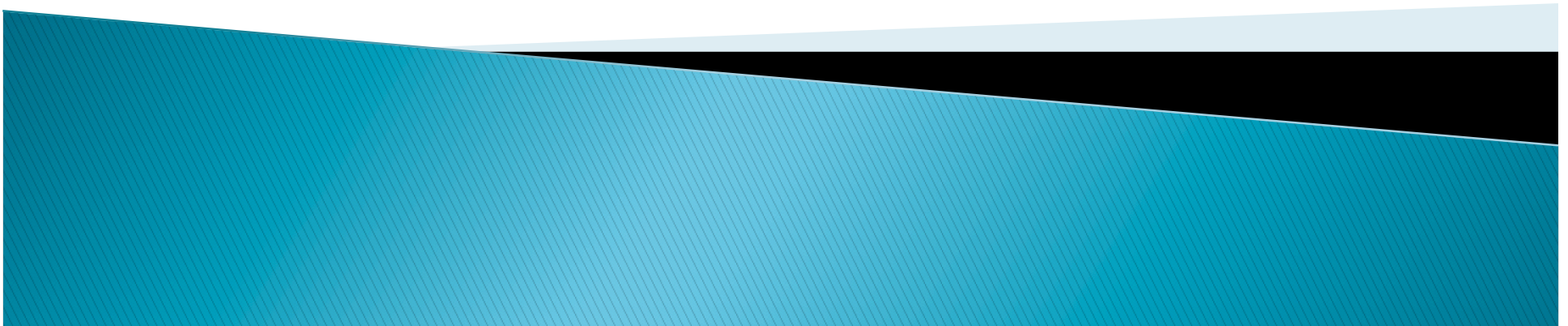


Managing and Juggling Your Media Vendors– Tips from the Front Lines

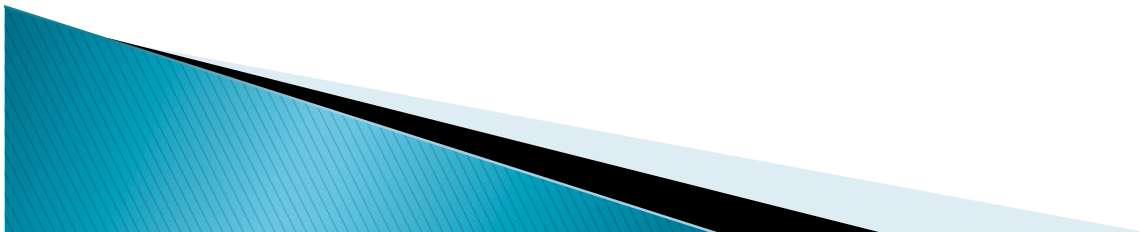
Prabhash Shrestha, CAE
CIO

Association of Fundraising Professionals



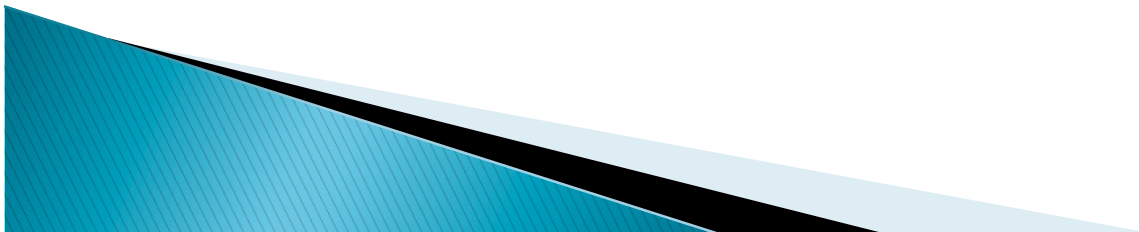
Media Vendors

- ▶ Webinars
- ▶ Online /Web Meetings
- ▶ Educational Sessions
- ▶ Information Sessions
- ▶ Board and Committee Meetings
- ▶ Staff Meetings
- ▶ Podcasts /Video casts
- ▶ Canned Educational Sessions
- ▶ Etc..



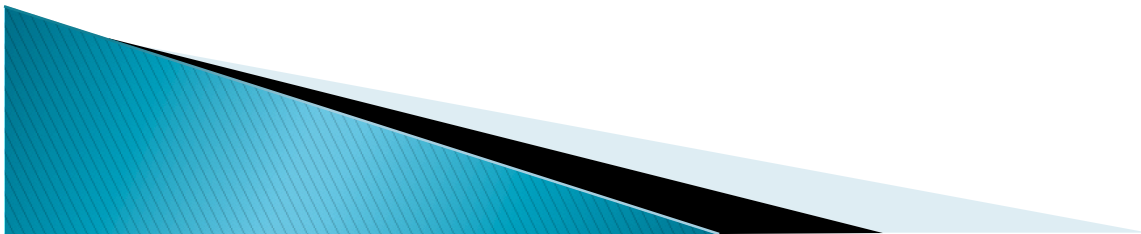
Thinking about Initiating Online Media Program?

- ▶ Four distinct phases of Setting up a program in your association or non-profit
- ▶ It is important to think about media vendors on each one of the stages
 - Phase I – Scan
 - Phase II – Plan
 - Phase III – Execute
 - Phase IV – Review



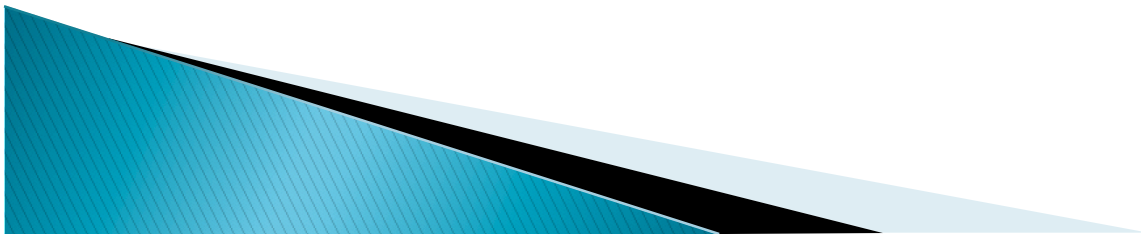
Phase I – Scan

- ▶ Member needs
- ▶ What's new and hot in the market?
- ▶ Who is your competition?
- ▶ Pricing
- ▶ Audience – potential members?
- ▶ Feasibility
- ▶ Success Potential



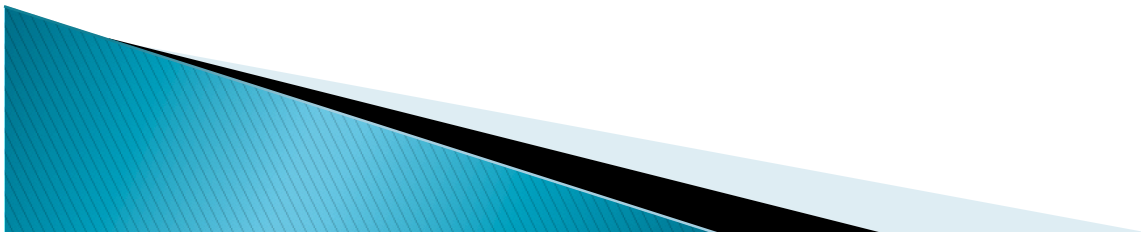
Phase II – Plan

- ▶ Gather data
- ▶ How/Why will your association be different?
- ▶ Tracks and Topics
- ▶ Presenters



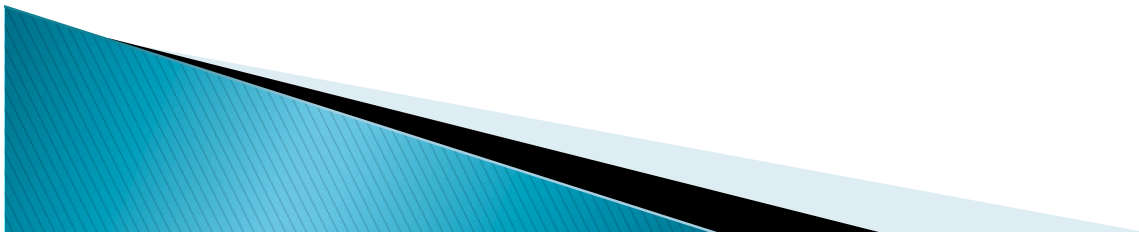
Phase II – Plan

- ▶ Plan your Pre Program activities
 - Marketing
 - Registration (Mail, fax, phone, email, online)
 - Session Arrangement
 - Presenters
 - Venue
 - Support to users and Presenters
 - Sponsorship



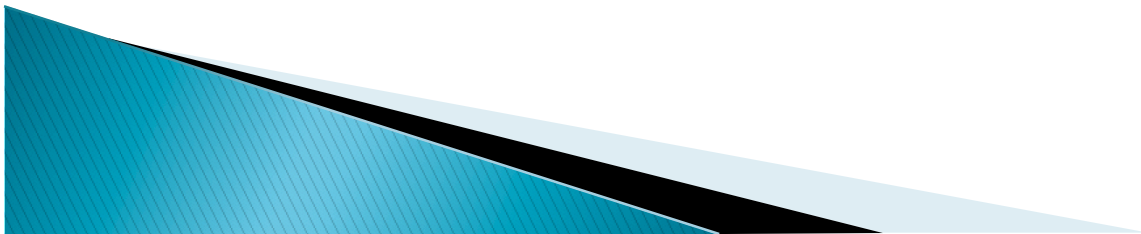
Phase II– Plan

- ▶ Plan your Program, the event itself
 - Dedicated staff on your end
 - Dedicated staff on the vendor end
 - Moderator
 - Ad space (Welcome, Thank you)
 - Presenter – good way to spread words
 - Communication with Vendor
 - Crisis planning



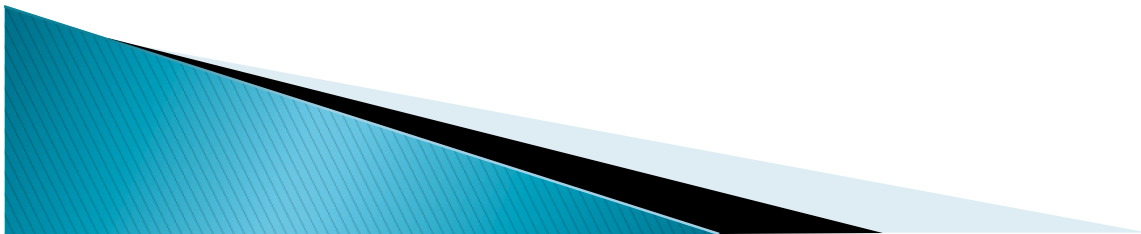
Phase II– Plan

- ▶ Plan your Post Program activities
 - Survey
 - Reports
 - Opportunities
 - Sales



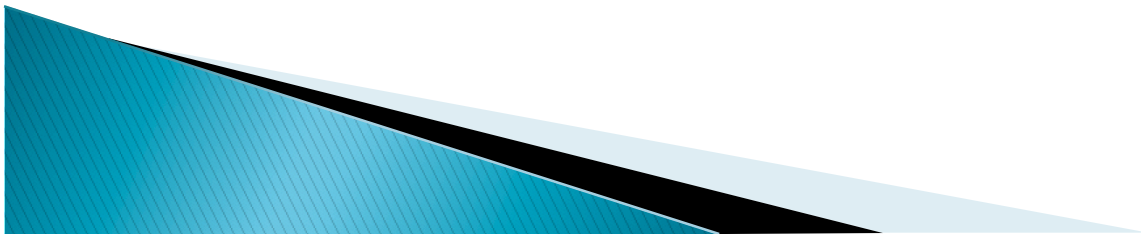
Phase III – Execute

- ▶ Getting it done
- ▶ Implement what you have planned



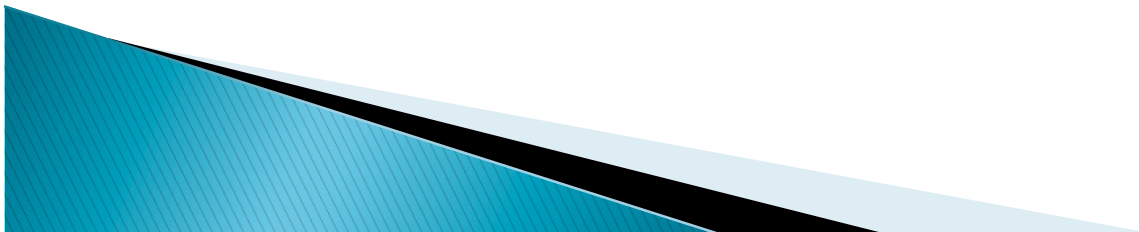
Phase IV– Review

- ▶ Analyses
- ▶ Opportunities
- ▶ Enhancement
- ▶ Ongoing review



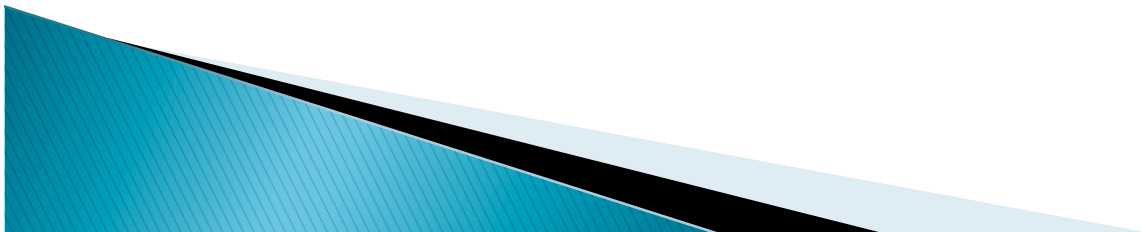
Life Cycle stages of Online Program Implementation

- ▶ Feasibility Study – Scan (Phase I)
- ▶ Association Requirements – Plan (Phase II)
- ▶ RFP and Selection Process – Execute (Phase III)
- ▶ Contract Negotiation – Execute (Phase III)
- ▶ Implementation – Execute (Phase III)
- ▶ Review and Enhance – Review (Phase IV)



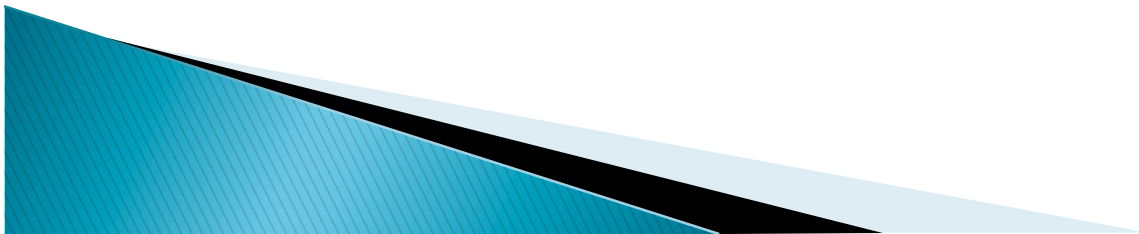
Association / Non-profit Requirements

- ▶ Very important stage
- ▶ Detailed functional requirement document
- ▶ Work with various departments
- ▶ For a small fee, get consultants help



RFP and Selection Process

- ▶ Use your networking skills
- ▶ Ask around
- ▶ Gather about 5 or less vendors
- ▶ See how responsive vendors are in the RFP response
- ▶ Ask many questions
- ▶ Consider Staff size and staff(s) dedicated to your association
- ▶ View Customer service record
- ▶ View Revenue generation record
- ▶ Seriously consider Past Performance and References



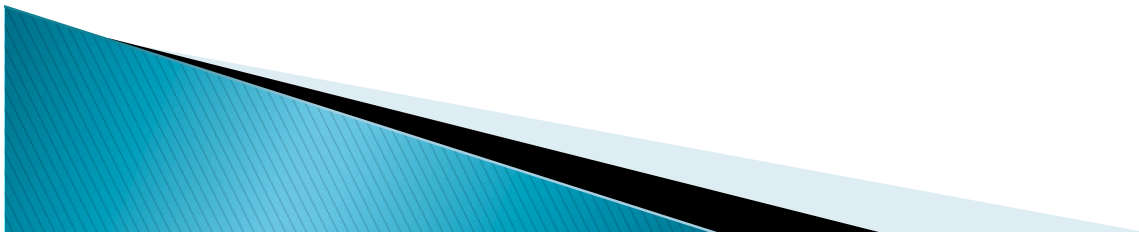
Contract Negotiation

- ▶ Extremely important
- ▶ Leverage
- ▶ Negotiate, Negotiate, Negotiate
- ▶ Cost, Service, SLAs, Reporting, web site, upgrades, usage
- ▶ Overall value over price
- ▶ Details – spell it out
- ▶ Mantra is “If it's not in the contract, it's not part of the deal“
- ▶ Be fair to your organization and to the vendor
- ▶ Win–Win situation for longevity of the relationship
- ▶ Legal help



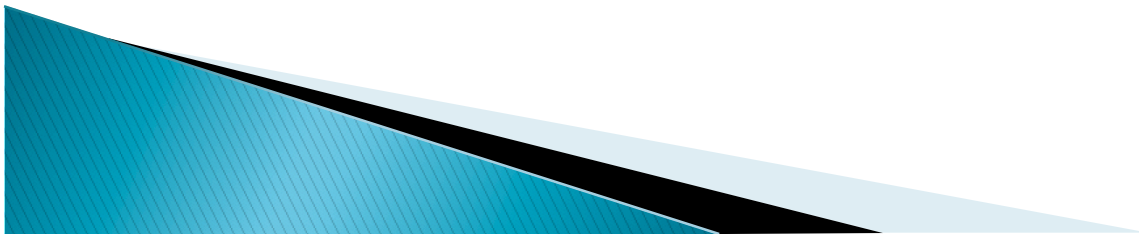
Implementation

- ▶ Become familiar with the system
 - Your staff should be able to answer questions from customers
- ▶ Test heavily
- ▶ Test every aspect
 - Web site
 - Technology
 - Compatibility



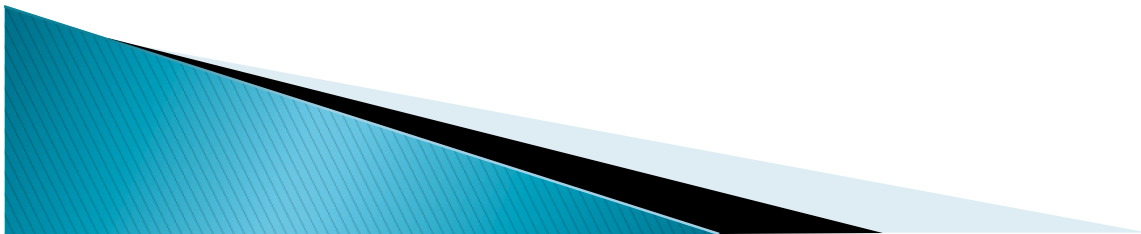
Review and Enhance

- ▶ Survey your customers
- ▶ Reports, Dashboards – Business Intelligence
- ▶ Revenue Model
- ▶ Business Model
- ▶ Membership satisfaction
- ▶ Impact on Association/non-profit



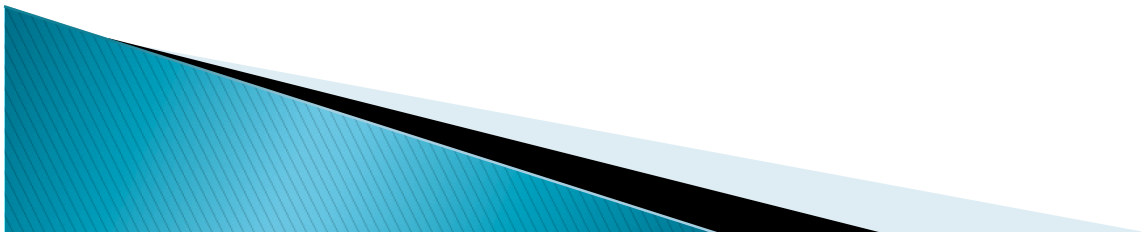
Media Vendor. Why do you need them?

- ▶ Subject Matter Expert
- ▶ Customer Service
- ▶ Technology
- ▶ Crisis Management
- ▶ Partnership



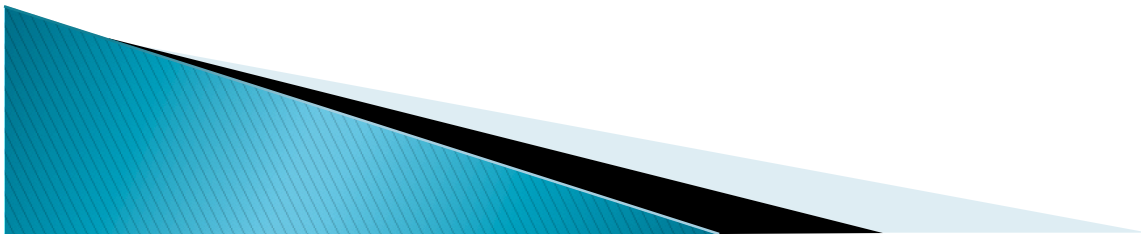
Vendor Relationship

- ▶ Reliance on Vendors
 - Software
 - On-time Delivery
 - Technical expertise
 - Crisis resolution
 - Training
 - Professional relationships with your staff, customers



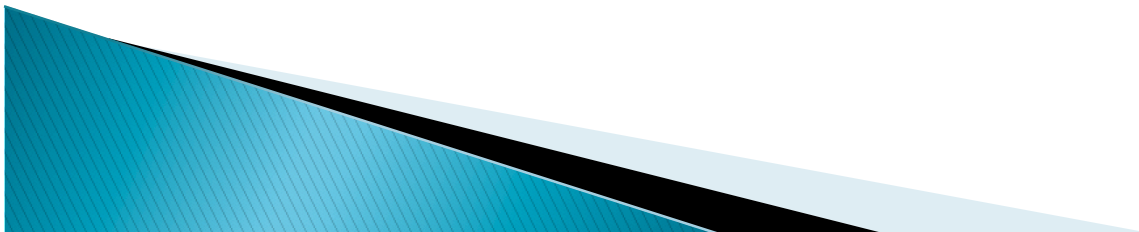
Vendor Relationship

- ▶ Vendors do not like
 - Failure in delivery
 - Lousy customers
 - Arrogance
 - Incompetent contact
 - Carelessness
 - Blame game



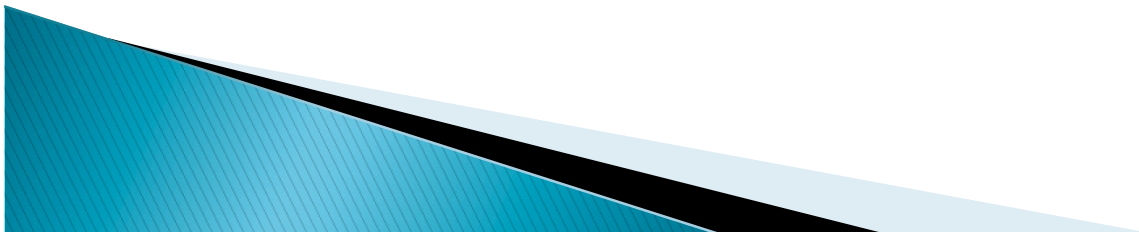
Vendor Relationship

- ▶ Vendors do like
 - Proactiveness
 - Cooperativeness
 - Understanding of their errors
 - Timely payment
 - Appreciation
 - Long Term relationship
 - Good references



Vendor Relationship

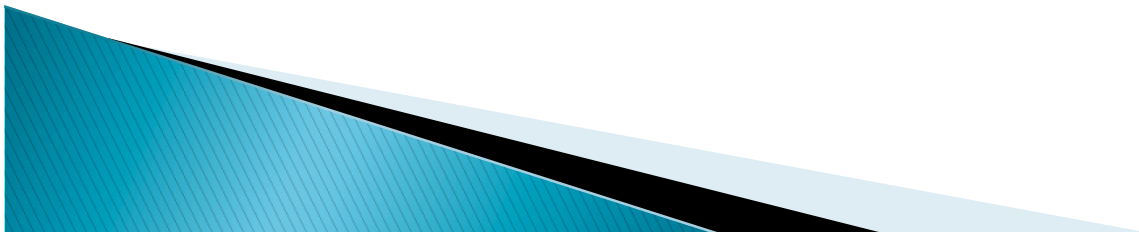
- ▶ Problem areas – Vendor's point of view
 - Misalignment of expectation
 - Vendors generally see that customers squeeze on price but not on demand
 - We generally see that vendors try to get away with minimal expense
 - Perceived Equilibrium



Vendor Relationship

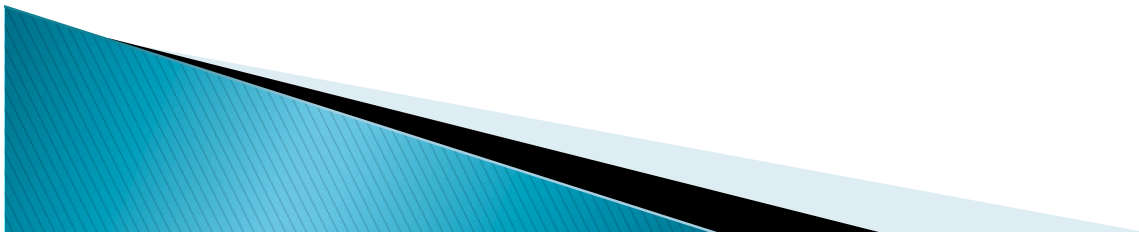
▶ Our diligence

- Make them realize that we want to work with them and leverage the relationship
- Provide detailed requirements to avoid confusion
- If vendor lacks logistical infrastructure, be aware and alert them
- Expectation management on both sides
- No such thing called “Over Communication”



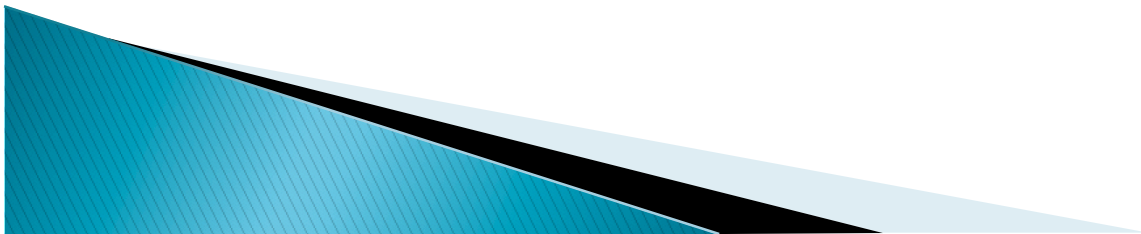
Vendor Relationship

- ▶ Important for us to do
 - Maintain audit trail of all discussions
 - Get a written document on vendor staffs, processes, changes etc..
 - Get a clearly written and agreed upon Roles and Responsibilities document
 - Require System and process documentation from the vendor
 - Clarify support and maintenance to be provided
 - Prearrange pricing model to address future scope changes



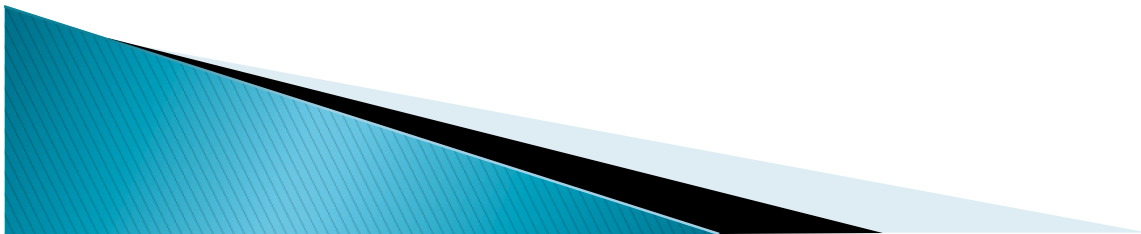
Vendor Relationship in Good times

- ▶ Celebrate.
- ▶ What else can you do to grow with the program?
- ▶ What else can the vendor do for your growth?
- ▶ What else can you do to make the relationship better?



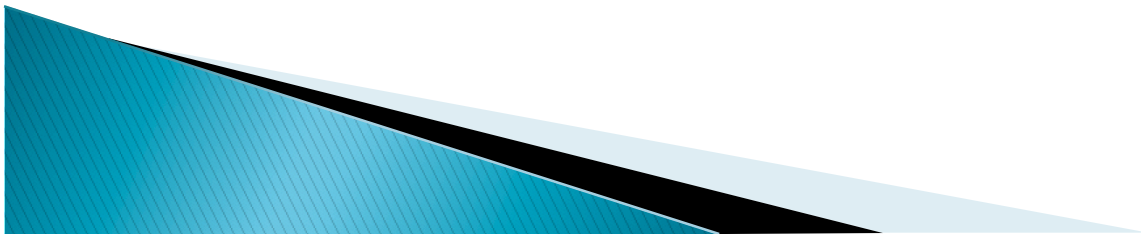
Vendor Relationship in Bad times

- ▶ Trust factor
- ▶ Crisis
- ▶ Ongoing battle
- ▶ What is vendor willing to do for your association?
- ▶ How can both parties plan to make it better?



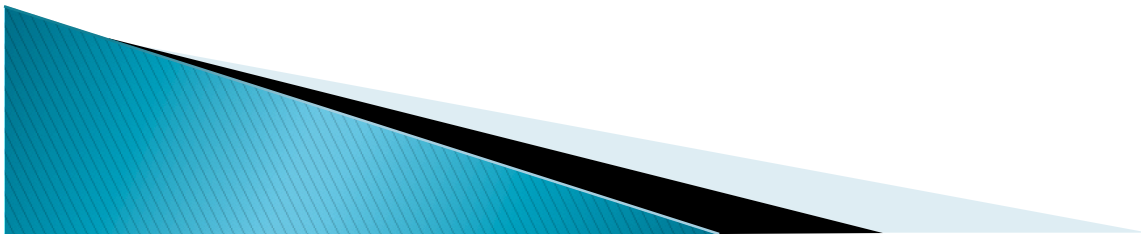
When you are unhappy...

- ▶ Problem analysis
- ▶ Open Communication channel
- ▶ What is vendor willing to do make things better?
- ▶ Contract situation
- ▶ If necessary, Good Exit Strategy



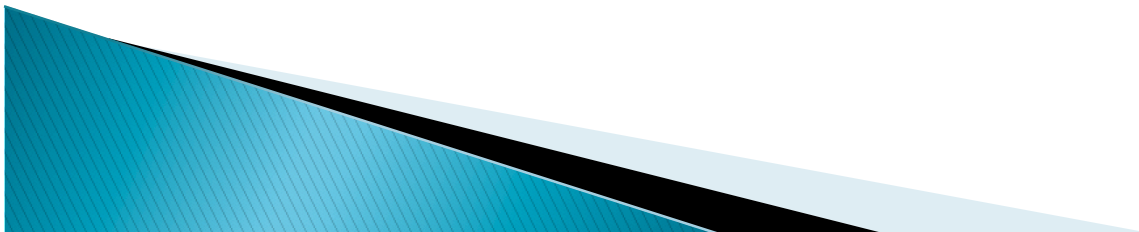
Things to Remember

- ▶ Don't try and figure it out alone--consult with colleagues, professional advisors
- ▶ If it doesn't feel right, analyze your concerns!
- ▶ Have a good primary contact. If you are not happy, have them change the contact person.



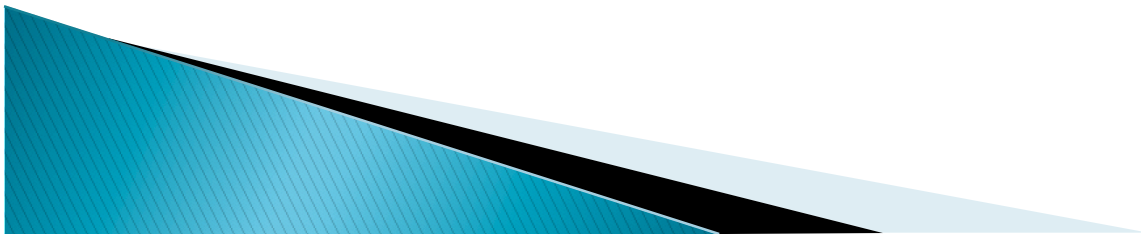
Things to Remember

- ▶ Build relationships with key vendor personnel
- ▶ Respect your internal protocols and you should do the same for the vendor
- ▶ Build a relationship so that you are comfortable picking up the phone and speaking with proper personnel
- ▶ Understand the role of each of their key players, and leverage them accordingly
- ▶ You can renegotiate



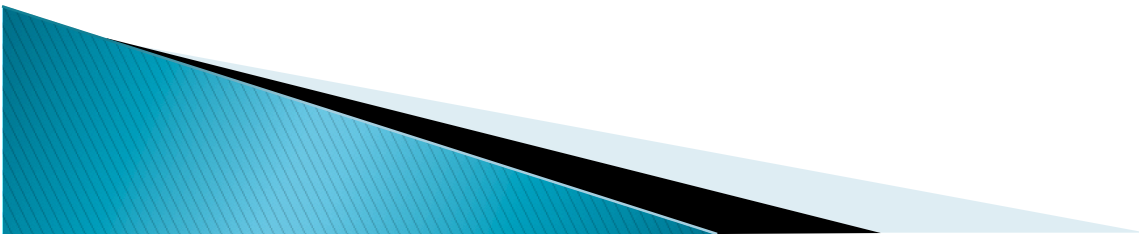
Things to Remember

- ▶ If you succeed, your vendor will too... Vice versa.
- ▶ A good vendor is one that will work with you in good times as well as bad.
- ▶ Again.... Open communication channel is path to successful and wonderful relationship!



Questions

?



- ▶ Prabhash Shrestha, CAE
 - ▶ CIO
- ▶ Association of Fundraising Professionals
 - ▶ Arlington, VA
 - ▶ 703 519 8468
 - ▶ pshrestha@afpnet.org

