presents

2021 Annual California Bar Leaders Conference

Keynote | Business as Unusual: Preparing Your Association for Post-Pandemic Life

Tuesday, November 16, 2021

Speaker:
Mary Byers, CAE

Conference Reference Materials

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Business as Unusual: Preparing Your Association for Post-Pandemic Life

As we emerge—slowly—from this once-in-a-century disruption, what’s next? Mary Byers, CAE, author of Race for Relevance: 5 Radical Changes for Associations, will help us harness the “Power of the Pause” to use it as a catalyst to identify opportunity on the other side of the pandemic. Mary will discuss association trends, the concept of a North Star, the value of dancing with uncertainty, why change leads to opportunity, and the benefit of a proactive “Go Forward” strategy for association leaders. You’ll have a chance to think through your organization's “next” as well as connect with other bar leaders as they do the same.

About the Speaker:

Mary Byers, CAE, has worked with over 300 associations and specializes in working with volunteer association leaders and staff to help define their roles and clarify their vision through leadership conference programming, facilitating strategic planning retreats and coaching. Mary is a certified association executive and a member of the National Speakers Association. She is also the author of eight books.

Program Materials and Resources:

1) PowerPoint deck from the live presentation.
2) Association Decision-Making Framework handout and worksheet.
3) Recommended hybrid meeting resources
   a. Velvet Chainsaw Consulting
      i. Game On! Returning to Face-to-Face
      ii. The High Cost of Hybrid
   b. Associations Now
      i. The Return to In-Person Meetings
BUSINESS AS UNUSUAL: PREPARING YOUR ASSOCIATION FOR POST-PANDEMIC LIFE

California Lawyers Association
Bar Leaders Conference
November 16, 2021
THE RESPONSE WINDOW FOR A CRISIS IS TYPICALLY MEASURED IN MONTHS, WHILE RECOVERY IS MEASURED IN YEARS.

--Ryan Estis
WHAT IS SOMETHING TO CELEBRATE ABOUT YOUR ASSOCIATION RIGHT NOW?
TIME FAMINE
Return on Investment
SPECIALIZATION & CONSOLIDATION
POLL #1
INCREASED COMPETITION
TECHNOLOGY
The Shark Fin of Adoption

In the past, technology adoption generally happened in predictable stages. Innovators and early adopters were in the vanguard, followed by a much larger group of mainstream customers and then by a smaller group of laggards. Recently this pattern has been compressed into two short stages.

Trial users

Everybody else

Innovators Early adopters Early majority Late majority Laggards

SOURCE: EVERETT ROGERS (BELL CURVE)
FROM: “FINDING YOUR COMPANY’S SECOND ACT,” BY LARRY DOWNES AND PAUL NUÑES, JANUARY-FEBRUARY 2018 © HBR.ORG

“DIGITAL FIRST”
POLL #2
THE PAN-DAMMIT IS BOTH AN ACCELERANT AND A TAILWIND.
“We’re different!”
All associations are challenged by limitations in time, finances, and human resources. Strategy is how you skillfully and purposely deploy them.
SET EXPECTATIONS: THERE IS NO “BACK TO NORMAL”

The more energy you spend trying to “go back,” the less energy you have to move forward.
FOCUS ON YOUR “GO FORWARD” STRATEGY
Definition:

A condition or circumstance that puts a company in a favorable or superior business position.

“IT answers the customer’s key question: Why should I do business with you? What are you offering that the other guy doesn’t?”
–Jaynie Smith
“For most companies, large or small, a competitive advantage is rarely unique and not often sustainable over an extended period of time.”
How to compete: the wave of transient advantage

Launch | Ramp up | Exploit | Recon-figure | Disengage

Source: The End of Competitive Advantage, Rita Gunther McGrath
Lifecycle of an Association

- Startup
- Rapid Growth
- Maturity
- Decline
- Rebirth
- Death
Lifecycle of an Association

- Startup
- Rapid Growth
- Maturity
- Decline
- Rebirth
- Death
POLL #3
VALUE CREATES RELEVANCE AND RELEVANCE CREATES VALUE
SUFFERING=OPPORTUNITY

- Mapmakers
- Sensemakers
- Wayfinders
WHAT DOES THIS MAKE POSSIBLE?
SUFFERING = OPPORTUNITY
WHAT DO MEMBERS NEED NOW THAT THEY DIDN’T NEED BEFORE?
HOW CAN YOU HELP MEMBERS WORK LESS STRESSFULLY, MORE PROFITABLY AND MORE PRODUCTIVELY?
WHAT CAN YOU DO FOR MEMBERS THAT THEY CAN’T DO THEMSELVES?
WHAT ARE YOU UNIQUELY POSITIONED TO DO?
IF WE COULD ___________________,
WE COULD ____________________
COLLABORATION IS THE NEW CURRENCY
CONVERSATION:

1. HOW CAN YOU EVOLVE WHILE RESPECTING THE PAST?

2. WHAT EVOLUTION OBSTACLES DO YOU FACE?
10% PLEDGE
HARNESS THE POWER OF THE PAUSE
What is your North Star?
What is your North Star?

- Purpose
- Focus
- Clarity
THINGS YOU SHOULD BE THINKING ABOUT NOW:

- Strategic Plan
- Investment
- Risk Tolerance
THINGS YOU SHOULD BE THINKING ABOUT NOW:

- **Strategic Plan**
  What are you going to do?

- **Investment**
  What is it going to cost?

- **Risk Tolerance**
  How much are we willing to experiment?
Strategic Plan: Simple is better

Committees

Task Forces
WHERE ARE YOU GOING TO SPEND YOUR TIME, MONEY AND EFFORT?
STRATEGIC PLAN SHOULD SUPPORT ALIGNMENT

Alignment

Expertise  Opportunity  Value
STRATEGIC PLAN SHOULD SUPPORT ALIGNMENT

Ensures your budget, staffing and governance structure allows you to succeed.
WHAT ONE THING WOULD MAKE THE BIGGEST DIFFERENCE IF WE WERE TO DO IT?
LEVERAGE RESERVES!

ACCORDING TO ASAE’S “ASSOCIATION IMPACT SNAPSHOT MAY/JUNE 2020,” 3 IN 10 RESPONDENTS ESTIMATED USING LESS THAN 10 PERCENT OF RESERVES TO OFFSET LOST REVENUE AND ONE IN FIVE DID NOT ANTICIPATE USING RESERVES AT ALL
RISK TOLERANCE
“...the same circumstances that are causing discomfort are also midwifing the future.”

Seth Kahan
How uncomfortable am I willing to be on behalf of my association?
# ASSOCIATION DECISION FRAMEWORK

<table>
<thead>
<tr>
<th>Financial Viability &amp; Sustainability</th>
<th>Value Proposition</th>
<th>Personnel</th>
<th>Go-Forward Strategy</th>
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# ASSOCIATION ACTIVITY MATRIX

<table>
<thead>
<tr>
<th>To Don't List</th>
<th>Pause/Uncertain</th>
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<tbody>
<tr>
<td>Stop Doing:</td>
<td>Don't want to happen:</td>
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<tr>
<th>Doubledown On</th>
<th>Collaboration</th>
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<tr>
<td></td>
<td>Potential collaborators:</td>
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<td>Issues to collaborate on:</td>
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*What do you want to be true when this season of uncertainty is over?*
ASSOCIATION DECISION FRAMEWORK FILTERS
Think "For Now" vs. "Forever"

What can we influence?

What is outside of our influence?

6 Months

6 Months to a Year

One Year Plus
Meeting Triage
Factors to Consider when Cancelling or Delaying Your Meeting

First, identify your stakeholders’ objectives for the meeting →

<table>
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<tr>
<th>Members</th>
<th>Partners</th>
<th>Sponsors</th>
<th>Vendors</th>
<th>Association</th>
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<tbody>
<tr>
<td><strong>1</strong> Must take place at the originally scheduled time</td>
<td><strong>2</strong> Can be delayed without harm</td>
<td><strong>3</strong> Can be jettisoned without impact</td>
<td><strong>Convert to Virtual</strong></td>
<td><strong>Delay and Retool as Virtual or Face-to-face or Hybrid</strong></td>
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ASSOCIATION RESOURCES

Health Trend and Modeling Resources:
- National Institutes for Health: https://www.nih.gov/health-information/coronavirus
- Return to Work Guidance: https://tinyurl.com/ycy2f65k

Meetings:
- Outlook and Recovery Timeline: (This resource includes a helpful chart) https://www.eventmanagerblog.com/events-coronavirus
- Conference Go/No Go Decisions in a Pandemic: https://velvetchainsaw.com/2020/04/09/conference-go-no-go-decisions-in-a-pandemic/
- Renegotiating Live Event Agreements When All Parties Are Innocent Victims: https://velvetchainsaw.com/2020/04/13/renegotiating-live-event-agreements-when-all-parties-are-innocent-victims/
- Steps You Should be Taking Now for Your Fall Conference: https://velvetchainsaw.com/2020/04/21/steps-you-should-be-taking-now-for-your-fall-conference/

Crowdsourcing:
- Associations Catalyzing Entrepreneurship crowdsourced answers to questions about communications, meeting cancellations, virtual event expectations, sponsor relations, disaster policy and teleworking: https://docs.google.com/document/d/1n9iZKKK4xI_k3quVuQgCSZSu-u0HDcLh5pVzm88ZfM/edit

Online Engagement:
- Making Online Meetings More Interactive: https://www.youtube.com/watch?v=nz_8UrWwZY4&feature=youtu.be
- Tools to Engage Online: https://yournerdybestfriend.com/2020/04/17/nerdwords-live-tools-to-engage-online/
- Education Tools We Can All Use to Engage Online: https://yournerdybestfriend.com/2020/04/17/education-tools-we-can-all-use-to-engage-online/
- Rethink Online Meetings (Before, During, After): https://stephenshapiro.com/pdfs/RethinkingMeetings.pdf?fbclid=IwAR3B-C-cvZyZos9kyR6jN3jKLNDMWu1h13jQxXGBRnvJKyvmRwrET0UkGM

Remote Teams:
- 15 Creative and Fun Team Building Ideas for Remote Teams: https://tinyurl.com/y839rncb

Note: The above list is curated by Mary Byers, CAE, CSP. The above should not be mistaken for legal or financial advice. The list is provided to be helpful and thought-provoking as association professionals navigate a time of extreme uncertainty.