

Welcome to the CIO Hour!

April 2024

Remember the Member
(when developing your tech!)

Today's Panel



RHONI RAKOS

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Rhoni is a digital strategist and customer experience designer who focuses on a data-driven approach to user-centered design. Through her work at fusionSpan, she harnesses the power of technology and user experiences across digital ecosystems to benefit her clients. She is the Co-Chair of the Programming Committee for Association Women Technology Champions (AWTC) and serves on the Technology Professional Advisory Council for ASAE.



KIM KNEEN

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Kim has been in the Business Analyst/PMO role for over 25 years and working in the association world for the last 10 years. She lives in Texas with her husband and 2 boys. In her free time when not at a football game or band competition for my boys, she enjoys photography and reading.



PHI NGUYEN

Senior Manager, Software Development and Agile Teams
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Phi has been a professional in technology for over 20 years and has been with AMPP for the last 12 years. He lives in Houston, Texas with his wife and daughter. In his free time, he enjoys running long distances, doodling with a brush pen, and playing board games about birds.



JAMES C. MARQUIS

Chief Information Officer, 501Works
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James C. Marquis is a seasoned senior executive with more than 30 years of experience working in technology with a wide variety of associations and nonprofits. James' work experience includes serving as CIO for a large medical association, CEO of a technology consulting organization and senior roles in product development and business consulting with for-profit and nonprofit clients. He also has designed and built multiple Internet-based business applications including Mojo Middleware™.

The CIO Hour: Remember the Member

- Tackling the problems and questions that are on your mind with real-world technology advice
- Featuring experts in their field with decades of real-world experience
- Usually the first Thursday of every month



Visit www.theCIOHour.com for upcoming topics and events.

Ground rules...

- No question is off limits!
- If the question is too specific to a particular situation, we may defer it but are happy to talk to you offline or after the event.
- This is a safe space, but we understand if you wish to remain anonymous.
- You may claim 1 CAE credit – details will be emailed tomorrow

Agenda

- In the News – A few highlights that might interest you
- Fast Facts – Introduction to the topic of the month
- Q & A – 40 min – Discussion with our experts and taking your questions
- The CIO after Hour – 30 minutes of open mic discussion

In the News...

1. Microsoft to separate Teams and Office globally amid antitrust scrutiny
<https://www.cnbc.com/2024/04/01/microsoft-separates-teams-and-office-globally-amid-antitrust-scrutiny.html>
2. AT&T admits data breach, and 51 million customers are affected
<https://www.techradar.com/pro/security/atandt-admits-data-breach-and-51-million-customers-are-affected>
3. NYC's AI Chatbot Was Caught Telling Businesses to Break the Law - the City Isn't Taking It Down
<https://www.usnews.com/news/us/articles/2024-04-03/nycs-ai-chatbot-was-caught-telling-businesses-to-break-the-law-the-city-isnt-taking-it-down>
4. Browsing in incognito mode doesn't protect you as much as you might think
<https://apnews.com/article/private-incognito-browsing-explainer-google-chrome-f8b3dd9ae41c5d9da027454e5c0c92c6>

Today's Topic:

Remember the Member (when developing your tech!)

Resources to start your own journey...

- 9 Steps for Building Member Personas
<https://www.higherlogic.com/blog/9-steps-for-building-member-personas/#:~:text=Member%20personas%20are%20imaginary%20people,or%20segments%20that%20they%20serve>
- How To Create Member Personas to Better Serve Your Organization
<https://sidecarglobal.com/blog/strategy/how-to-create-member-personas-to-better-serve-your-organization>
- Popular Online Tools
 - Miro
<https://miro.com/>
 - Figma
<https://www.figma.com/>
 - HubSpot
<https://www.hubspot.com/make-my-persona>

Emily Engaged



Senior-Level Manager
Age: 40

Needs · Wants

- I want to get to my membership information/services as quickly as possible.
- If I need to update my record or profile, I want to get it done in 1 minute or less whether I am calling in or doing it electronically.
- I want easy access to my password and a quick system to retrieve it if I have forgotten it so I can move on
- If I need to go to different areas of the website, I don't want to re-enter my password information.
- I need to know my data is secure

Pain Points · Concerns

- Accessing my membership information and services seems cumbersome compared to others sites I regularly use.
- I have to remember multiple sets of credentials to interact with the various systems my association uses.
- I'm constantly being asked for information that the association should already know and that wastes my time.
- I've forgotten my password... AGAIN and I am tired of jumping through hoops to reset it.
- I've forgotten what email address I used to register for this and I just need to make a purchase.
- I hate it when systems ask me useless security questions that do not mean anything to me.
- I seldom visit the association website and when I do I find it hard to remember how to do things.

Technical Competency
Low High

Product Frequency/Usage
Low High

Innovation
Low High

Risk Tolerance
Low High

Mobile/Desktop Usage
Mobile Desktop

Personality
Introvert Extrovert

Analytical Creative

Passive Active

SOURCE: 501Works

On to Your Questions...

Give us a basic idea of what a “Member Journey” and a “Persona” is and how are they different?

How did this lead you to want to explore
personas and member journeys?

So, how do you recommend associations go about doing this research?

As you went through these exercises, did you have any surprises that you uncovered?

When we think about things like personas or journeys – how many different personas do you need to reflect your users?

Is it important to take into consideration all
your members?

How do you use things like member journeys and personas as you make tech decisions?

How often should you re-visit your journeys to make sure they are still valid?

How do we get started doing something like this?

Any last parting advice,
especially for smaller organizations...

Other Questions?



Thank you to our panel of experts!

*fusion*SPAN

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 AMPP™

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Delivering technology that **WORKS** for your association.

CONSULTING

501 WORKS

- IT Consulting Services – vCIO Service
- Software Selection & Implementation Services
- Customized Software Solutions and Integrations

INTEGRATION



Mojo Middleware™ - Easily integrate your different association software packages with over 40 available connectors.

SOFTWARE




Software Mage™ – Online tools helping you navigate the AMS/CRM selection process, gather requirements, draft your RFP, and evaluate vendor responses.



We are here to help!

Call or email us for a **30 minute free** consulting session

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Final Thoughts

- Join us May 2nd for our **3rd Anniversary Extravaganza!**
- An archive of this presentation and today's Webinar will be posted on theCIOHour.com in a few days.
- Any suggestions for future programs? Topics you would like to see covered? Please email us: theCIOHour@501works.com
- For CAE credit – you will receive a link via email tomorrow so you can claim your credit and receive your certificate.