



*HARD SKILLS GET YOU IN THE
DOOR, MASTERING SOFT SKILLS
AS AN ASSOCIATION EXECUTIVE
ENSURES SUCCESS*

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SESSION OBJECTIVES

- Achieve Maximum Effectiveness in your Role
- Define the Personal/Professional Line with Board Volunteers (Do's and Don'ts)
- Use Trends to Determine Professional Action Plans

ASSUMPTIONS

- Full Service client scenario.
- Not a hybrid relationship. Some things still apply. However, they come with nuance if there is an outside ED/CEO.

AUDIENCE POLL

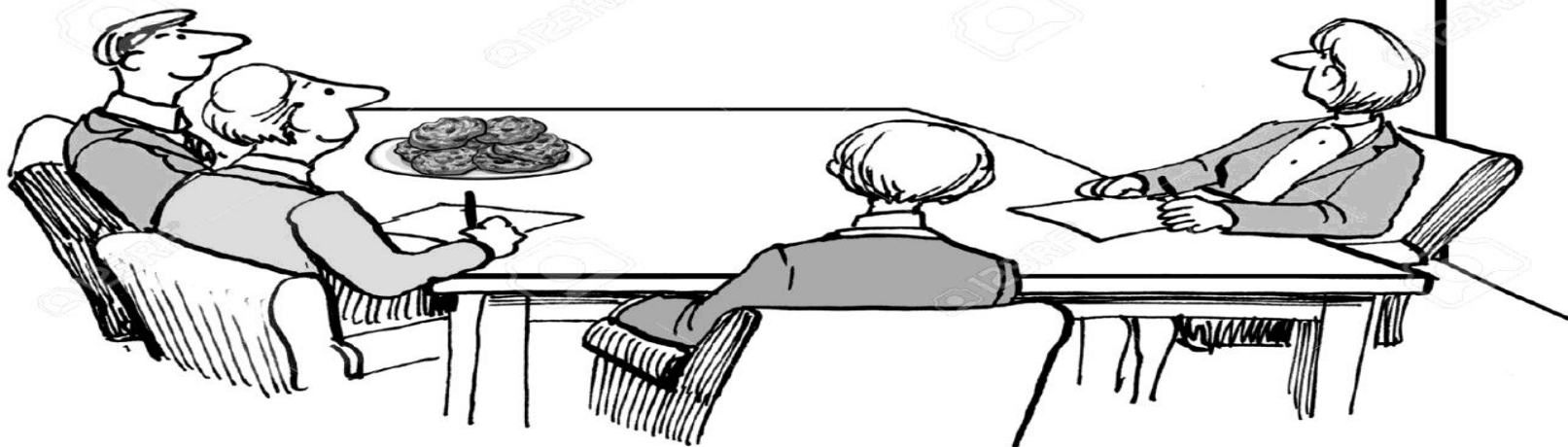
- Clients managed
 - Local, chapter, state, regional, national, international
 - IMO, Professional Society, Trade Association, Foundation, Certification Body, other
 - # of board members
 - # of standing committees

AS EXECUTIVES WE WEAR A LOT OF HATS.

- Counselor/Baby Sitter/Therapist
- HR Manager
- Visionary
- Public Face
- Leader
- Facilitator
- Mentor
- Cat Herder ☺



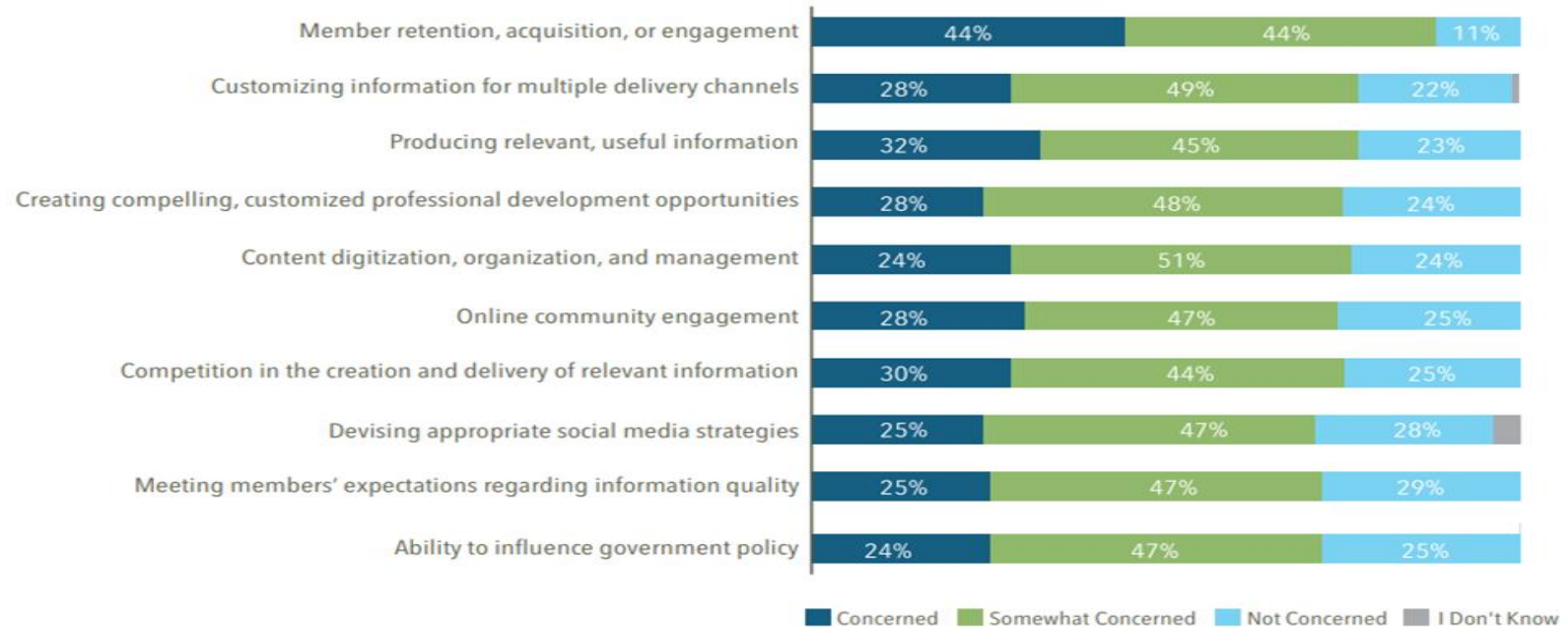
Ask yourself:
What do you bring
to the table?



WHAT IS KEEPING US UP AT NIGHT?

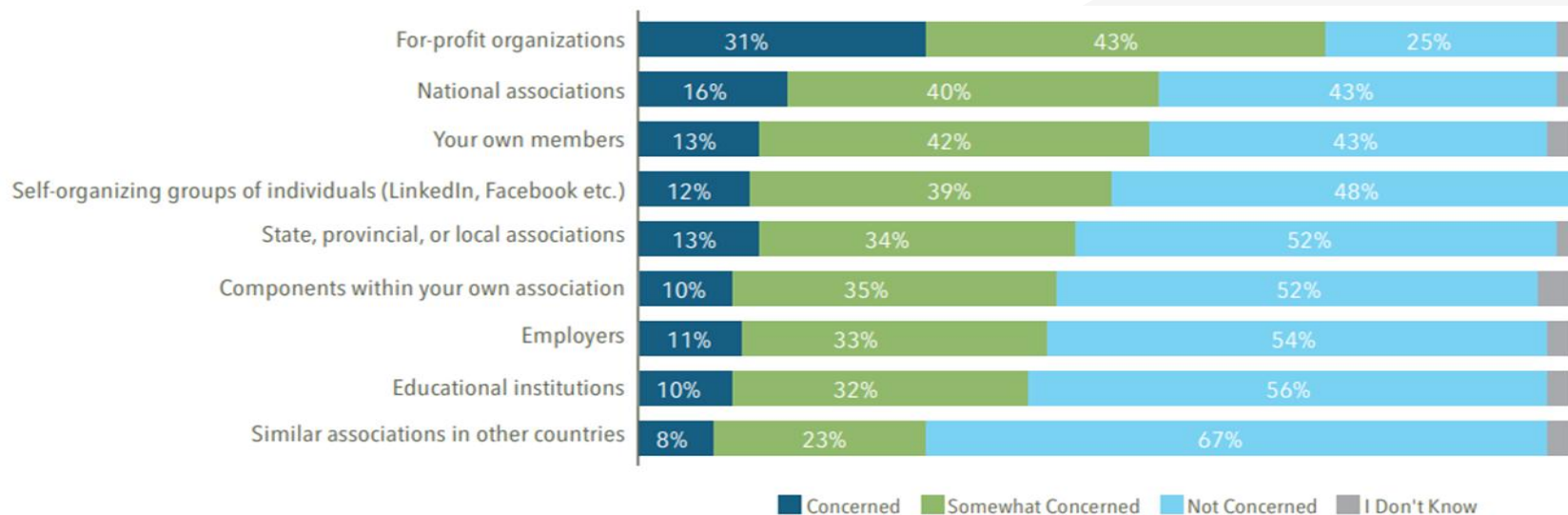
- Survey says....

MOST CONCERNING IMPLICATIONS FOR ASSOCIATION STRATEGY - TOP 10



Source: Association Laboratory

COMPETITION



Source: Association Laboratory

MAXIMUM EFFECTIVENESS

- Get your CAE and maintain it.
- Know your craft (*meaning become an expert not only in association management but the industry/profession subject matter*).
- Listen First, then speak. (*unless the topic is unethical or illegal*)
- Situational Awareness: Know when to hold'em, know when to fold'em. Emotions can get the best of us. Keep them in check.

MAXIMUM EFFECTIVENESS

- Look outside your own world to learn best practices. Take CE in other industries, general business sectors.
- CEO Peer Groups.
- Take a vacation.
- Treat people with respect.
- Don't take things personally.

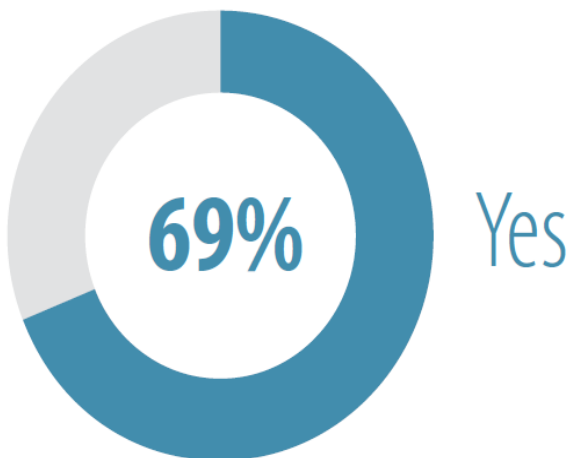
THE ROLE CONTINUES TO EVOLVE

FIGURE 3

The changing role of association CEO

Question: Have you personally seen a change in your role and responsibilities as CEO in the last three years?

n = 618



WHERE DO YOU SPEND YOUR TIME?

Areas of greatest focus for association CEOs

Question: Since you have seen changes in your role and responsibilities, what areas NOW have your greater focus and attention? (Please select all that apply.)

n = 440



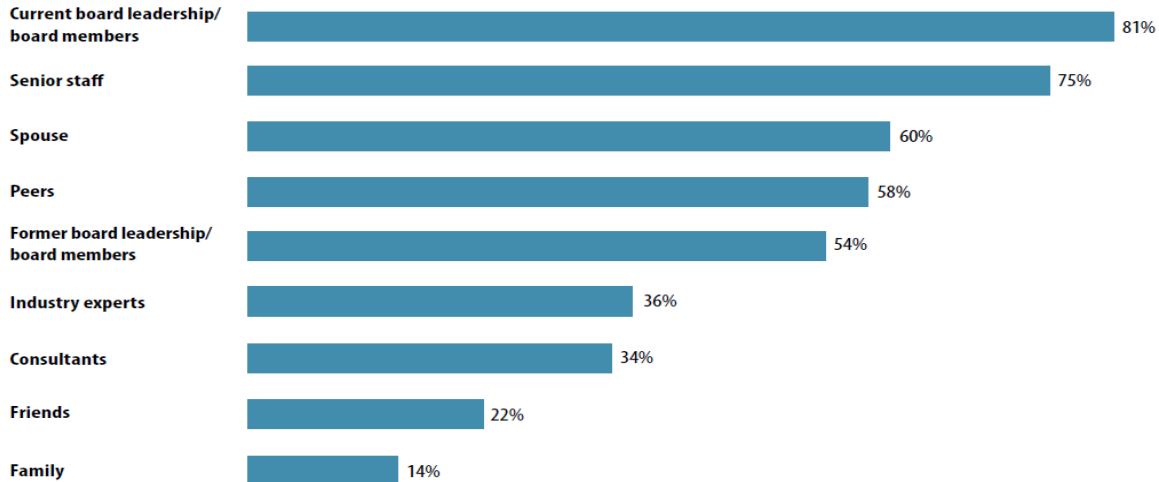
WHO CAN YOU VENT TO? LEARN FROM?

FIGURE 10

Sources of support

Question: When you have faced a MAJOR decision, where have you drawn source(s) of support? (Please indicate all that apply.)

n = 528



KNOW YOUR BOARD

- Google alerts on board members and/or board member businesses
- LinkedIn Profiles
- Facebook

BOARD OUTREACH – WHAT IS THE TARGET?

AIM FOR THE HIGH SIDE.

Hours spent on board work per month	1-10 hours per month	33%
	11-18 hours per month	18%
	19-30 hours per month	29%
	More than 30 hours per month	20%

FREQUENCY PRACTICES?

- Somewhat determined by number of board meetings and format (virtual vs.in person)
- Phone? Email? Text?
- General rule of thumb :
 - President or Chair – weekly or bi weekly contact
 - Executive Committee – at least 1-2 times a month
 - Directors at Large – at least monthly
 - Committee Chairs – when necessary, likely at least quarterly, more frequent based on cycle of work

FREQUENCY PRACTICES?

- Email communication – Is there a regular Association Executive or general staff report provided to board leaders on key programs and services; trends provided in between board meetings?

ARE YOU FOCUSED ON THE BIG PICTURE OR OPERATIONS?

- Ideally, a little of both.
- Lean towards the Big Picture. However, ensure you have other trusted team members focused on and good at details.
- Look outside the four walls, your likely major organizational competition is external.

KNOW YOUR NUMBERS!

- Revenue
- Expense
- KPIs
- Cash Flow Cycles
- Historical Trends
- Forecasting

STAFF RELATIONS

- Transparency fosters ownership and trust.
- Frequent and open communication is key.
- Provide regular feedback.
- Provide clear vision or expectations in areas of member service; initiative; financial and other performance metrics.

BOARD LEADERSHIP DEVELOPMENT AND RELATIONS



"Would you please send in one of my
'yes-men' to break this tie?"

BOARD MEETING PRACTICES?

- Blend of strategic and operational topics. *Ensure that material gives insight how did we get to here and where are we going?*
- How much “*pre heat*” is there with key leaders prior to release of the agenda?
- What level of detail is provided with board reports?
- Do you provide President/Chair with a cheat sheet agenda?
- Turn your phone off unless there is a culture of “texting between you and a board leader during an actual meeting. Sit next to the chair to avoid the need for “texting”.

ASSOCIATIONS ARE A PEOPLE BUSINESS

PERSONAL/PROFESSIONAL LINES

- How chummy can you get? Depends on the board culture.
 - Longevity is not an excuse for bad behavior:
 - Profanity – not good in most circumstances, even after hours
 - Don't get too deep on your political or religious beliefs or opinions
 - Vacations with certain leaders (possibly, after they are no longer in office)
 - Social outings – get to know the person, yes, when possible
 - Social drinking – be mindful of your role, surroundings, etc. Nothing good happens after midnight.
 - At the end of the day, you are always STAFF, no matter the situation or setting.

FAST TRACK TO THE DOOR

- Think everything is about you.
- Play favorites with certain board members. Engage in board gossip.
- Pad personal expenses.
- Aggressive behavior or attitude with staff, volunteers or members.
- Lose your passion.

THANK YOU!