

To: ACCT Board

From: John Voegtlin, Office Manager [& Secretary to the Consensus Group]

Date: 02/14/2024

Red - needs input

Yellow - in progress

Green - finished

Black - unstarted

### Membership:

Project	Summary	Status / Needs
<b>Expired Messaging</b>	<p>Communications sent to expiring members asking them to come back and apologizing if they didn't get our initial messages about the change in member platform and the need to reset auto-pay authorization when paying the first dues invoice on the new system.</p> <p>I have been sending these after each non-renew batch and will continue or the group will be transitioned into an acquisition mailchimp <i>journey</i> along with prospects, with the current content joining the dues reminder journey.</p>	ongoing with potential transition to new acquisition group and/or final message of dues reminder journey
<b>Additional Billing Reminders</b>	<p>I am also <b>adding</b> reminders to our standard options of sending emails at invoice generation (renewal), auto-pay warnings. and successful payment: <b>15 days before expiration date &amp; 15 days after expiration date</b> (before non-renew action) depending on content, a final message shortly after non-renew action may be composed before moving them into our acquisition communications, along with other prospects.</p>	mailchimp <i>journey</i> being built and tested for content and functionality
<b>Acquisition journey</b>	<p>I believe a schedule and general content could be created for gentle reminders of the benefits of ACCT membership for prospects we acquire as expired members, operations we learn about through word of mouth, non-member conference attendance, standards purchases, etc. It has the potential to branch into more specific content based on information we learn based on interaction or other intel.</p>	Not started yet, may be heavily produced in conjunction with Brittany
<b>Welcome Packet</b>	<p>An email drip campaign (called a customer journey at mailchimp) that starts upon addition to our member group. It is currently a series of 5 emails tentatively set a week apart that include a general welcome and introduction, then a Benefits overview, then a brief explainer on ANSI ASD status as well as TIRE as the writers, and the Programs group(s) that implement the standards, then volunteering and the organization chart, and finally, the conference opportunity.</p> <p>There's room to expand this into more messages, and there's absolutely updates needed since the Membership Work Group originally drafted these.</p>	drafted, but in need of maintenance and testing before launch

<b>Sub-Accounts and roles video walkthrough</b>	Screen recording of Sub-Account addition, removal, and assignment of seats for inheriting membership, and Management Access roles with a voiceover.	put thought into script, but not started yet
<b>Dues Billing video walkthrough</b>	Screen recording walking through standard renewal options, including auto-pay, and joining options for past members and prospects.	put thought into script, but not started yet
<b>Membership Policy implementation and communication</b>	<p>Have added the <a href="#">Approved Membership Policy</a> to the website, but have not yet added the checkbox to the member profile to require new members and any member editing their profile to check off that <i>"I have read, understand, and agree"</i> box yet.</p> <p>Some announcement email to our current members seems prudent, and then, after an appropriate amount of time, followed by a campaign targeted at a group who haven't yet clicked the box.</p>	Ready to implement, will draft an announcement.
<b>Membership Rate Increase</b>	Created a matrix of potential rate increases (by percentage) over a year ago because it has been 5 years since we raised general membership rates, and something we definitely said aloud when we made that change in 2019 was: <b>"let's never wait 5 years again."</b>	Needs BOD input

## IT Functions:

Project	Summary	Status / Who
<b>Billing and Admin of Tech Services</b>	<p>At this point, the billing for all of our tech services has been moved to the payment information in Korey's name, with the exception of our stable of domain names, that were shifted to an account attached directly to my Google Workspace account.</p> <p>Korey and Melissa have also been moved into the Super Admin, Billing Admin, or other appropriate roles for all of our tech services, through the ED@ACCTinfo workspace account where possible.</p>	finished
<b>Outreach &amp; Engagement Onboarding</b>	<p>Shifted Workspace licensed accounts to make room for a new one for Brittany. Also added a Google Voice license for an additional phone number. Sourced and purchased a laptop.</p> <ul style="list-style-type: none"> <li>• Pre-installed a suite of software that office staff regularly uses, and logged in to new Workspace account.</li> <li>• Sent invites to new Workspace account for all regular services</li> <li>• Shipped laptop to Brittany</li> <li>• Went through a day of tech and service orientation</li> </ul>	Finished and ready to provide additional support needed.

<b>Asana User Management</b>	Adding Brittany to our Slack team put us back over the 5 Users in our tier, so I sent a message to Rohan asking if he could transition his stuff to a guest account.	Need to follow up to see if there's been progress
<b>Regulation Map</b>	<p>Transitioned all current data from a Wordpress Plugin to an up-to-date version of the codebase that is hosted by the developer and embeddable on a page on our main site. It did take a little help from Novi tech support to allow their unique embed code to remain on the page and not be automatically stripped by their protections.</p> <p><b>This ends all dependence on wordpress hosting of web content / domains</b> There may still be some redirection of domain names from CVENT-provided site to wherever it may live next through conference transition time</p> <p>This latest version of the map code is easier to edit and maintain, and makes adding a layer fairly easy, which could provide us with an easy way to expand the regulations that we track beyond the US map.</p>	<p>RegMap transition finished</p> <p>Content still needs updating</p> <p>Language changes above and below the map to signal our willingness to track beyond the US map could be made.</p>
<b>ICE Translations</b>	<p>Japanese translations of current Certifications section pages on the website were provided to me for a quick posting effort. I identified a few sections that have changed since the translators did their work and posted all of it with those sections highlighted.</p> <p>French and German translations were also provided, but I haven't started them yet.</p>	<p>Japanese - posted with highlights</p> <p>German &amp; French unstarted.</p>
<b>Consolidation of Standards Items in online store</b>	Would still like to fix the ~30 items on our list of products that truly represent 11 different editions of the standards. I think that it's especially confusing from the backend view, and there's clearly some confusion by customers, as I've recently gotten orders for Spanish Translations of print copies when they meant to order English (not to say that better descriptions and more clarity couldn't be added to all of those products, but instead of editing four products, I could edit two). it would be simpler from our angle and from the shopper's angle if there were fewer to choose from and we let the platform handle Member vs Non-Member prices (like we already do with Job Posts).	Need Accountant Approval
<b>LMS (Learning Management System)</b>	<p>Invited both the Academy Development Work Group members (and Brittany) to make user accounts on the Path LMS so that I could add them as Course Admins on our onboarding course and a few sample courses</p> <p>Planning a little more clean up of the current public view of the LMS in case we do any of the "teaser" type walkthroughs at the symposium, where it is on the agenda, or during any other sessions. Academy Development had thrown out the idea of a sample course for interactivity, but it's not likely.</p>	One member of the work group (and Brittany) has joined to date

<p><b>Domains</b></p>	<p>Always willing to entertain dropping domain names that we don't feel hold value anymore, tracking the use of our extra domains has revealed no patterns, and the ones that can be tracked, have gotten no "natural" hits. All of our domains are acting as forwarders, either to the main site or a relevant subdirectory. In the cases of Certification, Conference, and RegMap, the ongoing tracking <i>may</i> reveal that those continue to see traffic, because of their former status as standalone site. I can safely say that we are holding the rest purely so that someone else doesn't.</p> <p>I did run a couple of searches to see what might be available and found that a decent amount of names that match the DBA choices that have been used as examples are available in various formats.</p>	<p>Tracking ongoing - but having found no hits, will not actively monitor</p> <p>Open to input on if or when we should add domains similar to our desired DBA choices.</p>
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**General Office Manager/Other/All of the Above:**

Project	Summary	Status / Who
<p><b>Consensus Group Activities</b></p>	<p>Navigated supporting the Board, acting as ASD, and current standing Consensus Body as their Secretary.</p> <p>Tried to relay basic instructions and requests back and forth.</p>	<p>Ongoing</p>
<p><b>Accredited Procedures Task Force</b></p>	<p>Still actively participating in this process, though my time to do work and analysis outside of the meetings has grown even smaller.</p>	<p>Ongoing</p>
<p><b>Member &amp; System Support through Conference Registration Period</b></p>	<p>Still actively adding legacy ID numbers to new members and sub-accounts and submitting sync data of new, renewed, and changed member data to the Hospitality Performance Network (HPN) team to add to the conference registration system for proper ability to redeem member registration rates through the appropriate CVENT Paths</p>	<p>Ongoing</p>
<p><b>Newsletters &amp; API Partnership Obligations</b></p>	<p>Maintained consistent newsletter schedule Added Ads and Plugs for API content and other advertisers Plugged and Launched our Sponsored Social Media posts, but they could use some more explanation, if we'd like more uptake.</p>	<p>Ongoing</p> <p>with PR &amp; Marketing Work Group Support</p>
<p><b>BOD Election Support</b></p>	<p>Launched similar messaging on Nominations Access to Nomination form Candidate Info Syncing of current eligible members for Election Ballots Extra Candidate time [future] plugs/reminders to vote [future] results processing and validation</p>	<p>Ongoing</p> <p>with Support of Vice Chair</p>

<p><b>Other Conference and Booth Support</b></p>	<p>Support of our conference supplies gathering, as well as our presence and booth at other conferences.</p> <ul style="list-style-type: none"> <li>● Storage trips to restock on ACCT branded swag.</li> <li>● Investigations of our current allotment of booth supplies.</li> <li>● Research and Purchase of portable monitor.</li> <li>● Purchase of hard shell box and shipping of booth supplies to other conferences.</li> </ul>	<p>Ongoing</p>
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