



# IMEX 2010 Association Day

Monday 24 May | Messe Frankfurt

## *Summary of roundtable discussions*

Roundtables organised by MCI



## Association Certification

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Moderator: William Chip Deale, CFA Institute

- Importance of drawing distinctions between certification (for an individual), a professional credential or designation (also for an individual), and an accreditation (for an organization). Determine what is most important and applicable for your organization.
- Global or domestic (country or region-specific)? Decide the “reach” that your initiative will have. If global, will the body of knowledge, the core competencies, the curriculum, the examination content, etc. be universally-applicable or will there be country-specific adaptations?
- Is there – should there be – a mandatory continuing education component to your certification program?
- Building a case for launching (or, as might be the case, not launching) a program. One of the roundtable participants – which included delegates from the UK, Canada, Australia and the U.S. – was under pressure from his organization to develop a certification . . . but was struggling with the justification for doing so. Lengthy discussion followed on the above-noted topical bullets, as well as the resources (human, financial, technological, etc.) that would be required of the organization if it initiated this undertaking – and whether the organization was capable of and prepared to commit these resources.

Moderator: William M. Drohan, CAE, Drohan Management Group

- Develop international, portable professional credential
- Customise international certification to specific countries
- Look to license certification programs country by country
- Look to establish “fellow” programs for advanced medical practitioners

## AMC vs. PCO

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Moderator: Tom Reiser, Interel

- Association to know and understand what the real wants, really needs to achieve
- Relationship is critical
- PCO: easier to understand services; AMC: not well understood
- Associations need to understand the options to make best decisions
- AMC: worry by associations to “lose identity and/or control”
- Transparency is critical with both service models

## Committee Management

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Moderator: Greta Kotler, CAE, & The Center for Association Leadership

- Based on everyone’s experience, this can be quite complicated. We discussed a number of different scenarios.
- There were examples where there were too many sub-committees, each with its own role. Sometimes, the committees were making decisions that went against the overall strategy of the larger organization.
- The group thought that it was important to have clear direction to the committee that would come from the top leadership and not always from the liaison to the committee.

- We also discussed the importance of cross-cultural competencies as many of the committees have members from many different countries.
- The group had good examples of how they had solved problems, worked with the committee chairs to understand priorities, and recommended clear communication back to the committee and organization of what was expected and what was accomplished.

Moderator: William Chip Deale, CFA Institute

- Roundtable participants from Italy, Portugal, Singapore, Switzerland and the U.S.
- What are some effective alternatives to traditional standing committee structures?
- How to deal with “dysfunctional” committees?
- Time zone differences – challenge of managing/operating committees when participants are spread across multiple time zones
- Importance of recognition (expressions of appreciation) of committee members for their commitment and contributions
- The challenge of staff versus volunteer roles on committees – striking an appropriate balance between the two
- How, from a staff perspective, to be impartial and effective and avoid “pandering” to a few committee members. Also, how to control or manage those who have their “own agendas”, especially if those personal agendas are at cross-purposes to the overall objectives or goals of the committee.

## Conference Sponsorship

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Moderator: Stephanie Hellstedt, Congrex

- ▶ the problematic around sponsors wanting access to the database was also discussed and it was decided that it is both illegal and unethical to “sell” the database.
- ▶ the only medical association present, reported that the educational activities are the best sold sponsor items and are gone first.

Moderator: Ann Delmiche, International Association of Public Transport (UITP)

- In-dependency of the region (governmental regulation) or national association (local sponsorship) the conclusion remains the same: don't rely on sponsorship to make revenue – it indeed needs to be considered as a plus
- Local host responsibility for sponsorship needs to be specified in the bid book
- Sponsorship package needs to be made (with some additional negotiation on return on investment – tailored made)
- Personal contacts with sponsors are very important

Moderator: Ross Robinson, Robinson Consulting

- Everyone agreed the initial step is for the association to build a dialogue with their relevant industry sponsors find out what they want and determine what the association is willing to share and under what conditions
- One idea was selling a virtual exhibit, very successful and brought significant revenues
- Multiyear agreements were seen as beneficial but could limit the growth opportunities

- Tiered sponsorship (Gold, Silver, Bronze, etc.) were discussed, it was thought to find core “partners” and have them contribute significant amounts to the conference and then “sell” marketing opportunities such as delegate’s bags, internet cafe, etc.

Moderator: William M. Drohan, CAE, Drohan Management Group

- Look to obtain sponsors for every conference related activity: program book, bags, events, etc.
- Establish Industry Advisory Group to assist in identifying potential sponsors
- Establish year long sponsorships with benefits
- Develop different price levels of sponsorship: Platinum, Gold, Silver, etc.

## **Conference VAT**

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Moderator: Gina Van Dijk, MCI

- VAT is a complex issue, and often not clear for associations when organizing an event in another country
- experiences were shared of challenging situations that were encountered, and what solutions were found to reduce risks for the association
- participants agreed that with the upcoming changes in 2011, a lot of issues related to applicability of VAT are not clear yet
- question was raised whether it would be interesting to develop a working group on VAT to represent the industry

Moderator: Siada El Ramly, Kellen Europe

Discussion summary to be received.

## **Corporate Social Responsibility**

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Moderator: Nikki Walker, MCI

Discussion summary to be received.

## **Delegates ROI**

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Moderator: Mike Illiopoulos, MCI

Discussion summary to be received.

## **Education Programme Development**

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Moderator: Maarten Vanneste, Abbit

Discussion summary to be received.

## EU Affairs

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Moderator: Tom Reiser, Interel

- Importance to be positioned/seen as « THE » voice for any given industry/sector
- It is a long term commitment and needs to be focused on partnership (expect to give before you receive)
- Must know the political landscape and players
- Create a “case” for the importance of the issue
- Must be proactive about shaping a dialogue and issue rather than reacting
- Find “champions” within institutions
- Speak their language
- Know your friends and foes – partner where you can and where it makes sense
- If you cannot afford your own public affairs support, find a “shared resource” (either work with another organisation or contract with a PA firm with experience in your field)

## Event Marketing

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Moderator: Paul Neale, European Ventilation Hygiene Association

- Most used “early bird” bookings but one delegate had done away with this in the USA and it did not affect the bookings so achieved a greater return as no discounts were given.
- General consensus was that there was too much information about the events circulated too many times...either delegates will attend or they will not. A reminder yes, but not continuous mailings
- Most stated that the event registrations had taken a small dip but generally were better than expected.
- All were confident that next year things would return to previous highs.
- Not all delegates had annual events so hard sometimes to judge as location sometimes had an effect on attendance

Moderator: Katia McKennon, Meeting Management Services, Inc.

- Use of Social Media is useful when used correctly. Associations need to look at the age of the core membership group and ask the question, “Do these members use social media?” If the answer is yes, then it is recommended that associations develop a strategic marketing plan incorporating the various types of social media.
- Trying to attract younger members? Definitely look into using at least one form of social media as the younger generation is very comfortable with the form of communication.
- How to best communicate to multi-national membership? Many associations produce multiple brochures in different languages. The brochure will use language and colors that will make members comfortable. The customised brochures get positive reactions from the members.
- Email Blast: using a different email theme for each blast is important to gain attention. Members quickly delete emails that use the same theme and verbiage for each blast. Variation creates necessary attraction.

Moderator: Ajay Bhojwani, Emirates Medical Association

The discussions revolved around new methods of marketing being implemented apart from standard direct marketing and media activities:

- Some of the organisations today have moved to using pre-event discussion forums to engage participants before hand and be in touch on a regular basis and have their input on the programme
- More and more association meetings today run their congresses in conjunction with some other meetings, workshops, trainings, so that audiences have more reasons to attend than the congress
- The websites are no longer online information portals and have moved to being more engaging and two way communication
- The whole discussion concluded with to market effectively and better, the needs to be more engaging with audiences and not just mail pieces being sent to them in different forms.

## Fundraising

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Moderator: Professor Wilhelm Engström, Swedish University of Agricultural Sciences

After some initial difficulties in distinguishing fundraising from meeting sponsorship, it was agreed that the term fundraising is a long term financial commitment that primarily supports the core idea of a project. In addition to a direct commercial benefit for the donor, fundraising also involves an idealistic angle.

It was generally agreed that successful fundraising succeeds in striking a sensitive cord in the heart of the donor. A good example is the various cancer research campaigns all over the world. It is therefore very important to optimise the choice of language when approaching potential donors.

There are three levels at which fundraising from corporate bodies can be aimed; Government, Industry and local societies. In these cases it is important that the fundraisers can show that they can produce a real product and not only an imaginary idea.

It is important that the fundraiser is absolutely clean. The word trust is imperative. Some delegates advised a sound sceptical view on "oversuccessful" fundraisers. This is a developing market full of adventurers masquerading as serious fundraisers.

The aim should be crystal clear before any fundraising attempts are initiated.

Local support is vital. This could make or break a meeting.

Acknowledge cultural differences. In America it is in their blood to give away. On the contrary, in high taxed European countries, the margins are so much narrower.

There is an unexploited potential in the European Commission where there are a plethora of possibilities to seek support via networking.

## Green Meetings

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Moderator: Eric Le Gal, gDEC

- Favor eco-friendly transportation means, insist when possible on train rather than plane.
- More and more venues are being built or transformed to become "green" and should be favored when doing site selection.
- Recycling is something to be educated about and contrary to perception, it may be more economical than not doing so
- Consider carbon compensation
- and final, at the very least, insure that you do measure carbon emission equivalent of conducting the meeting. After that, making the results public or doing something about it is another thing....

## Insurance for Events

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Moderator: Stephanie Hellstedt, Congrex

Most event planners do have some sort of Event Insurance although not many have actually received money back. It is still a jungle, though, and the following key advices emerged from the short discussion:

1. Always check all of your suppliers liability insurances
2. Make sure the hotels have a force majeure covering terrorism and pandemics (did cover the ash cloud for one planner)
3. Sign a Directors and Officers insurance
4. Sign a Congress Interruption insurance

## Leveraging Conference Content Online

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Moderator: Pol Van de Perre, MCI

Participants wanted to hear from each other which business models were used. Free as a member or delegate service, or paying models to get additional revenue. Challenges surfaced with regards to setting up e-commerce systems to sell access after an event. Selling access to on-line content at the time of registering for a live event was identified as a solution. This also implies that initial access is only for event delegates, which also helps managing competition between live & on-line offering

How to create value - where lies the value?

- Possibility to see/hear concurrent sessions that were not attended live
- Possibility to re-experience content to help learning retention
- Video is less important than voice and seeing the slides
- Keyword search in presentations greatly enhances usability and hence value of captured content

How to use on-line education (content) in support of Professional Development or certification programmes?

- Content needs to be selected and possibly re-authored to be used as on-line course material
- The system needs to be able to track/grant PDUs, CEUs, or equivalent
- A learning management system can greatly streamline credit tracking and participant progress.

## Managing Conflicts

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Moderator: Lauren Deaton, Courtesy Associates

- For internal conflict, staff to board or staff to member conflict: define volunteer and staff responsibilities through job descriptions so each knows what to expect from the beginning.
- Be persistent and consistent in communication.
- Delegate conflict to staff member: remove angry delegate from the situation/public and determine if the incident should be elevated so the delegate can speak to a peer instead of a staff member.
- Delegate to delegate conference: document the situation, have ethical guidelines for members, determine via the board disciplinary action necessary (maybe banning someone from the meeting).
- Planning conflicts; define expectations; a picture is worth 1000 words, site inspections are key to success.

## Managing PCOs

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Moderator: Lauren Deaton, Courtesy Associates

- Do your research, communicate needs and outline expectations.
- Revisit expectations, needs and the PCO's expertise as/if the meeting scope changed.
- Seek references from colleagues that hold similar meetings.
- Possibility to define a bonus in the contract if requirements are met. But still be flexible on pricing based on size (so a win win for everyone)
- Consider cultural communication norms and that language barriers will persist even if the same language is spoken

## Membership Benefits

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Moderator: Isabel Mortara, Kenes Associations Worldwide, Chair

- Segment the membership and personalise your approach with benefits specifically targeting each segment
- Before adding new benefits, ask the membership if they see value in these
- Cater to multiple generations with online benefits and social networks in addition to the traditional options
- Federations should strive to add value to the members of their members (online platforms, social networks)
- Don't let go of resigning members, understand why they leave, if they are still practicing in the field try to get them back

## Membership Recruitment and/or Retention

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Moderator: Megan Freedman, ASAE & The Center for Association Leadership

- For-profit companies acting like membership organisations
- Associations experiencing a decrease in loyalty of members. Reasons include financial constraints and competing against lifestyle of members
- As retention drops, need to recruit new members in new ways. Ideas include member-get-a-member programmes, and members telling stories of why they're members (story-selling)
- To recruit and retain members, you need a clear understanding of what the organisation stands for, what the association is.
- Must educate members on the benefits of your association in order to protect yourself.

Moderator: Tarnbir Kaur, Project Management Institute

- All participants agreed that the key to retaining and recruiting members is providing value to the members so they continue to stay with the association as members
- There was a discussion that members who are closely involved with the association stay longer
- A best practice that worked for one association was personalised calls to new members explaining the benefits of membership a week or two after joining
- Other best practices such as new member mentor programme and new member networking sessions at chapter and association events have worked in connecting members and assisting in them staying longer with the association
- Even though it may seem like cost is the only factor affecting the membership recruitment and retention, there have been instances where reduction in dues did not positively impact these areas

## PCO vs. AMC

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Moderator: Ross Robinson, Robinson Consulting

- Why vs, this was seen as a progression from being the associations PCO to eventually the Association Managers
- The industry has evolved, in the past PCO had a poor reputation but professional practises have greatly improved
- Another element is those associations who opt to organise with their staff and hire specific services, sometimes limited to a DMC

## Relationships with Global Organisations

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Moderator: Isabel Mortara, Kenes Associations Worldwide, Chair

- Go step by step, start reaching out regionally then globally
- Join networks, establish contacts and reach out to them
- Volunteer on international committees and build your contacts
- Don't be intimidated by global organisations' – provide them with the grassroots perspective
- Be selective – choose the right global organisation and partner with them or share information – it's less in the numbers than in the quality of the contact

Moderator: Greta Kotler, CAE, & The Center for Association Leadership

- It is important to build clear understanding of the partnership and what each partner will do and receive
- This is important because sometimes you enter into a partnership and find that there is some competition
- It is also important when working in another country to be sure that you have a partner who knows the local culture – whether that is a sister organizations, a PCO or a local DMC.
- There are many global organisations with which you can partner depending on your goals and needs. Again, as they may be larger than you, you need to be clear on the value and contribution that each partner will make.

## Social & Viral Marketing

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Moderator: Alexander John, MCI Dubai

- Social Marketing is the way forward in the future
- It is difficult to define ROI directly; however, unless Social Marketing tools show value to the user, there will be no ROI to generate
- Content and Relevance is key in Social Marketing
- Social Marketing may change the way we use some communication tools. Example: Twitter will be used in the corporate setting to communicate effectively
- Relevance to associations, Social Marketing is a tool that associations need to get savvy with as it would bring their communities closer together
- Create value through the social networking tool and create revenue.

Moderator: Tarnbir Kaur, Project Management Institute

- Most participants agreed that social networking is a powerful way to reach out to potential members if done correctly.
- There were some participants who had the view that LinkedIn was a tool for professional use whereas Facebook and Twitter were primarily for personal use. There were others however who have successfully used Facebook and Twitter and achieved significant results
- All participants agreed that the use of social media needs constant monitoring and regular updates in order to achieve maximum benefits
- A best practice that worked for one association was to have social media messages that highlighted benefit to the user, were constantly updated and had a call for action.

Moderator: Ajay Bhojwani, Emirates Medical Association

- Till date, there is no scientific pattern or formula to measure the success of social media on congresses i.e. delegates registering through it
- More and more congresses are moving to a programme format where the networking sessions are doubled and content is reduced as one of the most important reason for attendance is the networking opportunity
- Apart from standard lunch, coffee and evening functions, congresses today are creating special networking formats like one to one sessions, roundtable discussions over breakfast, etc to further add on to their networking opportunities

## **Strategic Alliances & Partnerships**

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Moderator: Philip W. Arbuckle, MT, MBA, CMP, MeetingTrack Inc.

1. Needing an international presence but without the funds to support that expansion, one association located a very similar association in another country and developed an alliance with them to represent each other and to hold a joint international meeting every 4 years.
2. The exhibition portion of one association's meeting was getting smaller each year. Part of the problem was related to a shift in who was buying another issue was the economy. The organisation found an association that shared the same vendor group but the association had a different purpose and membership. They formed an alliance and co-located their annual meeting. With the trade show in the middle and one group having their meeting before the exhibit and the other afterwards. This made for a stronger trade show and a stronger programme.
3. Another association has developed alliances with universities and research organisations that share a common interest. The alliances helped the association support more meetings and created a synergy by concentrating new research data among a common group.
4. One group had a group conference considered one of the best in the industry and another group was known for their benchmarking studies. They formed an alliance bringing the two units together making a better and stronger unit. They each continue to work on their core product but have grown participation because of the combined strength of their offering.

## **Tradeshow & Exhibition**

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Moderator: Katia McKennon, Meeting Management Services, Inc.

Pharma/medical meeting when pharma are no longer to spend money on sponsorships?

- Set up booths so to give pharma accounts enough space to give product/education seminars.
- Set up pricing so that the pharma accounts get a booth and a private meeting room. The pharma account can hold education seminars in the meeting rooms.