



CAUSEIS PRESENTS

Digital Academy for Associations

→ Course: Project Management for Associations

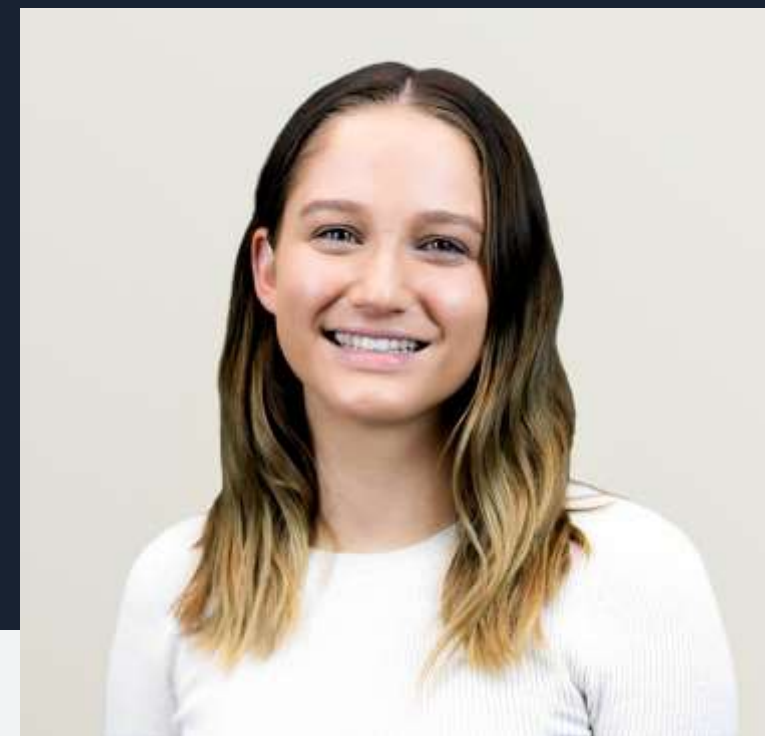


Digital Academy

Presenters & Facilitators



Michelle Lelempsis
Managing Director
Causeis



Yolande Smith
Digital Marketing Specialist
Causeis

Maximise your Workshop Experience



Mute as required

To allow for clear audio please mute yourself when presentation sessions are in session. At times we may mute your line if you may have forgotten.

Session recording

Today's presentations are being recorded however to maximise you're sharing and networking the breakout rooms will not.

Presentation Slides

Presentation slides and recording will be distributed on course completion.

Chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat. Share ideas, successes and learnings.

Use your camera

Especially in the breakout rooms, please don't be shy and turn on your camera to increase your engagement.

Update your Name

So that we know who you are, and to let everyone know where you are from – lets rename ourselves to show our full name & acronym

Thursday 16th June

Day 1: Agenda

- Recap of Tuesday
- Project Initiation
- Causeis Project Framework

Project Management for Associations

Let's Get Started

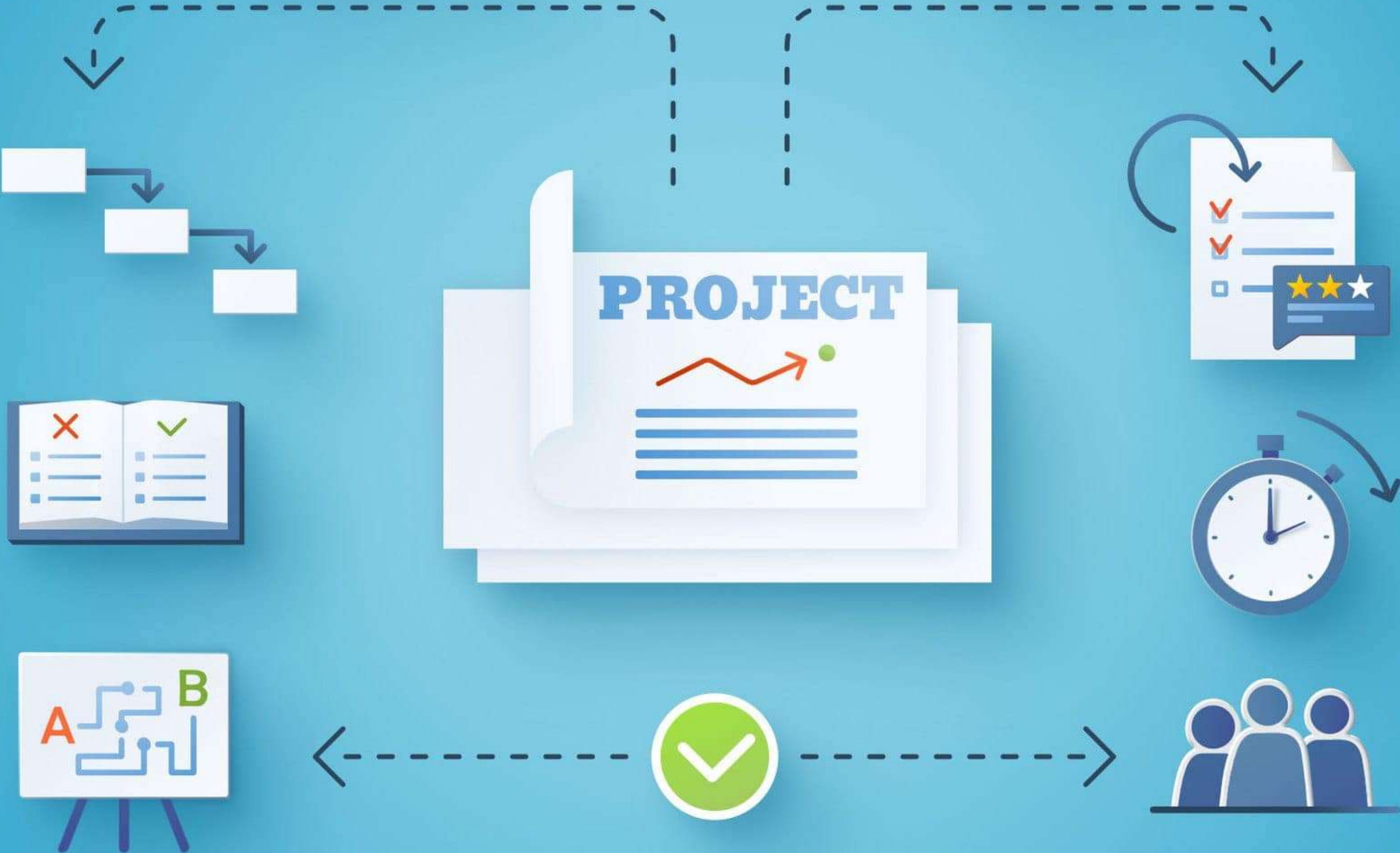
Review of Tuesday

What are the two methodologies of
Project Management?

Waterfall and Agile

Waterfall

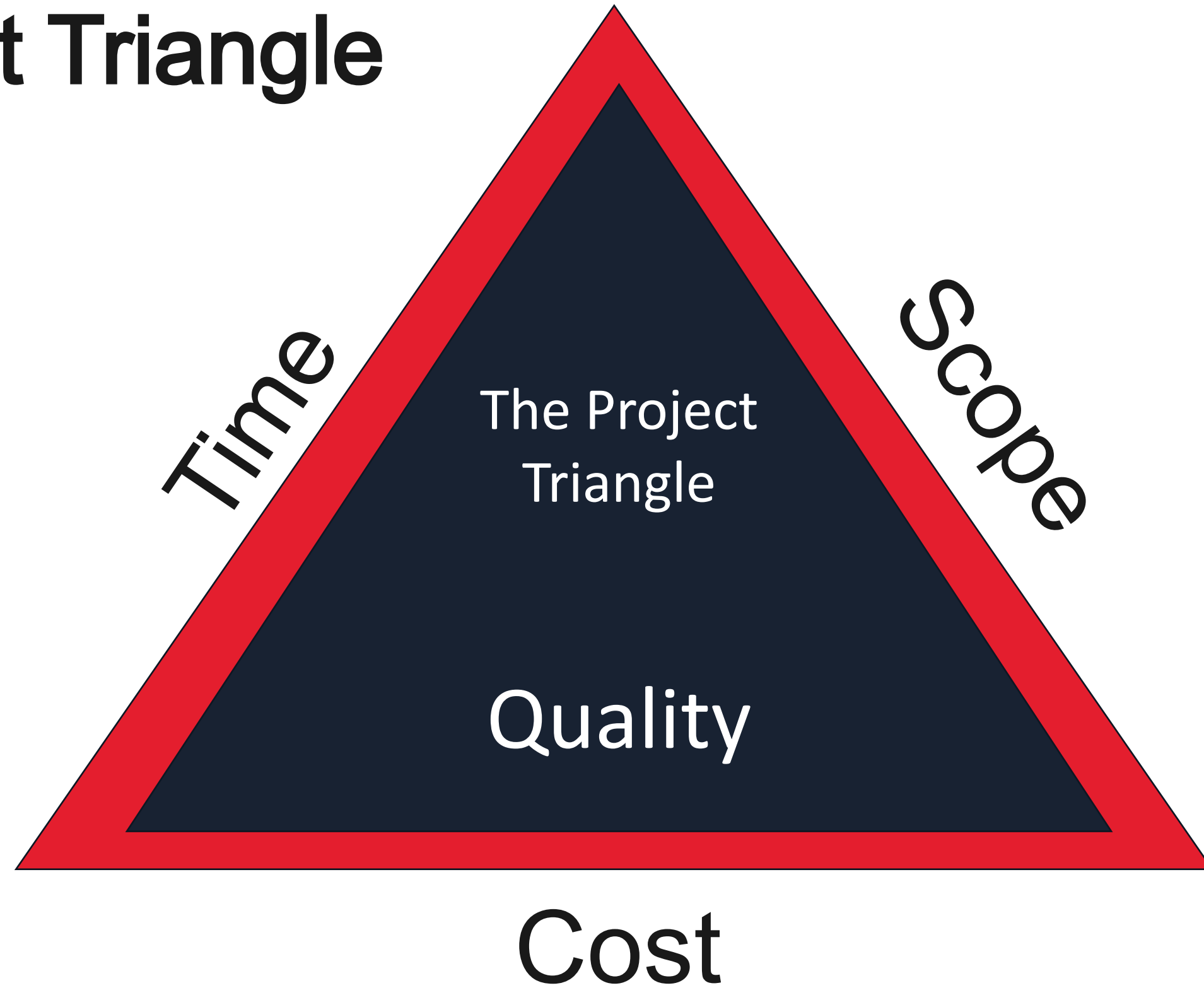
Agile





What were the factors of the Project Triangle?

The Project Triangle



Why does Project Management matter?

Why is it important?



Staff Satisfaction

Well managed projects will allow staff to feel less overwhelmed and contributing to the overall success of the business.



Source of Truth

Creating a project framework will ensure that the project has a reference to guide the requirements and goals.



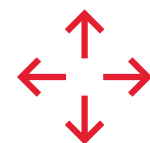
Documentation

The project framework will serve as documentation for the life of the project.



Delivery time

Structure the project to have a realistic delivery time. Enable and prepare marketing, business users and customers to know when to expect.



Change Management

Assist in the effective delivery of change management.



Successful Delivery

More likely to deliver a successful project that is in scope, on time and in budget.

What are the five phases of the
Causeis Project Framework?

The Causeis **framework** for successful projects.



INITIATION



PLANNING



DEVELOPMENT



**VALIDATION &
DEPLOYMENT**



**CLOSURE &
MEASURE**

The Causeis framework for successful projects.



INITIATION

- Goals
- High level requirements
- Priority and timeframe
- Impact Assessment

PLANNING

- Current landscape
- Requirements
- Data, Process & Experience
- Maintenance
- Measure of Success

DEVELOPMENT

- Guiding principles
- Considerations (Time, Performance, Impact)
- Development
- Testing

VALIDATION & DEPLOYMENT

- Documentation
- Communications plan
- Metrics
- End user training
- Post live validation

CLOSURE & MEASURE

- CSAT/MX
- Assess against initiation
- Improvement
- Lessons

THREE LENSES: MEMBER, STAFF & THE ASSOCIATION

DATA, PROCESS AND EXPERIENCE

Phase 1: Initiation



**INITIATION &
CONCEPTION**



PLANNING



DEVELOPMENT



VALIDATION



**PROJECT
CLOSURE**

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Project Initiation Template



Project: Phase 1- Initiation

Date:	
Business Owner:	
Business Unit/Team:	
Stakeholders:	
Project Impact :	<input type="checkbox"/> Impact on Business Performance <input type="checkbox"/> Impact on Member Experience <input type="checkbox"/> Impact on Operations Efficiency <input type="checkbox"/> Other
Purpose of requirement:	<input type="checkbox"/> Constitution / Business requirement <input type="checkbox"/> Member Experience <input type="checkbox"/> Efficiency and Process Improvement <input type="checkbox"/> Data Management <input type="checkbox"/> Financial and Auditor <input type="checkbox"/> Other

Project Goal

What is the overarching goal and outcome of the project? How will it support the business?

Phase 3: Development



INITIATION & CONCEPTION



PLANNING



DEVELOPMENT



VALIDATION



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DATA, PROCESS AND EXPERIENCE



Development

- Guiding principles
- Considerations (Time, Performance, Impact)
- Development
- Testing





Guiding Principles

- Project planning and guidance
- Scalability
- Data driven
- Business case for decision making
- Continuous improvement





Guiding Principles



Project planning and guidance: IT should be utilised as a business enabler of new projects identified. IT are able to provide insight in technology, systems and process to ensure suitability and alignment to the roadmap.

Scalability: The Association will work towards identifying and implementing scalable technology that provides the ability for The Association to adapt and be future focused.

Data Driven: The Association will identify data requirements, management and establish a data driven culture for performance measurement and improved operations.



Guiding Principles



Business Case for Decision Making: The Association's stakeholders will establish a business case for the identification of future technology decisions. The business case will outline the following areas;

- Feasibility and Needs Analysis
- Member Goals and Benefits
- Member and Staff Experience (Usability and Satisfaction)
- Data Assessment (Requirements, reporting and management)
- Case Benefit and Return on Investment Expectations
- Priority and Timeframe to deliver
- Assessment Criteria

Continuous Improvement: The Association will embrace a continuous improvement culture to support the entire technology and project methodology. This will ensure that the solution is continuously improved in both the pre-live and post-live state.



Cloud Friendly

- All clients will eventually need to move to EMS
- 2017 Service Packs will be released for the foreseeable future
 - No new features
 - Security Updates mostly (ie: don't expect bug fixes)
- 2017 clients need solutions which can translate to EMS
 - Via iDMS, on-page API, or 3rd party products





Quality Assurance and Peer Reviewed

When should your development be reviewed?





Impact Validation

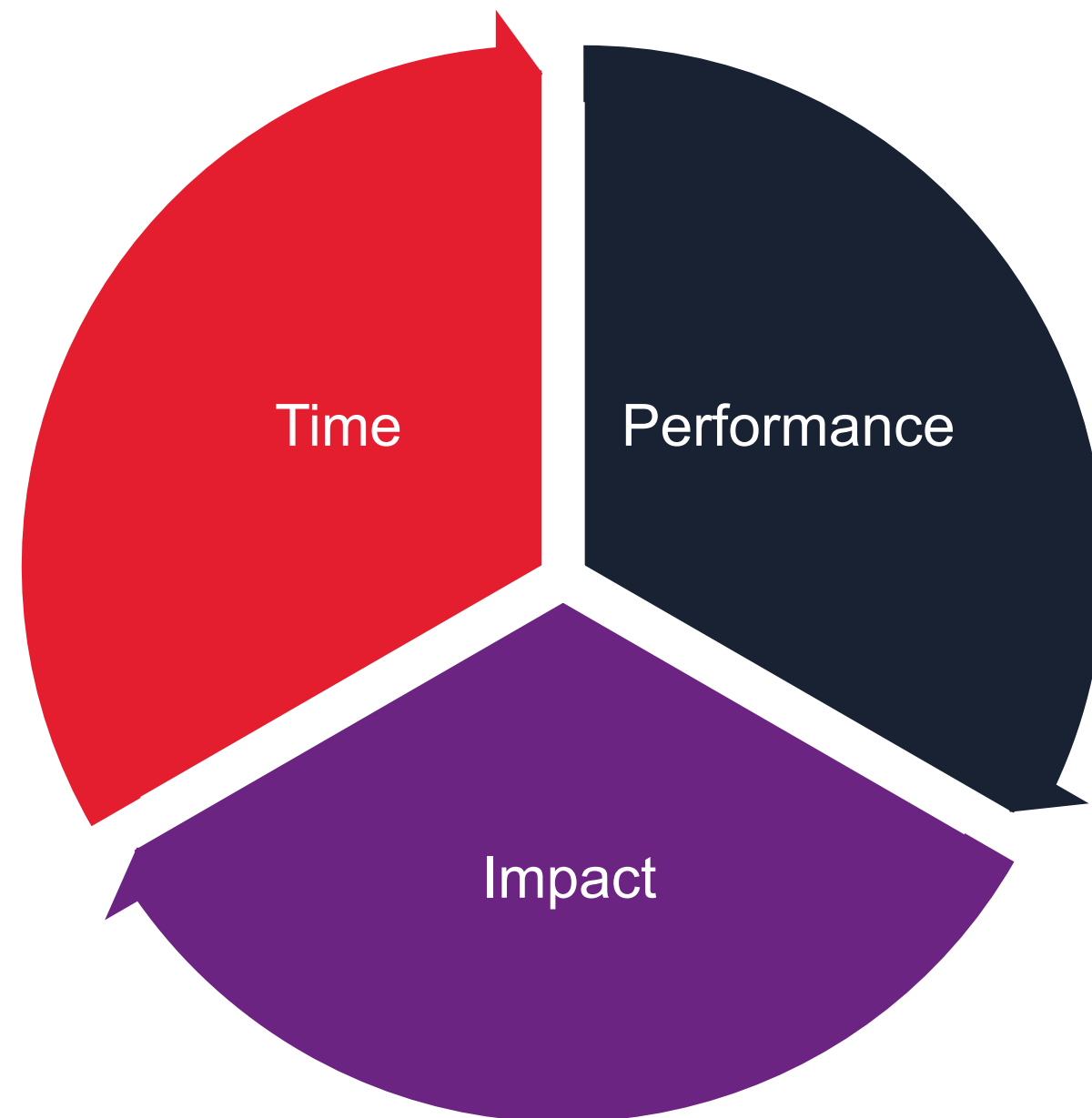
- How many records?
- Is there any automation?
- What are the risks?
- How are all scenarios tested? (Member, Non-Member, New Account, Staff)





Considerations

What should be considered in the development a solution?
Whether internal or external development?





Time

- Project health
 - Due dates
 - Dependencies
 - Time allowed and remaining time
 - Other contributions
- How will your week be planned to ensure momentum?
- How will your resources provide updates to their tasks?
- How will a variation or change to the project be handled?





Performance

- Is there any potential impact on the database or IT systems?
- Database size
- Website responsiveness
- Search Engine Optimisation
- Page performance and loading
- Application server resources





Impact

- Other projects currently in progress
- Future directions of your association
- How many records or members?





Development

- Review against the User Stories and Requirements
- Who is responsible for the development?
- Can the solution be developed? Should a proof of concept be considered?
- What about the look? Wireframes or Figma
- If you are collecting payments how will they be received, identified and reconciled.
- Test as you develop
- Consider an agile methodology for your development approach
- Don't forget to test for all scenarios



Test Environment

Should you develop in a test environment?

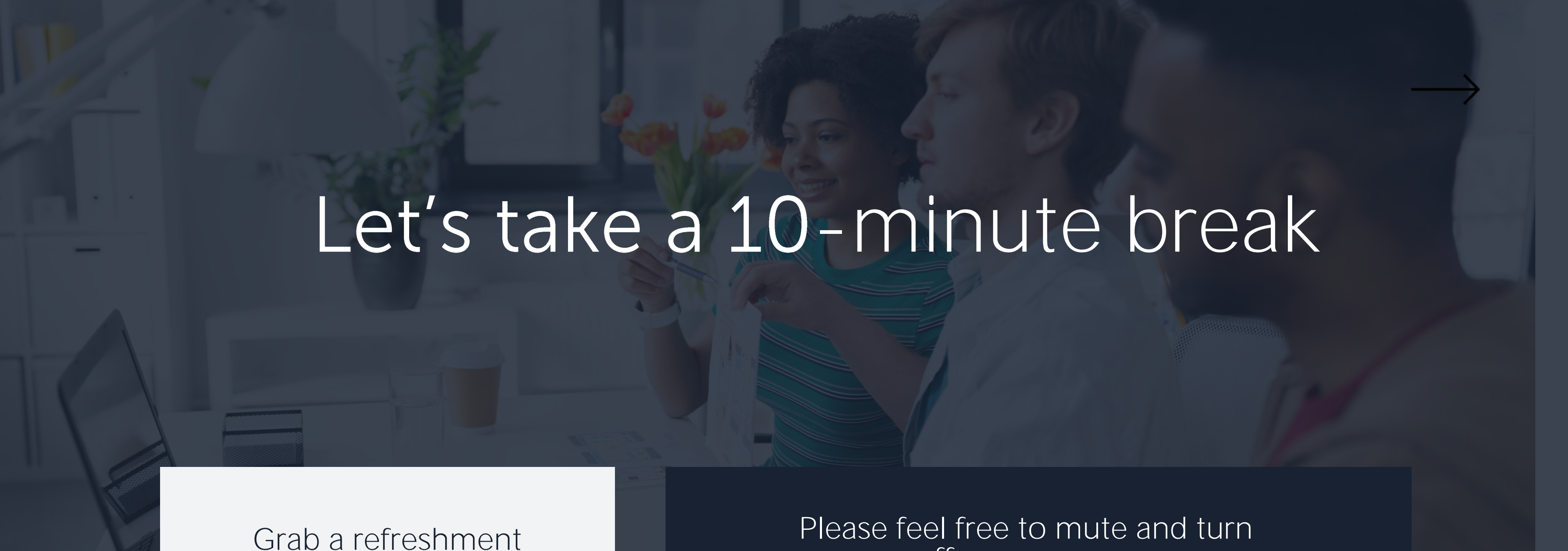
1. When the project allows
2. When it is a high risk project
3. All SaaS software, including iMIS, caters for test environments

When would you not use a test environment?



Outcomes of Development

- A thoroughly well thought out, planned development solution
- Documented solution – with more on this in the next phase
- Something that is fit for purpose
- The impact on existing functionality has been determined
- Something that will not affect performance or business continuation.



Let's take a 10-minute break

Grab a refreshment

Please feel free to mute and turn
off your camera

Don't close the Zoom
session

Phase 4: Validation



**INITIATION &
CONCEPTION**



PLANNING



DEVELOPMENT



VALIDATION



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CLOSURE**

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VALIDATION & DEPLOYMENT

- Documentation
- Communications plan
- Metrics
- End user training
- Post live validation

CLOSURE & MEASURE

- CSAT/MX
- Assess against initiation
- Improvement
- Lessons

THREE LENSES: MEMBER, STAFF & THE ASSOCIATION

DATA, PROCESS AND EXPERIENCE



Validation

- Documentation
- Communications plan
- Metrics
- End user training
- Digital asset review (email, content, reports)
- Go Live
- Post live validation



Digital asset review

What are the digital assets that are required? This can be extremely time consuming to prepare and often delays the project.

- Emails:
 - From Address
 - Subject
 - Content including layout and spelling
 - Attachments
- Content:
 - Page content including layout and spelling
 - Functionality
 - Imagery
- Reports:
 - Expected results
 - Layout
 - Format



**DIGITAL
ASSETS**



Testing

- Informal
- Formal
- Test Scrums
- External testing vs Internal testing





Informal Testing

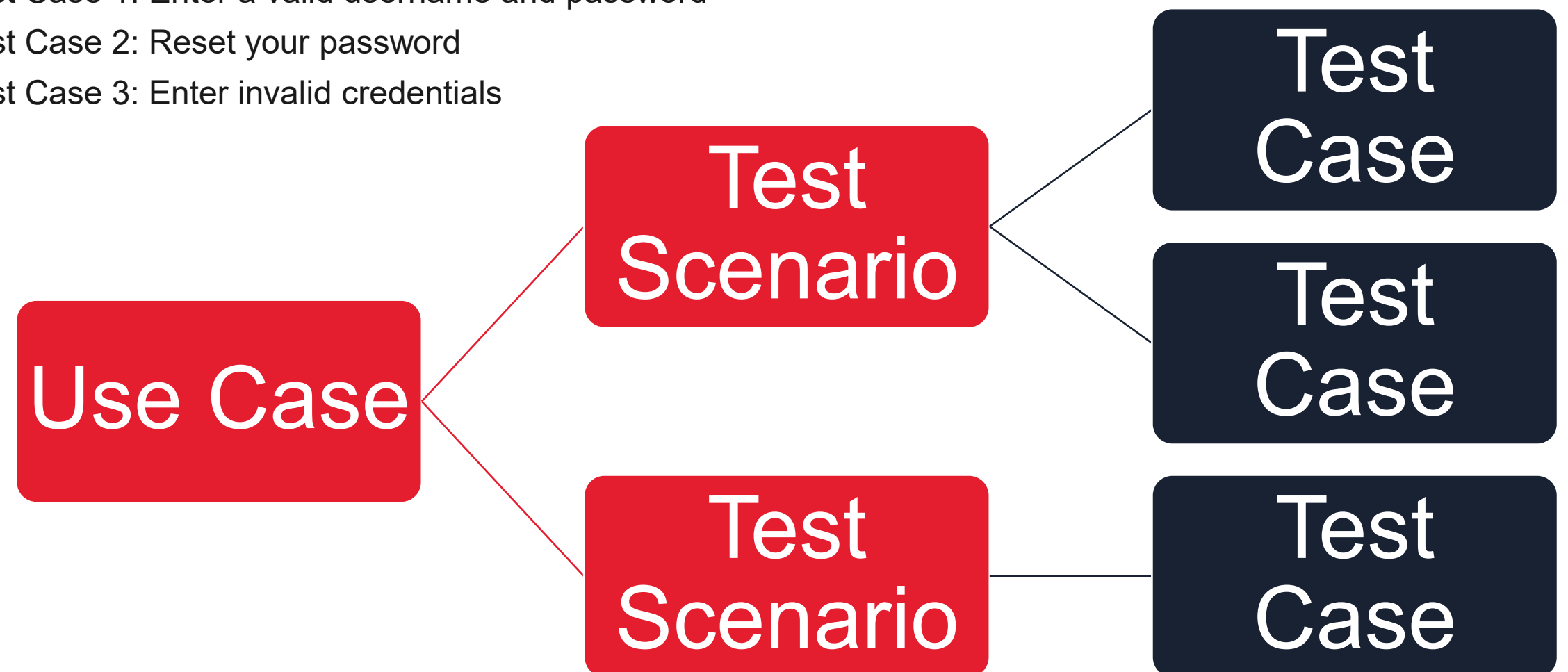
- Does it function as designed?
- Can you validate the results?
- What happens when you deliberately use it incorrectly?
- Tried against user segments





Formal Testing

- Use Case: A member should be able to log in to the website
 - Test Scenario: Validate the regular login page
 - Test Case 1: Enter a valid username and password
 - Test Case 2: Reset your password
 - Test Case 3: Enter invalid credentials
 - Test Scenario: Validate the cart login page
 - Test Case 1: Enter a valid username and password
 - Test Case 2: Reset your password
 - Test Case 3: Enter invalid credentials





Test Scrums

- Ideal for website projects
- Bring stakeholders together
- Have various devices
- Time limit of 30 minutes
- Find as many bugs as you can
- Move to resolve and then repeat until no bugs are found in 30 minutes



Client vs External testing

External	Client
Does it work as designed?	Does it meet my requirements?
Did I spell things correctly?	Have I tested all components?
Have I met all requirements?	Have I tested all scenarios?
Does it perform in an easy-to-use manner using best practices?	Have I checked spelling and other digital content items?



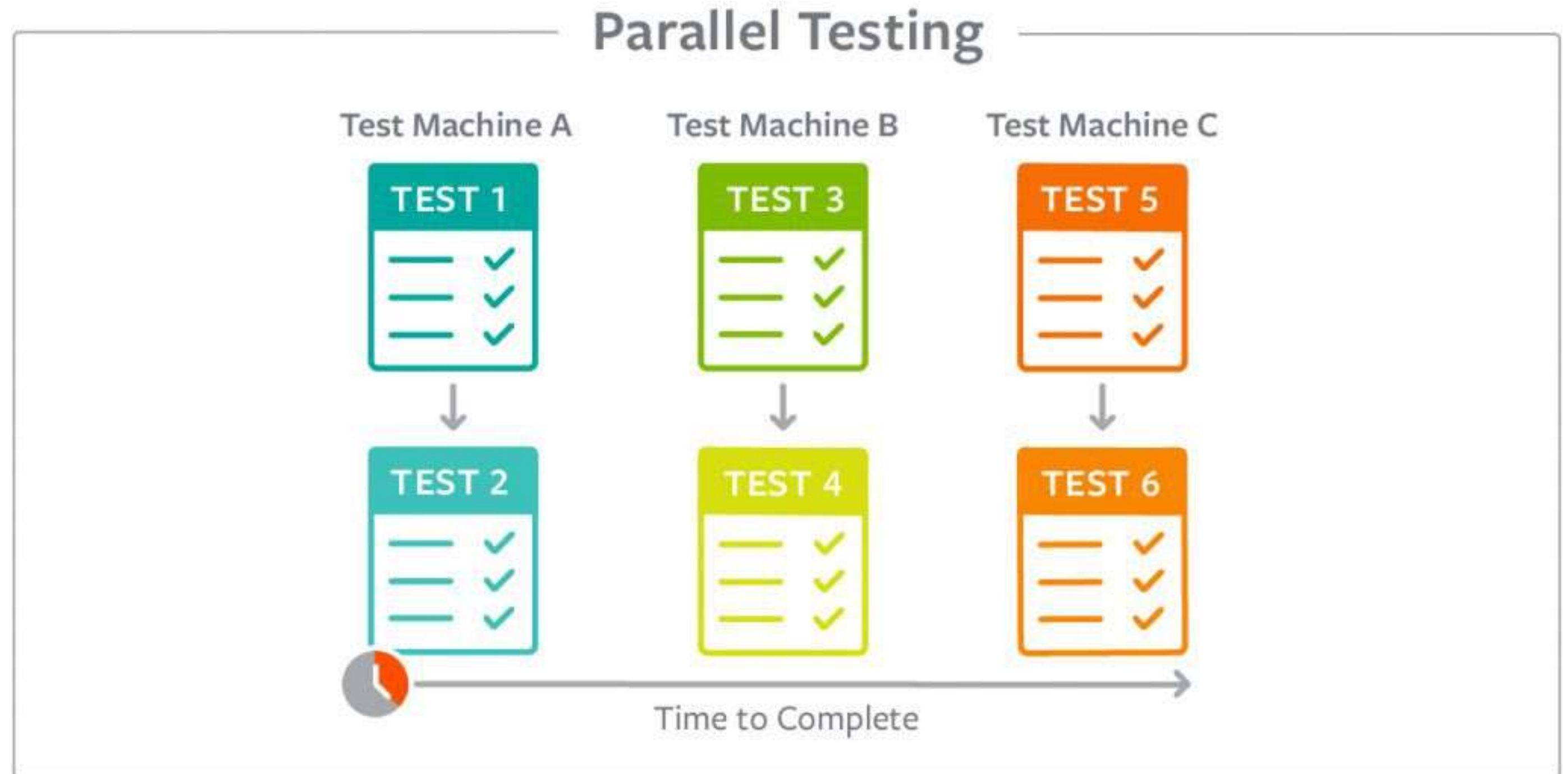
UAT Process

User Acceptance Testing is required for all projects

- Test against the user personas
 - Member/Customer
 - Staff
 - Association
- Formal UAT for large projects
- Use the initial requirements, user scenarios
- Informal handover and training to the users, requesting testing and signoff
- Track any issues



Parallel Testing





UAT time frames

- User acceptance testing should ONLY be completed once the requirement, phase or project is completed.
- Ensure the developer has completed their testing
- Ensure the task/project requirements have been completed
- Demonstrate the solution (can be used as training)
- Create deadlines for all testing tasks



Documentation

- System Documentation: The configuration, the development, the environment.
- User Documentation: The procedure, ownership, management, and business rules.
- Customer Documentation: How to access, use and request support.



System Documentation

Data Source Name: CauseisLegacyData

Description: Causeis Migration Data - Single Instance Data

Purpose: Migrate key em data as point-in-time snapshot.

Property Name	Data Type	Length	Multi	Notes	Added
Common Legacy Data					
ReinzId	Text	30			Yes
Status	Text	50			Yes
MembershipCategory	Text	80			Yes
MembershipType	Text	255			Yes
MembershipEndDate	Date				Yes
CurrentMembershipPaidThroughSQL	Text	30			Yes
MyobSyncDate	Date/Time				Yes
DateCreatedSQL	Text	30			Yes
DateUpdatedSQL	Text	30			Yes
LastUpdateBy	Text	150			Yes
Legacy Data for Individuals					
CurrentEmployer	Text	30			Yes
CurrentEmployerStatus	Text	50			Yes
CurrentEmployerMembershipCategory	Text	80			Yes
CurrentEmployerMembershipEndDate	Date				Yes
LastEmployer	Text	30			Yes
IsMembershipBilled	Yes/No				Yes
MonthlyBillingOfficeBilled	Text	30			Yes
MonthlyBillingIsBillable	Yes/No				Yes
MonthlyBillingDateBilled	Date/Time				Yes
ExternalMaintenance	Yes/No				Yes
ExternalId	Text	30			Yes
RequireAttention	Yes/No				Yes
MagazineDelivery	Text	30			Yes
Legacy Data for Offices					
Website	Text	255		Temporary field to state data to then load in Name table.	Yes
IsMasterOffice	Yes/No				Yes
IsOwnerGroupMaster	Yes/No				Yes

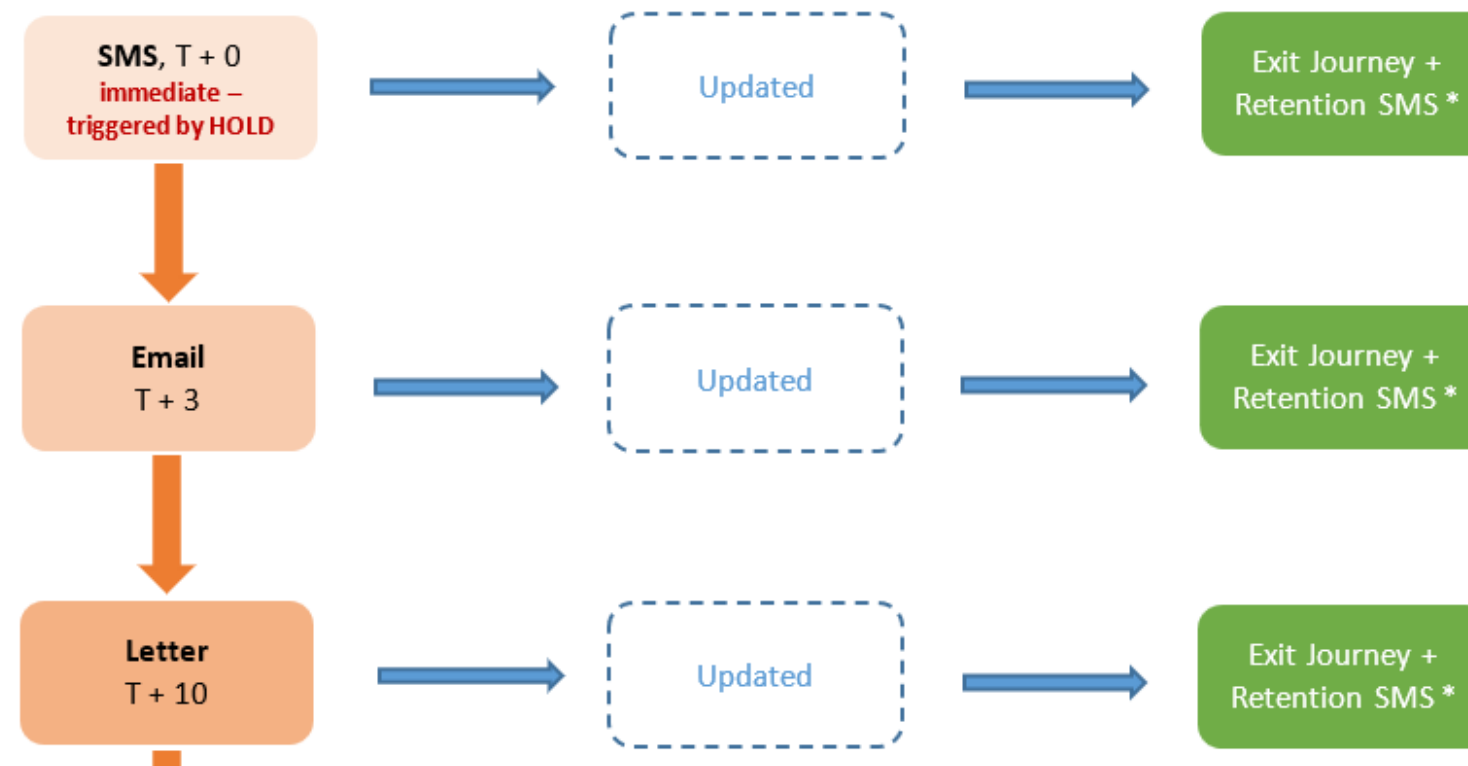


User Documentation

1 RG Declines Journey

1.1 Original requirements

Once the last debit attempt for the current cycle is made and the payment has been reattempted (includes CC, DD and online), flag recurring donation record as HOLD in the database. This should trigger a workflow and start the donor on the following declines journey. Most recently declined donors will be recaptured with texts and emails. If we don't have complete contacts details as required by each step of this journey (e.g., mobile number, email address, mailing address), we can create alternative decline journeys, but we need to work towards having all three data fields to fully automate the process.





User Documentation

1.4.1 Review journeys for donors with missing information to skip steps

If there is no mobile number (Name.TOLL_FREE) for the SMS (step 1) then the dates of steps 2, 3 and 4 are brought forward by the value of count 2 (the number of days to wait between steps 1 and 2). Step 2 will not be brought earlier than the current date. The status of step 1 will be updated with *No mobile number*. This will not run if the status of step 1 is populated.

If there is no email address for the email (step 2) then the dates of steps 3 and 4 are brought forward by the value of count 3 (the number of days to wait between steps 2 and 3). Step 3 will not be brought earlier than the current date. The status of step 2 will be updated with *No email address*. This will not run if the status of step 2 is populated.

If there is no postal address (blank first line of preferred mail address) for the letter (step 3) then the date of step 4 is brought forward by the value of count 4 (the number of days to wait between steps 3 and 4). Step 4 will not be brought earlier than the current date. The status of step 3 will be updated with *No mailing address*. This will not run if the status of step 3 is populated.



Customer Documentation

Frequently Asked Questions

General Questions



Insurance FAQ's



Payment Options



Accessing Certificates and Invoices



Documents and Forms



How-to-renew Videos



- [How to renew your ADAQ membership and complete the insurance application form](#)

Australian Dental Association QLD
<https://adaq.org.au/renew2022>



End User Training

- Formal
 - Agenda
 - Recording
- Informal
 - Part of UAT
 - Email (careful of communication issues)
 - Recording where appropriate



Project Action Items Register

Templates - Action Items Register 🔔 ☆ 🔗 📄 Last seen Invite / 1 + Add to board ⋮

Add board description

🏠 Main Table | + 🔗 Integrate 🤖 Automate / 5 ⬆

New Item 🔍 Search @ Person 🔽 Filter ↕ Sort 📌 👁 ⌵ 🔄 📄

Open Action Items	Creation Log	Phase Reference	Owner	Status	Due	
Item 1	May 21, 2021	-		Pending		

Out of Scope Items	Creation Log	Phase Reference	Owner	Status	Due	
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Closed Action Items	Creation Log	Phase Reference	Owner	Status	Due	
Item 1	May 21, 2021	-		Pending		

+ Add new group



Go Live Issues Register



Client Name - Project Name - Go-Live Issues Register ⓘ ☆

Add board description

Main Table | Form | +

Integrate Automate / 2

New Item ▾ Search Person Filter ▾ Sort

Open Items	Raised By /Date Raised	Description of Issue	Issue Own...	Status	Date Resolved	People

Closed Items	Raised By /Date Raised	Description of Issue	Issue Own...	Status	Date Resolved	People

+ Add new group



Go Live

- Assess ALL risks
- Assess ALL action items
- Assess ALL parked items
- Assess ALL user acceptance testing
- Assess external and internal impacts
- Decision
- Communications Plan





Go Live: Communications



- Internal Communications
- External Communications
- Preparing for issues
- Consider a “test scrum” for go-live



Go Live: Communications

ASI Hosting - Windows Updates Notification

hostingsupport@advsol.com
To: Michelle Lelempsis
2:46 AM

asi ADVANCED SOLUTIONS INTERNATIONAL

NOTICE

Important Information for iMIS users

Dear Michelle,

ASI applies monthly Windows updates to our hosted environments as stated within the Hosting Agreement. Microsoft releases these updates the second week of every month, and ASI will apply the updates the following weekend.

Hosted clients in all regions have been sent a notification, listing the start time for the updates in their region. Below is the schedule for **JUNE 2022**:

- AP: Friday, 17 JUNE, 8:00 PM AEST
- SG: Friday, 17 JUNE, 6:00 PM SGT
- UK: Saturday, 18 JUNE, 10:00 AM BST
- CA: Saturday, 18 JUNE, 4:00 AM CST
- US: Sunday, 19 JUNE, 4:00 AM CST

There will be a necessary reboot once these updates have been applied. We do not anticipate a significant service outage as a result of the updates and subsequent reboot. If you have any further questions or concerns, please submit a support ticket at <https://support.imis.com>.

Important: Downtime notice

Pipedrive <info@pipedrive.com>
To: Michelle Lelempsis
5:04 AM

pipedrive

Dear Michelle,

To provide you the best service, we will be performing maintenance on our servers on **Sunday the 19th of June from 5 am till 9 am UTC**.

If you are online, you may experience downtime.

In case you are impacted by this, we apologize for any inconvenience, and will do our best to get everything up and running – and better than before – as soon as possible.

All the best,
The team at Pipedrive

f t i in y



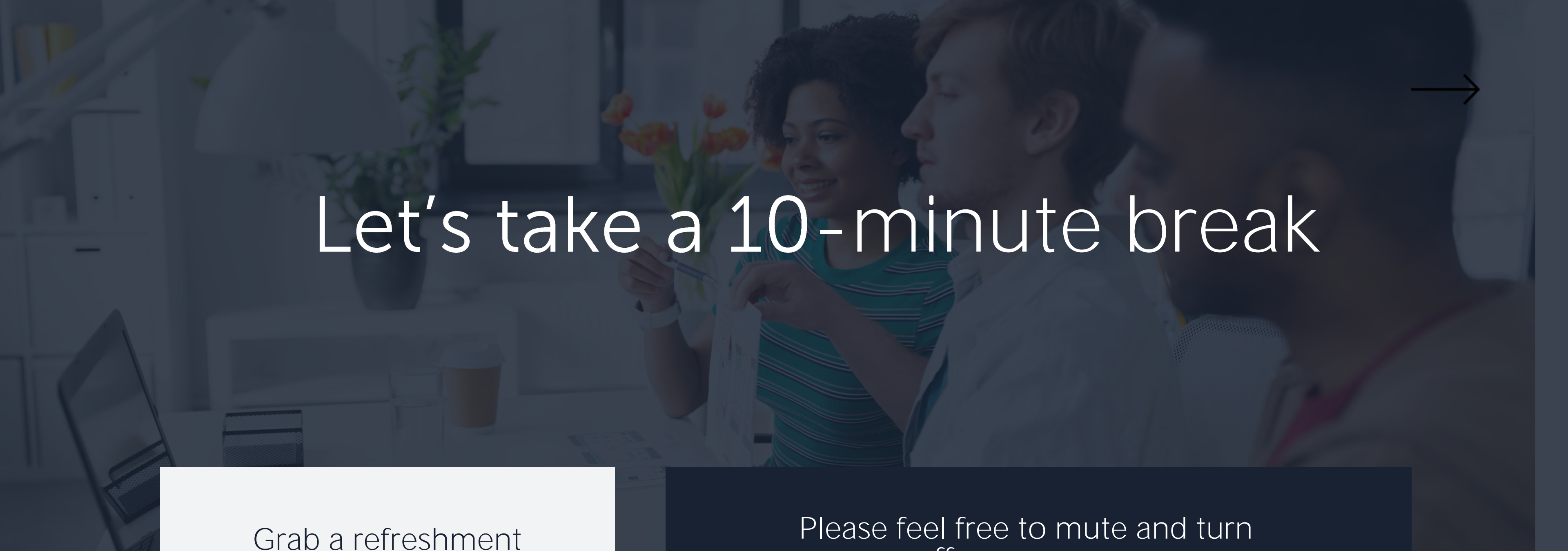
Outcomes of Validation

- Project or ticket solution is confirmed as fit for purpose
- Client is satisfied with the work delivered
- Timelines were met
- Testing was signed off
- Go Live successful



Deliverables

- Testing guides
- Monday board UAT items
- Documentation
- A successful go-live project!



Let's take a 10-minute break

Grab a refreshment

Please feel free to mute and turn
off your camera

Don't close the Zoom
session

Phase 5: Project Closure



INITIATION & CONCEPTION



PLANNING



DEVELOPMENT



VALIDATION



PROJECT CLOSURE



Closure

- Project signoff
- CSAT
- Internal documentation
- Assess against initiation





Client Signoff



Don't assume the everyone is satisfied with the result.

- UAT completed, and results provided
- Client has been trained and agreed to close out
- No further work required
- Transition to support



CSAT

CSAT is short for Customer Satisfaction, which is a commonly-used key performance indicator used to track how satisfied customers are with your organisation's products and/or services.

- Ticket Satisfaction (SimpleSat)
- Project Satisfaction (Jesse / Monday)
- Followup Interview
- Success Story



Internal Documentation

When should we document?

How should we document?



Assess against initiation

- Now we can actually develop the solution



Deliverables

Phase 5: Project Closure



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PLANNING



DEVELOPMENT



VALIDATION



PROJECT CLOSURE

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Change Management Techniques



CHANGE MANAGEMENT

Make a big impact with our professional slides and charts



SPONSORSHIP

How will you secure, engage and use high-level support and sponsorship of the change?



BUY-IN

Change is most effective when you are able to win support from people across the business. How do you plan to achieve this?



INVOLVEMENT

Who is best positioned to help you to design and implement the change?

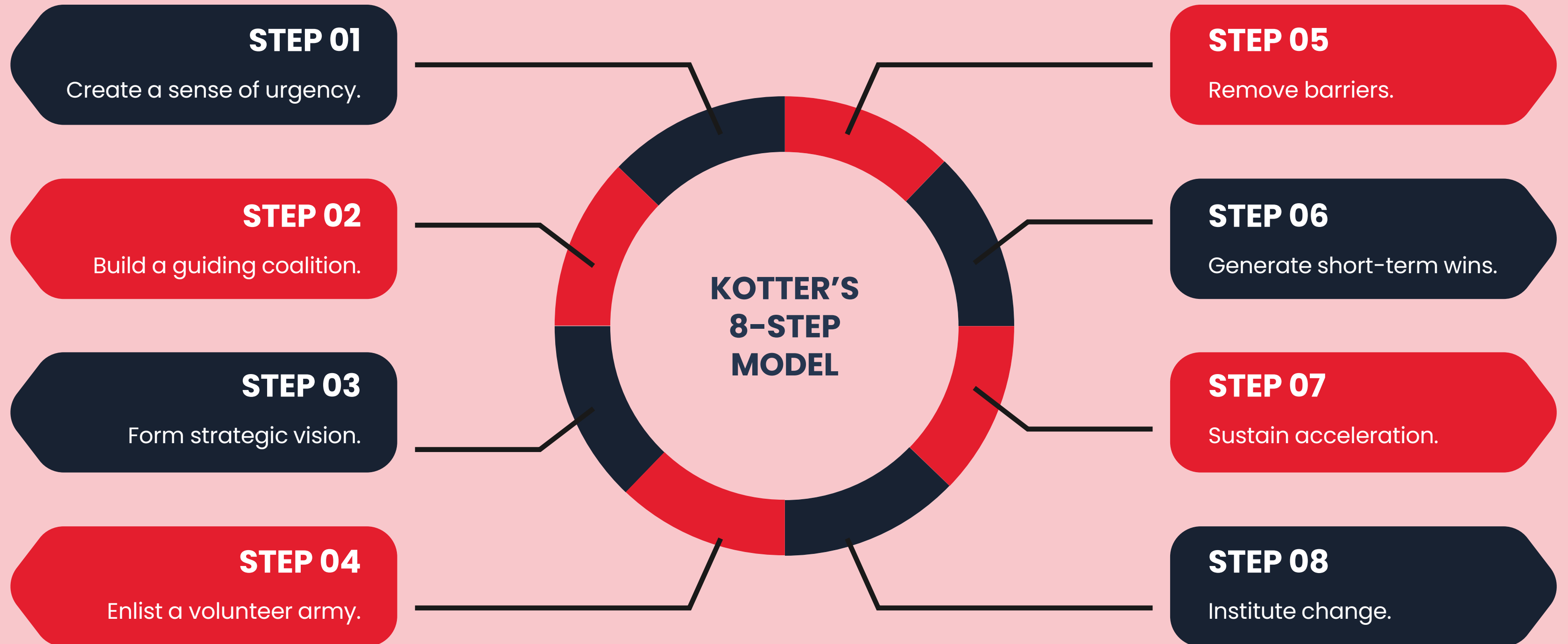


IMPACT

How will you predict and assess the impact of the change that you need to make? What goals do you need to achieve?

CHANGE MANAGEMENT

Make a big impact with our professional slides and charts





Change Management

- Change is hard. As a general rule, humans aren't very good at it and don't like it much.
- Investing in CX design and strategy is likely to be met with resistance.
- What techniques have you implemented to enable change?



Change Management

- Set a compelling direction
- Acknowledge and proactively support
- Invest in everyone - Although change starts at the top, it's embedded at the bottom.
- Create ownership, not just accountability



Change Management

- Over communicate
- Celebrate success
- Build a culture of enablement and high performance
- Forster a culture of continuous improvements:
 - identify for improvements
 - plan the change
 - execute the change
 - review and act on the results by standardising or improving.



Final thoughts, questions or ideas

Breakout Room



15 minutes and you will receive a 60 second warning when ending



What gain points would you expect a new member to have?



What are the pain points with joining?



How can you find out the pain and gain points?

In preparation for Thursday

- Data: How many prospects enquire? How many join?
- Refine your Join Journey
- Question: Why, why and why

Continue your PM learning

- PMI Project Kick Off Training
<https://www.pmi.org/kickoff>
- Australian Institute of Project Management
<https://info.aipm.com.au/project-leadership>

Wrapping up Day 1...

Customer
Experience

Prospect and New Member
Experience

Journey Mapping



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