know that the model is under great pressure to evolve in a way that makes sense for the present environment while anticipating and evolving toward a re-imagined future.

This report represents a path forward for associations. The research demonstrates that associations can continue to grow and thrive with leadership, vision, and fortitude. The Digital Transformation Assessment (DTA) framework is a tool that can help identify the current state, identify gaps, and establish a path forward for most associations.

identify the current state → **identify gaps** → **establish a path forward**
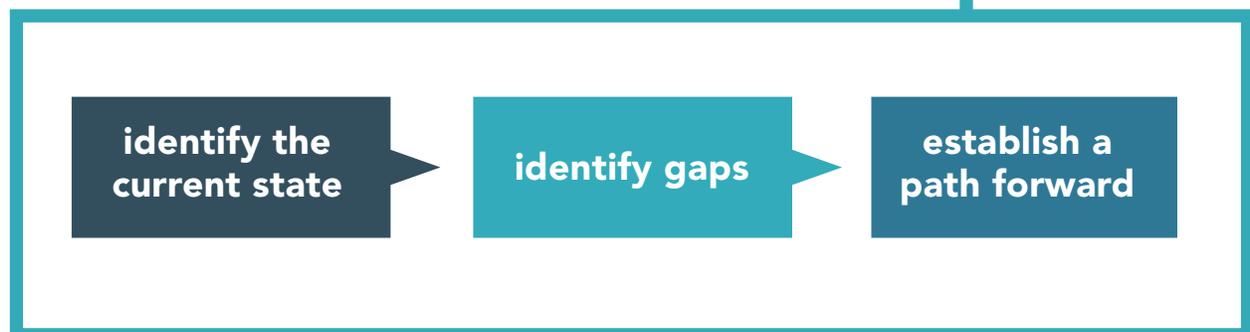
The survey and related case studies verify that associations of all shapes and sizes recognize the new business landscape and are striving to adapt. The results show that the shift is more about business transformation than digital, and digital is a means to an end and not the end in itself.

Organizations that are succeeding have an obsession with the customer, and the culture ensures that every individual from the board leadership through staff focus their energy on understanding, anticipating, and exceeding customer needs and expectations (Focus on Execution and Operational Excellence). The result in practice is a work environment that departs from the traditional association. Organizations on the transformative journey are identifying new ways to create new ecosystems of value beyond membership for members and global customers. The impact of this shift is an organization that is continuously adapting to the changing external environment with a clear sense of their own relevance as reflected in their customer engagement and satisfaction and advancing mission.

Focusing on the customer does not mean abandoning the mission. Exactly the opposite. In a digitally transforming world, the complexity, intensity, and velocity of changing customer needs represents an existential challenge and opportunity. Leveraging this point can lead to an advantage in the marketplace.

See the Ecosystem of Value infographic in **Appendix 1**

While no organization claims to "have it figured out," it is the clear obsession with the customer and its accompanying metrics that appears to most clearly define success. There is a clear and demonstrable trend of associations that are building this capability and garnering results.

For more information on any aspect of this report including the use and adaptability of the Digital Transformation Assessment (DTA), please contact any of the authors.

FUTURE WORK

This report is effectively "Chapter 1" of the association DT journey. A framework has been identified with baseline tools along with emerging best practices. Based on the work of our pilot associations and case studies, it is clear that priority areas that require deeper elaboration in the near term include:

- **Leadership**
- **Culture**
- **Talent**
- **Ecosystem of Innovation & Execution**
- **Third Rail: Digital & Technology Framework**

For those who participated in the initial survey and all of our pilot and case study participants, thank you for your engagement and leadership.
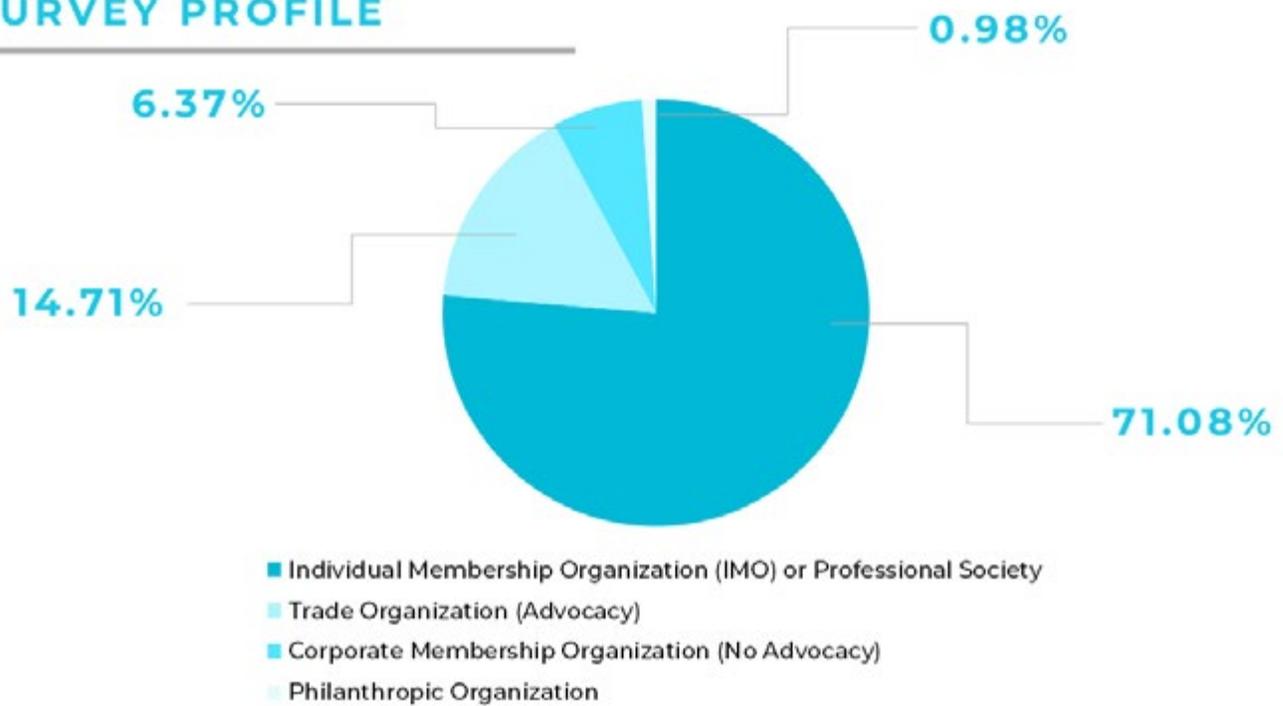
IN THE AGE OF THE CUSTOMER, BUSINESS IS EITHER DIGITAL OR IT'S DYING

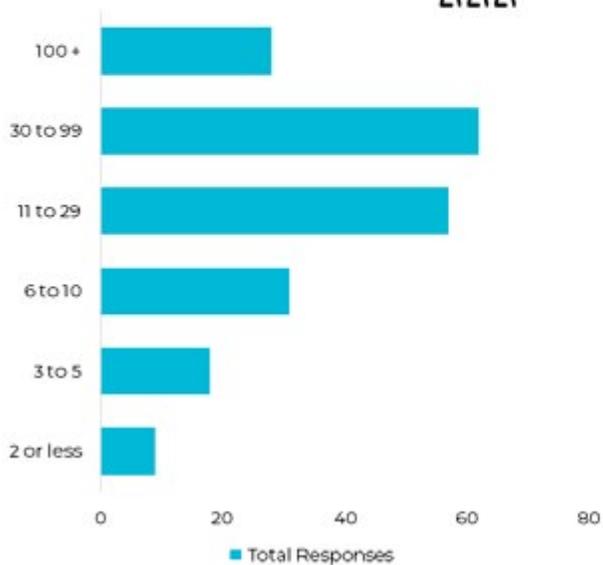digital**transformation**™
A S S E S S M E N T

APPENDIX: 1
RESOURCES

SURVEY PROFILE

0.98%

6.37%

14.71%

71.08%

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$2,000,000 - $4,999,999	
$1,000,000 - $1,999,999	
$500,000 - $999,999	

0   10   20   30   40   50   60

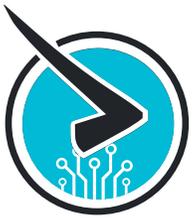■ Total Responses

DTA FRAMEWORK

- **Digital Urgency:** The organization recognizes the threats vital to organization. Processes and services with the acceleration of technology's compression on the business.

- **Leadership:** Executive/senior management leaders exhibit key characteristics of agility, flexibility, and collaboration; they embrace change and innovation with appropriate risk tolerance. These are experienced leaders executing daily business.

- **Governance:** Clear communication of strategy, new models are considered to make for a nimble organization with a value differentiation.

- **Culture:** Teams are cross-functionally empowered, not siloed, work collaboratively and learn from each other. Experimentation, entrepreneurship and continuous learning is encouraged to enable innovation.

- **Workforce/Talent:** Puts people at center of digital by investing in education and learning; providing opportunities for people to develop and contribute to digital. Clearly identified roles and digital responsibilities for staff and volunteers.

- **Operational Excellence/ Management:** Organization continues to reinforce its digital vision and plans in communicating well internally and externally; clearly define and communicate success metrics and KPIs; prioritizes investments and aggressively budgets

- **Customer Engaged/Informed:** Allows digital agenda to be driven from outside-in; encouraging input and involvement in design; customer connectivity – improved customer experiences and organization engagement; customer-centric ecosystem based on dynamic market conditions and customer journey

- **Data-driven Decisions and Insights:** Systematically gathers and analyzes data and business insights to continuously inform and enhance the strategy; data used to support channel and key metrics to steer strategy, etc. Data-driven decision making embedded throughout organization

- **Products/Services and Features:** Recognizing traditional products and services can be disrupted and may benefit from broader audience; rapid deployment often skipping pilots, regular evaluation of products and services with intent to sunset obsolete items; organization looks out and ahead re-imagining the organization building on mission and value.
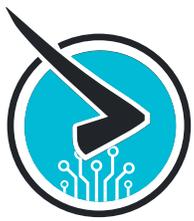
digital transformation ASSESSMENT ™

Association Digital Transformation Framework:

Domain	Early	Emerging	Establishing	Future Ready
Strategy / urgency / readiness	Isolated, Stand-alone projects/activity; customer processes and support not connected. Rooted in Association model & tradition.	Exploring digital transformation with volunteer leaders; starting to prioritize digital strategies w/in the organization to retain members and improve business drivers.	Operations/Digital strategy developed and Implemented; Embracing rapid introduction of digitally transformed businesses. Integrated approach to member/customer service utilizing data; digital metrics consistently evaluating and improving	Digital is at the core of association business; unwavering aggressive commitment from Board and Sr. leadership; Communication to members /customers and key stakeholders clear around the orgs. digital business transformation in response to customer needs; Members and customers connected through any device to any support, insights and information from the organization.
Governance	Fiduciary performed through hindsight/insight into financial and other measures; volunteer leaders not yet engaged and bought in	Linking implementation and performance of strategy to KPI; projects undertaken to embrace digital transformation;	Comprehensive strategic decision making based on insight derived from data analytics prerogative for greater operating discipline and supports investments and new models	Foresight and anticipation used to evaluate and rapidly implement digital business transformation drivers;
Leadership	Aware and supportive of digital transformation, but not actively linking activity; contemplating first steps in process	Aware and intentional about linking digital activity & platforms and people (members, customers and teams);	Using data from digital environment to drive performance and impact; Embrace need to digitize current businesses and innovate in support of new digital models.	Deliberate anticipation of strategies and capabilities required to improve organizational performance and drive digital behaviors; Willingness to make bold (digital) moves in support of digital transformation.
Operations Management / Excellence	Incremental improvement on traditional measures	Improving KPI and decision-making with propagation of digital solutions. Project Management Office formed.	Using data-analytics to drive breakthrough results; reimagine and reinvent business processes;	Digital is a core competency throughout the organization; Organization rapidly learns from mistakes and adapts to changes in marketplace and customer needs; Continuously piloting adaptive approaches to (digital) business transformation;
Culture	Isolated activity across enterprise with variable impact; teams working in silos; little tolerance for digital risk;	Taking steps to ensure common understanding and digital drivers; Change management is present.	Using common data from digital environment in decision making; teams embracing digital opportunities; innovation & risk routine. Open staff environment	Well-integrated teams collaborating to improve customer experience and value; Continuous and successful use of innovative digital approaches to positively impact stakeholders
Workforce Talent	Independent and unrelated skill sets across enterprise	Growing understanding of integrating digital platform skills; investing in digital skills and capabilities; cross-enterprise teams emerge	Common & uniform understanding of importance of digital skills, comfortable with uncertainty and change environment and flexibility in working to common goals	Consistent demonstration and implementation of digital skills; Embrace concept of customer value as key metric of success; staff across the enterprise are empowered knowledge workers;
Data-Driven Decisions & Insights	Extracting results from traditional performance measures and AMS	Launch customer analytics and develop skills for interpreting and decision-making.	Using data and customer analytics to drive decision making and continuous improvement. No longer making decisions based on historic processes	Full integration of data, analytics and insights to improve customer experience and performance exceeding all KPI targets; Data is used as a strategic asset in support of business objectives;
Customers Engaged/Informed	Transactional environment; not yet linking customer experiences with value.	Conspicuous linking of activities & engagement; Formalized feedback into decisions	Integrated and immersive experience reflecting personal needs/interests; customers are engaged/invested in digital transformation	Digital experiences and interactions are evangelized to support customers and demonstrate value. Customer needs and expectations are central to all digital business decisions;
Product/Service Features	Incremental change & improvements to traditional products & services	Link customer & member experience (including features) with product & service use; early prototypes piloted and tested consistently	Products & services continuously modified adjusted reflecting customer and performance feedback through "big-data" & analytics; customers inform new and innovative features to Products and services;	Integration of products and services into platforms of access and approaches to support the digitally transformed needs of members and customers; organizational digital "ecosystems" in place

Leadership → Operations → Outcomes

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ECOSYSTEM *of* VALUE

4TH INDUSTRIAL REVOLUTION:

New technology, digital advancements, and convergence enable newer, better, and faster delivery with improved capabilities at a lower cost.

Innovation

Agility
Leadership, Culture, and Talent

Platform

Customer/Member
Expectation Shift

Execution
Operational Excellence

Advancing Mission
Engagement
Relevancy
Value

New product, service, and business models create new competition and customer choices

New rules, conventions / regulations impacting safety, security, privacy. Accelerated demand for more personalization, speed and transparency.

Data and Analytics are creating new understanding and unique opportunities.

digital**transformation**™
ASSESSMENT

APPENDIX: 2
CASE STUDIES

You can also download these case studies online.

FUSION | digital**NOW**
PRODUCTIONS

American Speech-Language-Hearing Association (ASHA)

Started: 1925 | Membership: 198,000 | URL: https://www.asha.org/ | CEO: Arlene Pietranton

Journey

Organization: American Speech-Language-Hearing Association (ASHA); ASHA.org
Just under 200k mostly US-based members; Four online journals, peer review scholarly, certifying body mix of online courses, webinars and on-demand live events. As a part of their ongoing transformation, ASHA established "Office of Business Excellence" (OBE) which facilitates a project request process and prioritization by the Facilitating Team for enterprise projects and ensures alignment of key activities. All projects are now evaluated and monitored on an enterprise level with a deep understanding of the trade-offs and interrelationship of activity. The OBE has characteristics of a PMO with a broader reach that includes support of ASHA's strategic planning and execution activities, as well as ongoing process improvement.

Progress

ASHA is a well-managed organization with a Facilitating Team focused on the customer and results. The Facilitating Team is similar to an Executive Team, but operates in a framework of shared leadership and decision-making. The conversation with the Board has shifted over time to focus on "What" the organization needs to achieve to be successful and leaves the "How" to the professional staff. In this regard, Digital Transformation (DT) has been the domain of the executive staff as a means of execution.

The board has been supportive with capital investment and tracking improved service to members and customers. The board is provided with status and progress of key operating items such as social media, cyber security, etc., while focusing primarily on progress against eight strategic objectives. ASHA indicated that "digital" was not a specific part of strategy, it is how they do business.

ASHA's disciplined management approach has been a long time in the making. Like other organizations, there is a keen understanding by the facilitating team of member/customer wants and needs. ASHA generally does not consider itself at the cutting edge – they recognized there was a need around member interface and connectivity. A hybrid approach has worked best for ASHA, whereby one area evolves and incubates new projects that often touch other teams who influence and shift toward successful outcomes. digitalNow has been a regular part of the organization's outlook and planning.

ASHA does a lot to listen to customers and understand from their feedback the challenges they face in their work lives. Great emphasis is placed on the customer/user experience with lots of strong interaction including journey-mapping, personas, and interviews. Analytics also play a big part, including how they find ASHA on the web, and social media plays an important role. Everything is built with consideration of member feedback and input. Members and staff work in partnership – it's a collaboration.

Although there is a lot of data, specific KPIs are still nascent. ASHA believes that they capture 95% of the universe with 96-98% retention and yet they are still maturing in determining what data to capture and track related to DT.

Reflections Call Out

CEO Arlene Pietranton indicated when describing the impact of DT over the past eighteen months, "We used to be good at starting projects but not completing them in a timely manner. Now we are much better at completing them because we include important discussions about resource allocation, prioritization among business unit leaders, etc." She also believes the OBE established by ASHA plays an important role in tracking projects and organizational activities.

Project Management Institute (PMI)

Started: 1969 | Membership: 527,000 (2018) | URL: https://www.pmi.org/ | Executive Director/CEO: Mark Langley

Journey

The Project Management Institute (PMI) is the premier professional association for project management around the world. PMI has grown and continues to grow at a dramatic rate, currently representing more than 3 million stakeholders globally, through 280 chapters, multiple certifications, online community, academic research, and thought leadership. A businesslike approach to building markets and infrastructure has been their operating frame.

PMI has had a program of capital investment around digital infrastructure (transformation), customer engagement, and product development for over five years.

Progress

Membership and certifications drive PMI's business model with total certifications totaling more than 1.3M. The decision to embark on a digital transformation comes from a position of strength, and the work began nearly five years ago with significant financial and human resource investments. Over the course of this journey, PMI has continued to refine its strategy with greater focus on the core customer leading to more discipline about what they will and won't do. As it progresses, digital transformation will impact every part of the organization and is already providing insights about needed adjustments to operating model, data and information architecture, go-to-market approach, capability enhancement, and administrative tools.

PMI has conducted significant and detailed research on the Total Addressable Market (TAM), and is shifting their strategy to focus on the end-to-end professional life cycle of their stakeholders from "resume to retirement." PMI is establishing a modern product management approach and is restructuring around customer segments.

PMI's board of directors supports the staff in development of strategy and they have formalized a strategy function, led by a Chief Strategy Officer. PMI's executive team drives the strategic planning process and owns strategy, operations, and development, with oversight by the board's Strategy Oversight Committee (SOC). The entire organization (including the board) continues progressing through the transformation using a defined change management process. Great emphasis has been placed on having a high-performing executive leadership team, and there is ongoing commitment to "getting the people right." The staff team and organization capabilities continue to be refined as the culture shifts to be more agile, with a focus on innovation, customer centricity, accountability, trust, and teamwork.

Reflections Call Out

PMI continues to be one of the largest and fastest growing professional associations in the world. They have a disciplined approach to operations and markets designed to capitalize on advancing the project management profession. They have a history of using and adapting the best tools and practices essential to support their ongoing growth. This relies heavily on a keen understanding and capable implementation of all things digital from capital investment to customer analytics to understanding larger employment trends and expectations of the profession. Specific to the last point, PMI has formalized its extensive market-sensing capability to understand and adapt to changing external trends.

When asked about the role of innovation within digital transformation at PMI, Mark A. Langley, President & CEO, highlighted the method his team used to begin shifting the organization's mindset to innovation and customer centricity. Five teams competed in a two-week contest to create a new product that would serve as a "lead magnet." The teams created, promoted, tested, refined, and re-launched their digital

products, based on new skills they learned in a day-long innovation boot-camp. The teams tracked their results and reported incredible success at the end of the contest, with the winning team collecting more than 2,000 leads in a five-day period. The staff that participated in those teams are now involved in the formal new product development and capability-building work streams that are integral to the overall transformation.

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ASSESSMENT
CASE STUDY INSIGHTS

IFT
*feeding the minds
that feed the world*

Institute of Food Technologists (IFT)

Started: 1939 | Membership: 17,600 | URL: https://www.ift.org/ | CEO: Christie Tarantino-Dean, FASAE, CAE

Journey

IFT is a professional membership organization of leaders in food science and food technology, whose core membership includes Masters and PhD-level members. A large portion of IFT members are considered millennials.They are digitally aware and expect the organization to meet their personal needs for data and insights to support their demands for knowledge and information required to feed the future. They also expect the organization to support personal and career demands throughout their life stage.

Progress

In the last three years, IFT's executive leadership team (ELT) has led their digital transformation by proactively listening and responding to the needs of IFT members and customers. IFT's ELT is leading the integration of IFT's ecosystems while advancing the IFT culture to one that is known for innovation and collaboration. According to CEO Christie Tarantino-Dean, "We're working very hard to build more digital engagement and collaboration among our teams and embrace innovation as a core value." A change-management consultant was engaged to help the staff embrace disruption in the food industry and support IFT's efforts with digital transformation and several newer leaders in new roles has also spawned the cultural shift as IFT continues to evolve.

In many ways, IFT is the news source for the food science community. The organization has re-envisioned its publishing workflows and content strategy

approach to rapidly respond to the consumption needs of a mobile-ready global workforce across multiple channels. IFT anticipates using its website as a key differentiator. IFT is focusing on personalization of its member and customer journeys combined with effective data management to be relevant to a rapidly changing global food environment.

Reflections Call Out

Christie Tarantino-Dean, CEO, on Culture
"It's a delicate dance bringing staff along through the transformation journey. Our approach has been to expose our staff to professional development opportunities asking them to set goals that are in sync with our digital roadmap."

Tarantino-Dean has been in her role for more than four years.

Eric Schneider, SVP Communications and Strategy, on Innovation
 "Our staff is very excited by innovation and the opportunities it provides. Yet, it is also seen as more work and in some ways burdensome. We've had to find ways to let go of projects and programs to allow for innovation to take hold."

Schneider has been in his role for three years.

SAE International

Started: 1905 | Membership: 128,000 | URL: https://www.sae.org/ | Executive Director/CEO: David Schutt, PH.D

Journey

SAE International is the leading organization in connecting and educating engineers while promoting, developing, and advancing aerospace, commercial vehicle, and automotive engineering. A global body of more than 128,000 scientists, engineers, and practitioners that advances mobility engineering and system knowledge in a neutral forum, SAE focuses on connectivity for its stakeholders with an emphasis on life-long learning and voluntary consensus standards development.

Progress

Over the last several years, SAE developed and invested in cloud-based, SaaS strategy. During that time, SAE transitioned most of its ERP-related platforms that were not strategic/competitive differentiators. Current investment is focused on transitioning the proprietary, strategic differentiating platforms to a cloud-based model. Further investment is being made in a data strategy to ensure the ability to have high-availability of data across platforms as well as enable deep, real-time analysis. Future investments will leverage the developing strengths of Machine Learning (ML) and Artificial Intelligence (AI) for both operational excellence as well as extending its mission and marketplace value proposition.

SAE's Board and Finance committee recognize the convergence in technologies and the potential for disintermediation in support of an industry where information is fuel and are committed to working to position SAE as a leader in their space. According to David Schutt, SAE's CEO, "*The Finance committee recognizes*

these as strategic investments that have high impact and value, and are positioning the organization for the next phase of its growth strategy."

Mobilus, SAEs customer-centric subscription-based search access digital library, is the keystone of this strategy. Over the last few years, the tech team has participated in early discussions and decisions as an enabler to support the enterprise. Blockchain, AI, ML, and data analytics are becoming transformational service lines in the organization.

SAE has baked digital transformation into existing and new products and indicated expansion focuses on new value provided to customers -- new products in particular. A disciplined customer user experience with an intentional focus on customer needs is a driving theme in the organization. SAE is hiring a Data Scientist to move from predictive to data science and leverage its inherent neutrality in their space recognizing industry disruption has provided new opportunities to approach rapid transformation of the mobility industry.

SAE has focused considerable effort on shifting its staffing approach to one that over time thins out the organization into strategically differentiating and market focused-positions. This model and approach to hiring and retention has allowed SAE to move away from commoditized skills that can be outsourced and focus its culture on retaining and developing talented staff who can handle complex tasks and focus themselves and the organization on strategic differentiation. Schutt and his executive team believe, "*Hiring people with competencies who have done DT progressively for multiple organizations in the real world*" is a winning strategy as they know how to leverage data to expose opportunity.

Reflections Call Out

David Schutt, SAEs CEO has been in his role for 10 years. When commenting on how SAE addresses digital disruption at the board level, "*You have to amaze them, and do it over and over again.*" Schutt and his executive team shared their plans and

organizational capabilities with their board, and are in a continuous invest, develop, and deploy cycle. They leverage the Agile methodology with a strong focus on the customer and product design-centered thinking.

Maryland Association of CPAs (MACPA)

Started: 1901 | Membership: 8,500 | URL: https://www.macpa.org/ | Executive Director/CEO: Tom Hood | COO: Jackie Brown

Journey

MACPA's mission as stated in the Bylaws is to protect/further the interests of members, enhance the image of CPAs, enable members to conform to high standards of professional service, provide necessary resources to thrive. They are in the midst of a Bylaws change to reflect the journey and have been acting more as a "community of success" where CPAs turn to cultivate their professional growth, helping members to Connect in strategic ways, Protect their professional interests and Achieve in their careers.

The MACPA encountered big waves of disruption over the past five years as on-line competition in CPE and an aging membership challenged the business model. Involving the Board of Directors and Association management team in 2013, Hood shared a McKinsey article, *The do-or-die questions Boards should ask about technology*, (see resources). This raised important strategic questions about competing in this world of accelerating digital disruption. The Board challenged Hood to address how he would transform the Association to become the innovative, agile and anticipatory organization that would be necessary to thrive in the future. One major theme emerged - a mobile-ready framework was the imperative; new cloud-based systems designed with mobile first mindset (built from mobile backwards).

Hood leads with an operating philosophy that the MACPA should be at the forefront of technologies that could/should be employed by the CPA profession. He calls this philosophy of "eat your own dog food" meaning we should model the changes we are asking our members to make. The Association created a strategic partnership

with a global futurist, Daniel Burrus, and a new *Anticipatory Organization* model (see resources) with members in mind. The model provides a toolset, language, and skill set people find useful when considering hard trends. MACPA serves as guinea pigs to document and tell the story to members so the members could learn about the journey the society was on; believing ultimately most members were on the front-end of Digital Transformation for their organizations.

Progress

Hood and team mobilized the Board and staff team in a collaborative strategic planning process to reimagine the association around a 3-year strategic plan with 10-year vision addressing fundamental questions, including: Who do we want to be? Where do we want to be? What do we have to build? Enhance? and Dismantle? to accomplish this transformation.

The strategic plan identified several major themes that continue to drive the transformation:

- Create an agile, innovative, and collaborative culture
- Develop a mobile first, frictionless experience for members
- Build a curriculum to help members adapt to exponential change
- Innovate in learning and specifically e-learning
- Create a flexible, agile mobile cloud infrastructure to support rapid changes in business and allow for remote work

The manifestation of the Association's vision was to turn the business upside down and to fundamentally rethink the business model and components.This included a range of new/innovative activity, including: sponsorships, B2B learning, digital sales, new business lines with very little history... they are still developing the model.

The whole operating environment shifted. MACPA moved to open-style office space and employed tools such as "Slack" to improve speed of collaboration. They also

expanded flexible work schedules. They established good fundamental principles of running the business (a.m. huddles, weekly scorecards for predictive indicators, etc.).

On the operations side, it was harder than anticipated. When they had achieved some success, Hood realized that "we are making progress and we realized we could do more". Staff responded favorably to the changes with a strong sense of ownership and a favorable engagement score. The focus was on execution and accountability. New teams had their own metrics and scorecards. There is strong commitment to fulfilling mission in a business-like way.

Reflections Call Out

Hood recognized that for MACPA by taking advantage of exponential change opportunities, many of which were learned at digitalNow and viewed through a lens of strategic thinking system he co-developed (Insight to Action) and the *Anticipatory Organization* model (see resources). He has lived out with success the idea that, "If it can be done it will be done and if you don't do it someone else will," from his work with Daniel Burrus.

Association for Intelligent Information Management (AIIM)

Started: 1943 | Membership: 150,000 | URL: http://www.aiim.org/ | Executive Director/CEO: Peggy Winton

Journey

The AIIM home page reads, "Your digital transformation begins with intelligent information management." In providing Digital Transformation resources to her active community of 150,000 Peggy Winton leads with the view that AIIM must challenge itself to think about delivering on the Digital Transformation promise of understanding, anticipating, and redefining internal and external customer experiences. Winton believes that information is our most important asset in the digital economy; that all of us are information brokers, and that we need to also be information stewards. She and her team have crafted a comprehensive and year-round portfolio of resources designed to help organizations optimize their information in this way.

Progress

Digital Transformation is all about using information in different ways. Winton believes that this is the new business imperative, particularly for small to mid-sized organizations. Approximately five years ago, Winton questioned the business that AIIM is in: "what is the actual product we are offering; what is our value? She concluded that the potential for growth and relevance was in curating and surfacing the vast array of educational content within AIIM. She says that first and foremost, AIIM is a MARKETING BUSINESS. This approach has enabled AIIM to look well beyond "dues" and "membership" to create a marketplace of rich, freely available content that is largely underwritten by industry vendors.

As such, tracking and analyzing customer engagement become a key priority. In 2013, a marketing automation investment became a game-changer for AIIM. Because the purchase decision and implementation was business- not IT-led, the adoption of Hubspot (https://www.hubspot.com) was smooth and swift. Winton still refers to the project as one of the most successful to date. She believes that it represents the new way that organizations need to view their Digital Transformation toolkit purchases. As a cloud-based, SaaS tool, Hubspot is intuitive and easy to use. Immediate wins with Hubspot excited and encouraged the staff to consider additional ways to leverage its capabilities. Today, AIIM pushes nearly 90% of its processes through Hubspot. The richness of customer intelligence provided by Hubspot has made it far more valuable than any other system. In fact, the AIIM business teams are in the middle of a joint project to completely end reliance on the Association Management System.

Today, the entire AIIM organization works remotely, leveraging cloud-based collaboration tools. The virtual work environment succeeds by globalizing content/program delivery by functional teams. A strong culture code demands accountability and excellence while rewarding innovation, creativity, and mentoring. Winton calls 2018 the year of "our own hacks".

Mission and Messaging

AIIM has defined and shared five key information-driven points of differentiation with its community:

1) ENRICHING CUSTOMER EXPERIENCES – trumps everything; are we anticipating what our customers are thinking before they tell us? We should be.
2) ENABLING INNOVATION – get people out of the drudgery of manual and paper-based processes; focus on mission-critical and creative work.
3) EXECUTING PROCESSES NIMBLY AND ON DEMAND – this is a great place to begin the journey.
4) ENGAGING THE NEXT GEN OF EMPLOYEES by encouraging the use of apps such as Trello and Slack.
5) MINIMIZE RISK – protect IP and customer data.

Reflections Call Out

Winton leads with the expectation for continuous reinvention and improved efficiency. As inefficiencies are stripped away with new business and technology models, net profit has grown. This has afforded the ability to replenish reserves to be used for further investments in people, processes and technology. Ultimately, AIIM is seeking growth in areas that matter to its growing community of information professionals.

On a final note, Winton has changed the organizational (and Board) focus on net profits, rather than on top-line revenues. She cites statistics about improved performance by women-led organizations that practice this approach. She has engaged her entire staff on setting and achieving financial targets with shared incentives.

American Geophysical Union (AGU)

Started: 1919 | Membership: 60,000 | URL: https://sites.agu.org/ | Executive
Director/CEO: Christine McEntee

Journey

AGU sees itself as an integral member of a global community of organizations
supporting essential research and scientific development of Earth and space
science. Members are scientists that publish and share information and research on
a global scale. Members demand seamless engagement with publishing platforms,
meetings, and programs offered through AGU. AGU embraces and leans into this
challenge understanding that this is what members expect. AGU is at the forefront
of platforms and engagement for their members and community.

Progress

The AGU board supports annual investment of $1-2M/year toward digital strategy
development and the underlying technologies that will enable that strategy. The
board pushed to go faster into virtual meetings and transform old models. For
example, the legacy member paper transformed to digital. AGU has created better
apps for meetings to identify and find other participants, and is building an
underlying API-enabled content and data structure that will be foundational for
underlying architectures and platforms for strategic initiatives.

Digital Transformation has expanded beyond IT, which is involved, but not leading
the transition. Through a relentless commitment to the member and the Earth and
space science worldwide community, AGU is pressing for different points of access,
new platforms, new means of engagement, etc. They have adopted a culture of

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experimentation and are willing to fail along the way using agile development processes. AGU was an early adopter of on-demand virtual events including: 2-way events; digital posters with touch screen access; posters and pre -publication articles on pre-print server (built with partners Wiley/Atypon). They are using a variety of social tools – Twitter meet-ups, Instagram, Facebook Live, YouTube etc., to capture content and engage audiences across platforms. The publishing area continues to be a big push as Wiley/Atypon have the experience to provide platforms for scholarly content and leverage the underlying data. AGU understands the criticality of structuring data and foundational architecture. It is an ongoing priority.

Christine felt the biggest challenge is continuously changing the internal culture – asking questions differently such as "What does our user need to engage with us? What problems are they trying to solve and how can we assist them with that." She has established an organizational structure into departments with strong sense of ownership of their products and customer relationships. There is an ongoing effort to be customer-centric with a Digital Mindset which deviates from the program/product-centric organization in the past. In this new model for AGU, their efforts around personalization - including product co-creation with members - is making a difference.

AGU established a Digital Transformation Initiative team (DTI) with representatives from every department to ensure enterprise-wide understanding while focusing on the customer. They have worked on customer journey-mapping and other methods to gain insights. AGU expects to move further along with its digital strategy and is focused on enabling a first-class experience with emphasis on rapid adoption of hand-held devices and on making the experience between physical and digital seamless. AGU is working to ensure the organization is part of the everyday workflow of any researcher worldwide. AGU has an ambition to establish more KPIs. They attach an engagement score to members (coming to meetings, engaged in other

activities, etc.) and believe there are other metrics they should focus on. AGU believes they will establish interactive tracking of KPIs in the future.

Reflections Call Out

The digital and data investments in the last 3-4 years will have the greatest impact going forward. McEntee wants AGU to be the best at helping members do what they want to do and believes AGU will enable members' digital experience. McEntee was candid and indicated they don't exactly know how what the revenue model to support their efforts will be. However, by having the audience engaged through AGU and building that audience, AGU believes that new revenue models will emerge.

"We are becoming very digitally enabled, we're not sure where it will take us and we will plan and adapt as we grow and evolve." - Christine McEntee

About the Authors:

Thomas G. Loughlin, CAE has been an advisor to the annual digitalNow technology conference for associations since 2014. He and his partner, Ellen Moore are co-Authors of Digital Transformation Assessment (DTA) research report shared at the digitalNow conference in May 2018. Loughlin and Moore consult on digital transformation and future trends and implications to the association Industry.

Loughlin served as the Executive Director/CEO of ASME (American Society of Mechanical Engineers) from July 2008 until January 2018. He was responsible for the Society's wide-ranging and expanding standards, technical and educational programs, strategic initiatives, finance, operations, and staff. Loughlin was based at ASME's global headquarters in New York. www.ArchimedesLever.net

Ellen Moore has spent more than twenty-five years as an association executive. From 2014-2017 she was Chief Education Officer of the American Academy for Orthopaedic Surgeons (AAOS). A member of the executive team, Moore led the design, development, delivery and financial management of the Academy's wide range of live event and online educational programs including publications and periodicals.

Moore spent six years as Vice President of Education and Certification Services at SmithBucklin. She led all aspects of planning and execution for more than 100 client organizations with a staff of fifty learning professionals. She spent ten years with the National Restaurant Association as Senior Vice President of Education and Learning responsible for design, development, delivery and global sales of the NRA's robust education and certification programs including ServSafe® and its brand extensions. Email ellen@ellenmooredevelopment.com

Don Dea is co-founder of Fusion Productions. Don has authored several books published by the ASAE Foundation on the Internet, digital transformation, and online education, as well as articles on technology, healthcare 2020, mobile, technology innovation,and association leadership and governance.

He is the co-producer of digitalNow in its 19th year, an executive summit for association/non-profit leaders. He is a co-founder of several high-technology companies and construction firms. Dea served as special assistant to the Attorney General in the President's Executive Exchange Program.

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