



WHITEPAPER

Technology that serves your mission

A board-ready guide for organizations



Introduction

Technology is a fundamental driver of operational efficiency, member engagement, and long-term organizational resilience. Despite this growing urgency, securing board approval for major technology investments can prove an uphill battle. Association leaders often find themselves navigating a complex web of budget constraints, competing priorities, and the need to clearly demonstrate ROI to stakeholders.

[The latest Momentive Software research](#) found that technology can greatly help organizations. Among available technology solutions, professionals view events related tools as most helpful with driving revenue, AMS/CRM tools as most helpful with driving member acquisition and retention, and webcast/webinar tools and online communities as most helpful with driving member engagement.

Additionally, organizations that are early adopters of technology are more flexible, optimistic, and prepared for the future. Members are looking for their organizations to lead in technological matters. Ultimately, technology can help your organization boost a better member connection.

Continue reading our guide to learn why it's crucial to embrace innovative technology, tips to build your business case, and strategies to get your board on board for your new investment.

Let's get started!

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"From my experience working with associations, I've heard from many members who are waiting for their organizations to take the lead by investing in new technology. These members say they feel more comfortable making choices about technology for their chapters or federated organizations, if their associations have already made these larger technological decisions."



Rebecca Achurch, CEO
Achurch Consulting



1 What is the cost of inaction?

The cost of inaction for associations can be significant. While it may feel safer to maintain the status quo, failing to evolve or invest in strategic areas like technology can undermine your association's ability to enhance member engagement, data practices, non-dues revenue, and more.

Here are some of the top ways the cost of inaction can impact your organization:



1. Declining member and donor engagement and retention

Members and donors today expect personalized, tech-enabled, and timely interactions. If your association doesn't adapt, your members may disengage or leave, resulting in lower renewal rates, reduced event participation, and weaker community connections.

2. Loss of non-dues revenue

Associations that don't invest in new learning formats, digital products, or career services risk missing out on alternative revenue streams. This can lead to financial instability and over-reliance on traditional dues or event income, both of which are vulnerable to economic shifts.

3. Eroding competitive advantage

For-profits and more agile organizations are filling the gaps left by stagnant associations, offering education, networking, and career resources at scale. The cost of inaction here can result in losing relevance to members who seek innovative, real-time value.

"What I hear from CEOs is that there's a certain pride members feel when technology is up to date. And there's a sense of satisfaction, too. There's real ongoing value in investing in a modern and updated member experience."

Rebecca Achurch, CEO Achurch Consulting

4. Data vulnerabilities

Without data governance, integration, and analysis, associations can't personalize services, make informed decisions, or ensure data security. This can result in wasted opportunities, compliance risks, and inability to prove ROI to stakeholders.

5. Operational inefficiencies

Not automating manual tasks or integrating key systems leads to staff burnout, slow processes, and poor member experiences. The cost of inaction for your association here results in lower productivity and difficulty in scaling services.

2 How to understand your board's perspective

As you're seeking board approval for new initiatives, especially ones involving significant investment, like technology upgrades or automation, it's essential to see the proposal through your key stakeholders' lens. Your board is working to ensure every decision made is financially sound, mission-aligned, and supported by evidence.

To better align with your board's perspective as you seek their support for new technology, consider framing your proposal around these issues:



✓ Cost and ROI

In addition to the price tag, your board members need to understand the long-term value of new technology. What is the upfront cost, and what efficiencies, revenue opportunities, or cost savings will this solution create over time?

Consider building a clear case for how your investment will pay for itself, whether through reduced manual workload, higher member retention, or new non-dues revenue. Be prepared to show both quantitative ROI (dollars saved or earned) and qualitative ROI (member satisfaction, staff productivity, strategic agility).

✓ Member and donor experience

Your board cares deeply about how members and donors perceive your organization. If you're proposing a change to your AMS, website, LMS, or communications strategy, highlight how the solution will enhance your member experience, making interactions easier, faster, more personalized, or more impactful.

Can the change increase member satisfaction, renewals, and donations? How can it help your members feel more connected and supported? Link the proposed investment to tangible improvements in your value proposition.

✓ Data security and risk mitigation

Boards are acutely aware of the reputational and legal risks associated with data breaches or non-compliance. If your current systems are outdated or fragmented, they may pose real vulnerabilities.

Make sure your case addresses how the new solution will strengthen data protection, improve governance, and ensure compliance with regulations like GDPR or PCI-DSS. Or if there's a risk that you're taking by not upgrading your technology, such as unsupported systems or increasing cyber threats, clearly outline that as well.

✓ Minimizing disruption to operations

No board will want to greenlight a project that creates chaos or slows down essential functions. Address concerns about impacts to member services, staff productivity, and migration and support by presenting your implementation timeline, vendor support resources, and a change management plan.

✓ Staff and member adoption

Your new technology will only be valuable if people use it. Reassure your board that your proposed change will be embraced, not resisted by showing how the new system is designed with ease of use in mind. Include any evidence from staff interviews, pilot testing, or case studies and if possible, show early buy-in from department heads or power users.

The more you can demonstrate anticipated technology adoption, the more confidence your board will have in your initiative's success.

✓ A strong, data-driven case

Your board will respond best to facts over feelings. Try backing your proposal by solid metrics including the following:

- ✓ Benchmarks from similar associations
- ✓ Usage or satisfaction data from current systems
- ✓ Forecasted improvements tied to your investment.

Where appropriate, use visual aids like dashboards, charts, and side-by-side comparisons to make your case digestible. Tie everything back to your organizational strategy and mission, and be transparent about what you know, what you're estimating, and where there's risk.



"For non-profit organizations that are early technology adopters, they are more flexible, more optimistic about the future, and more prepared for the future. Technology adoption has multiple effects, not only on the organization and its success, but also on the member and donor experience."



Tirrah Switzer, VP Product Marketing
Momentive Software

3 Strategies to build your business case for new technology

Securing support for a technology investment demands a clear, strategic, and well-supported business case that resonates with stakeholders at every level, especially your board. A compelling business case aligns the problem, solution, and outcomes with the mission and long-term sustainability of the organization.

Follow these steps to build a case with precision and purpose:

1. Problem definition: What's broken or limiting progress?

Every strong business case starts with a well-defined problem. Clearly identify what isn't working in your current systems, processes, or infrastructure. Ask these important questions:

- a. Where are we falling short of our mission or strategic goals?
- b. What inefficiencies are costing us time, money, or members?
- c. How is our current technology limiting our ability to grow, serve, or innovate?

Examples may include an outdated AMS that makes reporting cumbersome, fragmented data systems that prevent personalization, or manual processes that drain staff resources. The goal here is to quantify the cost of inaction (whether financial, reputational, or strategic) and position the current state as a barrier to progress.



2. Solution overview: What technology are you recommending?

Once you've made the problem clear, outline your recommended solution. Be concise but specific by addressing these questions:

- a. What is the technology?
- b. What core capabilities does it offer?
- c. Is it a replacement, integration, or a new system?

Explain how the solution directly addresses the defined problem. For example, if you're proposing a modern association management system (AMS), highlight how it improves data integration, automates member communications, and supports scalable growth.

3. Strategic fit: How does this advance the mission or strategic plan?

Tie your investment to your organization's broader purpose and strategy by showing how the technology can help you accomplish the following:

- a. A more connected and personalized member experience
- b. Greater operational efficiency
- c. Improved access to data for better decision-making
- d. Expansion into new service areas or non-dues revenue models

For your board members, alignment with your mission and strategic plan is often more compelling than the technical specifications. Make the case that this investment is not a luxury; it's a necessary step toward realizing your goals.

4. ROI and value

Your business case must speak to the bottom line, especially in an environment where every dollar is scrutinized. Do so by offering example of both hard and soft ROI:

- a. What is the technology?
- b. What core capabilities does it offer?
- c. Is it a replacement, integration, or a new system?

Hard ROI:

- i. Time savings through automation and streamlined workflows.
- ii. Revenue growth from new educational products, sponsorship opportunities, or improved member retention.
- iii. Cost reductions from eliminating redundant tools or reducing manual work.

Soft ROI:

- iv. Enhanced member experience through faster, more relevant interactions.
- v. Improved staff satisfaction by eliminating inefficiencies and tech frustration.
- vi. Reduced risk by addressing data security gaps and compliance issues.

Where possible, use real numbers or case studies from peer associations to strengthen your argument.

5. Budget and timeline: Cost range and project scope

You'll also want to offer a realistic snapshot of what your technology investment will entail, including an estimated cost, funding sources, and implementation times. The more clarity you offer, the more confidence your board will have in your ability to manage your investment wisely.

6. Risk mitigation and planning: Training, adoption, and continuity

Every board wants assurance that new initiatives won't disrupt day-to-day operations. Proactively address the following with your board:

- a. **Implementation planning:** Highlight partnerships with experienced vendors and internal project leads.
- b. **Training and onboarding:** Show your plan for equipping staff and volunteers for success.
- c. **Adoption strategies:** Include pilot programs, phased rollouts, and internal champions to drive engagement.
- d. **Business continuity:** Offer assurances that mission-critical services won't be compromised during the transition.

7. Frame it in the board's language: Mission impact and long-term sustainability

Finally, speak directly to what matters most to your board. Reframe your investment not just as a cost, but as a strategic enabler of long-term growth, resilience, and mission impact by answering these questions:

- a. How will this technology make the organization more agile and future-ready?
- b. In what ways does it protect or grow our financial health?
- c. How does it safeguard our ability to serve members and stakeholders effectively for years to come?

When you position your technology as a catalyst for mission delivery, you'll help the board see the investment as both urgent and essential.



4 Best practices in board presentation

Your technology proposal may be strong, but how you present it to your board can make or break the outcome. Keep your presentation sharp, mission-aligned, and outcome-focused to help you make a compelling, board-ready presentation to earn trust and approval.

Follow these best practices to get started:



1. Be concise and focused

Boards appreciate efficiency. Keep your presentation lean and intentional, ideally no more than five to seven slides by focusing only on what matters most, including the following:

- a. The problem
- b. The proposed solution
- c. Strategic alignment
- d. ROI and value
- e. Budget and timeline
- f. Risk mitigation
- g. Call to action or next steps

You can always provide detailed supporting data in an appendix or follow-up memo, but the boardroom is not the place to go deep into operational minutiae. Show respect for their time by staying on point.

2. Use visuals, not jargon

Skip the technical jargon, buzzwords, and acronyms and communicate your message with the following:

- a. Diagrams to show before-and-after workflows
- b. Dashboards or charts for data insights
- c. Icons or infographics to explain complex ideas

The goal is clarity and connection. When in doubt, simplify. The more visually digestible your proposal, the easier it is for your board to grasp the value quickly.



3. Anticipate tough questions

Board members are tasked with protecting your organization's resources and reputation, so be prepared for them to ask difficult questions, including the following:

- a. **What's the ROI of the new technology?**
- b. **How will we pay for it?**
- c. **What happens if adoption lags?**
- d. **Will this disrupt member service or staff operations?**

Be prepared with hard data, real use cases, and lessons learned from similar organizations. Know your numbers: cost estimates, timelines, projected gains, and risks.

4. Tell a mission-aligned story

Ultimately, your board cares about one thing: advancing the mission. Try framing your presentation as a story of impact by including these elements:

- a. **Begin with a real-world challenge your members or staff are facing**
- b. **Describe how current limitations are holding you back**
- c. **Show how the proposed technology is a strategic enabler—not just a tool**

Use language that reflects the board's values, like growth, sustainability, service, stewardship, and paint a picture of what success looks like if the investment is approved. A compelling story can do more to sway your board than a spreadsheet ever could.

Learn more

As member or donor expectations rise and technology becomes central to operational success, the cost of inaction grows higher. Maintaining the status quo may feel safe, but in reality, it places your mission, member experience, and financial sustainability in jeopardy.

Technology plays a crucial role in advancing your association's strategic goals, improving engagement and retention, driving non-dues revenue, and protecting data integrity. Your board doesn't just want to know what technology you're recommending; they want to know why it matters. Your board needs confidence that any investment will strengthen your organization's ability to serve members, deliver on your mission, and remain resilient well into the future.

Leverage the tips outlined in this whitepaper to build your business proposal with data, discipline, and a focus on long-term impact. When you do so, not only will you make a case for new technology, but you'll also make a case for your association's future.



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