

A Total Digital Transformation Project

In Motion for Associations:
People + Processes + Technology

HALMYRE'S DIGITAL TRANSFORMATION
LEADERSHIP SERVICES

halmyre™ | YOUR MARKETING
STRATEGY PARTNERS

Hello.

Thank you for your interest in our services. Digital transformation is a potent and essential part of an association's life today.

We ensure that people are at the centre of your digital transformation: current staff, future staff, board, stakeholders, and most importantly, your members.

With that as your starting point, your digital selection and the processes become very clear.

Our promises to you:

- Your stakeholders will be heard and included at every step along the way.
- Solutions will have options, with analysis, for you to consider.
- We are uniquely aligned to your success – we are unbiased and striving for what's right for you.
- We will prepare and support you in your journey, from the very start to the post-implementation review.

Our approach will be different than other consultants you review because we understand the unique ecosystem that will help you grow. We are leaders who will get to the heart of your ask and situation to guide you to results you didn't imagine possible.

We welcome your questions and will work hard to earn your business.

Thank you for your interest in our services.



INTEGRATION

Connecting the dots between corporate strategy and growth tactics, through a focus on fundamentals, disciplined innovation, measurement, and long-term thinking.

PLATFORMS

OWNERSHIP

LONG-TERM PLANNING

COST

DECISIONS

SYSTEM REQUIREMENTS

CUSTOMIZED

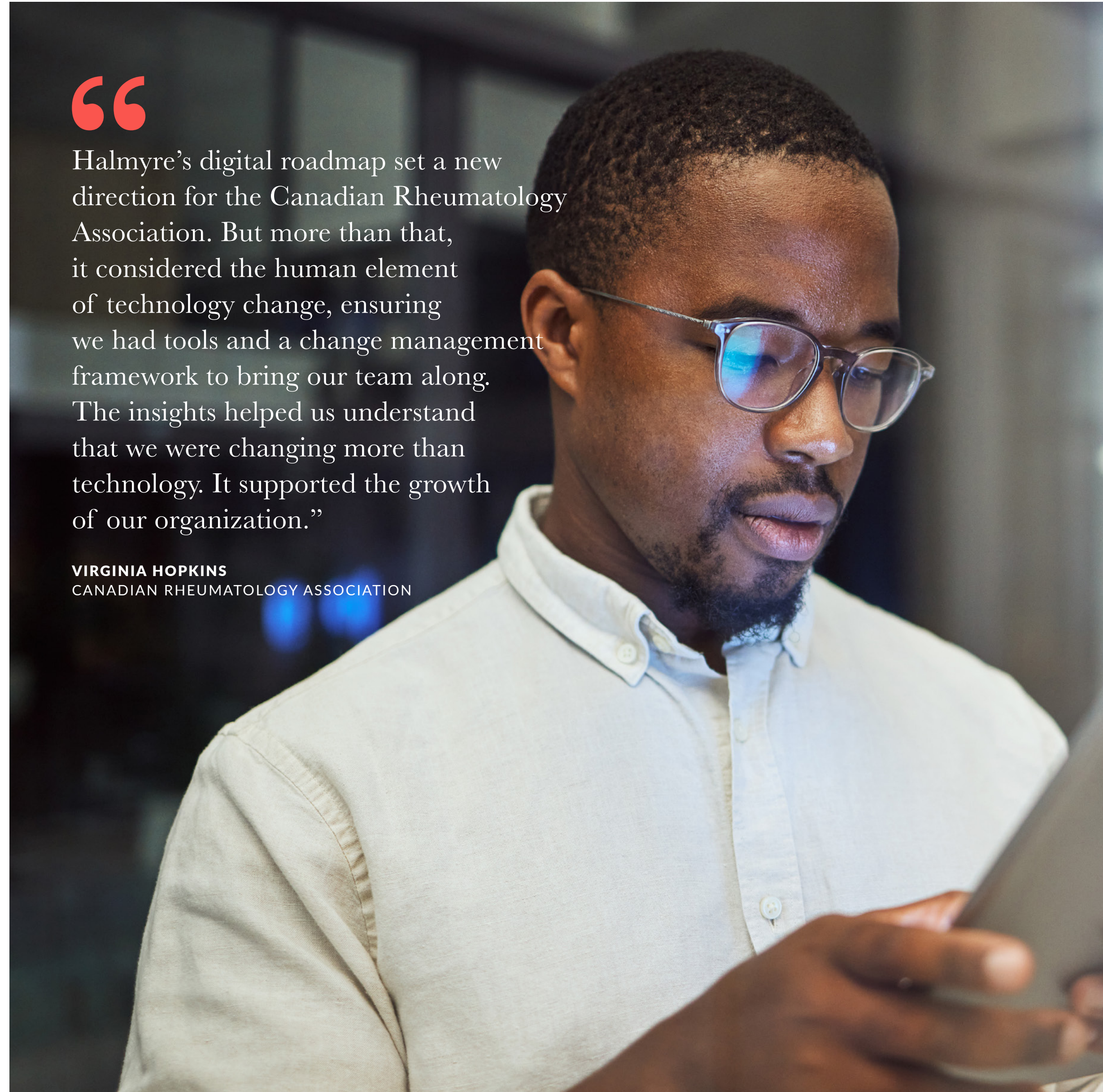
CONFIDENT

**END-TO-END CONTENT
MANAGEMENT
SOLUTION**



Halmyre’s digital roadmap set a new direction for the Canadian Rheumatology Association. But more than that, it considered the human element of technology change, ensuring we had tools and a change management framework to bring our team along. The insights helped us understand that we were changing more than technology. It supported the growth of our organization.”

VIRGINIA HOPKINS
CANADIAN RHEUMATOLOGY ASSOCIATION



Associations need to:

- Be modern
- Engage with new technologies for efficiency, effectiveness, and growth
- Not waste money on technology — seize the opportunity ROI

Associations want to:

- Minimize the “pain” of a long-term digital transformation experience
- Stay relevant to a modern, diverse, and inclusive workforce
- Challenge day-to-day business — to combat what Halmyre calls “last-year-itis”
- Have processes that will include many of their staff and stakeholders — to have them participate in the “cooking” of solutions to the greatest degree possible

Is this you?

“I need a new Association Management System (AMS)!”

“All the sales pitches sound so good.”

“How can I scale my operation efficiently?”

“I can’t get this wrong or it’ll hurt us for years to come.”

Because, this is Halmyre.

Conducts audience research to investigate actual wants and needs of your members/audience, then selects the best solution.

Follows a disciplined, analytical process that holds the sales teams to account.

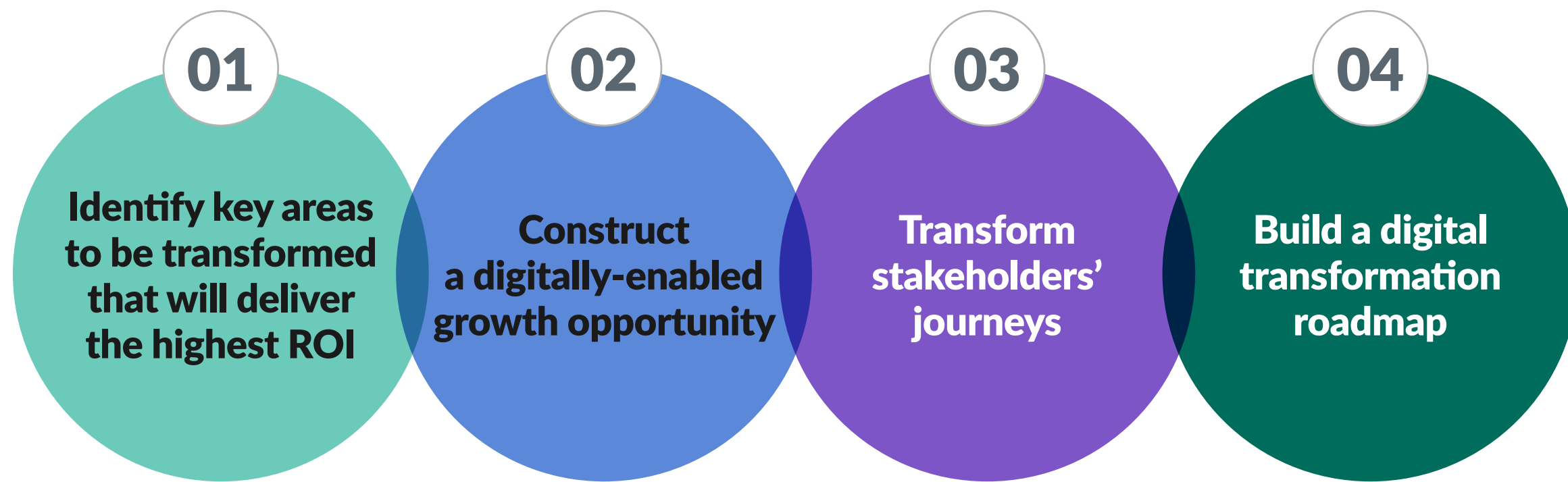
Provides long-term planning, total cost-of-ownership insights, and change management plans for your team to grow with the technology.

Measures twice in the planning phases and makes very confident decisions, leaving no question unanswered.

Turn the page with us to learn how Halmyre sees the total digital transformation process of
PEOPLE + PROCESSES + TECHNOLOGY = ASSOCIATION GROWTH

A four-step approach to navigating a new digital strategy, from ideation to implementation

Digital strategy focuses on using technology to improve business performance, whether that means creating new products or reimagining current processes. It specifies the direction an organization will take to create new, competitive advantages with technology, as well as the tactics it will use to achieve these changes.



“

Without understanding the wants and needs of your audiences, you are just serving the generic masses. This is not a recipe for success.

URSULA GREEN
VP & CXO, HALMYRE



Halmyre Digital Transformation Services

We are your one-stop partner, capable of wrapping our arms around everything required to make your transformation successful.

- Digital transformation strategy
- AMS requirements planning, request for proposals (RFP), response assessment, and implementation services
- Total tech stack requirements planning, RFP support, and implementation services
- Internal and external journey mapping, user story documentation, and empathy mapping
- Website customer experience: information architecture, user interface design, and content planning
- Total data dashboarding, performance marketing analytics set-up, and ongoing insights
- Project management services — end to end

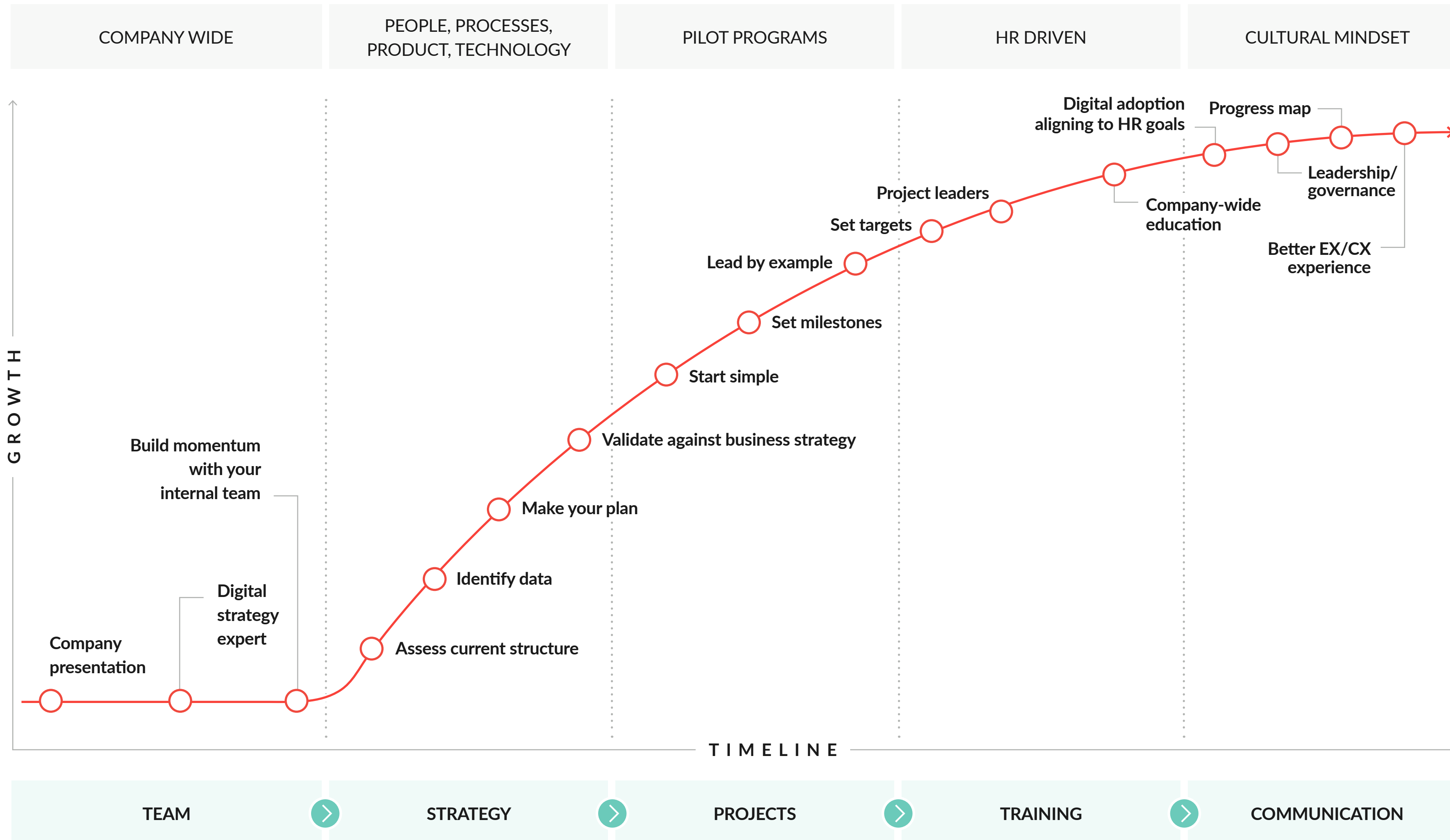
A Word about AMS Selection

There are several different AMS approaches in the market:

- 1. Out-of-the-box with low customization** — majority of functionality is part of the AMS solution with some API integrations to external systems.
- 2. Customization of core AMS solution** — significant code modification and development of core AMS and API integrations to external systems.
- 3. Hub & spoke blended software solution** — distributed models that harness the benefits of specialized solution providers into one solution via an AMS management hub (out-of-the-box with low customization) that brings everything into one solution.

Halmyre will help you understand the best approach for your digital strategy. It is the anchor to the transformation process and your pathway to success.

Halmyre's framework for digital transformation



Key Takeaways

Five phases of digital transformation are expected to be addressed

The first digital transformation process is expected to take the longest time period

People are the foundation to smooth digital transformation – train and educate your employees on digital-first customer and data proficiency

Keep the end goal in mind: better EX/CX experience equals better member experience

Tie digital transformation actions to HR goals to ensure quicker adoption

Halmyre is technology-neutral and works with a range of solutions to meet your needs

AMS SAMPLE OPTIONS			BEST-IN-CLASS PRODUCTS		

Common “unique” issues

Associations are very similar. But they're all unique. Here are the common areas that we are accustomed to dealing with in digital transformations for our clients.

- Membership data + data structure requirements
- Accounting software and e-commerce integrations
- Credentialing requirements and Learning Management System (LMS) integrations
- Data privacy and storage requirements
- Donation and charitable data
- Complicated reporting requirements
- Building out and integrating popular association software

“

We bring a seasoned, pragmatic problem-solving mindset to help our clients expand their appeal in a way that works for them.

CHRISTINE SAUNDERS
PRESIDENT – HALMYRE

Three case studies

To inspire and support your own planning

Case study one: Ontario Federation of Anglers and Hunters

The situation

- A legislative change required OFAH to separate its membership and charity functions.
- The redesign required total organizational transformation of everything from bylaws to technology infrastructure.
- The existing technology was inefficient and not designed for future development and growth, making this transformation particularly challenging.

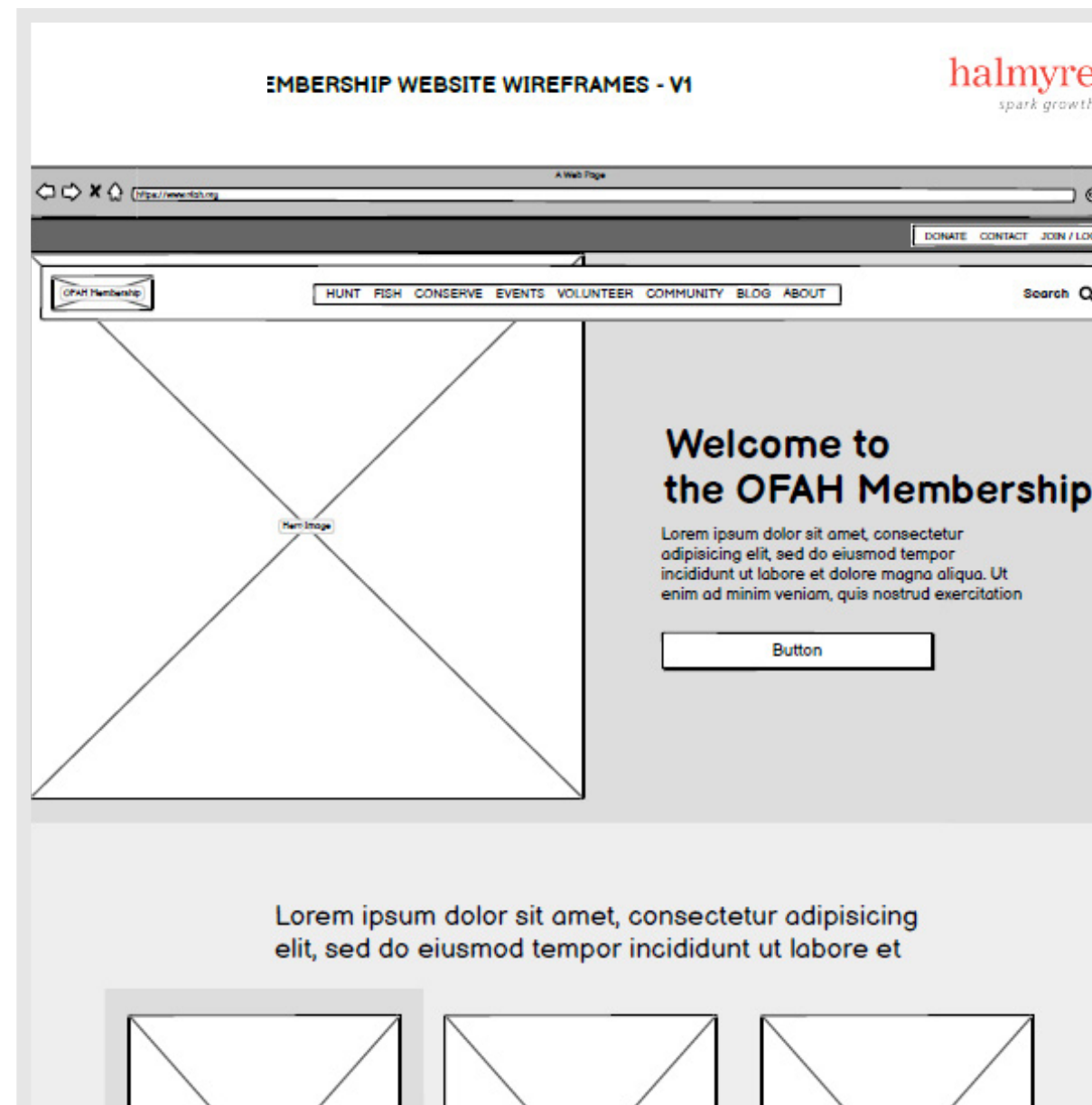
Impact to the business

OFAH's digital transformation, by the numbers:

- 15+ websites streamlined into 2 websites in 1 year
- 1 new association management system
- 1 new donation management system
- 5 newly integrated technology platforms (previously siloed)
- 5 years - timeframe to double market awareness

Takeaways for your own planning

- Holistic change-management plans are critical to support the necessary changes in employee behaviour, processes, management, leadership, governance, and content - all while achieving cost efficiency;
- Mapping detailed business requirements and customer journeys provides rationale and structure for change;
- When well designed, a digital ecosystem supports member insights, preferences, and complete member self-management.

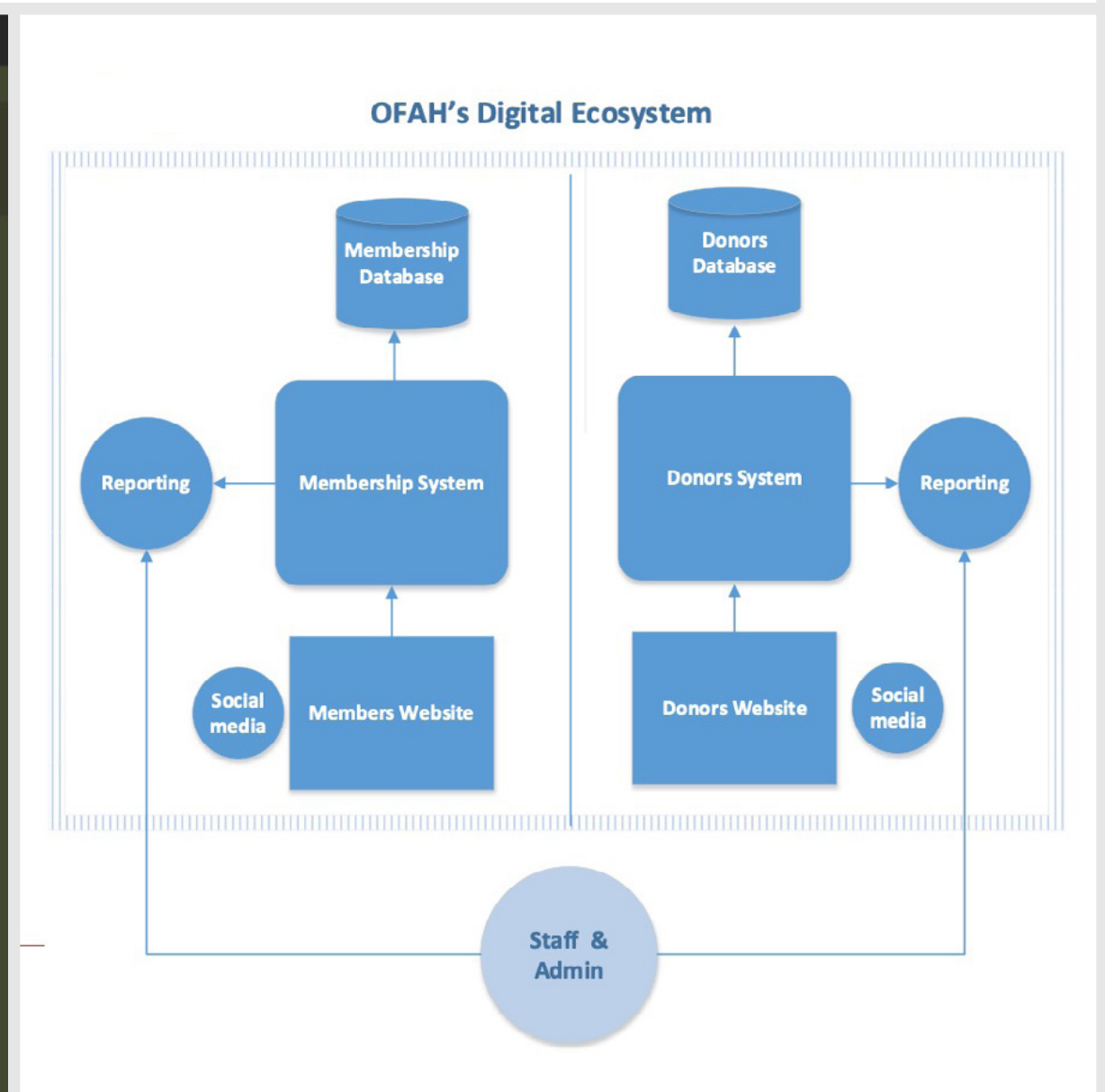
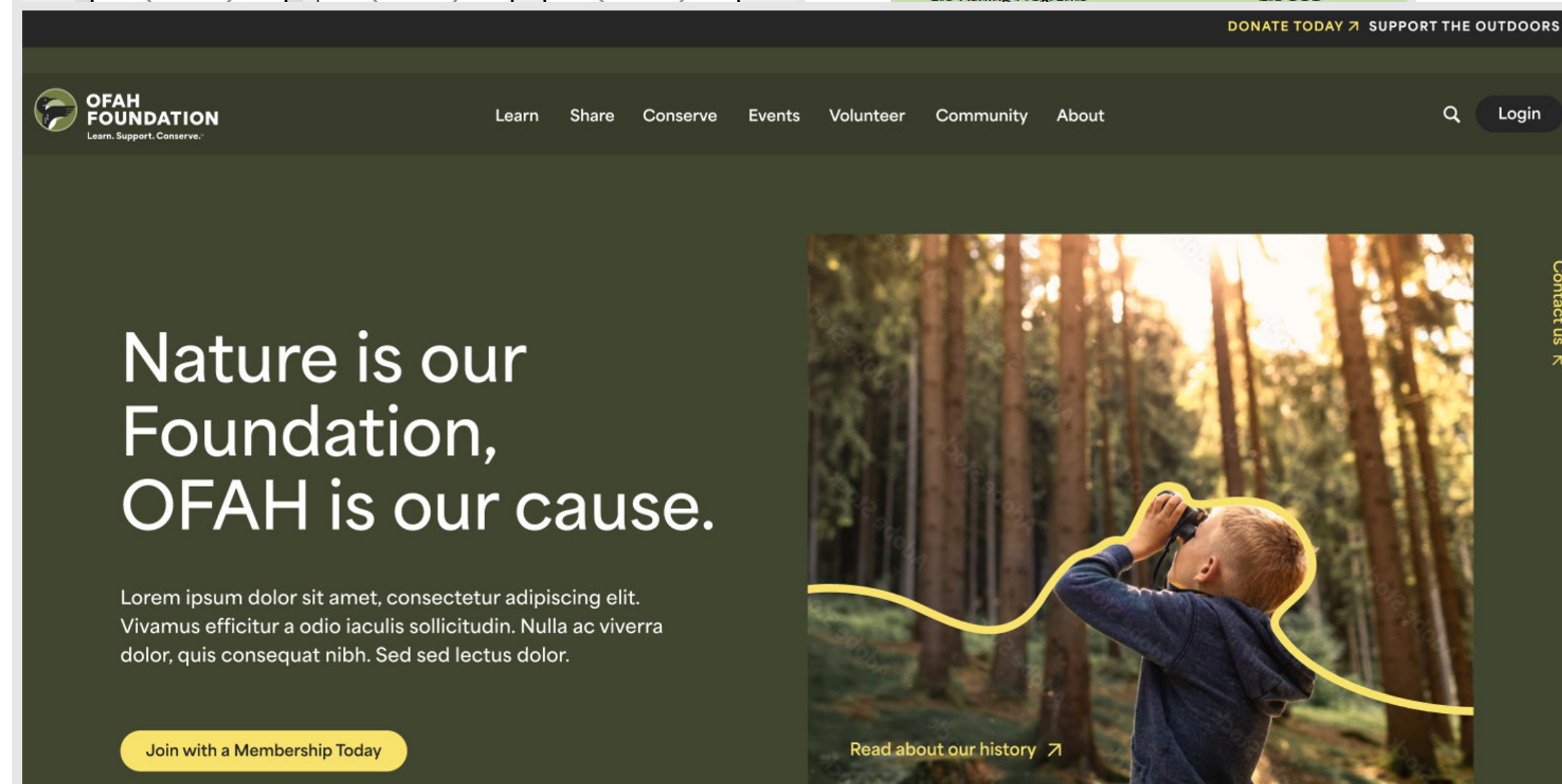


Launch 1-Jul-24
V5 MemCo Content Buckets

1.0 FISH	2.0 HUNT
1.1 Fishing Advocacy 1.1.1 Policy Submissions 1.1.2 Lands & Access 1.1.3 Volunteer with a Community 1.1.4 Volunteer with Atlantic Salms 1.1.5 Committee Opportunities 1.1.6 Other Fishing Conservation Ej	2.1 Hunting Advoca 2.1.1 Lands & A 2.1.2 Firearms 2.1.3 Policy Sub 2.1.4 Committe 2.1.5 Other Con 2.2 Get Hunting 2.2.1 Ontario H 2.2.2 Get Your 2.2.3 Landowne 2.3 OFAH Hunting C 2.4 Hunting Learnin 2.4.1 Youth Lea Get Outdo 2.4.2 Adult Lear 2.4.3 Hunt Alon 2.4.4 Hunting V 2.4.5 Hunting M 2.5 Hunting Events 2.5.1 Huron Per 2.6 Hunting Program 2.6.2 Hunter Ed 2.6.1 Waterfow 2.7 A&H TV Hunting 2.8 OOD

Functional Requirements

REQ#	PRIORITY	DESCRIPTION	DETAILS / RATIONALE
CMS			
AMSCMS-001	1	Personalization	To fit the needs of the OFA
AMSCMS-002	1	Connectors to third-party systems	Connectors to third party s functionality cannot replace functionality (i.e. advanced capabilities of Survey Moni
AMSCMS-003	1	Portal with Members Only Content	Tied to membership status
MEMBER MANAGEMENT AND BUSINESS ANALYTICS			
MEM-001	1	Online Registration	Set preferences for freebie purchase (i.e., keep, re-dir opt out)
	1	Assign member number	Calculated membership nu validated to cut down on n member is entering their o Ability to manually change needed Ability to mask member nu
	1	Connected member profiles	For family memberships
	1	Automatic invoicing	



Case study three: Forum of Canadian Ombudsman

The situation

- FCO's technology was getting in the way of attracting and retaining ombudsman.
- The existing AMS could not meet the needs of the organization, and the outdated website needed a refresh.
- They needed to make significant changes to their website and AMS.

Impact to the business

- Confident selection of an AMS and a website vendor well-matched to FCO's requirements and budget.
- A well-managed, well-supported process that added dynamic, cost-effective bench strength to the FCO team.
- A technology infrastructure that meets FCO's membership and operational requirements, enabling significant steps forward in fulfilling its value proposition strategy.

Takeaways for your own planning

- Detailed, needs-based interviews with staff and volunteers support detailed business requirements documentation, which in turn support a successful vendor selection process;
- For best effect, web copy must align with carefully crafted value proposition messaging.

Building a Better Member-Centric Website and Management Tool

Forum of Canadian Ombudsman – AMS Business Requirements

FORUM OF CANADIAN OMBUDSMAN
March 11, 2022

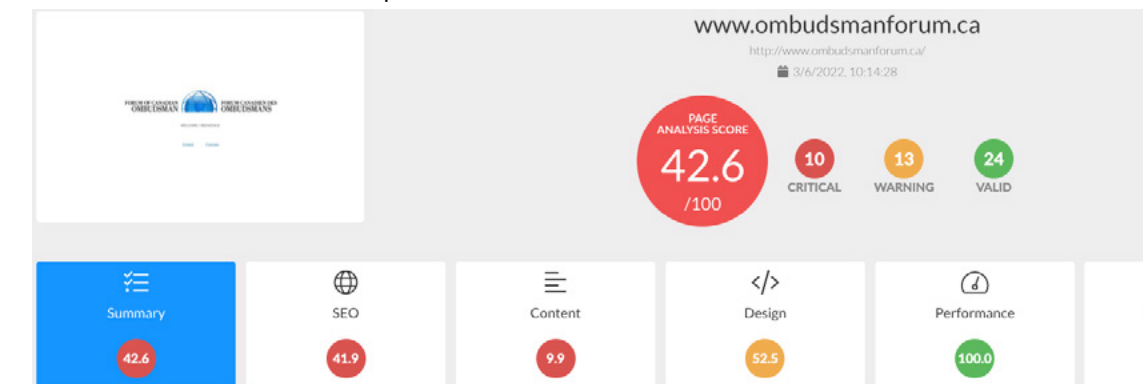
halmyre



The current website, <http://www.ombudsmanforum.ca/>, has not changed in look and design much from at the site are reflective of a site that is over a decade old, and does not convey the up-to-date and modern Canadian Ombudsman would likely expect.

The site is not built using a modern content management system (CMS). Thus making updates and addit compared to a new site built on a CMS like WordPress.

The site has a number of issues present at this time:



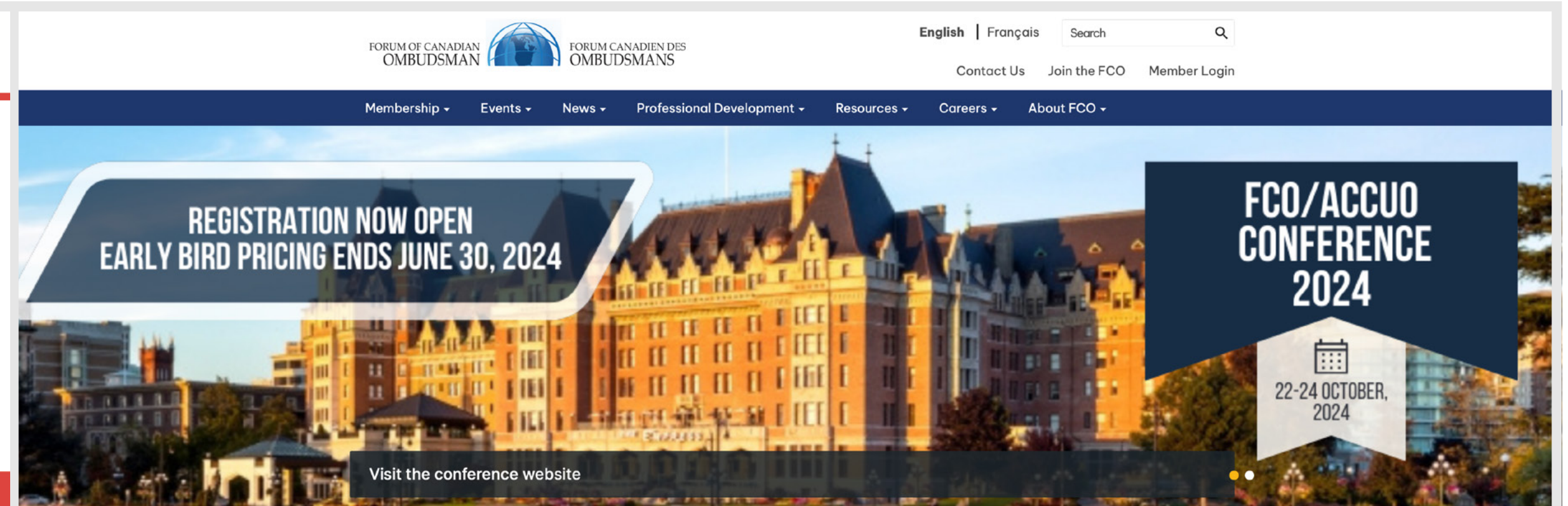
The homepage did not pass a website analysis and there are critical issues that affect designed in a way that is easy for Google and other search engines to understand for your services less likely to find them organically in a Google search.

These issues also make the site challenging to navigate if a person has a disability. About 20% of the population has a form of disability. Making your site more accessible to your content.

Finally, people browsing the current site on a mobile device or tablet cannot properly

As seen on an iPhone 12

A more modern site will adjust to the size of the screen automatically. Mobile phone navigation and layouts.



Be Part of a Community

FCO has the broadest membership of any ombuds organization in Canada covering a vast range of practice areas.

[Join Now >](#)



Learn and Grow

FCO offers training courses on a wide variety of topics ranging from the essentials of ombuds to decision writing to advanced ombuds practice.

[Current Opportunity >](#)



Stay Connected

Network with experienced pros with years of experience and new ombuds practitioners with 'out of the box' ideas!

[Upcoming Event >](#)



Mark, the Budding Hero

- Actively engaged in community development programs since high school; has always had a keen interest in the area of social service
- Built a career in public service for more than 20 years as an investigative social worker in the workers' benefit office and various similar community enhancement programs

- Has a strong, confident personality developed through a career in social service, advocating for others
- Is driven by his convictions and a need to create a strong office – a voice for those who have been exposed to unfair situations
- Finding solutions for unique situations comes naturally to him
- Uses technology to keep himself up to date



Laura, the Juggler

- Started working at a very young age in a local dispute centre in her town and developed an eye for justice and fairness
- Her extremely career driven nature pushed her to a director role in the local fair practices office until her desire to do more for people led her to the ombuds profession

- Expert at managing high volumes of work; pushes herself to beat her own record of successful case resolutions
- Has deep desire to be highly involved with the association and strictly dedicates time for professional development (her organization provides funding)
- Uses technology to keep herself organized and achieve the highest level of efficiency

NAVIGATION HIERARCHY - EN

1. Membership / 2. Events / 3. News / 4. Professional Development / 5. Resources / 6. Careers / 7. About FCO

ENGLISH

CURRENT SECTION/PAGE TITLE	COMMENTS/EDITS	SIGN-OFF INITIALS	NEW SECTION
1. HOMEPAGE (TO DO): https://host9.viethwebhosting.com/~fco/index_english.php	<ul style="list-style-type: none"> • Navigation is reflective of the current FCO website – to be adjusted to reflect new navigation hierarchy 		0. HOMEPAGE
2. ABOUT FCO https://host9.viethwebhosting.com/~fco/about_fco.php	<ul style="list-style-type: none"> • Change main header from "About" to "About FCO" • Change fco@intertaskconferences.com to info@ombudsforum.ca • Missing Twitter widget for 		7. ABOUT FCO

The Halmyre Advantage

We Know How Associations Grow

We have served over 100 professional, trade and regulatory associations across North America. They're our specialty.

Our award-winning experience at helping associations grow relies on our understanding of the strategic and tactical connections between your

- Value proposition
- Performance data and dashboarding
- Customer experience and tech stack
- Creative and branding
- Content and promotional abilities

It is within this total Halmyre Marketing Ecosystem™ context that we provide you a solution that is

- Intelligent
- Business-friendly and integrated with your strategy
- Member-centric
- Technology-savvy
- Best-in-class for your size and needs
- A platform to grow for years to come

Our 5-star Google reviews

- strategy
- value proposition
- organization



Matt DeMille
Ontario Federation of Anglers and Hunters



I have felt a strong commitment from the entire Halmyre team in helping our organization navigate a path forward. They work with us, not simply for us, and it is clear that they are fully invested in the Ontario Federation of Anglers and Hunters' journey and want to see us succeed. This brings considerable comfort as we work towards a sometimes uncertain future through our total, digital and brand transformation.



Just some of our recent strategy clients



HOTEL ASSOCIATION OF CANADA
ASSOCIATION DES HÔTELS DU CANADA



We are serious about your marketing dollars

Five things about us that may be of interest to your business

We are an Agency of Record for the Ontario provincial government. This means we have met the highest standards of business and creative excellence for the following categories of marketing:

- Logos/wordmarks/visual identity
- Digital products
- Data/information elements
- Illustrations
- Print/digital publications



We have an environmental, social, and governance policy to challenge ourselves to constantly be better actors in the communities we serve.

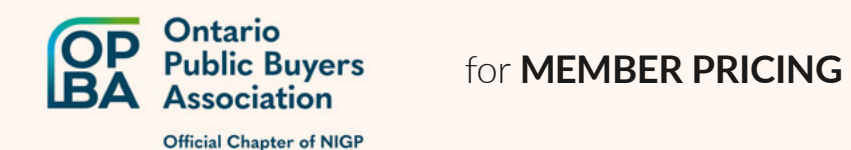


We are a Certified Women Business Enterprise, meaning that we have met a rigorous independent vetting of our business and can support your supplier diversity programs.



As responsible and prudent professionals, we are fully insured, carrying \$2 million in general liability and \$2 million in errors and omissions insurance to protect both of our organizations.

Our clients win peer-recognized awards. In 2022 and 2023 alone, three clients won Canadian Society of Association Executives Awards of Distinction:



Are you ready for your future?
Contact us:



**Meet Jeff Gibson,
Halmyre's Manager,
Business Development**

Jeff was a client of Halmyre's digital transformation services at the Canadian Medical Association. But he liked our services so much he decided to join our team.

Contact Halmyre and ask Jeff anything — you won't get a sales pitch; you'll speak to an association peer and get straight answers to your real questions.

hello@halmyre.com

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