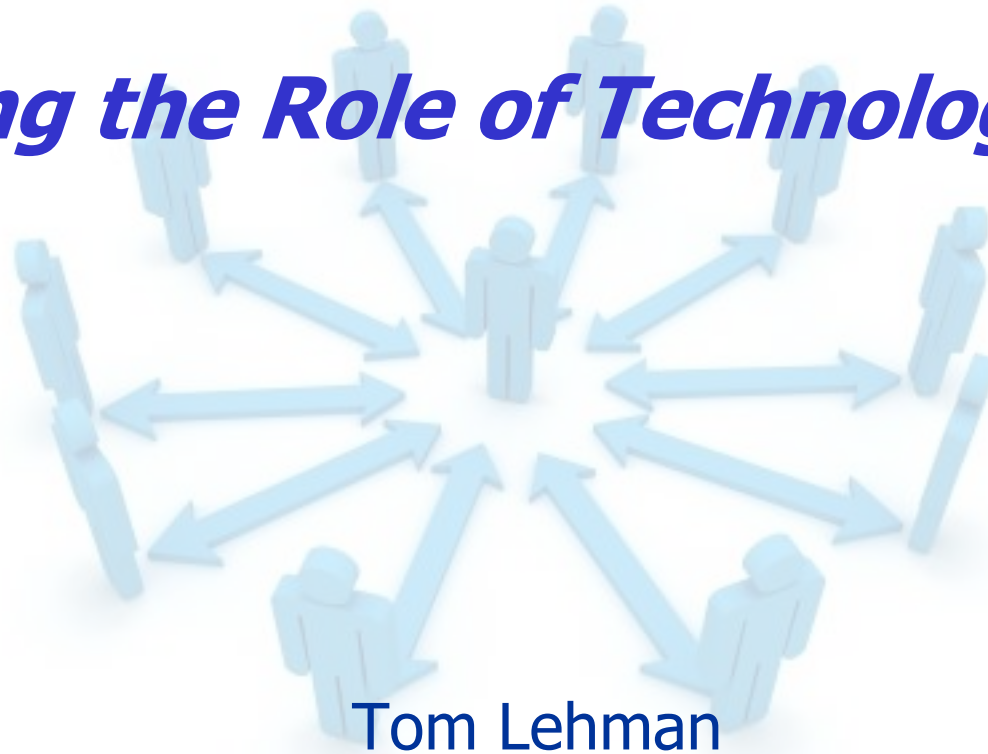


Technology as a Strategic Asset

Elevating the Role of Technology and IT



Tom Lehman

Lehman Associates, LLC

Lehman Reports

Lehman Associates, LLC

- Associations and Supplier Companies
- Strategy consulting for technology and marketing
- Customer Satisfaction, Market & Member Research
- The Lehman Reports™ industry research series
- Founded 1992, Alexandria, VA

AMS Use and Satisfaction 2006-2016

AMS International: CA, AU, UK 2010,13,16

Association Technology Study 2011-15

Donor Management Systems, 2013-2016

In collaboration with NTEN

Evolving Role of Technology

ROI Potential

Exponential

Investment

Technology
as Strategy

Linear

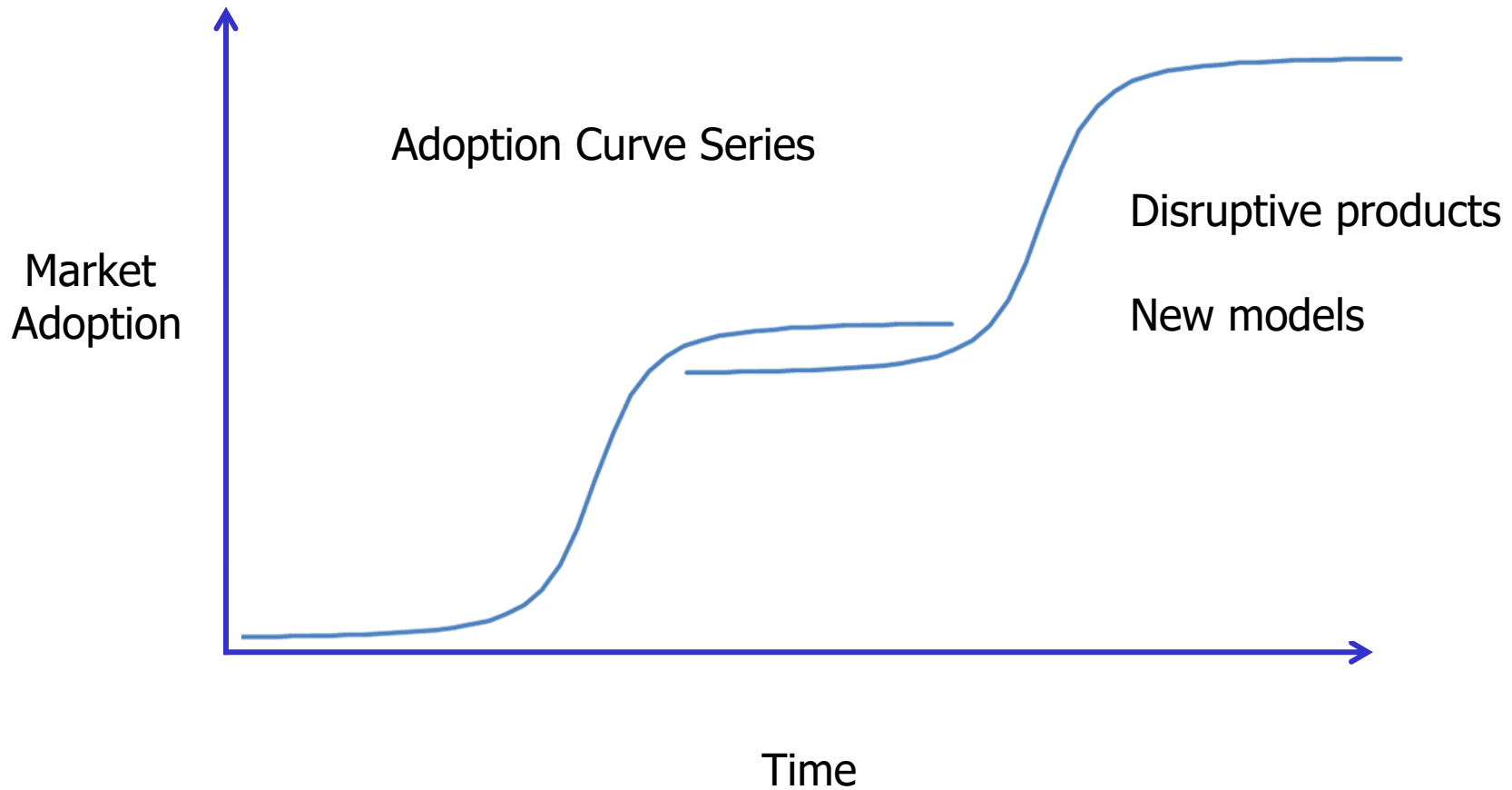
Cost Center

Technology
as Tools

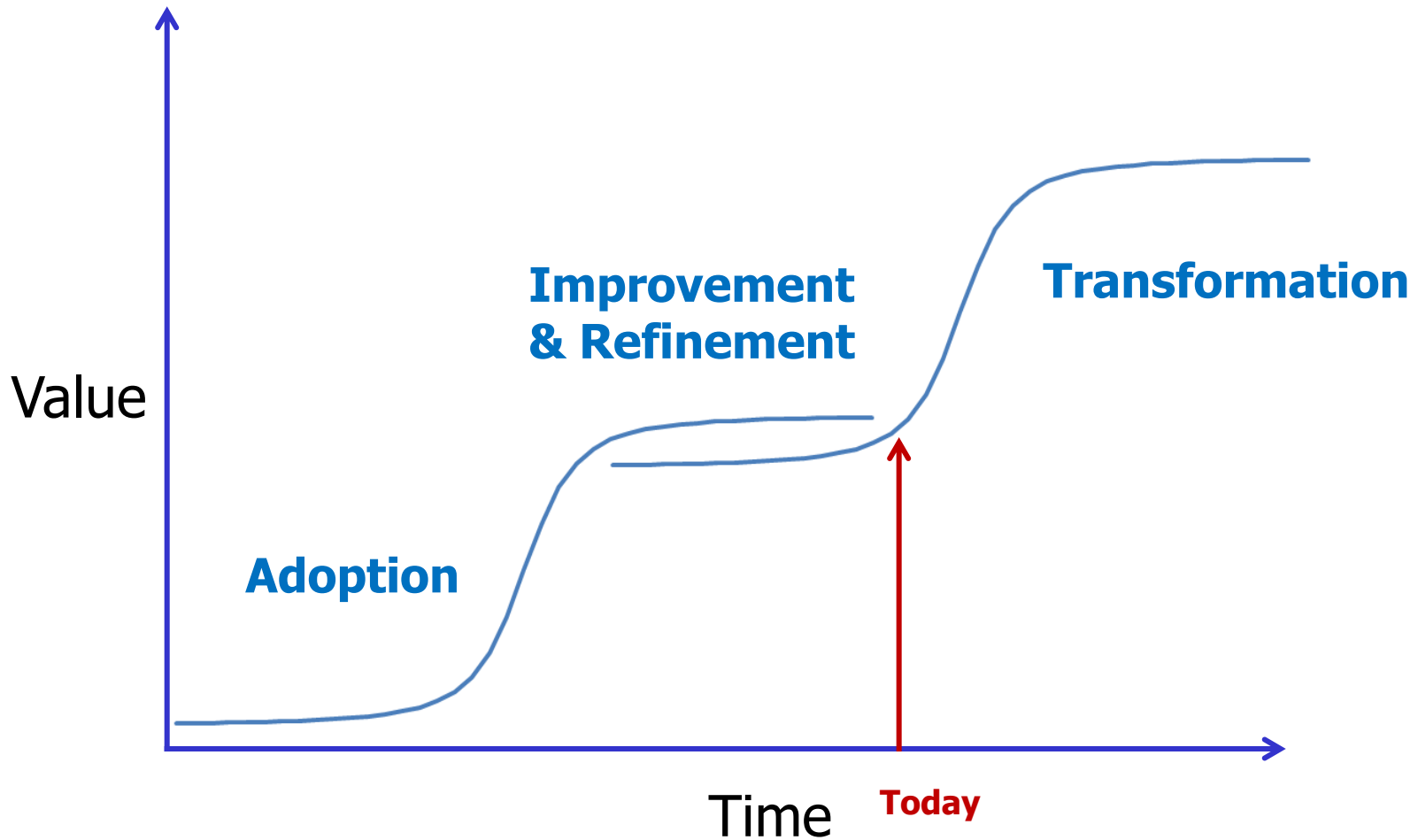
Investment

Technology
Introduction

Adoption Curve



Changing Technology Proposition

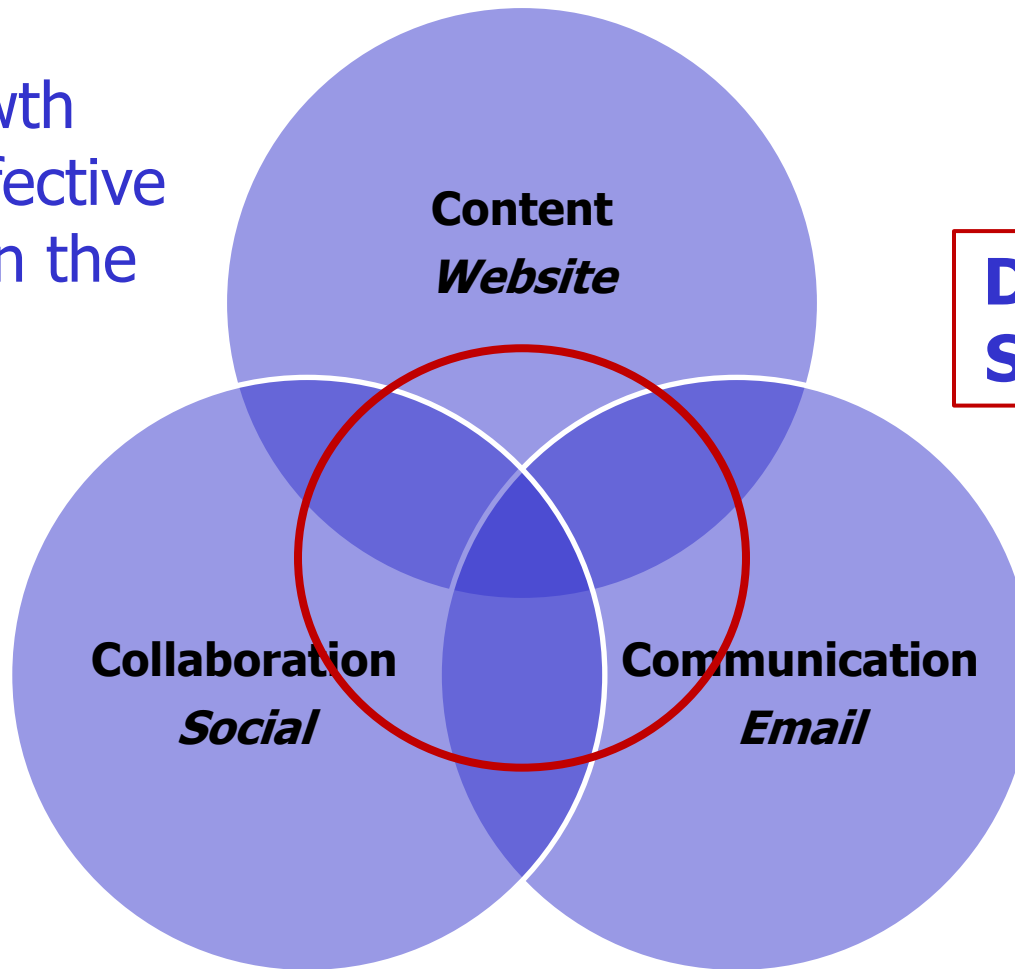


Enterprise software used to be about making existing work more efficient. Now, the opportunity for software is to transform the work itself.

Aaron Levie, CEO , Box cloud computing

Content Defined by Topic and Role Rather than by Channel

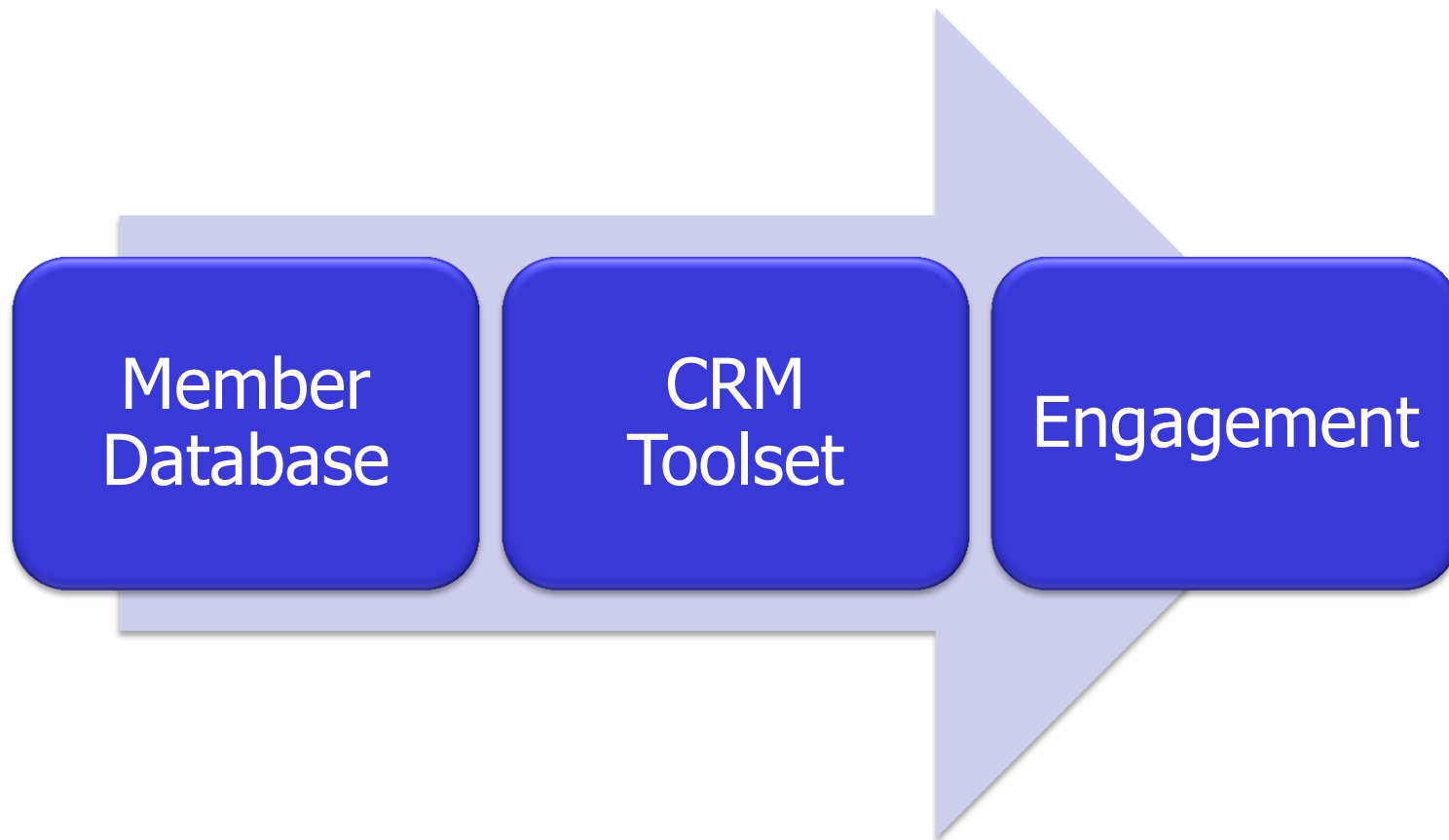
Highest growth and most effective models are in the overlaps



**Digital Assets
Strategy Plan**

**Circle of
Engagement**

A Greater Focus on Outcomes



Mobile as Market Context

A close-up photograph of a hand holding a white smartphone. The phone's screen is visible, showing a blue interface. A semi-transparent blue rectangular overlay is positioned over the phone, containing white text. The background is a blurred cityscape with buildings and a blue sky.

Not just another channel of access
Situational segmentation

Intelligence is the new Rock and Roll

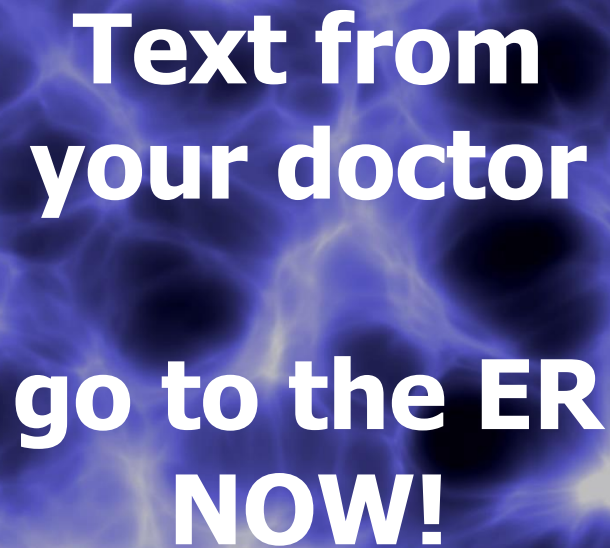
Audi Advertising Campaign

Data is a Rock Star

Veritas



Internet of Things And Analytics



**Text from
your doctor
go to the ER
NOW!**

25-50 Billion devices by 2020

**High-volume, continuous streams,
global nervous system**

Business, personal, public sources

**Advanced analytics and predictive
analysis – greater insight**

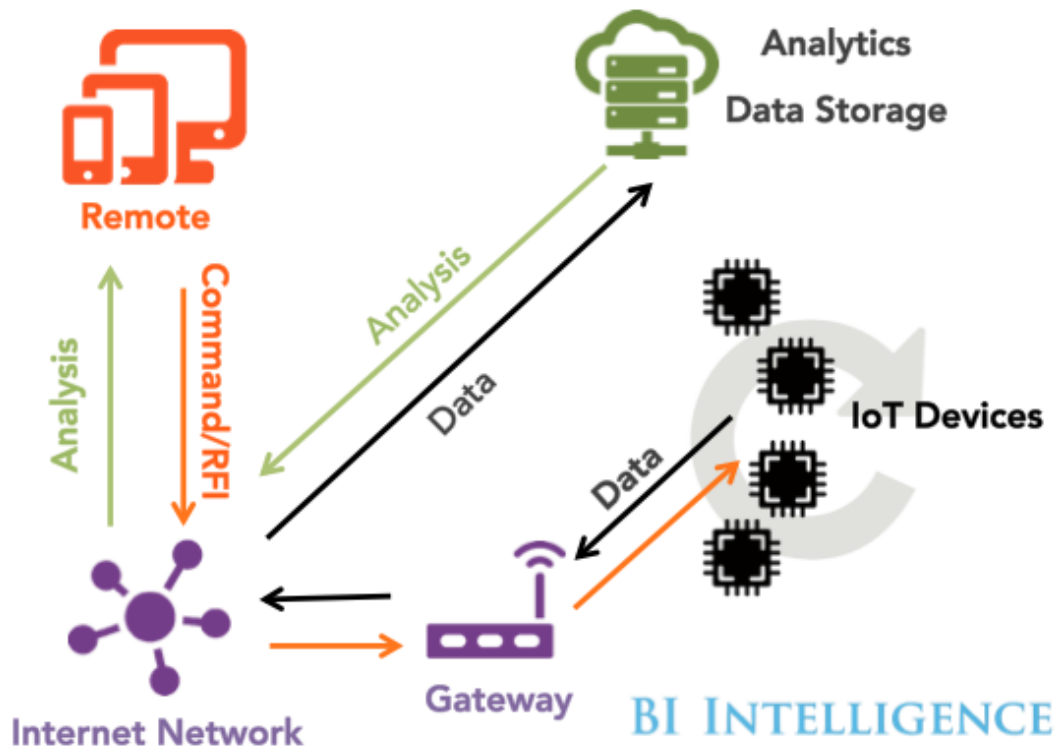
Drive personalization

Enhance policy, advocacy, cause

Requires expertise

IoT Ecosystem

The Internet of Things Ecosystem

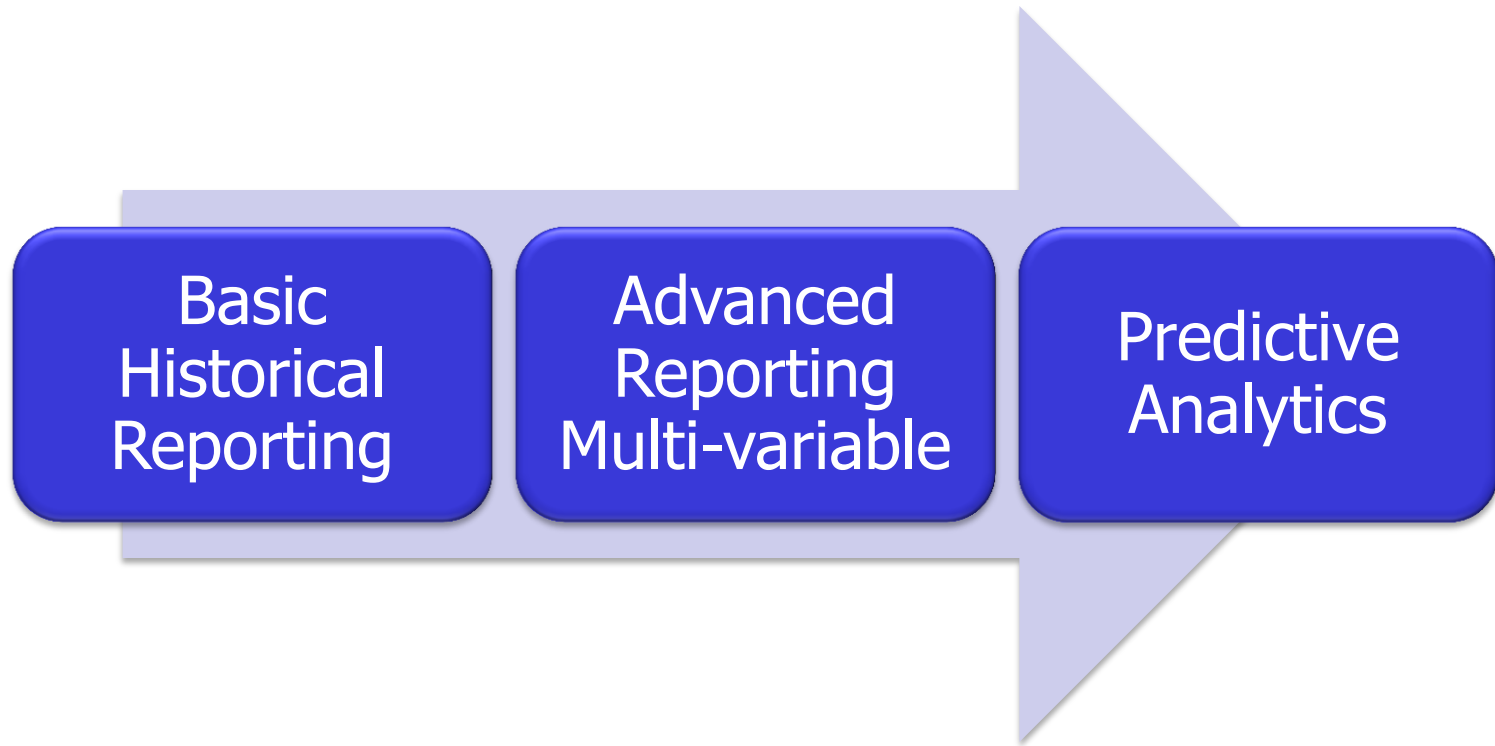


Mobile as IoT Remote



**A Major IoT User Interface
Makes B2C and B2B IoT possible**

A Greater Focus on Prediction



Looking Back



Looking Forward

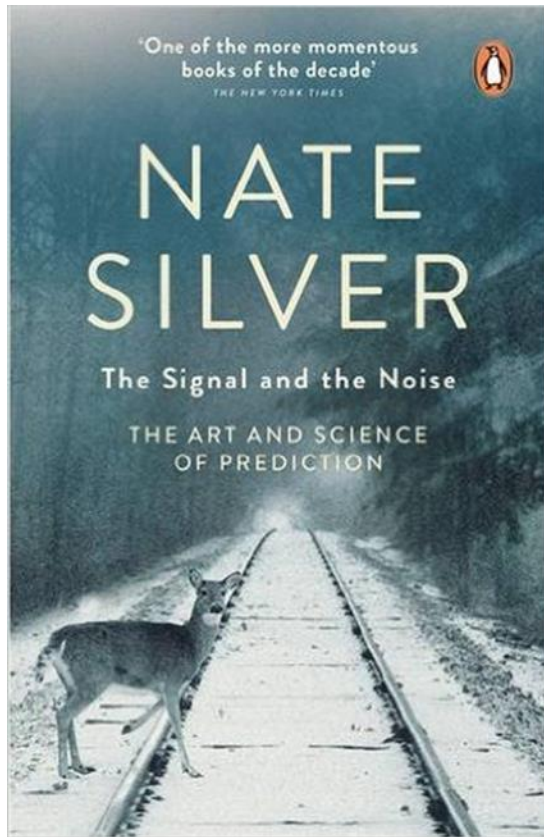


***Ten years from now, when we look back
at how this era of big data evolved ...***

***We will be stunned at how uninformed
we used to be when we made decisions***

Billy Bosworth, CEO , DataStax

Prediction Challenges



- Large datasets offer new insights, opportunities
- They also increase spurious correlations and false predictions
- False conclusions and actions

Evolving Role of Technology

ROI Potential

Exponential

Investment

Linear

Cost Center

Investment

Transformation

Technology
as Strategy

Improvement

Technology
as Tools

Technology
Introduction

Technology Strategy Plan

- Strategy aligned with organization goals
- Translate into technology strategy to achieve goals
- Technical assessment
- Core competency decisions
- Workflow, business process requirements
- Changing roles

Tech – Org Alignment

Tech Strategy Foundation

IT Decision Framework

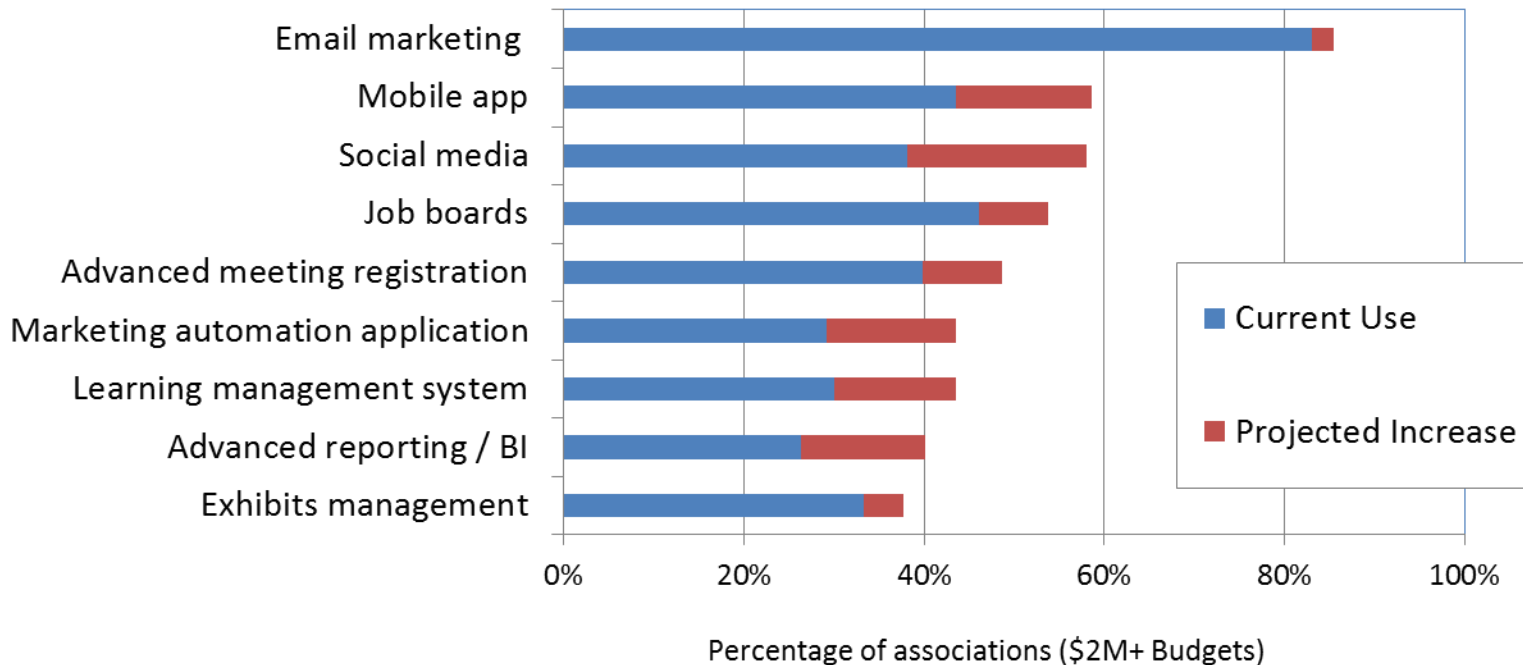
Action Plan

Nonprofits and Associations

Technology Complexity

Third-party Services Adoption - Associations

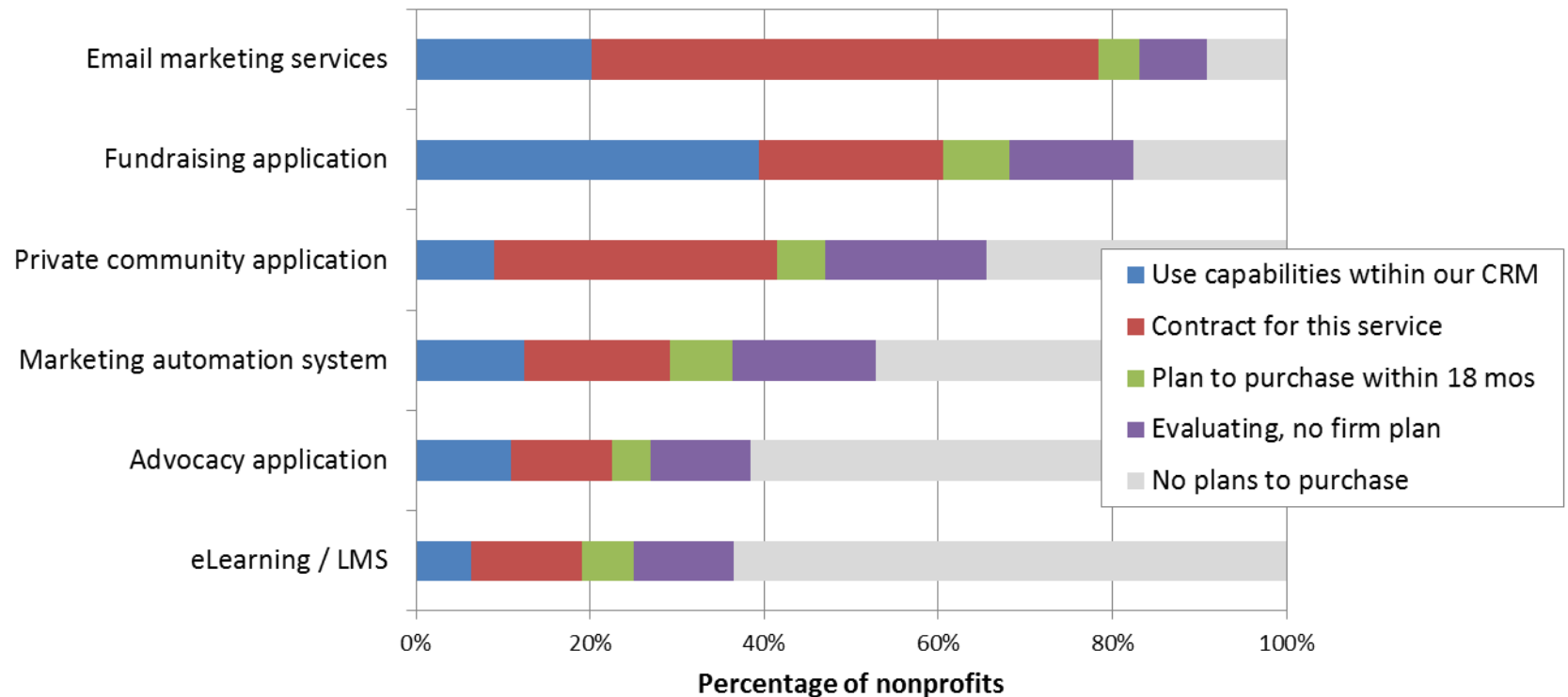
Projected Use by Early 2017



Lehman Reports Technology Study, 2015

Technology Complexity

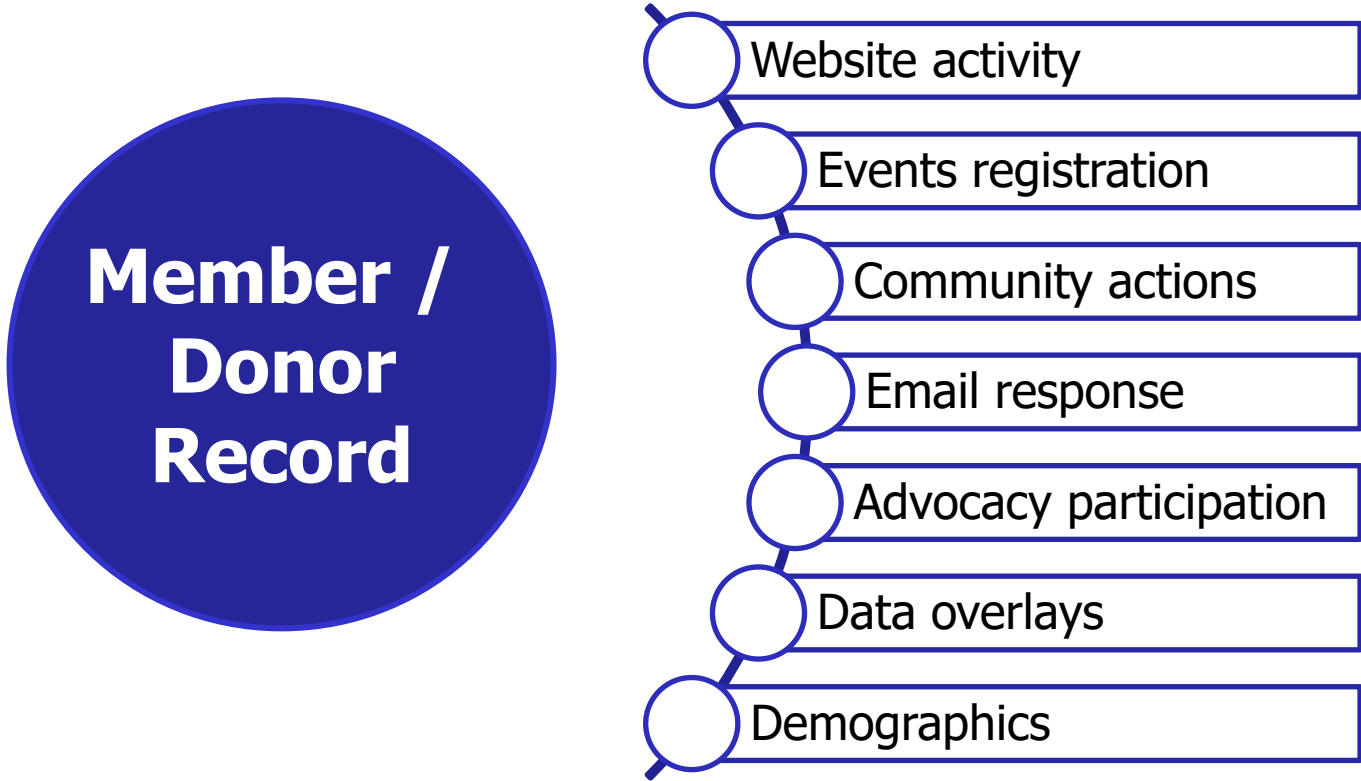
Third-party Services Adoption - Nonprofits



Lehman Reports DMS Study, 2015-6

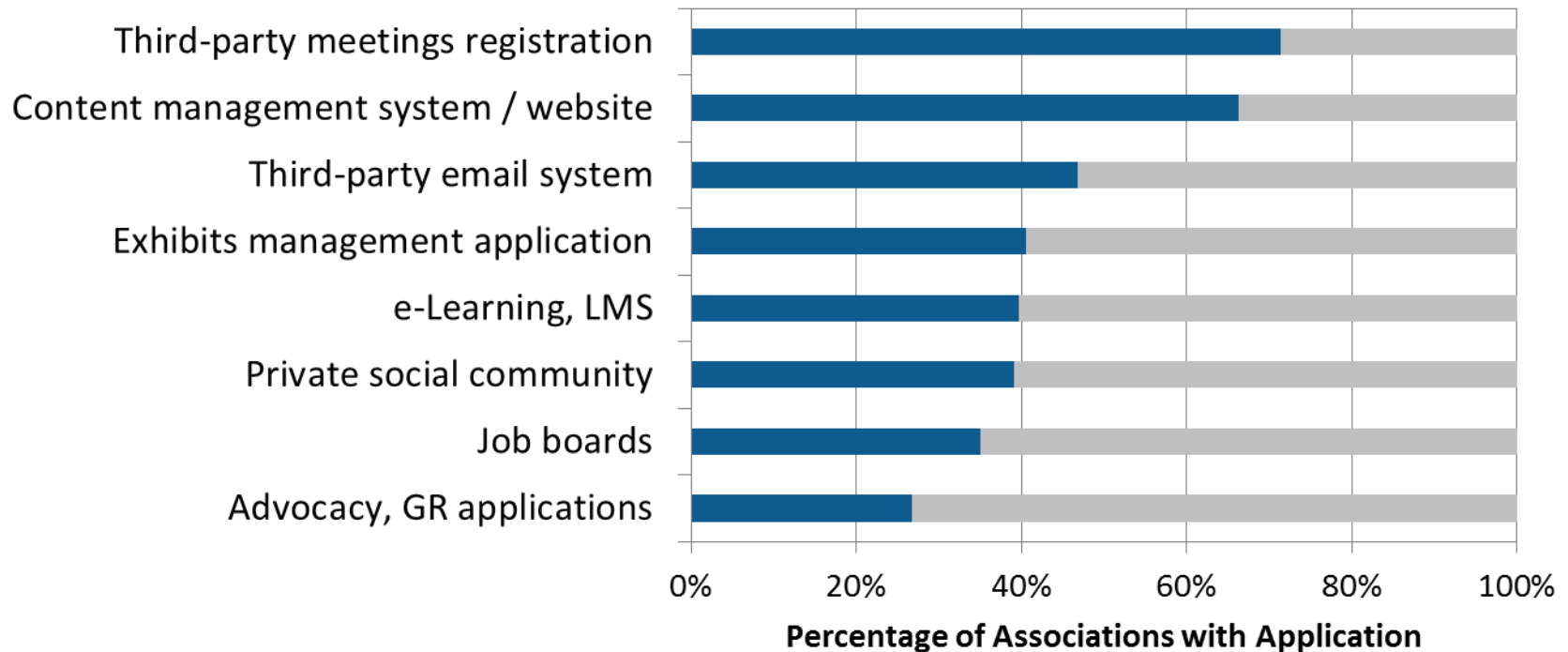
360° View

AMS / DMS remains the hub for most nonprofits



Integration Challenge Associations

Integration between applications and the AMS



Lehman Reports AMS Study, 2016

Lehman Reports Association Technology Study, 2015

■ Integrated

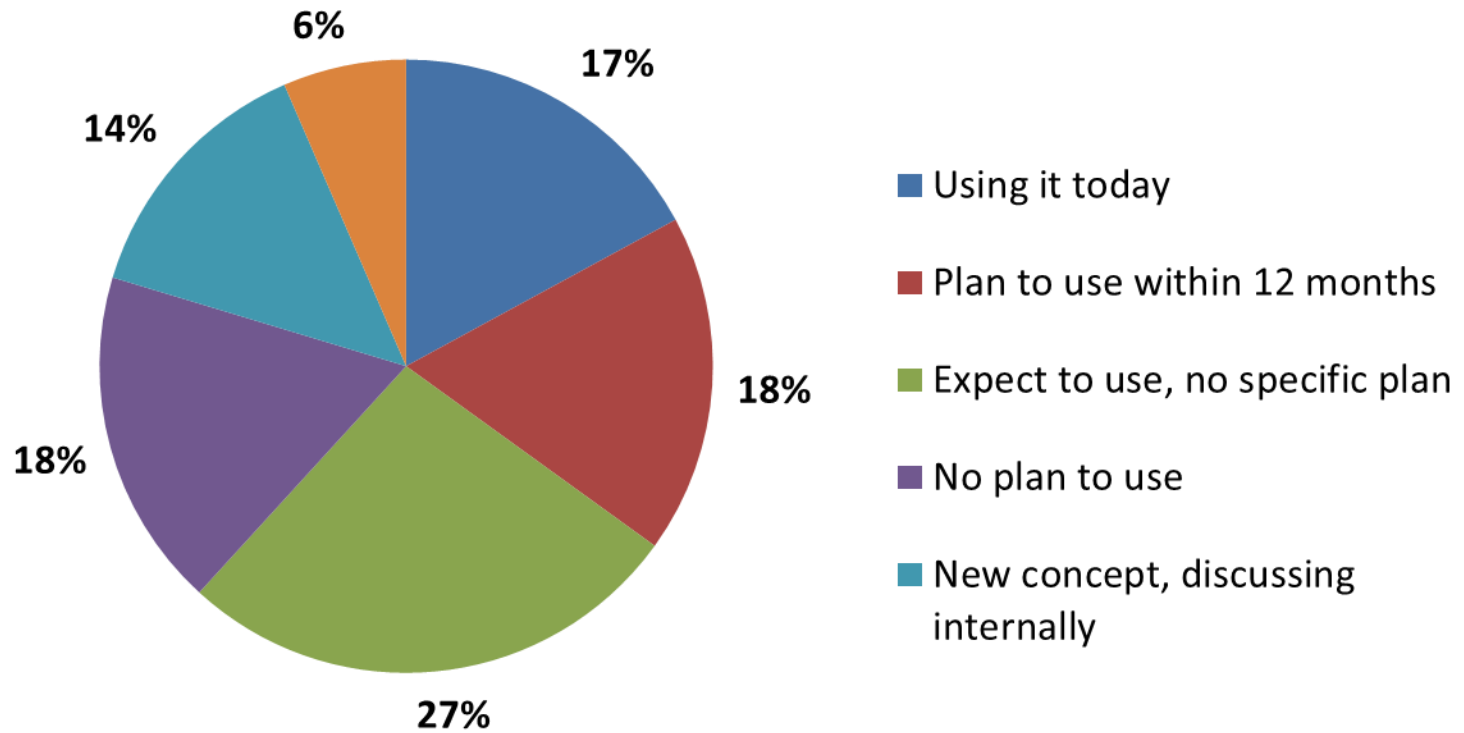
■ Not integrated

Inbound Marketing and Marketing Automation

Engaging constituents and prospects with tailored content and communications based on characteristics, activities, interests and behavior

- Increase campaign effectiveness
- Automate qualifying process
- Nurture prospects to become new members / donors
- Nurture existing members / donors to increase participation
- Marketing, fundraising, advocacy, content-positioning

Use of Marketing Automation



Lehman Reports Association Technology Study, 2015

Challenges and Opportunities

Expanding Role of Technology

***By 2017, the CMO will spend
more on technology than the CIO***

Gartner

IT Role Questions

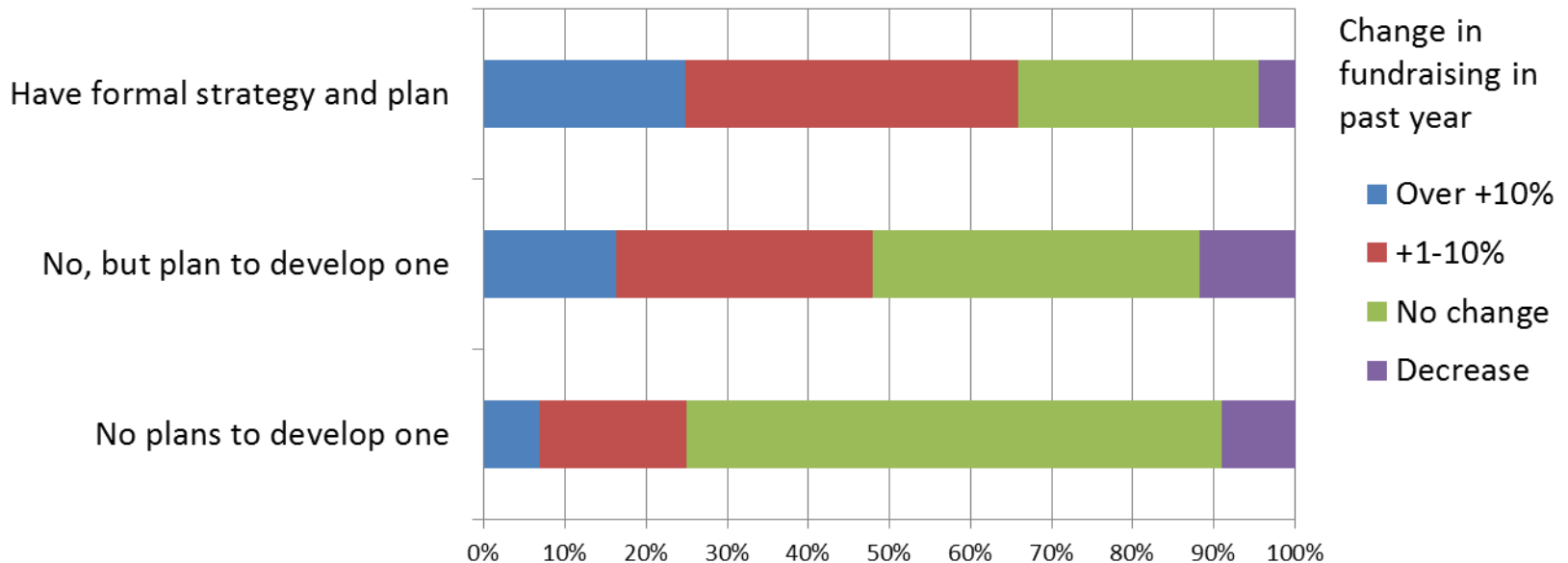
- Who makes technology decisions? Budget?
- IT role re professional expertise?
- Leadership to leverage technology?
- Balance between transformation and productivity?
- IT role for content strategy across channels?

Limiting Factors

- Senior management understanding of the new role of technology
- Technology leadership
- Marketing leadership / advanced expertise
- Integration
- Effective measures of ROI
- IT marketing and analysis skills

Importance of Strategy

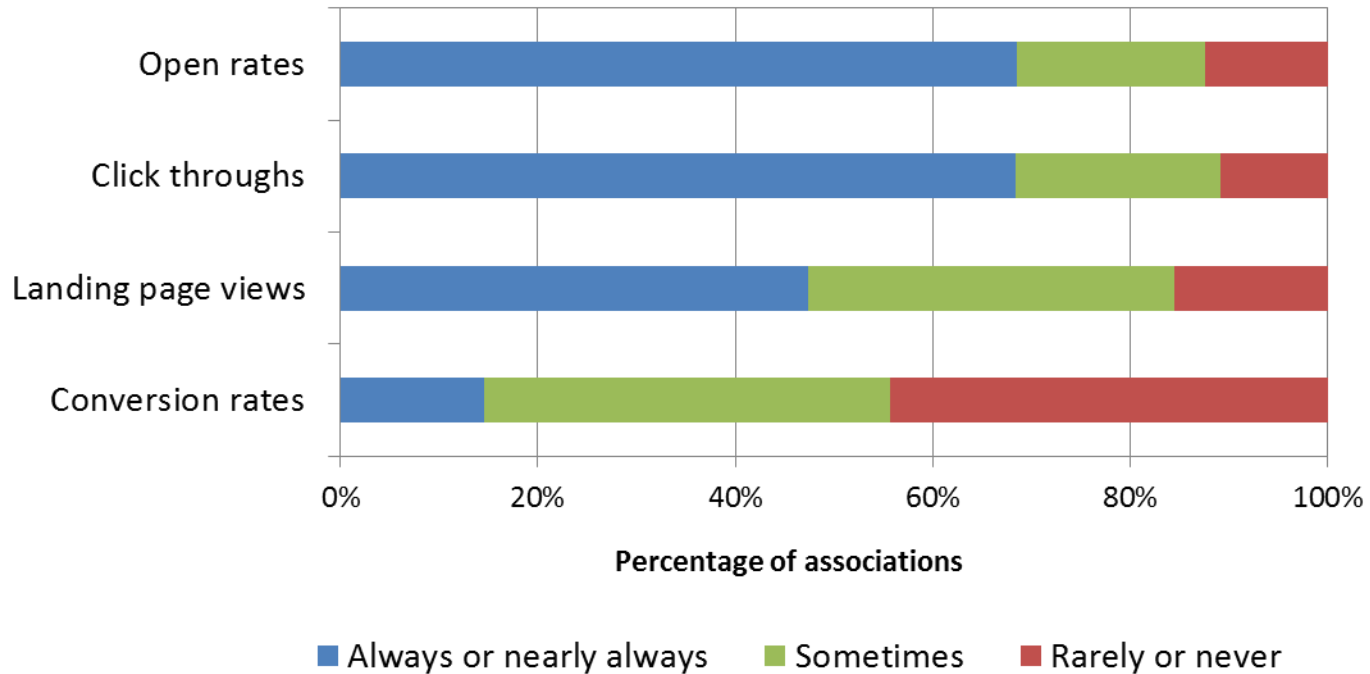
Relationship between an Engagement Strategy / Plan and Changes in Fundraising



Lehman Reports DMS Study, 2015-6

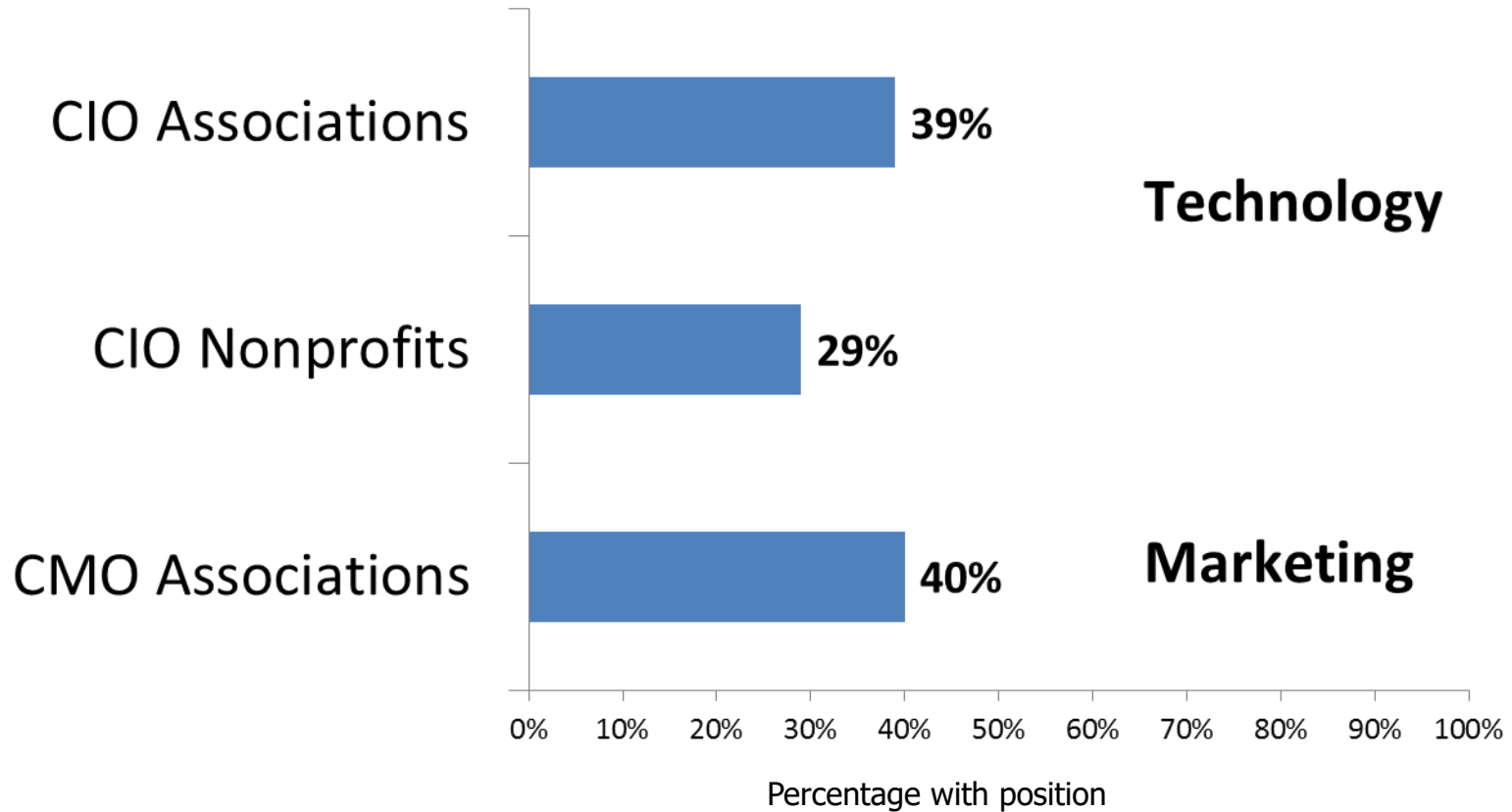
Best Practices

Use of Metrics to Evaluate Email Campaigns



Lehman Reports Association Technology Study, 2014

Leadership Challenge



Lehman Reports DMS Study, 2015-6
Lehman Reports AMS Study, 2016

Changing Role of IT

More about

- Being a strategic resource to help leverage technology
- Management of the tech environment and providers
- Big data, analytics, application integration
- Technology education of possibilities, opportunities
- Content management strategies
- A focus on outcomes, contributions

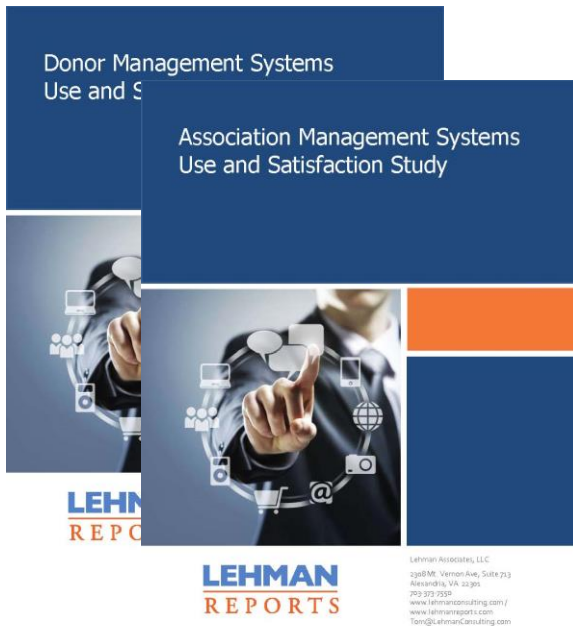
Less about

- Operating technology
- Purely reactive support function
- Application training
- Focus on input and activities

New Opportunities for IT

- Promote Technology as a Strategic Asset, ROI
- Build your role as a knowledge point on the use of technology to address organization challenges, goals
- Become an internal partner with departments on leveraging content and advanced marketing capabilities
- Move beyond a supporting role focused on productivity, impact outcomes
- Be a more active participant in the development of organization strategy – seat at the management table

Questions and Discussion



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