

Executive Memo


 July 2002

Focus on Marketing

Tips for Better Brand Building

—by Rick Jacobs, Principal, Monigle Associates

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2170 S. Parker Road, Suite 265
 Denver, Colorado 80231
 303-368-9090
 Fax 303-368-4222
 joant@csaenet.org
 coverton@csaenet.org
www.csaenet.org

Powerful brands don't just happen—they are developed through careful planning and extensive work.

A brand is a promise, a piece of real estate that you occupy in a person's mind, and the related impressions it leaves behind. Brand strategy distinguishes companies from the competition and drives customer preference. A successful brand generates consumer loyalty and long-term financial return.

So, how do associations mimic the success of an organization such as the Red Cross when it comes to brand building and equity? With more than 30 years experience in corporate identity, branding and environmental graphics, experts from Monigle Associates provide the following seven tips to build a strong brand.

1) Analyze yourself and the competition.

Branding starts with the analysis of both an organization's and a competitor's strengths and weaknesses. Organizations should look at how they want to be perceived by key stakeholders and what differentiates them from the competition. Through internal research and target market analysis, you will uncover potential sources of competitive advantage. Determine which key benefits provide maximum relevance and differentiation for your service. Understanding the strategy and dynamics behind your own brand and competing brands will provide the backdrop against which to craft a distinctive brand with long-term competitive advantage.

2) Develop your brand strategy and positioning.

Strong positioning identifies the niche where an organization can own and win. Brand strategy and positioning is based on detailed market research and planning, and does more than describe your product or service uniquely. It defines your relationship with your key stakeholders. It clearly and concisely articulates how you want key stakeholders to think, feel and act toward your brand. Branding positions situate the organization at the center or hub and its products and services as the spokes. This positioning concept then becomes the cornerstone of all communication activities.

3) Create a brand design system.

Today's brands and logos can generate a powerful visual statement and brand representation, which can set the tone for an entire organization. A strong design system reflects and personifies an organization through an immediately recognizable symbol, logo, design and/or environment. An organization's design system is a cornerstone of branding efforts and includes productions involving logos, business stationery, identity systems and brand communication services. A design system is simply invaluable to supporting a strong brand.

4) Create employee brand ambassadors.

A strong brand gives internal audiences a common rallying point, creates a cohesive environment and promotes a

Executive Memo

Executive Memo is the monthly publication of the Colorado Society of Association Executives (CSAE) and is provided as a benefit to members. Submit your article by e-mail to JoanT@csaenet.org. Deadline for all material is six weeks before issue date. Submissions are edited and published as space allows. Letters to the editor, suggestions, comments and encouragement are welcomed. Expressed opinions and statements in this publication do not necessarily represent the opinions of the CSAE board of directors or its membership.

Editorial Committee

Tim Blum

*Rocky Mountain
Electrical League*
303-695-0089
timblum@rmel.org

Jon DeBoer

303-346-1365
jolodebo@att.net

Mo Goldman

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thomaa@totalshow.com

Marilee Yorchak

*Business Marketing
Association*
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marilee@bmacolorado.org

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303-741-8612
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Editor: Jill Ladouceur

303-804-9778
ladjill@qwest.net

Publisher: Colorado Society
of Association Executives

Executive Director:

Joan Tezak, CAE, CMP
*Colorado Society of
Association Executives*
303-368-9090
joant@csaenet.org

President's Message

Commitment Is Key to CSAE Success

—by *Karen Wojdyla, CSAE President*

I am delighted to have the opportunity to serve as CSAE's 2002–2003 president. The commitment of my predecessors to shape our growth and success over the years has provided me with a solid foundation to carry forward our purpose, "to support association executives in the ongoing pursuit of knowledge, wisdom and continued professional excellence."

On behalf of CSAE, I would like to express my sincere thanks to Tim Jackson for his leadership this past year. His warmth, enthusiasm, energy and dedication to our organization have helped put CSAE on the road to another successful 50 years.

For those of you who were unable to attend our annual meeting last month, you missed a wonderful educational and networking opportunity (see related article on page 6). CSAE continues to offer the finest educational experiences available to association executives and industry professionals.

In August, as you know, the American Society of Association Executives (ASAE) will bring its annual convention to Denver. This is the first time that ASAE has held a convention in Denver and, after experiencing our Rocky Mountain hospitality, certainly won't be the last. I hope you are planning to participate in ASAE's annual meeting. By volunteering to help with the meeting, CSAE members can take advantage of a \$99 registration fee. This is a substantial savings off the regular registration fee and will give you the opportunity to meet other association professionals from across the globe. As the host allied society, we would like to have all CSAE members participate in this meeting.

In addition, the ASAE convention will offer over 100 educational sessions, the annual exposition featuring a variety of association management products and services and some really unique evening events and networking opportunities. On Monday evening of the convention, we will have a

special CSAE 50th birthday celebration as part of the Colorado Adventure at Coors Field. You won't want to miss this historic event. How many organizations can boast that they celebrated their 50th birthday with thousands of their peers—and in the middle of Coors Field. It will be spectacular!

We will continue to celebrate our 50th anniversary throughout the rest of this year. Remember, it only happens once so let's party up a storm and show the rest of the worldwide association management community how to celebrate!

Lastly, it is my pleasure to serve as the president of CSAE. With that in mind, I want to know how CSAE can serve you best and provide you with a positive experience. Please do not hesitate to call me at 303-770-2220 or e-mail me at info@gwami.com with any thoughts, ideas or questions. I look forward to hearing from you and seeing you at the ASAE annual conference, as well as our own CSAE programs and activities.

CSAE, your career deserves it.



Karen Wojdyla
CSAE President



Ten Tips for Direct Mail Success

by Marilee Yorchak, *Business Marketing Association*

Most business professionals today recognize the value of direct mail as an effective medium. It is an advertising medium that is focused and measurable.

Here are ten tips to help you maximize the investment you make with your direct mail program.

1. Consider hiring professional support.

It may seem easier and cheaper to just do it yourself, but you run the risk of overpaying, or worse yet, making a faux pas that could have been easily avoided by using a professional direct marketing services firm.

2. Test, test and test.

This important axiom is repeated often in direct mail. However, make sure that what you are testing is relevant. Only test one piece at a time. Don't experiment with color and price in the same mailing, for example.

3. Always ask for the order.

Unless you ask your prospects to buy, they will never buy. It's amazing how many direct mail offers never ask for the order or the membership or the call for action.

4. Do your math.

I hear many people say, "The average response rate for direct mail is 2 percent." That is not always true, and worse yet, it doesn't matter. That's right...it doesn't matter what your response rate is...it matters if you make money on the mailing. A response rate of .05 percent can be profitable for someone with low costs. However, an expensive mailing (a three-dimensional package for example) may need a 10 percent response rate to be profitable.

5. Promote reader interaction.

Reading your direct mail piece is passive.

However, scratching, sticking, inserting, lifting, circling, identifying, peeling, and marking are active responses to your message. It helps your prospect focus on the message. The more involved your prospect is in your message, the more likely your prospect is to take action.

6. Make it easy to respond.

If your prospect has to work too hard to respond, he/she may simply put your offer aside and there it sits...and sits...and sits. Consider enclosing a BRE (business reply envelope) or card, a toll free number, a fax option, or an online option.

7. Create a sense of urgency.

Although this seems logical, it's surprising how many offers you get that don't have a deadline on them. That value of having the sale happen now is that it increases the likelihood of a repeat sale. You can create a sense of urgency by using action words, raising your prices after a deadline, stating a limited time offer, offering a bonus for ordering now, offering a limited supply, etc.

8. Don't forget the envelope.

Many offers never get opened...because the outside envelope doesn't give them an incentive or reason to do so. The importance of the envelope can't be overstated. Consider adding copy to the envelope to encourage prospects to open your offer.

9. Use a powerful headline.


Along with #8 above, many prospects never get into the body of your offer because the headline doesn't engage them. There is no hard and fast rule about how long a headline should be. Rather, your head-

line should be just long enough to say what you need to say to get your reader to pay attention to the rest of your offer. Your prospect reads for knowledge, information, or pleasure...not because he/she wants to work.

10. Using the three most important words in direct mail copy.

There are three words that always seem to work well and continue to be effective. Keep in mind the words "You," "Free" and "New." These three words have a proven track record. "You-Free-New" overpowers "We-Us-Our" every time. ❖

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303-292-6278, ext 5267
allison@denvermart.com

Henry C. Kyle, III, CAE

The Kyle Group, LLC
303-302-1109
ckyle@thekylegroup.com

Lois A. Rice

Casino Owners of Colorado
303-237-5480
melrose53@prodigy.net

Marilee Yorckak

Business Marketing Association
303-986-7611
marilee@bmacolorado.org

Executive Director

Joan Tezak, CAE, CMP
Colorado Society of Association
Executives
303-368-9090
Fax: 303-368-4222
JoanT@csaenet.org

Better Brand Building

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unified sense of purpose. It is critical to instill that sense of brand and teach all employees what the new brand stands for and how to be brand ambassadors — marshal this collective human spirit and you gain a competitive advantage.

- 5) Deliver on the brand.** Keeping promises is more important than good intentions. Authentic and demonstrable claims must link back to the brand promise and must be fulfilled. Remember, your brand symbolizes the trust relationship you have with your target audiences. Your organization's brand will succeed only when the entire organization, including its

audience members see them over and over again. As audience members grow to trust those messages, so grows their loyalty.

7) Measure the effectiveness of your brand.

Understanding the effectiveness and impact of a brand is important. Organizations should monitor the effectiveness its brand and the equity built into the brand through primary market research. The association should survey prospects and key decision makers in its target markets to determine how they see the company. This should be done anonymously to find out where the respondents think the

Building a strong brand is invaluable. It is the foundation of your corporate marketing. It is your essence, your herald, your identity.

operations and culture, is aligned with the brand values. Every business practice, member contact and even employee attitude must support the brand positioning. If your brand says "friendly" and your switchboard operator is not, you are not. Likewise, if you identify yourself as "convenient" and you open the doors 24 hours a day, you are. By delivering what your brand promises, your organization can increase its credibility and leadership among competing organizations.

6) Send a consistent, integrated message.

Organizations that care about building their brand speak in a clear, consistent "voice." Consistent and cohesive use of the name, logo and message points present the organization in the same fashion to everyone. Every word, spoken and written, about the organization must support the essence of its brand — ads, brochures, presentations, press releases, sales materials, Web site and other collateral. Done well, those messages generate a kind of cumulative power, because

association fits in relation to its competitors and what value the association brings to the table. These responses will help you learn whether your self-perception and that of the target market match.

Building a strong brand is invaluable. It is the foundation of your corporate marketing. It is your essence, your herald, your identity. Remember, your organization has a brand, but it is up to you to support it consistently, through words and deeds. With the right strategy, branding can help any organization increase membership, loyalty and credibility. Without a branding strategy, you are leaving the most important facets of your organization's success to chance. ♦

Rick Jacobs has counseled more than 200 major corporations on brand strategies. Rick is responsible for overseeing the strategic planning component of all major projects while also directing marketing, strategy and new business development for Monigle Associates, Inc. He can be reached at 303.388.9358 or e-mail at rjacobs@monigle.com.

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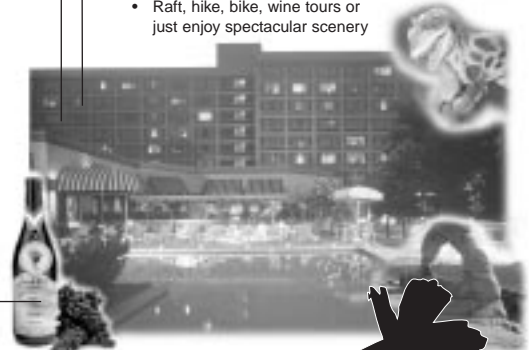
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Using Interactive Marketing to Acquire New Members

by Sam Eidson and Jim Grinney, Partners, 90octane Interactive Marketing

This article is intended to highlight the key points of CSAE's May luncheon presentation entitled "Are You Maximizing Your Interactive Marketing Capabilities?" It can help you explore targeted e-mail, online advertising, e-newsletter sponsorships and search engine optimization to cost-effectively gain new members.

Your first question may be: Should I consider interactive marketing for my membership drive? The answer is most likely yes if you are looking to:

1. Reduce your cost of acquiring new members. Targeted e-mail, for example, has negligible incremental transmission costs, compared to

\$0.18–\$0.26 for postage. As you continue your online marketing efforts, the economic case becomes even stronger: using electronic media, creative and technical work can be reused at little or no additional cost, bypassing the ongoing printing costs of a direct mailer. This transforms your marketing costs into investments.

2. Improve your member targeting. With the growth of online marketing has come improved external media: highly targeted opt-in e-mail lists, online ad unit placements, and e-newsletter sponsorships. The owners of these media are using the

Web's ability to track online behavior and collect users' profile data in order to offer you the most targeted opt-in addresses for external targeted e-mail campaigns and advertising space on their Web sites.

Because of this targeting—and tools like HTML e-mail (see Tech Tip below) still carry some of the "wow" factor and offer a convenient way to view and interact—response rates are higher for interactive marketing than for direct mail. Bottom line: a higher return from a lower investment.

What Tactics Are Available?

Opt-in E-mail. E-mail is one of the most targeted tactics available and produces higher response rates than most other direct marketing tactics. It also offers detailed tracking to effectively measure the results of a campaign. There are numerous options to consider: HTML (graphical) versus text e-mails, landing pages to offer additional information, collection of profile information through a registration page, etc.

E-newsletter Sponsorships. E-newsletters provide regularly e-mailed content from an online publisher to individuals who request this content. Providers allow advertisers to "sponsor" their newsletter for a fee. A sponsorship is normally two or three lines of text and a hyperlink to a landing page. E-newsletter sponsorships provide the credibility of the publication at an affordable cost.

Online advertising. Banners, skyscrapers and buttons have recently fallen out of favor, because their proliferation has led to low clickthrough rates. The good news is that the cost of this media has dropped accordingly, and marketers are starting to use nonstandard, differentiated ad units as an inexpensive method of branding. By carefully targeting the right

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Tech Tip

Quick tips to improve your day-to-day work and increase the efficiency of your organization. E-mail your tips to Tim Blum at timblum@rmel.org.

Text Versus HTML E-mail

E-mail is just e-mail right? Wrong. E-mail can be sent to recipients in various formats. Two of the most commonly used formats for sending e-mail are plain text and HTML (Hypertext Markup Language).

Plain text e-mails are what you're probably used to seeing in your inbox each day. Plain text is exactly that—text without formatting. This format is most common and the advantage is virtually all recipients can read e-mails in this format. Most e-mail programs allow you to define a default font in which your plain text messages will be displayed. For example, in Outlook click Tools-Options-Mail Format-Fonts.

HTML is used in designing Web sites, but can also be applied to e-mail. HTML e-mails allow the sender to use formatting in the body of the e-mail. The HTML format is used when an e-mail includes features such as text formatting, numbering, bullets, alignment, horizontal lines, backgrounds, etc. Want to bold or underline something in your e-mail? This is the format for you. The downside is not everyone may be able to read your e-mail.

Microsoft Outlook can send and receive messages either HTML or plain text. To change the format of your e-mail in Outlook, click New Message-Format-and then HTML or Plain Text. You can also specify one of these as a default message format. ❖

Interactive Marketing

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pages and taking advantage of the creative flexibility that online advertising offers, you can bring your message to the top of your audience's mind while simultaneously presenting them with high response mechanisms such as targeted e-mail and e-newsletter sponsorships.

Search engine optimization. Your Web site should be an important component of your online marketing. You spend resources updating it with fresh content for your existing members—why not leverage this investment by making sure new prospects find the site? The most cost-effective way to accomplish this is through search engine optimization: manipulating the site so that Google, Excite and the other engines will place your site in a favorable position when prospects search on keywords that describe your organization.

How Do I Decide Which Tactics to Use and How Do I Implement Them?

Answering this question requires an interactive marketing plan. The plan should address such issues as:

- ❖ What are my specific campaign objectives?
- ❖ Who is the target audience and what are their online behaviors?
- ❖ What are the tactics that will most effectively target this audience?
- ❖ Does my association have an internal opt-in e-mail list? Are there good third-party opt-in lists that are targeted to my audience? How do I prioritize, negotiate and manage these?
- ❖ What offers will motivate prospects to respond, register, or attend a meeting? What profile information should I ask of them? How will I use this information in my next communication to them? When is this next communication appropriate?

❖ How do I implement the creative and technical plan? What resources and tools do I have in-house, and what do I need to outsource? Developing an effective online marketing plan requires some time and expertise, but it will help you design a program that reduces your marketing costs and exceeds your membership acquisition goals. ❖

Sam Eidson and Jim Grinney are with 90octane, a Denver-based interactive services firm that develops and executes targeted online marketing strategies for clients ranging from small organizations to Fortune 100 companies. You can contact Sam Eidson or Jim Grinney at: info@90octane.com or 720.904.8169.



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Common Contract Issues Involved in Planning a Meeting

by *Adrienne McNamara and Cathy Traugott*

Planning a meeting? Get ready for numerous contracts. Hotels, convention centers, caterers, speakers, exhibitors, sponsors—you'll usually want a clear, written contract with each party that addresses all aspects of your relationship. Each contract is likely to be different—but all need to be consistent. Here are some issues to consider:

How do the contracts address changes in anticipated attendance? Meeting planners and facilities negotiate contracts months or years in advance, based on projected attendance. However, attendee numbers often change, and the facility may permit adjustments. In negotiating such provisions, both parties should consider: 1) the timing of the adjustments and the impact on attrition fees (possibly including a sliding scale based on the number of days prior to the meeting); 2) whether provisions can be included to reduce the fees owed by

are oversold, who must find another hotel for the guests, room rates at the other location, and related issues associated with moving a participant to another hotel.

Do the contracts allow for adjustments to room rates? Because of the lead time required to plan a meeting, room rates or facility charges may change. When negotiating a contract, the parties should consider whether the contract: 1) locks in a maximum rate but provides that the hotel or facility will not charge more to the attendees than it is charging to other comparable patrons; or 2) clarifies that attendees who book a room outside of the association's arrangement (to obtain a lower rate) will nevertheless be included toward any contract room minimum or minimum payment due.

Does the contract adequately address event cancellation or contract

or personal injury may occur at meetings. Indemnification and insurance provisions in contracts address in advance the responsibility and allocation of risk for such incidents. Consider whether either party should be required to carry insurance. If so, the contract should specify what kinds of policies and the minimum dollar amounts. It is also prudent to have insurance provisions reviewed by your insurer.

Are all of the contracts consistent? Make sure the various contracts are mutually consistent, for example, that the terms and conditions of the exhibitor and sponsorship contracts are coordinated with the facility contract. There may be provisions that the hotel or facility requires to be in the exhibitor or sponsorship contracts—be sure they are there.

Do speaker contracts give the association all the rights it wants? Consider in your contracts with speakers or other presenters who will own the rights to the presentation and related materials. If the speaker is the owner, the contract should clearly specify what rights the association has to use such materials. Also, consider whether the contract adequately addresses the speaker's responsibility to ensure that his/her materials do not infringe the copyright or other rights of others.

General contract principles obviously also apply to meeting contracts. For example:

- ❖ If using a form contract, remember that you cannot typically just change the names at the top of the contract and sign it. Each relationship and situation involves unique facts and the parties may want different rights or responsibilities in the contracts.
- ❖ If you orally agree to certain terms, be sure those terms are included in

Every provision of a contract needs to be reviewed carefully. Read your contracts completely and be sure that you fully understand your rights and obligations. Seek legal counsel whenever you have a question about a provision or whether an issue should be addressed in the contract.

the number of rooms or amount of food that the facility resells; and 3) the need for and content of any post-conference report used to determine the fees.

Do the contracts include provisions to assure sufficient available rooms? The parties to a hotel contract should consider whether the contract includes provisions that: 1) specify when the hotel can re-sell a blocked room; 2) provide a date through which the guaranteed number of rooms will be available; and 3) address, if rooms

termination? As recent events have made clear, all parties need to address the issues of event cancellation and contract termination in their contracts. Contracts should address: 1) whether and how the contract can be terminated, and 2) what happens if all, or part, of an event is cancelled or postponed. These are key provisions that require thoughtful review and negotiation to address and handle unanticipated events.

Do the contracts address indemnification and insurance? Property damage

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Meeting Contracts

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the written contract. With limited exceptions, a written contract will be considered to contain all of the material terms agreed upon by the parties. If one party thinks that the parties have previously agreed to something, but it is not in the contract, the party often will not be allowed to enforce that term.

- ❖ Be sure you receive a properly signed contract. Frequently, parties fail to follow through completely, once negotiations are concluded, and fail to receive a signed agreement. Be sure that all blanks have been completed, and if you are signing on behalf of an entity, be sure to sign in your official capacity. In summary, every provision of a contract needs to be reviewed carefully. Read your contracts completely and

be sure that you fully understand your rights and obligations. Seek legal counsel whenever you have a question about a provision or whether an issue should be addressed in the contract. ❖

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Adrienne McNamara and Cathy Traugott represent associations and other nonprofit organizations at Faegre & Benson LLP. They can be contacted at 303-592-9000 or amcnamara@faegre.com or ctraugott@faegre.com.

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Simplify your Membership Marketing

Association members today respond to different stimuli that they did several years ago. They are more sophisticated and expect more from their associations. So, how do we continue to communicate the benefits of our associations to them in a way that they get the message?

Although there is no one magic answer to the question, we must continue to seek ways to revitalize our marketing techniques. One of the simplest is to borrow ideas from other associations and test them on our own members. Sometimes simple is better. Plus, a simple idea is easier to implement

than a complex, costly process. Here are some simple ideas to consider.

1. Promote membership to non-member attendees at your educational events and follow up with them. Offer an incentive to join, like a discount on future events.
2. Invite former members to rejoin and emphasize what's new since their membership lapsed.
3. Track people who request applications and encourage them to sign up.
4. Offer trial memberships for a period of time. If your members hold a certification of some sort, offer a free one-year membership to non-members who receive the certification.
5. Create a "membership road show" to take to large companies. If you have individual memberships, ask the company if you can introduce the association, both to non-members and to current members. This can be a recruitment and a retention tool.
6. Advertise membership in trade and industry publications. It not only reminds current members of the great things you provide, it also encourages non-members to join.
7. Offer a range of payment options—credit card, partial payments—payable online, by phone, fax, or mail.
8. Say thank you for their payments. Send a membership card, thank you letter, or postcard acknowledging receipt of dues payments.
9. Call members before you drop them for non-payment of dues. Update your database, obtain feedback and get their payment by credit card.
10. Notify your past due members that their membership has expired. Enclose an application and encourage them to reinstate their membership.
11. Conduct exit interviews or focus groups for terminating members.

These are just a few examples of what has worked well for other associations. Some will work and others won't but you will never know the difference until you test a new idea. ❖

How I Got Here...

Once again, CSAE Execs responded with vigor! The question, "How did you get here?" brought many "you won't believe this, but...." stories. A few of us attacked the profession with a mission, but most of us are "accidental executives," taking a winding path to fulfilling destinations.

Because of the number of responses, we are publishing these throughout several issues. Watch for them—stories about you—in this and coming editions of *Executive Memo*.

Tom Cooper, CAE, Executive Director Association of periOperative Registered Nurses (AORN)

Did any of us start out with the goal of being an association executive, or even know that association management positions existed? I got into it accidentally. I had been a public school teacher and was making a career change when I was hired by an association as director of education and research. At the time, I had no idea what associations were all about, but it seemed like a great opportunity. The rest is history.

Adrienne A. Bien, S/A/S Services Director Medical Group Management Association (MGMA)

How did I get into this business? I answered a want ad for MGMA's first full-time customer service representative seventeen years ago. At that time, I hadn't really realized that you could get paid for working for an association. I have stayed with the profession because of the people and the opportunity to continually learn and grow—everyday brings something new.

Ilene D. Kamsler, CAE, Executive Vice President Colorado Hotel and Lodging Association

Funny you should ask...it was definitely a "winding path." I was working for the City of Torrance in California as a recreation supervisor. An employee told me about a new resort opening and I thought that would be fun for a year. I quit my job in May and in October pointed the car toward Utah to take a job at the front desk of The Lodge at Snowbird...five years later, I had had enough of the resort life and joined the Utah Ski Association as assistant director. About two years later, my former Snowbird boss asked me to apply for the director's position of the Utah Hotel and Motel Association and five years later a Colorado board member asked me to apply for my current position. Prior to working for the Utah Ski Association, my only connection with associations was as a district president of the California Parks and Recreation Association (totally volunteer driven...no staff). It never occurred to me there was a profession in association management. If I had known way back then, what I know now, I would have by passed three careers and gone directly to association management. Most people I have talked to also fell into it through a back door. I do believe that has changed and that association executives today, while still "falling" into the profession, are a great deal more professional.

Can't We Just Change Our Logo?

by Jon DeBoer, *Management and Facilitation Consulting*

Many associations are looking for a new image, especially if they have been around for many years, and have a logo, name, and mission that still reflect the 1950's (or earlier!). In those days, logos often looked like corporate seals, names were defined by the terminology of the day, and the look was staid or even stultifying. Today, many associations are following the business trend of updating their image to better reflect their current mission as well as the services they offer to their membership. It may look easy, but be careful—you may end up with worse results than when you started.

The first caution is the answer to the our headline: Can't we just change our logo? No, you cannot just change your logo. Your identity is as important as the brand put on cattle in the old west, when free range meant your cattle could intermingle with those of your neighbor. Today, your members can

your image, or does the image stand alone?

First, you must realize the process is going to take six to twelve months and will require considerable volunteer, staff and financial resources. Unless you are very well staffed, you are going to need a consulting designer to assist with design concepts, sketches and layouts. You will probably also need the assistance of a marketing/advertising firm to help with the overall process, especially if you are a small organization. If you do use consultants, make your selection very carefully, as these people will have a significant impact on your final results. Check their portfolio—are their designs pleasing to your eye? Get references—are they easy to work with? Were there clients satisfied with the value? Also, make certain you develop a contract that clearly defines what you are buying.

Both staff and volunteers need to be involved in the change through con-

Today, your members can and do intermingle with other associations, with for profit companies providing similar services, and with government services. You need to provide the identity that lets your member know when he or she is dealing with you!

and do intermingle with other associations, with for profit companies providing similar services, and with government services. You need to provide the identity that lets your member know when he or she is dealing with you!

Your brand is more than just your logo. It includes the colors and the fonts used, even the style. Are the graphics of your image the key, or do the words or acronym provide the primary voice? Do you include a tagline, one that ties your primary mission to

trolled focus groups, surveys and other involvement in the process, but, as Brigid O'Conner, vice president of marketing and Communications of Medical Group Management Association (MGMA) states "you must involve all of the stakeholders so they have ownership of the final product, but you must also control the process carefully to avoid a chaotic selection process. The final decision making must be done by a small group that takes all of the input into account."

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One final consideration is how you are going to launch your changes. You can tie the launch to a celebration, such as a significant anniversary, or to your next annual conference, or to another event that will showcase the changes, and make certain the membership is aware of the change and the purpose of the change.

MGMA used a process that included reviewing all the current materials they produce; publications, advertising and marketing materials, conference images, letterhead, memos, faxes, forms—even the invoices used by finance. Spread all these materials out on a conference table and you will see your current "image." Is it consistent? Does it convey the impression you are seeking? If not, you might want to take on a re-branding process for your association. ♦

Jon DeBoer is with Management and Facilitation Consulting and a member of CSAE's communications committee.

Keeping a Pulse on Membership and Member Needs

by Kris Hefley, PresentFutures Group

The convergence of major trends illuminates the sometimes daunting process of fulfilling members' needs by delivering the right mix of association programs, products and services. Added to this complexity is communicating with members in a timely, cost-effective manner. With members asking, "What's in it for me?" association executives are constantly faced with membership issues that require immediate action.

- ❖ **Instantaneous response.** Connectivity and the information explosion created by the Internet and e-mail has resulted in a "I want it now," member mindset.
- ❖ **Association marketing and member retention is all about building relationships.** Just like in the private sector, finding customers, building relationships and keeping customers is the end purpose. However, sometimes unlike the private sector, many associations do not have the means to match their vision and strategic plan to their members' needs.
- ❖ **From product/producer driven to customer driven.** No longer can association management create programs that they feel members want and need without assessing member interest and demand.
- ❖ **High tech—high touch.** A trend coined by John Naisbitt in his best selling book *Megatrends*, the concept of nurturing relationships with technology alone without balancing it with a personal touch is just as real today as when Naisbitt wrote about it 1982.

Associations are membership driven organizations. They should be devoted to meeting the needs of membership

and being advocates for the industries and/or professions they serve. While committed to meeting membership needs, many associations know very little about their individual members or the companies that support them. With the emergence of the Internet, associations are increasingly relying on their Web presence to build relationships with members and broader communities. However, many Web based communication strategies lack the personal touch to really understand member needs.

So, how do associations become more relationship-driven? In answer to this question, many associations are committing more resources to member research in an effort to build stronger relationships with members.

The following member research projects and interactive processes will provide associations with invaluable information and knowledge to build and effectively manage their relationships with members.

Assess Member Needs and Association Benefits

Use focus groups and member surveys to find out whether the association is keeping pace with member needs. The assessment should be done at least once a year and include:

- ❖ Recognition of the features and benefits of each association program, product and service.
- ❖ Evaluation of usage levels of each association program, product and service.
- ❖ Evaluation of the gaps between how members perceive the importance of programs, products and services with their satisfaction levels of those same programs, products and services. For example,

meetings, publications, conferences, newsletter, web site, etc.

- ❖ Identification of association audiences/segments.
- ❖ Development of member profiles including interests and validation member information.

Potential Outcomes: Associations can better target members based on usage and interests. Research findings focus marketing resources. Research provides bench marks for member satisfaction. Research identifies appropriate programming and publication content and member retention through identification of member needs.

Conduct Industry Studies and White Papers

- ❖ Use secondary research, executive interviews and member surveys to conduct industry studies and white papers that association members can use to enhance their organizational practices and strategic planning. These studies can also be used for association conference seminars and industry events.
- ❖ Conduct short flash/fax surveys and/or web based surveys to assess hot industry issues or get feedback on new association products, programs and services. For example, education seminars, association publications or advocacy initiatives.

Potential Outcomes: Salary/compensation surveys and reports. Cost of operations and revenue studies. Industry trends, futures and best practice studies. Business climate updates and

Continued on page 13

Keeping a Pulse on Membership

continued from page 12

analysis. New program development and event evaluation.

One-to-One Communication

- ❖ Studies from the private sector indicate that contacting new customers within a few weeks of a major sale increased customer retention. The same would apply to association members.
- ❖ Having a toll-free or local telephone number that is constantly promoted as a “direct line to association management” allows members an opportunity to provide feedback on programs and services.
- ❖ Web pages and fax-on-demand can be effective methods to disseminate association information and publications.
- ❖ While Web sites are usually more informative than interactive, there are web based technologies that offer an association various interactive capabilities such as personalized content, content management and member profile management. Simply having an e-mail contact on a web site also offers members some interactive link for one-to-one communication.

Potential Outcomes: Direct contact and communication with members. One-to-one communication enhances member retention and individual recognition of members. Direct interaction with members on their satisfaction with programs, products and services. Mechanism to get member ideas and comments.

When associations are committed to keeping a pulse on their membership and building relationships with their

members, they must also be committed to member research. While not overwhelming members with surveys and studies, it is important to periodically conduct research that focuses on member interests, needs satisfaction and industry issues/trends. Successful association management is all about keeping members satisfied. Without member research, association managers do

not know their members or what keeps them happy. ❖

Kris Hefley is the President of the Present-Futures Group. He has conducted research, strategic planning, marketing, and seminars for over 25 state and national associations. Before founding his company in 1986, Kris was the Director of Research of the Naisbitt Group. He can be reached at 303-894-9867.

Executive Circle: Catch-and-Release Hunting?

by Mary R. Jordan, EdD—InterNational Electrical Testing Association

We all have a little knowledge about catch-and-release fishing in Colorado lakes and streams, but catch-and-release hunting? Just one of many heady topics covered at the organizational meeting of the newly formed CSAE Executive Circle.

This network of experienced executive members is charged with creating the CSAE Think Tank envisioned in CSAE’s strategic plan. The initial meeting in May involved sharing experiences, expectations, concerns, and Circle goals. Circle members will determine the topics, and any information of benefit to other members will be shared with appropriate CSAE committee chairs or communicated through Executive Memo. The members themselves rather than guest speakers will serve as resources, relying on related readings as well as their own experience base. The discussion topic for the next meeting is global trends and their possible effects on associations.

Meetings are at 5:00 pm on the second Tuesday of odd months, with the next meeting July 9. The two-hour meetings will have one hour of discussion on a topic determined by the group with the final hour allotted for open brainstorming and problem sharing/solving. The Circle, capped at 20, has 17 charter members with nine attending the May meeting. If membership swells, additional Circles may be formed.

As for catch-and-release hunting: You can legally hunt rhinos using tranquilizer darts and remove the horn as a trophy before releasing the pride-injured, three-ton animal. The hornless rhino is now safe from poachers. (Reference: Sam Albrecht, Society for Range Management). ❖

How to Join Executive Circle:

Executive Circle applications are available from the CSAE office or at www.csaenet.org.

Criteria for joining:

- ❖ Active membership in CSAE
- ❖ Currently employed in an association at the department director up to the chief staff level.
- ❖ \$200 annual fee.

Here's the CAE question of the month...

Which of the following is the most effective financial tool for monitoring an association's performance against the objectives and strategies of its strategic plan?

- A. Audited statement
- B. Profitability ratio
- C. Natural expense budget
- D. Functional expense budget

Answer at bottom.

Interested in finding out more about the CAE certification? Call the CSAE office, 303-368-9090.

Member Profile: Linda Schafer

You've probably seen her set-up at CSAE monthly meetings, she's Linda Schafer, a promotional products distributor for GL Specialties. She works through a national organization, Kaiser & Blair, as an independent contractor. Because of this exclusive relationship, she is able to pass along national discounts to her local customers.

Linda started her business in 1998, and joined CSAE in 1999. Prior to that, for 30 years, she sold property and casualty insurance and was involved in marketing and product development, as well. She has always been involved with associations and recently won a prestigious sales award in Kaiser & Blair's Century Club.

Linda was born in Petosky, Michigan. Her father was in the service, so they lived

on various naval bases including Chicago, Benton Harbor and finally, Camp Pendleton in San Diego where she attended San Diego State University as a history major. Linda has spent the past 20 years in Denver with her family, who all still live in Colorado. Her husband is a general contractor and they have three adult children, two grandchildren and a dog—a Bischon named Christopher Robin. Linda enjoys camping and boating at Lake Powell, reading, music and theatre.

What would Linda like to be doing in ten years? "I want to still have this business and acquire a partner so that I can do this the rest of my life. I love what I'm doing and only wish I had found this 20 years ago." Need some promotional products for your business? Call Linda Schafer at 303-456-9035. ♦

New Members

Professional Members

Peg Brown, Executive Director
Colorado Association of Health Plans
1177 Grant Street, Suite 304
Denver, CO 80203
Phone: 303.832.9611
E-mail: pbrown@idcomm.com

Jill Farschman, Executive Director
ExecSavvy
PO Box 101268
Denver, CO 80210
Phone: 303.282.7978
Fax: 303.733.4621
E-mail: jill@execsavvy.com

Elizabeth M. Julin, Deputy Director
Colorado Society of CPAs
7979 E. Tufts Avenue, Suite 500
Denver, CO 80237
Phone: 303.741.8607
Fax: 303.773.6344
E-mail: ljulin@cocpa.org

Kenneth R. Kirwin, CFO
New Ventures of Regis University
6890 West 52nd Avenue, Suite 201
Arvada, CO 80002
Phone: 303.458.4322
E-mail: krkirwin@regis.edu

Stephanie Retz, Deputy Director
InterNational Electrical Testing Association

PO Box 687
Morrison, CO 80465
Phone: 303.697.8441
Fax: 303.697.8431
E-mail: sretz@netaworld.org

David F. Walker, President/CEO
Hemlock Society Society – USA
PO Box 101810
Denver, CO 80250-1810
Phone: 303.639.1202
Fax: 303.639.1224
E-mail: ceo@hemlock.org

Paula Wallace, Director of Public Relations and Marketing
Gamma Phi Beta Sorority
12737 E. Euclid Drive
Centennial, CO 80111-6445
Phone: 303.799.1874 ext 322
Fax: 303.799.1876
E-mail: pwallace@gammaphibeta.org

Associate Members

Jane Deegan, Sales Manager
Steamboat Grand Resort Hotel & Conference Center
2300 Mount Werner Circle
Steamboat Springs, CO 80487
Phone: 970.871.5540
E-mail: jdeegan@steamboat.com

Leah Fischer
Conference Sales & Services Manager
Boulder Convention & Visitors Bureau
2440 Pearl Street

Boulder, CO 80302
Phone: 303.442.2911
E-mail: leah@bouldercvb.com

R. Michael McKinney, President
COMhaus, Inc
390 Union Blvd, Suite 260
Lakewood, CO 80228
Phone: 720.962.4715
Fax: 720.962.4716
E-mail: mike@comhaus.net

Colleen Pace, Regional Sales Manager
Garden of the Gods Club
3320 Mesa Road
Colorado Springs, CO 80904
Phone: 719.520.4967
E-mail: cpace@destinationhotels.com

Kevin Reimer, Owner
Hawthorn Suites & Hampton Inn,
Grand Junction
225 Main Street
Grand Junction, CO 81501
Phone: 970.424.2525
Fax: 970.242.0295
E-mail: westhospitality@cs.com

Ellen Singleton, Sales Manager
Hyatt Regency Tech Center
7800 E. Tufts Avenue
Denver, CO 80237
Phone: 303.714.4616
Fax: 303.714.4671
E-mail: esinglet@denvepo.hyatt.com

Answer is D. Functional expense budget

CSAE Golf Tournament— September 10, 2002

Inverness Golf Club

Start your day off right with a round of golf followed by lunch at Inverness Golf Club, rated one of the top ten courses in Colorado by Colorado Golfer. A continental breakfast will be served at 6:30 a.m.

Reservations are on a first come, first served basis, so please register as soon as possible. This tournament includes green fees, golf cart, range balls, continental breakfast, lunch, snacks, beverages, giveaways, great prizes, and awards.

To register complete the form below and return with payment to CSAE at 2170 South Parker Road, Suite 265, Denver, CO 80231 or fax

to 303.368.4222. For sponsorship information call the CSAE office at 303.368.9090. ❖



Cancellation deadline: 9/5/02

July Golf Tournament

When: September 10, 2002

Where: Inverness Golf Club
200 Inverness Drive West
I-25 & Dry Creek Road
Englewood, CO 80112
Phone: 303.799.5800

Directions: Take I-25 to the County Line Road Exit. Turn east on County Line Road, then North onto Inverness Drive West

Time: 6:30 a.m.—Continental Breakfast & Registration Check In
7:30 a.m.—Tournament Begins (shotgun start)
12:30 p.m.—Awards Luncheon

Cost: **Golf Tournament:**
\$240 Foursome
\$125 Individual

CSAE Golf Tournament Registration Form

Golf

Name _____

Association/Company _____

Phone _____

I am attending as a CSAE Member Guest

Golf Tournament: \$440/Foursome Rate (completed foursome is listed below) \$125/Individual

Total amount enclosed \$ _____

Method of Payment Check AMEX Visa/MasterCard

Name _____ Number _____ Exp. Date _____

Golfer #1

Name _____
Association/Company _____
Telephone _____
Hdcp or average score _____

Golfer #2

Name _____
Association/Company _____
Telephone _____
Hdcp or average score _____

Golfer #3

Name _____
Association/Company _____
Telephone _____
Hdcp or average score _____

Golfer #4

Name _____
Association/Company _____
Telephone _____
Hdcp or average score _____

Register today by fax 303-368-4222, mail to: 2170 S. Parker Road, Suite 265, Denver, Colorado 80231
or register online at: www.csaenet.org

Mark Your Calendar: July—August 2002 Meeting Dates



Wednesday, July 10, 2002

Virtual Seminar
CSAE Office, Denver

Thursday, July 25, 2002

Education Seminar
Efficient Association Management
Denver, CO

Saturday, August 17–

Tuesday, August 20, 2002

ASAE Annual Meeting
Denver Convention Center, Denver

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Sign up at

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