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NEWS

When managing IT, be clear on goals before using available tools

Proper implementation also key, experts say

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By [Mark Tarallo](#)

Associations that are considering adding more IT tools have a few new prominent examples. Just a few weeks ago, the White House joined Instagram, and Michele Obama took charge of her five-month old Twitter account—usually run by staff—and pushed out a flurry of personal tweets.

Of course, some groups have already jumped on this bandwagon by tweeting frequently and maintaining active Facebook pages, blogs, and LinkedIn groups. Others are taking advantage of new software programs and smartphone apps specifically tailored for membership organizations, whether they be trade associations or professional societies.

But the rise in popularity of these IT tools has also resulted in management challenges for many association CEOs. Deciding which tools to use, and how much staff time and resources to spend, can be a continual struggle. CEO Update asked technology experts, and CEOs who have been managing IT effectively, to provide some guidance on best practices in IT management.

Strategic objectives come first

Experts seem to agree on a central precept behind successful IT management: First, don't focus on IT. That is, don't be driven by a keeping-up-with-the-Joneses mentality (i.e., other associations are using it, so our group needs to do the same) when choosing new tools. A well-managed IT program always starts with the association's clearly defined strategic objectives, says Abdullahi Sheriff, a knowledge management expert at PA Consulting Group who has worked with several global associations, such as the American Society of Civil Engineers.

With the objectives (rooted in the group's mission) spelled out, new IT tools may be selected once the association has a clear answer to the question: What exactly is the technology aiming to achieve? "Technology allows us to use information. Associations that use it best will survive—and thrive—in the digital world," Sheriff said.

But the "first, don't focus on IT" is a principle that some associations have yet to learn, says Rod Stiegman, director of IT for SmithBucklin association management firm. The rising popularity of social media has made it hard for some groups to escape the keeping-up mindset. This leads to associations using tools not aligned with their strategic objectives, which means a much higher chance of failure. (SmithBucklin has roughly 100 full-service association clients, Stiegman said.)

"What we see a lot of today is people saying, 'Hey, we have to get on Facebook.' There's a lot of pitfalls to that," he said.

Culture can be key

Still, successful IT management requires more than choosing the right tools. The implementation also is critical, experts say.

Again, not all associations have learned this lesson, Stiegman said. Some groups launch a Facebook page, blogs, or Twitter stream, and mistakenly expect the new tool to be a hit among members. "A lot of

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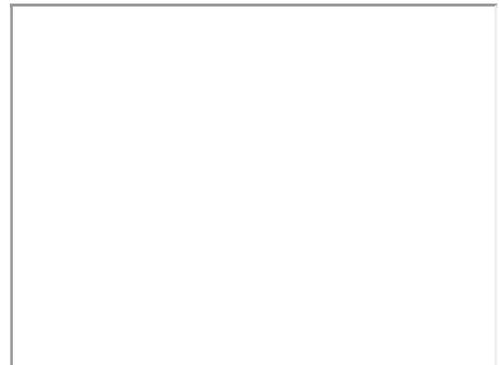
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those projects [ultimately] fall to the wayside," he said.

In reality, associations have only a relatively short time after the launch of a new media tool to prove that it is worth a reader's time. Otherwise, members will conclude that it is mainly "useless information," Stiegman said.

To avoid this, a group needs to promote the new outlet from the start ("you need a big bang up front," Stiegman said), and ensure that there will be interesting and timely content pushed out to members on a regular basis—perhaps even weekly, he said.

Proper implementation of new internal IT tools is also critical, Sheriff said.

Take, for example, an association introducing a new database system. If the association has sufficient staff, the process could start by having a team of volunteers use the system first. After the team has "bought in," they can help teach it (and vouch for its effectiveness) to other staffers.

In this way, the new tool is treated as a "tightly implemented piece of change," not something that is "massively disruptive," Sheriff said. It is also vital that this internal implementation match the association culture, he added. The volunteer-first method, for example, may be especially suitable for less hierarchical associations.

Managing IT, from the corner office

Longtime association leader Susan Waters, who has headed several different groups and is now CEO of the National Association of Insurance and Financial Advisors, said the proliferation of new IT tools has changed the nature of CEO management.

In earlier CEO jobs, Waters said she always felt that if a staffer was out, she could "sit behind their desk and do their job." That is no longer the case.

"I have to become more and more dependent on the people who report to me who have skills that I don't have," Waters said. For example, she cited a NAIFA lobbyist who has a much greater facility with Twitter than she ("I know how to tweet, but I wouldn't know how to retweet," she said.) This trend, she said, serves as a natural pull against micromanagement: "My level of trust has to keep going up."

And for a CEO, managing IT requires flexibility, and an ability to navigate between staffers who are "pretty exploratory" with new technology and welcome the newest developments, and staffers "who are frankly more like me—they say, 'just give me the tools I need, and don't try to force down my throat these other things that I see as not necessary to doing my job,'" Waters said.

This is particularly true in the current workplace, she added. Like many associations, NAIFA has an office populated by staffers from three different generations. Some have used IT since grade school; others, like Waters, did not become familiar with it until later. "I didn't have my own computer," Waters said, "until I was writing my master's thesis."

Different levels of familiarity result in different attitudes toward IT, and CEOs should always be aware of that fact in day-to-day management. Waters anticipates that NAIFA, moving forward, may use more video in its communications arsenal, which she acknowledged can be a daunting change for some.

"Not everybody is comfortable standing in front of a camera," she said. "Not everybody looks that great standing in front of a camera."

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