

A night-time photograph of the Chicago skyline, featuring prominent skyscrapers like the Willis Tower. The foreground is dominated by long, vibrant light trails in shades of blue and green, likely from traffic on a highway or bridge, creating a sense of motion and technology. The sky is dark with some clouds.

EXECUTIVE BRIEF

Navigating Tech Transformation for Association Growth: A Strategic Approach

Associations face increasing pressure to adapt their technology to meet the rising expectations of their members and demands of a competitive environment. This brief, inspired by a webinar co-hosted by Halmyre and 108 ideaspace, offers a framework for evaluating technology, identifying challenges, and making informed decisions for growth.

Challenges in the digital landscape

Associations operate in a complex digital world. Key challenges include:

- **The “Amazon effect”:** Rising member expectations for seamless, personalized digital experiences.
- **Specialized marketing:** Difficulty maintaining in-house, multi-skilled marketing expertise to drive member engagement.
- **Rising costs:** Unexpected price increases for software licences, maintenance, and support.
- **Complexity:** Integrating disparate systems and managing fragmented platforms.

Technology is now critical to member value, so critical that the American Society of Association Executives identified several of these challenges in their ForesightWorks series on external factors impacting association success. Disjointed systems create measurable revenue loss, and quick fixes like manual workarounds or duplicate data entry mean missed member engagement opportunities and erosion of both member satisfaction and organizational efficiency. Instead, a diagnostic approach is crucial.

Drawing inspiration from the popular home renovation concept, this Executive Brief applies a ‘Love it’ (invest, improve, optimize) or ‘List it’ (replace) metaphor to an association’s technology stack.

This framework supports maximum ROI for technology updates.



Diagnosing symptoms vs. root causes

Don’t make the common mistake of addressing symptoms as they come up. Before deciding whether to “love it” or “list it,” identify the root cause by asking “Are we solving the right problem?”

Common symptoms

Symptoms of strategy problems that tech transformation may not fix without deeper analysis:

- Stagnant or declining membership growth and engagement.
- Poor website metrics (low traffic, high bounce rates).
- Negative member feedback on digital interactions.
- Unexpectedly rising technology costs.
- Excessive administrative effort due to manual workarounds.

Root causes (tech and beyond)

- **Strategic misalignment:** Tech is no longer supporting core strategic goals.
- **Skill gaps:** Staff lack training on existing systems, so they are underusing paid features and relying on time-consuming manual workarounds.
- **Data gaps:** There is insufficient data from member research and association management software (AMS) to diagnose member dissatisfaction.
- **Poor member engagement strategy:** Member marketing and engagement planning misses the mark.
- **Inefficient processes:** Workflows are redundant or disjointed.
- **Outdated architecture:** Legacy systems cannot keep pace with change or meet evolving security needs.
- **Over-sophistication:** Technology offerings exceed actual organizational needs and capabilities.

Ignoring root causes leads to temporary fixes, escalating costs, security vulnerabilities, poor ROI, and missed value opportunities. Take time to assess your root causes, and once you understand them, step back and look at the big picture. What is your full inventory of technology today, and where do you want to be in the future? Not just what systems you need and want, but also how you need them to support your association's goals and value. Without this perspective, it's impossible to draw a roadmap to your desired future state.

System inventory & future state mapping

- Conduct an audit of all current systems to find redundancies, unused tools, and risks.
- Map a desired "future state."
- Identify systems to:
 - **Love:** **Keep** as-is the systems that function well and fit future needs.
 - **Improve** tech that needs enhancements, integrations, or training.
 - **List:** **Replace** solutions that are fundamentally flawed or outdated.



Holistic framework for people, process and platform

As you move through the process to love or list your technology, focus your efforts for maximum impact with three pillars:

1. People: your members and staff

- **Skill gaps:** Do staff and members have the skills to use current tech?
- **User frustration:** Are employees or members frustrated with current systems?
- **Expertise:** Is there adequate internal and external support?
- **Perspectives:** Does member research and marketplace data inform your tech decisions?
- **Future needs:** What will members, future members, and staff require long-term?
- **Solutions:** Invest in training and automate tasks, re-evaluate user experience design, seek support solutions, undertake research, improve change management.

2. Process: your operating procedures

- **Workflow efficiency:** Are workflows streamlined or are there redundancies?
- **Integration gaps:** Do systems share information seamlessly?
- **Member journey:** Does tech support a smooth member experience?
- **Solutions:** Re-engineer workflows, implement integrations (single sign-on, APIs), map member experiences.

3. Platform: your tech systems and standards

- **Modernity & support:** Is the platform current and actively supported?
- **Scalability:** Can the platform grow with the association?
- **Security & compliance:** Does it meet current standards?
- **Feature alignment:** Does it offer needed features without unnecessary complexity?
- **Solutions:** If the answer to any of these questions is no, fundamental problems exist, and a “list it” approach may be necessary.

Strategic alignment and the business case

Digital transformation is a strategic imperative. Every tech investment needs a clear business case with quantified benefits, whether that's staff time savings, member retention improvements, or revenue growth that leadership can defend to their board. Halmyre calls this approach the “measure twice, cut once” approach to tech investments: take the time to build your business case and identify priority needs, while creating clear links between member value, member experience, and technology decisions.

This process can also assist with prioritization — you don't need to do everything at once. A phased approach can support budget realities and change management for users.

Key considerations for strategic alignment:

- **Clear value proposition:** Demonstrate how tech enhances unique value delivery for members.
- **Growth drivers:** Identify primary growth sources (acquisition, retention, engagement) in a marketing strategy that tech can enable.
- **ROI calculation:** Quantify expected returns (cost savings, revenue, satisfaction, efficiency).
- **Total cost of ownership (TCO):** Look at long-term expenses beyond the initial purchase.
- **Phased approach:** For big changes, implement in phases for incremental value and reduced risk.

Documenting requirements is your power tool:

A comprehensive business requirements document (BRD) is essential to buy (rather than be sold) technology. A BRD should clearly articulate:

- **Strategic alignment:** The growth, engagement, and advocacy goals the systems must support.
- **Functional needs:** “Must-haves,” “nice-to-haves,” etc.
- **Business processes:** How tech impacts workflows.
- **Integration points:** Other systems that need to be connected.
- **User experience (UX):** Desired experience for members and staff.

Select your partners with care:

Asking the right questions when you are evaluating partnerships is key to successful technology transformation.

- **Reference checks:** Ask other users of the systems you're considering about the first year of ownership and post-launch support. Inquire about change management, vendor responsiveness, and if they'd choose the vendor again.

From theory to practice

MOBILIZING INTO ACTION: SCENARIOS

Once the planning and alignment phases are complete, it's time to mobilize. Here are common scenarios and actionable insights supporting “love it or list it” decisions:

Challenge: Website load time is frustrating members

- **Love it first (diagnose):** Check for unoptimized images, slow-loading pages, too much custom code, or poor hosting.
- **List it if necessary:** If the underlying tech is outdated/unsupported (e.g., old Drupal version), a replacement is needed. Start with a content audit, define personas and current (and desired future) user journeys, features, and integrations.

Challenge: Email marketing system lacks segmentation

- **Enhance first (diagnose):** Is it system capability or team training? Is there a clear marketing strategy, including effective segmentation aligned with corporate strategy and objectives?
- **Switch if necessary:** If the vision requires a comprehensive marketing system (integrating social media, ads, full-funnel visibility) or advanced content capabilities, a switch may be justified. Ensure operational ability matches sophistication.

Challenge: The cost of software and maintenance is continually rising

- **Love it first (diagnose):** Are costs genuine increases or inflation? Are they due to customization, unused features, or outdated support?
- **List it if necessary:** If costs are exorbitant for value or if core functionality is a struggle, consider alternatives. Focus on total cost of ownership and whether core needs are met.

Challenge: Fragmented platforms lead to excessive administrative effort and frustration

- **Manage complexity first (diagnose):** Analyze if it's a process issue (manual entry, data hygiene) or a lack of integration. Can APIs connect systems to automate exchange?
- **Consolidate if necessary:** If systems lack robust APIs or fragmentation impedes a unified member experience or collection of useful member data, consolidation may be required.



Watch Christine and Ashish discuss each of these scenarios in more detail

Conclusion and next steps

Digital transformation is an ongoing journey. By adopting a “love it or list it” mindset, grounded in thorough problem diagnosis and strategic alignment with people, process, and platform, associations can make informed technology decisions that drive growth and deliver member value.

Remember to:

- 1. Diagnose the root cause(s): strategic, business and technical.**
- 2. Focus on people, process, and platform.**
- 3. Document your business requirements and desired future state, aligned with strategic directions.**
- 4. Build a strong business case, rooted in member engagement and growth objectives.**
- 5. Take a prioritized, phased approach to support budget and change management realities.**
- 6. Buy, don't get sold, the right solutions for your organization.**

Together, these principles will help associations navigate digital transformation, spark growth and engagement, and strengthen their future.



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Additional resources

Want more on association tech strategy and decision support?



Watch the webinar that inspired this executive brief



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Learn more about Halmyre's membership and digital transformation strategy service

Learn more about 108 ideaspace's tech transformation services