

TechSmart NFP Summit 2018, Tuesday 27th November, London

08:30 – 09:30	Breakfast, registration and networking (Thames suite)		
09:30 – 09:40	Introduction and welcome: Anne Godfrey, Chief Executive, The Chartered Institute of Environmental Health (County Suite)		
09:40 – 10:10	Keynote speaker: Dr Daniel Susskind – The future of professional bodies (County Suite) Daniel will discuss the future of professional bodies and linking this to the impact of technology		
	TED-style Talks:		
10:20 – 10:40	<p>Strand 1: Get Smart – Get started and get ahead with tech</p> <p>People first: CRM benefits for the British Orthopaedic Association (County Suite)</p> <p>Bluelight and the British Orthopaedic Association will tell the story of their CRM implementation project including a 5 minute Q&A with Liz Fry, Director of Finance at the BOA. Providing an insight into the typical challenges of an implementation and demonstrating how building a solid relationship with your partner could be the secret to success</p> <p>You will learn:</p> <ul style="list-style-type: none"> • How to build strong and lasting partnerships • How to implement a rapid CRM • To maximise user adoption <p>Marios Chrysanthou, Projects Director, Bluelight CRM</p> <p>Liz Fry, Director of Finance, British Orthopaedic Association</p>	<p>Strand 2: Smart Data – Dive into your data and put it to work</p> <p>Delivering value to members and delegates through mobile apps (Lord Suite)</p> <p>You will learn:</p> <ul style="list-style-type: none"> • To understand the current state of mobile event and engagement apps while gaining insight on how mobile apps have impacted member behaviour and expectations • To explore how leading associations have leveraged mobile event apps to enhance the event experience of their delegates while creating return on investment (ROI) for their organisations • How associations are leveraging mobile technology to strengthen member engagement, deepen connections, and deliver more value to members through dynamic year-round experiences <p>Michael Jones, Director, Mobile Technologies, Results Direct Mobile</p>	<p>Strand 3: Future Smart – Get ready to embrace next-gen tech</p> <p>Future-proof your member relationships with AI and smart systems (Westminster)</p> <p>It's hard for membership organisations and NFP's to keep up with the fast pace of technology. This is the value we add to our clients by keeping up with this and updating our solutions all the time, so our clients can serve their members more effectively. The systems they've traditionally used have moved from membership databases to CRM systems to intelligent systems</p> <p>This session will be based around AI and how it can be used to leverage those intelligent systems for membership organisations</p> <ul style="list-style-type: none"> • What is AI? • How can it benefit member-focused and NFP organisations? • The applications of AI and why should you be thinking about it? <p>Ahmed Eltohamy, Managing Director, <i>smartimpact</i></p>
10:50 – 11:10	<p>Strand 1: Get Smart – Get started and get ahead with tech</p>	<p>Strand 2: Smart Data – Dive into your data and put it to work</p>	<p>Strand 3: Future Smart – Get ready to embrace next-gen tech</p> <p>Don't fear the future, define it (Westminster)</p>

<p>Reality of fantasy? Key considerations for Professional Awarding Bodies and other non-profit organisations embarking on a digital project (County Suite)</p> <p>Are you a Professional Awarding Body about to embark on a digital project but are having difficulty to know where to start? Non-profit sector specialist Emma Dawkins has 15+ years' experience of digital transformation projects within educational institutions and will provide delegates of key insights that she has encountered within transformation projects</p> <p>In Emma's experience, there are two key areas that delegates should consider before embarking on a digital transformation project:</p> <ul style="list-style-type: none"> • The desired outcomes for the digital transformation project; what are the drivers for change? What does good look like? • The procurement process; how will we select the right supplier that fits our organisational needs? <p>You will learn:</p> <ul style="list-style-type: none"> • How to carry out your procurement process to select the right supplier that meets your specific organisation needs • To identify the outcomes of the technology project and what value they deliver to your members, customers and learners <p>Steve Shiels, Head of Operations, ProTech</p>	<p>Creating lakes and rainbows: deploy supporter data at an individual level without compromising internal resource (Lord Suite)</p> <p>Frustrated at not being able to act as forward thinking as you truly are when it comes to supporter data collection and relationship nurture?</p> <p>In this session, Nicky will outline how marketing and IT teams can overcome resource scarcity and technological challenges to create more meaningful and tailored experiences for supporters which are data compliant, flexible and future-ready. Learn how to reintroduce creativity into the process and turn data streams into automated opportunities to improve the depth of your connection with supporters</p> <p>You will learn:</p> <ul style="list-style-type: none"> • To overcome resource and technological challenges for compliant data collection • How to reintroduce creativity into generating new supporter relationships • How to personalise and automate unique experiences for supporters <p>Nicky Watson, Chief Architect, Syrenis</p>	<p>Identifying and selecting which digital technologies are best for your organisation can feel overwhelming. However, this task can feel simple in comparison to the challenge of influencing the mind sets of both your internal and external stakeholders. If you can't convince your staff and members of the benefits of change, your digital transformation will fail</p> <p>In this session, Noel will share his approach on how best to introduce new technology (Dynamics CRM) to a deeply traditional organisation. Noel has balanced the need to innovate and better support the commercial initiatives of the Club with remaining respectful of its heritage, exclusivity and unique structure. Noel's approach means he has the essential support of the Club's members and therefore control over its digital future</p> <p>You will learn:</p> <ul style="list-style-type: none"> • How to enable innovative change without compromising your organisation's identity and heritage • The top 3 tips to ensure buy in from your members and stakeholders • How to identify and implement the innovations that will deliver the most value and efficiencies <p>Alan Perestrello, Director & Co-Founder, Trillium</p> <p>Noel Dixon, IT & Communications Executive, The Hurlingham Club</p>
---	---	--

	Emma Dawkins , Academic Director, NCUK		
11:10 – 11:30	Coffee break and networking		
11:30 – 11:50	<p>Strand 1: Get Smart – Get started and get ahead with tech</p> <p>Using engagement scoring to improve the member experience and drive retention (County Suite)</p> <p>Member engagement scoring has moved from buzz-word to common practice in recent years. Join us to learn the latest trends and best-practices associations are using to leverage engagement scoring to improve member satisfaction, retention, and even revenue generation. We'll share real-life case studies, research-based insights, and explain the underlying technology model critical to effective engagement scoring</p> <p>You will learn:</p> <ul style="list-style-type: none"> • Best-practices for building a scoring model • How to segment your membership using scores • The latest trends in scoring gamification and transparency • Why CRM systems are failing to support engagement scoring <p>Jeremy Jalie, Performance Improvement Leader, Advanced Solutions International</p>	<p>Strand 2: Smart Data – Dive into your data and put it to work</p> <p>Why your organisation needs to be data-driven, connected, empowered and trustworthy (Lord Suite)</p> <p>Join NetXtra and a panel of their clients in discussing their stories of transformational change</p> <p>Find out how they've:</p> <ul style="list-style-type: none"> • Harnessed the power of their data through integration • Improved their audience connection through the personalisation of the user experience • Empowered members to engage with each other, their organisation and relevant content • Improved internal efficiencies through automation and moving various system processes online • Been developing trust and building brand authenticity through the value of their content and the accuracy of their data <p>You will learn:</p> <ul style="list-style-type: none"> • To understand the value that your data can bring to your audience and how it increases their engagement • How to adopt the learnings of your peers and understand how you can also enhance your user experiences, build 	<p>Strand 3: Future Smart – Get ready to embrace next-gen tech</p> <p>NFPs and the future of engagement (Westminster)</p> <p>Engagement is on the tip of everyone's tongues - but how does it translate into day-to-day actions, and an increase in fundraising? Our product expert Andrew Campbell discusses how to personalise via data analysis and engagement scoring and what the future holds with machine learning</p> <p>Andrew Campbell, Head of Product, The Access Group</p>

		<p>your brand and organisational business model</p> <ul style="list-style-type: none"> To use your data to make educated decisions and drive your organisation forwards <p>Simon Butler, Chief Client Officer, NetXtra</p> <p>Emma Barrett, Digital Marketing Manager, FSRH</p> <p>Brendan Harris, Director of ICT, Coeliac UK</p> <p>François Josserand, Chief Technical Officer, Tenancy Deposit Scheme</p> <p>Ian Holloway, Director of Communications, RCVS</p>	
12:00 – 12:20	<p>Strand 1: Get Smart – Get started and get ahead with tech</p> <p>Modern tools for today’s non-profits (County Suite)</p> <p>MillerTech will be presenting how we have developed modern tools for today’s non-profits and deliver engagement at a local level</p> <p>Come and hear from UNISON on how they have utilised our mobile solution to ensure that the remote staff have as much access to tech and data as the teams in the office</p> <p>You will learn:</p> <ul style="list-style-type: none"> To broaden the scope of real-time data How mobile and offline tech can be utilised in the field 	<p>Strand 2: Smart Data – Dive into your data and put it to work</p> <p>Quit whinging! You have the data – building supporter engagement (Lord Suite)</p> <p>Too often we hear from marketers that they “don’t have data”, but the reality is that they do not have all the data they want. Charities and membership bodies are no exception, but they are in a much better position than their commercial counterparts. Due to recent events, non-profits have reviewed, renewed and refreshed all their data. Join Skip as he walks you through examples of how non-profits are using their data to build stronger relationships with supporters, members and customers</p> <p>Jas Banal, Account Director, dotmailer</p>	<p>Strand 3: Future Smart – Get ready to embrace next-gen tech</p> <p>Preparing your organisation to take advantage of modern technology (Westminster)</p> <p>Felinesoft have a wealth of experience of working with NFP organisations and one thing we have learnt is that, no matter the size of the organisation, the process to achieve a successful digital transformation and change management programmes is the same. The focus of any successful project has to be based on 3 core pillars – People, Processes and Data!</p> <p>Before you embark on your next digital journey, please come along to hear practical tips on how Felinesoft and the Royal Society of Medicine prepared and implemented the next generation of</p>

	<ul style="list-style-type: none"> To discover the benefits of mobile tech without scaled down functionality and how this intelligence is driving new member acquisition and retention <p>Sharon Hayden, Projects Director, MillerTech</p> <p>Simon Ayre, Projects Manager, UNISON</p>		<p>intelligent systems to support their ever-changing digital landscape</p> <p>Ralph Johnson, Managing Director, Felinesoft</p> <p>Janice Liverseidge, Marketing & Communications Director, Royal Society of Medicine</p>
12:30 – 13:10	<p>Lightning Talks (County Suite)</p> <ol style="list-style-type: none"> TestReach: Switch to a transformation mindset GoCardless: What do members actually want? 3 lessons from tech giants Cantarus: TBC Blackbaud: TBC Centrepont / oomi: Delivering a complete Cloud CRM & CMS for under £100,000 Professional Advantage – The difference between CRM project success and failure Synergy Print – 5 minutes in the magical membership print cloud 		
13:10 – 14:10	<p>Lunch and networking (Thames Suite)</p>		
14:10 – 14:40	<p>Keynote speaker: Natalie Campbell – The power of tech for good Natalie will discuss the influence of technology in making a positive impact</p>		
14:50 – 15:10	<p>Strand 1: Get Smart – Get started and get ahead with tech</p> <p>Supporting Childline and Helpline with Microsoft Dynamics: CRM Project Reflections and Key Learnings from the NSPCC (County Suite)</p> <p>TechSmart 2016, Gordon Gillespie, Transformation Manager at the NSPCC, joined Pythagoras to set their vision for their CRM strategy which would underpin the delivery of Childline, Helpline and children’s services across the UK. Pythagoras are delighted to welcome Gordon back to TechSmart 2018 to reflect on the</p>	<p>Strand 2: Smart Data – Dive into your data and put it to work</p> <p>Why good quality, well-governed data is the key to your future success (Lord Suite)</p> <p>Good data has never been more valuable than it is now, yet it is often not as valued as it should be. A lot of organisations focus their transformation strategies on technology, without acknowledging that it’s really data, information and insight which is going to sustain them and drive them forward</p> <p>Data may not be as exciting as new technology, but it is more important in itself, as well as being</p>	<p>Strand 3: Future Smart – Get ready to embrace next-gen tech</p> <p>Putting customer engagement at the heart of your digital transformation strategy (Westminster)</p> <p>The British Heart Foundation will be sharing their story of how they revamped their customer experience, leveraging the Freshworks platform to deliver exceptional customer support. They’ll be explaining how they refreshed their approach to customer engagement, the results they’ve seen so far, and their plans for the future</p> <p>You will learn:</p>

	<p>NSPCC’s digital transformation, which has seen them navigate a complex, multi-stream project to introduce a consistent and streamlined approach to service delivery across the charity.</p> <ul style="list-style-type: none"> • The drivers behind the digital transformation programme at the NSPCC. • The improvements to process throughout the charity. • The challenges, successes, and what they have learnt along the way. • Insight for those embarking on a digital programme of work. • The impact this project has had for children and young people all over the country 	<p>arguably the most critical component of any technology replacement project. Badly managed or under-resourced data migration will mean all bets are off for the time and cost of your project, and bad data will undermine the success of any new engagement technology you do implement.</p> <p>Rob Dobell, Director of Technology and Services, Hart Square</p>	<ul style="list-style-type: none"> • How one of the UK’s leading charities provides exceptional customer service to donors • How to build an effective omnichannel customer engagement strategy • How future tech can be implemented into your current customer service operation <p>Katie Knight, Head of Customer Experience, The British Heart Foundation</p>
--	---	--	--

15:10 – 15:40 **Coffee break and networking**

<p>15:40 – 16:25</p>	<p>Panel Discussion</p> <p>Digital transformation - is it just a buzzword, does it really matter, how do you feel transformed? (County Suite)</p> <ul style="list-style-type: none"> • Discuss and debate what digital transformation actually means in practice. What they have actually done and what it means in the real world • How important is the technology itself within a “digital” 	<p>Roundtable Discussion</p> <p>The challenges and triumphs of delivering complex technology projects (Lord Suite 1)</p> <p>Benefit from the shared learnings of other delegates on the pitfalls and progress they’ve experienced in undertaking transformation through technology. Dive deep into the issues affecting your ability to affect change that is strategic, meaningful and empowering. This round</p>	<p>Roundtable Discussion</p> <p>Lead or follow? How to identify opportunities in future tech early enough to gain an advantage (Lord Suite 2)</p> <ul style="list-style-type: none"> • How to match your organisation’s needs to the right technology • How to choose technology and digital approaches that will keep you relevant into the future • How to identify digital “fads” vs efficient 	<p>Roundtable Discussion</p> <p>Do more, better (Lord Suite 3)</p> <p>To discuss the impact AI, bots etc. will have on non-profits; the need to have a strategy, to identify where best to introduce future tech and to prepare for its arrival</p> <p>Ahmed Eltohamy, Managing Director, smartimpact</p>	<p>Roundtable Discussion</p> <p>How to develop and leverage meaningful engagement scoring metrics (Westminster)</p> <p>Discuss the challenges and lessons learned in developing engagement scoring metrics. Gain insight on what to measure, how to prioritise your measures, and how to build them into an engagement score.</p>
----------------------	--	--	--	--	---

	<p>transformation? What are the other pillars?</p> <ul style="list-style-type: none"> • When do we stop needing a digital strategy – isn't the ultimate goal to no longer need one because digital is embedded/business as usual? • Looking ahead, what is the next "transformation" likely to be for your organisation? Are you planning for it yet? <p>Olivia Belle, Director of Transformation, Versus Arthritis</p> <p>Matt Phipps-Taylor, Head of Innovation & Insight, PPL</p>	<p>table will be hosted by sector specialists NetXtra</p> <ul style="list-style-type: none"> • Gain strategic insight into connecting with your audience and stakeholders • Identify the value of setting measurable objectives • Be inspired to be brave and creative! 	<p>solutions - including the potential role of AI</p> <ul style="list-style-type: none"> • How to avoid creating technology silos when choosing and implementing new tools <p>Alan Perestrello, Director & Co-Founder, Trillium</p>		<p>Share ideas on how to leverage engagement scores to improve retention, drive action, and foster greater involvement.</p> <p>Jeremy Jalie, Performance Improvement Leader, Advanced Solutions International</p>
16:30 – 17:00	<p>Keynote speaker: Will Higham – The impact of technology (County Suite) Will is going to address the growing power of technology and its significance in today's world</p>				
17:00 – 17:10	<p>Event close</p>				
17:10 - 18:00	<p>Drinks, canapés and networking (Thames Suite)</p>				