

International Growth

Part of the role of any technology department is to ensure adequate resources are available to support the growth of the organization. This includes current and future operations domestic and/or international.

When developing a strategy for future international growth an organization's ability to implement and sustain new Technical Resources to support that growth is critical.

It is extremely important that your mission and goals for international growth take into consideration the technical capabilities currently deployed within your organization and with any external organization(s) you plan to work with. Additionally you should identify those areas, both internal and external, where the technical capability needs to be expanded based on short and/or long term objectives.

With any growth initiative there will be challenges that need to be managed. In order to minimize the effects of these challenges it is recommended that the following be included in your strategy:

1. *Define and document the types of relationships* your organization will enter into with regard to international growth e.g., wholly owned subsidiary; formal partnerships; informal partnerships; consultants.
2. *Evaluate existing systems* and services to ensure scalability to support international operations and upgrade/replace where necessary.
3. *Identify technical resources* that can be provided and at what cost based on the level of relationship that is defined.
4. *Ensure adequate human resources* are available to support initiatives without degrading domestic operations.

Relationship Types

When evaluating support requirements, four distinct relationships emerge. Providing technical support for international growth would vary based on the type of relationship that has or will be established.

1. *Wholly owned subsidiary*

These types of relationships would typically require external access to an organizations database system (AMS, CRM, etc) platform in order to facilitate business processes. Additionally, desktop support, remote access, email, telephone, and all other technical elements required for any remote location. There is a definitive parent child relationship where the parent can enforce certain rules and processes.

2. *Formal Partnerships*

Relationships such as this do not typically need access to your backend systems to conduct business but there may be a need to exchange data in order to meet goals and objectives of the relationship. In most cases funding is provided by one organization to the other and there are documented (contractual) guidelines on how the partnership works.

3. *Informal partnerships*

This is very common in most organizations where one offers the other some level of participation that would require technical integration. Documented processes or agreements on how things will occur/work don't exist and are done as just email or verbal exchanges.

4. *Consultants*

Individuals who work on behalf of an organization but are not officially staff fall into this category. There always seems to be a need to establish email, computer, printer, remote, etc support for these individuals. Consultants typically work from a home office and this can be challenging due to running a business environment with home based services.

Evaluate Systems

It is recommended that when entering into an agreement with an external organization that both parties systems are assessed to ensure adequate capability is available to accomplish the objectives of the relationship. This particular element is critical to a successful partnership and can often be overlooked. In many instances agreements are made to create or implement some type of solution that would require technical integration, however when they are not assessed initially, objectives may not be met without significant costs and/or staff resources.

An example of this would be the ability to grant discounts to partner organization members to all of your Associations Events, Products, and Services. However, without the ability to identify partner organization members electronically, your Associations staff would be required to manually validate the names of each individual. This slows the process and adds an unnecessary burden to staff.

The value of our backend system is only realized when real data is input and then extracted as needed in an ongoing basis for marketing, research, membership management, and other needs.

Technical Resources

There are many different aspects of technology to be considered when supporting a global operation. The following technical resources are currently employed at most associations and can be provided to other entities based on our overall relationship and objectives.

1. Association Management System (AMS) Database Platform
 - a. **If the current configuration of your AMS does not meet your needs this may be a time to replace it if an upgraded version is not adequate. This would be significant in terms of cost and business processes reengineering.**
 - b. This is the database system used by an association to facilitate the management of all member records (active/inactive), event registration, member driven financial transactions, and all other customer relation management activities.
 - c. Should only be used for wholly owned subsidiaries or formal partnerships.
 - d. Usually integrated into your website design for the purpose of online transactions
2. Electronic Messaging (Email)

- a. In our business we have grown to rely holistically on email. It is such a critical aspect of our daily routine that we often forget the level of effort required to maintain this communication tool.
 - b. This service can normally be provided to any entity at little to no cost.
3. Websites
- a. Associations host a variety of websites and these need to be factored into the expansion cost. Examples of the sites are event specific, convention, forums, etc.
 - b. If your association were to agree to host a website for a future partnership any special programming required to integrate systems, implement e-commerce, graphical design, etc., would need to be considered and a cost/time estimate should be provided. This type of work can be very time consuming and/or costly.
 - c. Once a website has been created there is an issue of Content Management that needs to be considered. Who updates what on the web site?
4. E-Commerce
- a. This type of implementation can take from 30-90 days to implement and is very time consuming.
 - b. A significant amount of testing must be done to ensure accuracy of transactions.
 - c. Integration with your backend systems must be factored into the development cycle.
 - d. Finance must be informed to ensure appropriate process and oversight is established.
 - e. Currency options must be defined and integrated (GST and/or other Taxes)
5. Telephone support
- a. If using VoIP phones this server/support can be provided at little to no costs to your association. However time zone considerations are a must.
 - b. If not using a VoIP phone system you must consider the cost of routing calls to and from your offices to the remote location.
 - c. **The implementation of video conferencing should be considered.**
6. Technical Support
- a. Application and desktop support to end users located outside of your associations offices can be provided at little to no cost if the support remains limited.
 - b. A fee schedule should be implemented based on the type of relationship and some level of free support should be provided based on other services we may be providing.
 - c. If a remote management system is already in place to facilitate this type of support, that is good, but the burden is in on the amount of time this type of support takes away from other tasks and should be carefully considered.
7. Computer Procurement
- a. Your association typically purchases computers for staff and can apply appropriate security methods; however, if not doing this for international groups, it can become a burden when providing technical support. An option would be to purchase equipment for remote locations in order to maintain a set standard.
 - b. This type of service is normally reserved to wholly owned subsidiaries where we also own the equipment.
8. Mobile computing (black berry)

- a. Some associations maintain an enterprise black berry server which allows wireless synchronization with our email server and black berry devices. This service can be provided at little or no cost if using our email system.
 - b. If within the US it is recommended that the parent association purchase the device and service to maintain security and control.
 - c. If outside of the US the using party should purchase the device and service which must include the “enterprise data” option in order to work with our systems.
9. Event and Member Management
- a. Although not exactly technical in nature, this type of support normally falls to Technology Services due to the interfacing backend systems.
 - b. Clear identification of who is responsible for member and event management should be defined.
 - c. When your association is hosting the website(s) and facilitating registrations for membership/events, you should be the lead authority for all business processes.
 - d. Finance should be informed of the processes for accepting payments to ensure applicable oversight is maintained.
 - e. Onsite event management should also be defined for any event where your association is responsible for registration.
 - f. Your association should define integration parameters for any third party registration system for events, membership, etc.

Human Resources

With any new initiative the evaluation of our staff should be taken into consideration. Additionally it should be clearly defined at all levels where staff at your association is responsible for certain activities while staffs at other locations are responsible for others. Sometimes it is appropriate for shared responsibilities however that can leave a grey area and tasks tend to go undone. This means that communication is vital. It also means that leadership and managers must remain engaged in activities where their staff is involved.

With any new initiative it is recommended that staff resources be evaluated to ensure enough staff is available to ensure success criteria are met. Where applicable, new staff should be added or realigned.

To conclude, I offer the following from ASAE:

- Involve staff and resources in the process
- Do the hard work up front
- Don't forget STAFF
- Don't underestimate the communication challenge