

10-Point Plan To **Convince Your Board to Change Systems**

Persuade your board to approve your new association software with these proven tips to build an effective business case and anticipate roadblocks.



10-Point Plan to Convince Your Board

1. Get Your CEO on Board:

Ensure your executive is thoroughly behind your new system initiative; if they're not, use the other tips below to convince them first.

2. Understand the Board Structure:

Work with your CEO to identify exactly who will vote on your project and then plan accordingly.

3. Start EARLY:

The Board approval begins well before your presentation; provide regular updates about the initiative, its goals, and how it will benefit the organization.

4. Build a Business Case:

Be sure to address the problems you're trying to solve, why you've chosen the new system, potential risks/how you'll mitigate them, and the proposed budget and timeline.

5. Demonstrate the Risk of Doing Nothing:

Make sure the Board understands how waiting to decide later could impact the organization now.

6. Do the Due Diligence:

The Board will want to know the other solutions you considered and why you rejected them. Use quantifiable terms.

7. Prepare Your Rebuttals in Advance:

By practicing your presentation with others, you can uncover the tough questions you may face so you'll be fully prepared when the time comes.

8. Profile Your Board Members:

Learn as much as you can about each one before your presentation so you can highlight the issues they care most about.

9. Count the Votes Before You Enter the Room:

If you're not sure the Board is in favor of the project before you present, delay the vote (if possible) until you're sure you'll get the green light.

10. Lean on your Solution Provider:

They've been through this before with many other clients; leverage their experience and the resources they can offer you.

For more detail, read our blog post: [10-Point Plan to Convince Your Board to Change Systems.](#)

Board Personalities and How to Persuade Them

Your Board is likely made up of a mix of personalities, professions, experiences, and even biases. In each case, it's important to understand what makes them tick and how best to convince them of the importance of your project. Here are a few of the most common types you will find and tips to get them on your side.



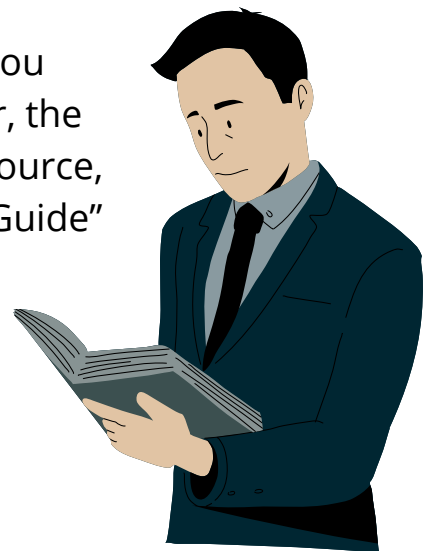
The Friend

This might be your technology committee chairperson or CEO — or someone else. While you think your work may be already done, take the time to dig deeper to uncover concerns they may have been reluctant to share. It's important to identify any hesitation they may have before your project gets to a Board vote.

The Guide

This is the person who may be willing to help direct you about how best to present, what's important to cover, the stats this Board wants to hear, etc. This is a great resource, but don't rely solely on this person. Sometimes "the Guide" may have a skewed perspective and you'll want to make sure you consider several viewpoints.

And make sure the Guide is well-briefed and doesn't inadvertently promise something more than the project delivers.



Board Personalities and How to Persuade Them

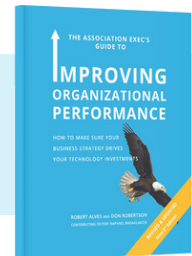
The Skeptic



While this is the person you might fear the most, the Skeptic can often be easily convinced if you've done your homework. Skeptics want the details and they want to kick the tires. Work with your selection committee to identify the objections you'll likely face and devise a response for each.

A system preview can be helpful in overcoming their arguments because it shows how a system will work using your own data and processes before you invest.

**Learn more about system previews in ASI's new eBook:
*The Association Exec's Guide to Improving Operational Performance.***



The Non-Techy:

This has less to do with the personality and more to do with their technical knowledge. There is usually one person on the Board who is not tech savvy and is resistant to technology in general.

Your best strategy here is to refrain from acronyms and jargon. Focus on what the organization can accomplish with the new system and the burdens it will relieve. Facts and figures are nice but this person usually wants to understand how the system will help further your mission.



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The Cost-Cutter:

Similar to the Skeptic, the cost-cutter enjoys being fiscally responsible. Their first instinct is to say “No.” So you need to demonstrate to them how saying “No” will actually cost the organization more. Cost-cutters respond well to stats, ROI, and the Total Cost of Ownership. Ask your solution provider for help preparing to answer this person’s questions.

The Climber:

This is the ambitious Board member who may be interested in moving up on the Board or in their career. The Climber may go hard at you, demanding a lot of stats to back up what you’re saying. Do your homework, anticipate their questions, and be ready to help them understand how getting behind the project could be good for them as well as the organization.



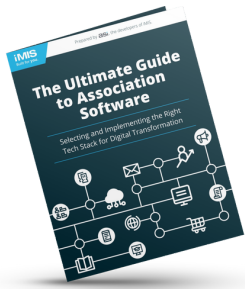
The Blocker:

There will always be one person who just won’t support your project, typically because of a negative past experience. But if you’ve followed the 10-point plan, demonstrated the value the system will bring, and outlined the risks of doing nothing, the other Board members will see the value and your project won’t be sidelined.



Next Steps & Additional Resources

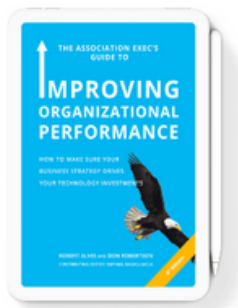
If you're considering new membership management software as part of your organization's digital transformation strategy in the next 1-2 years, we've put together several resources that can help you now.



The Ultimate Guide to Association Software

Our comprehensive guide on selecting and implementing the right tech stack for digital transformation in your organization.

[Download](#)



5th Edition Association Exec Guide

Get insights on how to improve your performance by becoming a learning organization to achieve continuous performance improvement.

[Download](#)



Online Resources

- [Sharpen Your Board Management Skills](#) by the American Society of Association Executives (ASAE)
- [How To Write a Concise Business Case \(With Template\)](#) by Indeed
- [The Right Way to Present Your Business Case](#) by Harvard Business Review
- [Pros & Cons of Using an RFP for Your Digital Transformation](#) by iMIS

