

CLIENT CASE STUDIES

CHANGE ADOPTION

One organization was implementing new technology with resistant staff. By applying key facilitation and adoption techniques, staff took ownership of and eventually embraced coming changes.

SUMMARY

Situation

- Implementing a new off-the-shelf AMS from a leading vendor
- Organization was replacing a failed AMS implemented only a few years earlier
- Most membership staff had 15+ years with the organization, with several negative influencers

Action

- Implemented extensive, mandatory testing and training program, with approximately 100 hours in the new system prior to go-live
- Consistent positive messaging and demonstrations of system improvements
- Translation of negative influencers to positive through targeted messaging, and development as 'experts' in areas of capability

Outcome

- Staff were fully trained by go-live, and experienced a smooth transition
- Staff were committed to the change, and became positive influencers for the new system with later-phase departments.
- No significant decline in services or increase in member complaints

Repeatability

- Early and often exposure to new changes, even if all staff cannot be included in decision-making
 - 'What's in it for me' messaging highlighting tangible, real-life benefits to each individual
 - Work hardest to build self-efficacy with least confident staff and celebrate all progress
 - Convert negative influencers by enrolling them in project success
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THEIR STORY

At one organization, most of the membership staff had worked there for decades, and had already experienced one failed AMS implementation only a few years earlier. They were managing over 30K members with several manual processes, but were skeptical that a new system could improve things.

Staff had difficulty learning new technology and had a couple of 'leaders' who led the charge with a resistant attitude. Their own confidence in their ability to learn a new system was very low.



As a membership staff member, I represented the department on the new AMS implementation team. I was responsible for communicating Membership's requirements for configuration and customization; working with the DBA to convert membership transactions and data; creating a testing plan; and writing departmental SOPs. But, I was also new, significantly younger than most staff, and didn't command the same respect or trust as others in the department.

A new AMS would correct many problems, but the staff would have to embrace it for those improvements to be realized. Recognizing this, I partnered with management to create a testing and training campaign that provided at least 100 hours in the new AMS before go-live.

I implemented a testing program using hundreds of actual paperwork samples to simulate real-life scenarios, to help staff gain confidence that day-to-day exceptions could be handled. Management supported the effort by requiring staff to leave their desks and log a required number of hours for testing and training each week for months before go-live.

I combined training with consistent positive messaging about how the AMS would improve their work. The most challenged staff were given constant positive reinforcement for any progress, and super-users were identified and trained from among the more resistant staff.

By go-live, staff were able to perform their jobs using the new AMS with confidence and accuracy. But, most importantly, they were committed to making it work since they had come to believe that the AMS would make their lives easier. They were excited to go-live, and had the skills to work through problems and figure out complex scenarios on day one.



Not all organizations are able to devote this type of effort or time to testing and training. But in later projects the change effected here is repeatable. The key is to expose staff to a coming change early and often. Always combine that exposure with encouraging, 'what's in it for me' messaging that highlights tangible, real-life benefits to each staff member or role. By building staff self-efficacy and converting key influencers to support changes, staff will take ownership of their future and eventually embrace it.

POLICY REVIEW

An organization made what seemed like a simple, clear-cut policy change, but didn't review the data or alternatives first. A simple, cost-free change allowed them to retain hundreds of members.

SUMMARY

Situation

- An organization set a policy to refund duplicate memberships automatically, without examining data on these payments
- During an optimization service, the policy came to light as part of the operations discussion, and it was found that several hundred members and about \$200K were being refunded
- Accounting had valid ethical and GAAP considerations for not retaining duplicate payments, since members were not notified that duplicate payments had been received

Action

- Identified a way to notify customers of duplicates, and offer them the option to request a refund
- Determined process by which duplicate payments occur, and recommended changes to invoicing process to reduce duplicates overall

Outcome

- Increased retention and potential revenue by reducing automatic refunds to those who actively request it, while satisfying ethical and GAAP principles

Repeatability

- Always review data before setting policies
- Ensure policies serve the member and the organization first
- Request outside perspective to reveal new opportunities and creative solutions

THEIR STORY

During an optimization service to review membership policies and procedures, it was found that membership receives several hundred duplicate payments each year. Original policy did not notify customers of the duplicate payment, and applied the payment to an additional dues year. Also, a policy not to refund membership dues meant that customers who requested a duplicate payment refund were sometimes refused.

New Accounting staff immediately recognized the ethical and GAAP issues with retaining a voluntary membership payment, and not allowing refunds of these payments. To address these problems, accounting changed the policy requiring all duplicate payments to be refunded immediately.



When this policy came up during the optimization service, it was found that duplicate payments represented more than \$200,000 and several hundred members. In the interest of member retention, it was clear that the organization needed to find a way to retain these members while satisfying GAAP guidelines.

A three-part solution was implemented, with minimal effort from IT and no cost:

- Developed a new policy to retain the money, apply it to next year's dues, notify the member, and allow a refund on request.
- Designed a new automatic notification to both the member and his employer. Messaging would notify the member that his membership was extended, thank him for his dedication to the industry, and allow him to call staff and request a refund if desired.
- Retrained operations staff to process refund requests as needed.

These simple changes allowed the organization to retain hundreds of thousands of dollars and several hundred members, while satisfying ethical and GAAP requirements, with minimal effort or disruption to operations.



Organizations often have policies that are not backed by appropriate data, do not clearly serve members, or that work counter to organizational goals. But, it can be difficult to see these issues when staff are in their day-to-day work.

An outside perspective can identify constraints on revenue streams, new ways to drive member value, or new growth opportunities. An outside consultant also sees the same problems in multiple organizations, and can help you apply industry best practices and creative solutions to your operational needs.

OPERATIONAL REVIEW

Service

- During an organization-wide requirement gathering, processes and procedures for every department were reviewed and documented
- The review found several issues due to departmental silos or a lack of communication channels between business lines

Issues & Recommendations

- Issue: It was found that every department relied on the same individual in Accounting to perform some portion of their business functions. She represented a serious organizational risk – and she probably could use some help!
 - Recommendation: Identified this individual as risk point, and suggested cross-training or distribution of her duties across multiple staff to make the organization more resilient
- Issue: Two departments had requested directly opposing modifications to a shared feature on the web site: one felt it was no longer needed, and the other wanted to modify the feature to be more useful.
 - Resolution: Exposing the crossed purposes allowed departments to see how they impact each other and create better lines of communication going forward.
- Issue: Almost every department was losing opportunities or time because on-site Annual Meeting registrations were not captured in real time, but were entered manually for weeks after the meeting.
 - Resolution: With overwhelming evidence of organizational detriment, management agreed that a cost-benefit analysis of different annual meeting registration tools was necessary.

Repeatability

- An operational review can often reveal risks, lost opportunities, miscommunications, and inefficiencies that most organizations take for granted, but which cause poor member service and low staff productivity
- An Operational Optimization with a member-centric view is a simple, time- and cost-effective project that can be undertaken any time, with any number of departments. An optimization almost always reveals numerous ways to increase member value, revenue, efficiency, productivity, and cross-department communications.