

Best Practices for Continuing Virtual Operations After COVID-19



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With many associations finding they are working well from home, some are considering permanently operating without a brick-and-mortar office. These six tips can help you ensure the move to fully

virtual goes smoothly.

With the advent of COVID-19, many of us were thrust unexpectedly into the world of fully virtual organizations. Having lived with this for six months, your organization may be among those considering a hybrid or even fully virtual operation. What do you need to know?

The American Society of Colon & Rectal Surgeons (ASCRS) reached that conclusion *before* COVID entered the picture—making the commitment to become a fully virtual organization last fall after roughly 35 years of management by two AMCs. We made the leap to standalone as scheduled on April 1, just as COVID peaked the first time, and within a week of cancelling our Annual Scientific Meeting.

Fortunately, ASCRS had the benefit of learning from many associations that previously chose to become fully virtual. We also benefitted from benchmark data and best practices by participating in the Virtual Association Network. As a result, our transition to fully virtual has been relatively uneventful. We'd like to share some of what we've learned and continue to learn.

Note that this is *not* one size fits all. If you have real estate holdings or use a different mix of direct employees and vendors, your roadmap will vary. Here are six lessons to consider:

Devote sufficient time to identify vendor partners with experience serving fully virtual associations. We rely on vendor partners for finance, human resources and payroll, and information technology. With finance, a key issue to address is where mailed-in payments from members and other customers will be sent (e.g., lock box). We found the professional employer organization option was a best fit for HR and payroll needs—integrating benefits, payroll, training resources, employee assistance, HR administration, and legal expertise to navigate vagaries of state and country-specific regulations for staff management and reporting. In terms of IT, virtual associations have unique needs pertaining to equipment and helpdesk support, telephone communication, local to cloud applications, video conferencing, and file storage and sharing.



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Give member service the emphasis it needs during significant change. Ensure enough staff are available to respond to calls and email during business hours. An intuitive system to direct calls takes on fresh importance. Equally important is assessing member satisfaction with service and response time. Also consider adding a chatbot to better triage member queries 24/7.

Prepare for employees who can live anywhere. Virtual means you are no longer limited to a local job market—a good thing! Our 15 staff reside in four states with another living in Istanbul. Focus on candidates who (ideally) have prior experience working virtually and have appropriate work environments at home. Use the same technology applied with your members to conduct your job interviews and onboard new hires. Employees who are comfortable with video engagement technologies are highly valuable in virtual organizations. Adaptive technology must be available for candidates who need it.

Retool your staff performance management methodology. Re-examine competencies used to assess staff performance. Some may be more appropriate for a physical environment than a virtual one. Focus more on outcomes and less on activity. It is critical to identify outcome metrics that can be tracked; job descriptions with clear, measurable responsibilities are a requirement.

Find new ways to build staff camaraderie and interdepartmental engagement. It is still important for staff to “see” one another. If you have a nucleus of staff in a common location, consider contracting space from a willing association. We have a once-a-week arrangement for meeting in-person that we anticipate utilizing when in-person gatherings are allowed. Any staff member can “Zoom” in. When COVID abates, consider the frequency of in-person and virtual meetings. Benchmarking data suggest at least semi-annual all-staff in-person meetings are effective. Many hold all-staff virtual meetings monthly or weekly. Ask interested staff to organize fun virtual contests and events. Celebrate milestones (work anniversaries and birthdays) by physical or e-delivery of items. The cost is low and the payback considerable.

Other advice. Determine how mail delivery and distribution will work. ASCRS uses the street address of our finance director. Patient brochure orders are fulfilled by the printer/mailer. We will likely coordinate shipping for meetings with our once-a-week meeting space partner. Address insurance coverage, including home offices. Turbocharge benchmarking initiatives. Arguably we are in the midst of the most change in a short period of time that the association world has ever experienced. It is critical to learn best practices in virtual management from those who have already gone down the path.

The good news is, courtesy of COVID, you have a taste of your virtual future. Many associations have successfully blazed the trail for you. If we can do it, so can you!

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