

# e-strategies: A blueprint for

by Sherry Budziak and David Martin

**D**REAM OF A LONG-RANGE STRATEGY that will provide your organization with a vision into the future on how to grow and efficiently manage operations using technology.

"To attain the kind of success that you want, you need to dream big. You need to have a clear vision of what you want to achieve," says David Martin, CEO/executive vice president of the Society of Critical Care Medicine (SCCM). With the ever-changing demands of your members and rapidly evolving technology, it is important to have a strategy for success, which is exactly what the SCCM has put into place.

Recent surveys by Deloitte and CSC consulting group indicate that most chief executives do not have a long-range strategic information technology (IT) plan for their companies. Although IT executives and corporate business leaders increasingly acknowledge the potential benefits of better aligning IT with business strategy, few have succeeded at making the link, according to a Deloitte survey released in March 2004.

As more organizations consider centralized data and IT consolidation, it is apparent that these changes will not be successful without a vision and strategy to accomplish the goals.

## Increasingly competitive landscape

Bill Gates has said, "Digital technology can play a major role in increasing the speed and effectiveness of information flow and breaking down the barriers to successful knowledge sharing." This is certainly true in associations today. Sharing knowledge is at the core of most associations' activities. With the emergence of digital technology comes a more competitive landscape. As the pressure to make the most of each member's dollar increases, it is crucial that associations capitalize on their most valuable asset: their intellectual property.

As members' expectations continue to expand, having a comprehensive e-strategy in place is necessary. It should be a strategy that empowers your organization to administer changes quickly and with dexterity. A well-rounded e-strategy will help your organization stay aligned with its mission and technology goals while greatly enhancing value and, above all, stimulating growth.

## What is e-strategy?

E-strategy refers to a planning process that produces a comprehensive blueprint and vision which then set priorities for your technology initiatives and detail how you

will implement those initiatives. It is a strategic plan developed in support of the organization's overall mission and strategic goals. Creating a living e-strategy will help your organization devote resources, establish a long-range strategy, and support the budgetary needs of your overall technology goals while supporting your Web initiatives.

Martin describes, "We have an e-strategy team made up of staff at all levels and from all departments. Volunteer members participate in the process as well. The team visualizes and identifies our technology needs for online education, database systems, Web-based work spaces, and all other areas of technology. We were clear in our vision and planning stages, which has proven vital to our overall organizational success."

## Common obstacles to success

GartnerGroup, an IT research and consulting firm, released a study on the common problems encountered by organizations when working on Web-based technology projects. The top four biggest challenges included the following:

- The ventures were viewed as ends in themselves, rather than as vehicles for improving overall business results.
- The projects were not managed well and key players did not understand underlying technologies.
- Business goals were not clearly defined.
- There was no flexibility to incorporate new technologies to achieve those goals that were spelled out.

Additionally, some IT professionals feel that the technology changes too rapidly to have a plan. Jim Friedman with the Information Systems Consulting Group

(ISCG) notes that, "Your e-strategy should be aligned around your organization's strategic plan. Before you can develop an effective e-strategy, you must define how the Web can help you achieve your overall strategic goals. Too many associations deploy Web applications solely as a vehicle to sell products and services, without clearly defining how those applications will help achieve the organization's mission."

## Steps to an effective e-strategy

"The American Academy of Dermatology (AAD) took a step back to look at its overall technology infrastructure and Web site when starting its Web site redesign project," explains Suzanne DeWulf, director of Web services at the AAD. "Not only did we consider how to re-brand our site and review the overall site navigation, but also how we could integrate our applications and processes to provide site users and administrators a seamless infrastructure that was easy to use. The AAD looked at its technology goals for the next several years, its policies and procedures for the Web site as well as the overall technology goals of moving to the Microsoft .Net platform. These high-level goals allowed the staff to stay focused and develop a plan to implement our strategies.

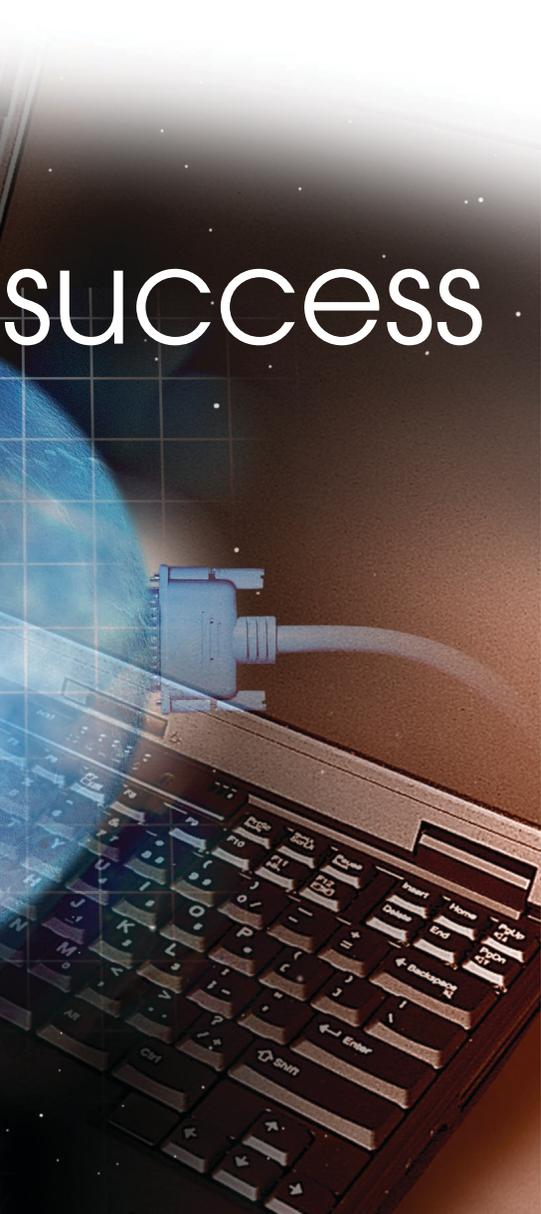
Effective e-strategy planning requires the following steps:

1. **Develop a technology planning team.** A successful e-strategy requires a long-term commitment on the part of senior management as well as your entire organization. A "Technology Planning Team" composed of key staff throughout the organization should be established.

## e-strategy tools for productivity

- Association Management Software
- Office Productivity Tools
- Web Support Tools
- Knowledge Management Software
- On-Line Communities
- Content Management Tools
- Personalized Web Content and Member Portals
- e-Commerce & e-Marketing
- Distance Learning Tools
- Infrastructure/Platforms/Compatibility

# Success



This team works together to assess your organization's mission-critical business needs, operational requirements, establish goals, and manage e-strategy initiatives.

It is important that this team provide input and educate your association's management and leadership about the expected results of each project. It is equally critical to communicate your goals in business terms, not technical terms. For example, explain that e-support will help your organization not only reduce call volume, but also optimize the handling of the calls that you do receive. Estimate the reduction and the optimization, and translate these numbers into dollars.

**2. Things to consider.** What are your strengths and weaknesses? Scope out competition, and take stock of the following in your own organization:

- What are your current procedures and policies when it comes to technology? Do you have a policy for laptop usage? What are your current policies for e-mail, broadcast e-mail distribution, Web site content updating and review, legal disclaimers on the Web site, etc.
- What are your disaster recovery and back-up plans? Do you have cyber liability insurance, etc.?
- Investigate all of your data storage and consider integration or data warehousing.
- What is the upgrade path for your current systems? Think about whether or not the vendor is supporting your vision. If not, consider other options.

- Office productivity, connectivity, association management system (AMS), database management, data mining tools, financial and e-commerce systems, communication tools, Web-interface products, etc.
- Security: Secure protocols, encryption, access control, etc.
- Front end: Desktop computers, laptops, printers, scanners, hand-held devices, phone handsets (local and remote), etc.
- Back end: Application servers, file servers, database servers, collaboration servers, e-mail servers, Web servers, voicemail servers, fax servers, phone systems, etc.
- Infrastructure: Network cabling, switches, wireless access points, presentation gateways, routers, CSU/DSU, broadband Internet connections, phone lines, capacity, etc.
- Security: Firewalls, encryption, physical security
- Programs you are offering compared to competition (including for-profit groups)
- Your core competency (How are you delivering this through the Web?)
- Staffing (Are there in-house or out-source staffing requirements?)

**3. Consider your options.** What technology solutions exist? There are an abundance of technology solutions and software on the market, both proprietary and nonproprietary. Additionally, there are in-house or outsource hosting considerations. It is important to find solutions that are scalable and flexible and that provide the ability to be integrated with other applications your organization utilizes.

**4. Define your organization's short- and long-term goals.** It is important to ensure the objectives are both aggressive and attainable. Develop corresponding budgets.

**5. Build your infrastructure for the future, not the present.** In today's fast-paced economy, it is essential to create an infrastructure to sustain change and time.

The ability to integrate systems and applications to share information easily is extremely important to the growth of associations. However, integration has been a longstanding obstacle for organizations. Now there is technology that can support the ease of integration and aid in solving this issue for associations. Over the past few years, Microsoft .Net has evolved to offer seamless integration between these diverse systems, applications and devices. .Net technology is simplifying the integration between various technologies and accelerating development. .Net's flexibility and ease of development means increased productivity, greater efficiency, and significant cost savings to associations.

**6. Select easier projects first.** Start with easier projects to demonstrate the possibility of success and to learn from your experiences. Martin affirms, "We

started small to prove ourselves, and with a number of victories under our belt, the volunteer leadership has been very supportive. I would encourage my colleagues to ensure high-profile, member-interactive items are on their early list of projects, as they build confidence in the staff's ability to execute this type of complex project."

**7. Ensure the project manager has authority and accountability.** Clearly identify the role and responsibilities of the project manager. This prevents miscommunication and establishes accountability.

**8. Identify success measures and backup plans.** The strategy must identify a method for tracking progress, understanding variances, and evaluating success.

**9. Anticipate project delays and cost overruns.** It's important to understand that project delays and cost overruns happen. A good rule of thumb to anticipate and plan for these occurrences is to add approximately 5 to 10 percent to your budget costs and increase the estimated timeframe by 10 percent.

Developing an e-strategy forces you to decide what you want to accomplish, the best approach, and what specific tactics must be undertaken—all within the timeframe and the limitations of your resources. Planning is critical: The better the planning, the better the results. The key is to develop a highly flexible, highly responsive e-strategy for today and the future.

Finally, be sure to heed the advice of someone who has been successful in implementing an e-strategy: "The importance of developing a complete e-strategy cannot be understated," says Martin. "You need to ensure everyone on your team, volunteers included, knows where it is you want to go and how you will get there." □

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