



Managing through change: A small professional association gains flexibility and freedom

Smaller firms can't afford to be heavily dependent on technical consultants or bound to a portfolio of siloed applications that don't provide the ability to track data. Recently, the visionary leader of a healthcare professional association freed her business from these dilemmas. But the flexibility and strength her small team stood to gain from their digital transformation initiative were plainly illustrated as the COVID-19 pandemic challenged their efforts mid-project.

As a national nonprofit organisation, the association provides evidence-based educational programs to nurse practitioners and advanced practice clinicians, hosting live events almost every month that are the association's chief revenue source. Yet, even before the pandemic began, research showed the organisation needed to keep pace with the demand for digital learning. Understanding the business landscape was key to implementing a successful technology solution.

Examining the challenges

The association recognised it needed to modernise its systems. The data-driven executive director was eager to gain insights from the data held in various systems.

A week was too long to wait for spreadsheet-driven analyses. With the current configuration, the data she needed was stored in different systems and included redundancies and gaps introduced over several years. These obstacles made it difficult to build relationships with association members.

"The association needed to complete a full-system transformation within ten months so it could adhere to its historical timeline of assessing needs, planning educational programs and announcing upcoming digital and live events each fall."

The executive director was also concerned about lost revenue opportunities. The association partnered with a learning management provider which claimed a large portion of the association's revenue in exchange for hosting, producing and managing curated online events. She wanted to bring a learning management system (LMS) in-house so the association could maintain content that met needs continually assessed in clinical environs.

She assembled a team consisting of her 10-person staff and Protiviti consultants to complete a full system transformation within ten months so the association could adhere to its historical timeline of assessing needs, planning educational programs and announcing upcoming digital and live events each fall.

A portfolio for success

The blended team analysed the current system landscape and used this information, paired with the association's strategies, to identify a technology portfolio that would improve business opportunities and insights while reducing dependencies on partners.

The association needed tools that were simple to administer so users could build data and content collections without a steep learning curve. Because customisations would be complex and expensive to build and maintain, the organisation employed a platform-as-a-service (PaaS) model and selected technologies that were built on or would integrate well with Salesforce, including:

- Nimble AMS (association management system built on Salesforce). Similar to a customer relationship management (CRM) solution, an AMS is optimised for association business processes, including event management, accounting and e-commerce.
- Elevate LMS. This learning management solution would allow the association to retain all revenue related to their on-demand course offerings. The solution was optimised for medical content and supported specialised features like stand-alone products and bundles as well as pre- and post-course testing and issuance of accredited certifications.
- Pardot, a marketing automation tool from Salesforce that would integrate well with the other technology selections.

Flexibility for a healthy pivot

This future-state picture was ready for implementation in spring 2020. But as the pandemic forced almost every business to pivot to new priorities, the association didn't know when it might be feasible to host live events again — a change that could deeply impact revenue.

Generating alternative revenue opportunities became the principal and most pressing requirement. Event management diminished in importance, while the LMS became central to generating revenue. The association wanted the fastest way to publish course content and host virtual conferences and webinars leveraging the LMS and an event management app called Socio.

The flexibility of the new technology stack enabled the blended team of association staff, Protiviti resources and vendor implementation teams to change direction without losing (in fact gaining) momentum. Together, the team revised requirements and recast schedules toward new goals.

A shift in time

The team quickly recognised that the LMS and marketing automation solutions could be implemented in parallel in about three months. While these solutions were being implemented, the association held its inaugural virtual conference in September 2020.

Considering the pandemic's devastating effect on clinical providers, including round-the-clock clinical schedules and harrowing patient care, the organisation was concerned that nurse practitioners might not participate. However, an audience of over 600 attended the conference to participate in a four-day, multi-session live event that wove primary care topical presentations with hands-on trainings and added opportunities for nurturing community activities. It was a needed respite after a year of giving themselves to help others. As importantly, it delivered an 93% rating of "good" to "excellent" and delivered considerable net revenue to the organisation's bottom line.

The AMS and LMS solutions went live six months later, proving to be valuable tools to enable the organisation's shift to online learning and to support marketing email efforts, including newsletters, sponsored emails and upcoming events.

While the solution implementations were underway, the team was busy cleansing and consolidating data from two legacy systems for import into Salesforce. It was critical that data migration efforts be completed for the overall project success. Critical nurse practitioner data was imported before the applications went live, and data migrations from historical legacy systems were completed later.

The team knew these efforts would enable reporting and analysis on historical customer interactions to bolster marketing efforts. The association recognised additional data points that would round out customer profiles further, and they analysed transaction histories more deeply to populate additional characteristics.

The newly implemented solutions bring all department data tracking under one umbrella, including member and sponsor management, live and online learning, marketing automation and finance, setting the stage for the organisation to continue successfully serving the expanding audience of advanced practice clinicians nationally. With technology solutions that are low-code and straightforward to implement, less costly to operate and easier to reconfigure, the organisation is positioned to easily adapt to whatever changes the future may bring.

Protiviti (www.protiviti.com) is a global consulting firm that delivers deep expertise, objective insights, a tailored approach and unparalleled collaboration to help leaders confidently face the future. Protiviti and our independent and locally owned Member Firms provide clients with consulting and managed solutions in finance, technology, operations, data, analytics, governance, risk and internal audit through our network of more than 85 offices in over 25 countries.

Named to the 2021 *Fortune 100 Best Companies to Work For*® list, Protiviti has served more than 60 percent of *Fortune* 1000 and 35 percent of *Fortune* Global 500 companies. The firm also works with smaller, growing companies, including those looking to go public, as well as with government agencies. Protiviti is a wholly owned subsidiary of Robert Half (NYSE: RHI). Founded in 1948, Robert Half is a member of the S&P 500 index.