



FORGING GREATER COLLABORATION
BETWEEN **VENDORS** AND **CONSULTANTS**

Washington D.C.
November 18, 2024

Agenda

- 12:30-1:00pm • **Welcome / Lunch**
- 1:00pm • **Review Ground Rules**
 - **Planning Committee Update**
- 1:30pm • **Sharing Technology Project Successes**
- 3:00pm • **Break**
- 3:15pm • **Open Conversation / Reaction**
- 4:00pm • **Feedback for Planning Committee**
 - **Wrap-up**
- 5:00pm • **Happy Hour!**

Ground Rules...Antitrust

- **No attendee shall engage in antitrust behavior, such conduct includes:**
 - Agreements or implicit understandings reached as to pricing, even as to price “floors” or price “ranges” and not specific, individual prices.
 - A participant’s present and future prices, pricing policies, terms or conditions of sale including credit terms, discounts, or upcoming bids;
 - A participant’s cost of operations, profit margins or mark-ups;
 - A participant’s specific marketing strategies, capacity, production quotas, output decisions, purchasing information and strategies, sales revenue and volume, or research and development plans;
 - Agreements not to compete;
 - Boycotts or blacklisting; and
 - Allocation of customers or sales areas.

Ground Rules...For Conversations

- All experiences in the room are **valid** and **welcome**
- Speak from **your experience** not from others
- All voices in the room are **invited** to contribute –
(lean back vs. lean in)
- Have an open mind and be **curious** –
(not a typical engagement for our day to day, get what you give)

Ground Rules...Common Vocabulary

- **Our Industry** – the association technology space
- **Association's technology project** – a major platform implementation for an association of any size (e.g. CRM, AMS, LMS, finance, website)
- **The Journey** - an association's technology life cycle: preparation, selection, discovery & design, implementation, launch, post implementation support & growth
- **Vendor** – organization that publishes software intended to serve as an AMS/CRM for an association
- **Consultant** – an independent organization providing professional services to association clients

Technology Project Successes

Recollection – Connections

- Individual Reflection – 20 minutes
- Each person shares with the entire group – 40 minutes (~3min/person)
- Surface connections in pairs – 10 minutes
- Pairs report to the entire group – 20 minutes

[break]

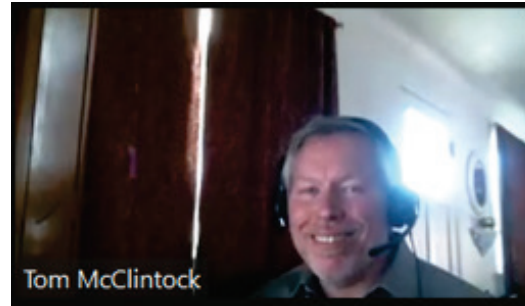
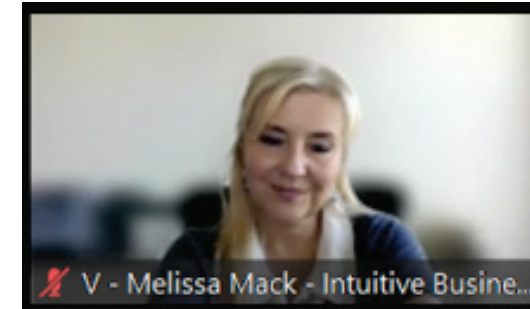
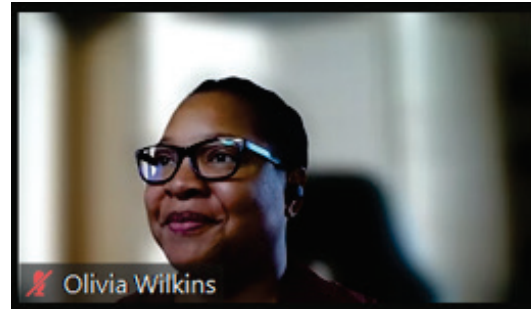
- Open conversation / reaction – 30 minutes

Technology Project Successes

Recall an association technology project that you are particularly proud of....

- Briefly describe the type of project...
- Looking back on it, what makes you proud of this project?
- What factor had the largest influence on the success of the project?
- Who was the primary force that drove the project's success? How did they influence the project?
- Were any challenges / obstacles overcome? If so, how?
- What did you learn from that project that influences your work today?

Ven-Con Planning Committee Update



Feedback for Planning Committee

Primary objectives of planning committee

- Layout the process for the establishment of a formal Advisory Council
- Guide the activities of Ven-Con through first half of 2025

Given the conversations so far...

- What activities should the planning committee prioritize for Ven-Con in 2025?
- A year from now, two years from now...what would you love for Ven-Con to look like?

Evaluation

