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McKINLEY MARKETING, INC.
TRUSTED ASSOCIATION ADVISORS

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McKinley Marketing is dedicated to helping our association clients advance their missions and achieve their visions. We employ a unique blend of strategic thinking, best-practices and real-life implementation tactics that reflect each client's working environment.

Our well-honed methods and innovative techniques have evolved over decades of working in, for and around associations.

We are well-suited to help associations tackle their most pressing challenges, particularly in the following areas:

Member and Market Research

How will you know if you don't ask? McKinley Marketing is experienced in all modes of data collection, and our business-minded approach focuses on providing clients with recommendations they can actually implement.

Strategy, Planning and Facilitation

The process of crafting an effective plan is a tall order for many associations. McKinley Marketing is adept at working with association staff, volunteers and governance to hone in on the critical questions that must be addressed up front, so future efforts are not hamstrung by the lack of a clear roadmap for success.

Membership Recruitment and Retention

Recruitment and retention are the "blocking and tackling" of association management. McKinley Marketing's extensive expertise in membership allows our clients to achieve their goals from membership marketing campaigns.

Marketing and Communications

In an era of marketing saturation and mass customization, deploying the right message to the right audience is paramount. McKinley Marketing is a full service marketing firm, providing expert assistance in concept development, branding, copywriting, design and communications.

Organizational Development

As associations mature, dues structures, component relationships and processes often fail to keep pace with growth or respond to changing forces in the marketplace. McKinley Marketing excels in helping associations answer the critical questions, "If we were going to build this association from scratch today, what would it look like?" and, "What do we need to succeed?"

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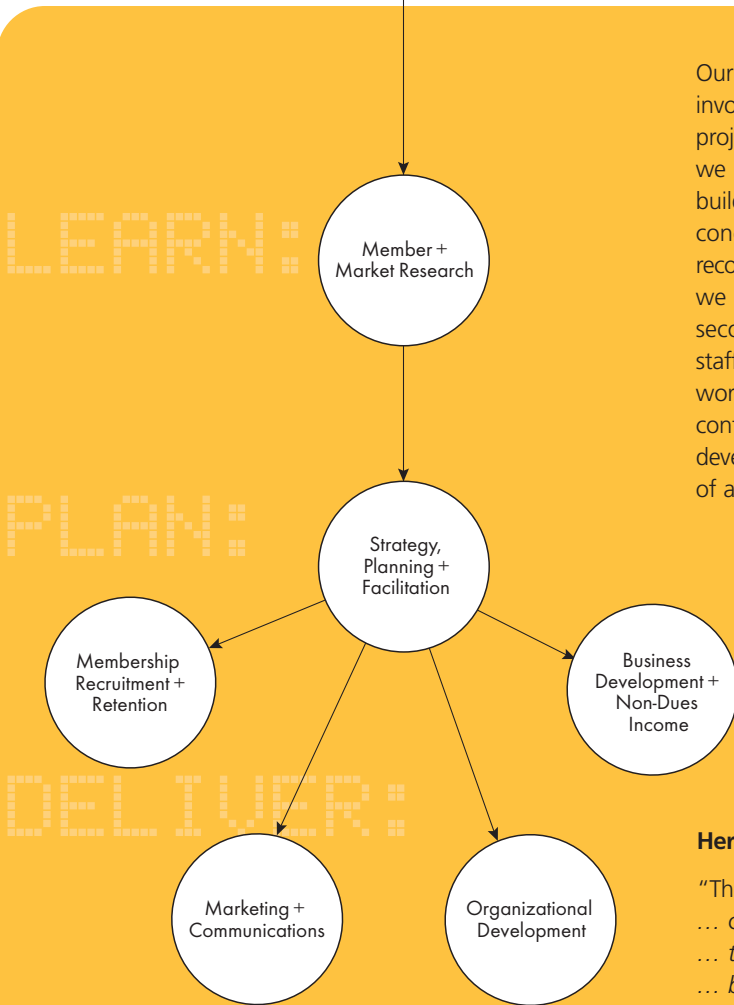
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The McKinley Experience

Successful projects and satisfied clients.

This is the true "bottom line" of McKinley Marketing's business.

Our projects always include a methodical examination of each marketplace, a review of the unique challenges and business realities and a thorough immersion into our clients' cultures.



Our client-focused approach involves tight collaboration with project contacts to ensure that we have the necessary input to build consensus before drawing conclusions and delivering recommendations. To this end, we conduct primary and secondary research, facilitate staff and Board meetings and work hand-in-hand with our contacts and their members to develop the deep understanding of a tenured employee.

Our deliverables are not those of a typical consultant. Too often, consultants are hired for short-term projects and the results are placed indefinitely on dusty bookshelves. We are committed to providing tools our clients can use. The specific, tangible recommendations that result from our work are actionable and customized to each client's unique environment.

Our flexibility means that we design and execute projects to meet the needs of the largest associations as well as those with limited resources.

Our competence, responsiveness and ability to meet deadlines and reach established goals have been documented for over a decade.

Here are some comments from our Annual Client Survey:

- "The best part of working with McKinley Marketing was ..."
- ... confidence that things were running as planned.
 - ... the synergy and willingness to advance efforts.
 - ... being able to learn from their vast experience.
 - ... they are a true extension of our team.
 - ... the credibility of their recommendations to our Board.

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Collectively, we have surveyed and interviewed more than 1 million individuals worldwide in numerous industries including healthcare, education, science, engineering, arts, finance, accounting, technology, manufacturing, legal, marketing and association management.

Senior Leadership

Jodie Slaughter

President & Founding Partner

Jay Younger

Managing Partner & Chief Consultant

Tania Galarza

Managing Consultant

John Grifferty

Director of Operations

Sheri Jacobs, CAE

Managing Director, Chicago

Shelley Sanner, CAE

Managing Consultant

Nancy Krikawa

Consultant

Mike Norbut

Consultant

Recognition and Accomplishments

ASAE & the Center for Association Leadership

- > 2 ASAE Fellows
- > Chair, ASAE Services, Inc.
- > Chairs, Membership Section Council
- > Strategic Research Committee
- > Frequent contributors: *Journal of Association Leadership, Associations Now, Membership Developments* and *Marketing Insights*
- > Editor and chapter authors: *Membership Essentials: Recruitment, Retention, Roles, Responsibilities and Resources*
- > Frequent speakers: Annual Conference, Marketing and Membership Conference, Great Ideas Conference, Membership Bootcamp, CAE Immersion

Association Forum of Chicagoland

- > Frequent contributors, *FORUM Magazine*
- > Speaker: Association 101, Membership Essentials, Membership SIG, Annual Meeting, Holiday Showcase

Other Industry Accomplishments

- > Founder, HEMM (Higher Education Membership and Marketing) network
- > Speaker, American Marketing Association
- > Speaker, Digital Now
- > Gold Award, *Association Trends Membership Marketing Recruitment Program*
- > Bronze Award, *Association Trends Membership New Member Kits*

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Case Study: Women in Cable Telecommunications

*Applying Brand Mapping Strategies to Create a Brand Essence
Built on the Strengths of WICT*

CHALLENGE

Women in Cable Telecommunications (WICT) was faced with the challenge of trying to understand how its staff, operational leadership, and membership perceived the organization's brand. In order to more accurately position the brand in the mind of its key stakeholders, WICT sought to capture current brand associations and assistance with the development of creative guidelines for use in the development of new materials, messages and programs. Furthermore, the association sought to build visual and verbal messages that reinforced the value and excitement of membership.

APPROACH

The market research and staff facilitation conducted by McKinley revealed the following with respect to WICT's brand:

- > Perceptual gaps existed between staff and members in terms of how members "experienced" the organization and the lack of a consistent level of interaction across chapters and the National organization.
- > Members placed great emphasis on the need for enhanced events and programs to feel more engaged and to create an emotional connection with the organization
- > Members overwhelmingly associated the brand with being the leading source for women in the industry.

Additionally, the research suggested that the inconsistencies and varied chapter experiences greatly impacted members' overall perceptions of the WICT brand. In other words, local experiences and messages needed to more closely align with those of National in order to deliver a consistent brand message and identity.

Finally, data revealed that although members generally had positive perceptions of the WICT brand and viewed it as a leading source representing women in the field, members desired stronger and more consistent communications that quantified and reinforced the desired impact of the organization's advocacy efforts on behalf of women in the field.

RESULTS

WICT utilized the research findings and brand blueprint as internal guideposts to ensure a unified and cohesive brand image and messaging across all communications, products and services provided by the organization. Additionally, McKinley provided WICT with an evaluation tool to ensure that all future programs, services and marketing efforts are effectively evaluated to make certain they are in line with WICT's core brand attributes and desired messaging.

As a direct result of the project findings, WICT determined the need to establish a chapter standards and guideline handbook to ensure all offerings and member experiences were consistent across chapters and in line with the National brand image. The project outcome also resulted in a further assessment of WICT's educational and professional development offerings to ensure that members had ample opportunities to interact and experience the brand as well as meet their desired professional needs. Lastly, the findings resulted in the association re-examining their Annual Conference, as this is the predominant National brand experience for members.

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Case Study: Medical Group Management Association (MGMA)

Even a Nonprofit Should Price for Profitability

CHALLENGE

The Medical Group Management Association (MGMA), the nation's principal voice for the medical group practice profession, has served its growing membership with innovative, competitive and high-value products for over 80 years. Yet MGMA was looking for a new, disciplined data-driven pricing strategy that could be implemented across many different program areas, audiences and product lines and would ensure ongoing value and growth.

MGMA sought McKinley Marketing's expertise in devising a pricing strategy that would:

- > Maximize non-dues revenue.
- > Provide guidelines that would be competitive in the marketplace.
- > Drive product life cycle.
- > Ensure ongoing membership value.

APPROACH

Through a comprehensive review of past research and collaboration with MGMA staff, McKinley created a list of priority products to test in the marketplace on a pilot basis, and it provided recommendations and guidelines for MGMA to operate its pilot testing program. McKinley also constructed a customized dashboard that incorporated both the subjective and objective information available to MGMA and responded to the challenges of meeting member needs while balancing the core fiscal, strategic and operational needs of the association. The dashboard was designed to help MGMA identify opportunities for new product development, assess the current value and profitability of the product and membership portfolios and even assess the viability of products near the end of their lifecycles.

In addition to the dashboard, McKinley Marketing developed an extensive set of pricing tools to accommodate any type of MGMA product or life-cycle situation. The decision trees took into account factors such as perceived value, market demands, market prices and cost to produce as they led MGMA through a systematic evaluation of each of its products and services. The decision trees helped the association make many critical pricing decisions, such as whether to raise the price of a product (and by how much), whether to bundle a product due to low performance and whether to enhance its promotional efforts to increase sales.

RESULTS

All of these tools and recommendations were compiled in a comprehensive pricing handbook for MGMA. The tools created by McKinley Marketing have provided MGMA with guidelines to identify a potential price range and set a proper price for each of its existing products. MGMA has already put the new tools to use on a larger scale, including using McKinley Marketing's dashboard and decision trees to build the pricing structure for its upcoming Annual Conference.

IN THEIR OWN WORDS

"The McKinley pricing project helped create a uniform pricing strategy for the association. The tools provide a systematic way to ask the right questions and develop pricing recommendations and rationale. They give staff the confidence to price correctly and support their decisions to senior management and the Board of Directors."

— DANA GUILFOYLE, Vice President,
Communications and Marketing,
Medical Group Management Association
(MGMA)

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Case Study: National Association of Counties (NACo)

Strengthening a Brand and Improving Visibility

CHALLENGE

The National Association of Counties (NACo) represents America's counties. More than 2,300 member counties rely on NACo for timely, relevant communications and regular updates on key legislative issues, research and technical assistance. In 2004, McKinley Marketing conducted a research initiative that revealed a general lack of knowledge about wants, needs and expectations of NACo's key audiences. Awareness of NACo's member resources and legislative activities was minimal and members' understanding of the NACo "brand" was disjointed. NACo was in need of a cohesive marketing plan to increase awareness and raise the organization's visibility.

In 2006, NACo's Public Affairs Department retained McKinley to:

- > Review NACo's communications processes to identify key issues.
- > Interview relevant constituents to contextualize the issues around communications.
- > Explore the NACo database for solutions.
- > Make recommendations for an improved communications architecture.

APPROACH

McKinley's methodology included a study of the communications practices for all of NACo's departments. McKinley then audited all NACo communications and used those observations to create a "SWOT" analysis of existing practices. The analysis pointed to a need for more targeted communications for members, revealed a lack of coordination and uncovered missed opportunities stemming from the absence of a standardized plan. In essence, some members were receiving redundant communications while others were left out.

The analysis led to a number of recommendations, including McKinley's suggestion that NACo add a comprehensive electronic communication that should be sent to all members. McKinley also recommended that certain communications with redundant content be merged and others discontinued. Finally, it was recommended that a list of "hot-button topics" be created and reported on regularly. Internally, McKinley suggested that NACo establish an annual e-communications calendar and revise its guidelines to ensure that all communications were effective and consistent.

RESULTS

NACo's marketing director has executed many of the suggested enhancements, which have helped to satisfy many of the organization's goals. Already, the actions have helped raise awareness of NACo's brand and have increased visibility.

As a result of McKinley's work, NACo:

- > Created a tag line to better represent NACo's mission and purpose – The Voice of America's Counties;
- > Launched a new e-newsletter, NACo e-News, designed to inform members and encourage involvement. The e-newsletter is sent twice a month to more than 25,000 readers;
- > Educated all departments on the importance of branding and sending a consistent message about NACo;
- > Defined its core messages, developed boilerplate text and introduced new designs and brand standards;
- > Created a new look/design and professional image for NACo;
- > Created a "Resource Center" at conferences to present products and services and encourage participation.

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Case Study: Healthcare Information and Management Systems Society (HIMSS)

Developing a Highly Targeted Annual Meeting Marketing Strategy

CHALLENGE

The Healthcare Information and Management Systems Society (HIMSS) has historically been the largest and most advanced health care IT conference and exhibition in North America. However, the sheer size of the conference (more than 24,000 attendees and 850 exhibitors) led some attendees to feel that it was too overwhelming and not specific enough to address their individual needs.

HIMSS sought McKinley Marketing's expertise in devising a marketing strategy that would:

- > Attract more attendees from current and prospective audience segments.
- > Increase the number of qualified buyers in the exhibit hall.
- > Entice attendees to spend more time at the conference in general and on the exhibit hall floor specifically.
- > Enhance the value proposition for attendees and exhibitors by promoting the conference's comprehensive offerings.

APPROACH

McKinley Marketing thoroughly reviewed past research, including member needs assessments and evaluations from past conferences. McKinley met with HIMSS staff to develop a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis to help the society better understand its market and core competencies. McKinley also conducted a benchmarking study to determine best practices and discover innovative strategies being used by association peers to market their annual conferences.

The information collected and reviewed by McKinley led to the recommendation that HIMSS should develop a segmented, targeted marketing approach that drove home the conference's unparalleled educational value and networking opportunities to members and other potential attendees. McKinley developed a list of nine customer segments and created a marketing calendar specifying when a certain type of promotional message should be pushed out to a certain segment. The marketing plan also called for a different approach to how HIMSS promoted its conference. McKinley suggested the society create benefit-specific "mini campaigns" to help drive more attendees to the conference. This plan included going beyond promoting the features of the conference (i.e., networking) to promoting its benefits (the opportunity to share innovations and best practices with your colleagues).

RESULTS

Attendance at the 2008 Annual HIMSS Conference and Exhibition was the largest ever, with 29,400 attendees and 900 exhibitors. The 2008 conference, held in Orlando, topped the 2006 San Diego conference – the previous record – by a sizeable margin. Most niche programs, such as the physician and nursing symposia, saw participation levels that were ahead of previous years. The audience mix was strong across the board with participation from core segments, including CIOs from hospitals and large hospital systems

IN THEIR OWN WORDS

"I want to thank McKinley for all the solid work they did around our conference – they added true value to our marketing efforts and the results speak for themselves!"

—TRICIA SPELLMAN, Director, Marketing, Healthcare Information and Management Systems Society (HIMSS)

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Case Study: National Association of College and University Business Officers (NACUBO)

Membership Dues Restructuring

CHALLENGE

The National Association of College and University Business Officers (NACUBO) came to McKinley Marketing with a problem. NACUBO suspected that their existing membership structure was out of balance and that their existing dues categories were not accurately reflecting the metrics of their membership base. With over 30 unique dues categories, NACUBO's complex structure proved a complicated landscape when attempting to analyze membership trends and data. NACUBO also wanted to see how well their current structure met the needs of key segments of potential members and needed insight on how to effectively structure and deliver a series of new corporate membership categories. Finally, the project needed to be completed in less than three weeks, so that a report could be delivered at an upcoming board meeting.

APPROACH

After an initial assessment suggested that that the current dues matrix was not adequately apportioning dues revenue across the membership, McKinley Marketing completed a detailed statistical analysis to identify areas where reallocation opportunities existed. We then suggested revisions to the dues scale that provided a more equitable allotment of dues revenue across the spectrum of NACUBO membership.

To provide guidance on expanding membership categories and services, McKinley Marketing completed a series of telephone interviews to identify core themes and explore member needs. Our research led to recommendations that allowed large organizations that previously joined NACUBO at multiple locations, to centralize their NACUBO membership through a primary contact. We also provided strategy on programs, products and services that would compel prospective corporate members to increase their dues investment in NACUBO.

Finally, in order to effectively serve a larger percentage of the entire vertical market (i.e. for-profit companies doing business in higher education), McKinley Marketing recommended that NACUBO make membership more attainable for small companies and consultants by creating a new small businesses membership. McKinley Marketing conducted market research to explore price sensitivity and the optimal allocation of programs, products and services. As a result, our recommendations included concrete strategies and tactics related to dues, benefits and positioning.

RESULTS

NACUBO's new membership structure has created a more logical distribution of dues, created the potential for the generation of additional membership revenue, and provided plenty of room for members to "rise" up the dues scale. This framework has allowed NACUBO to streamline operational issues and meet their established membership revenue goals. The project was also delivered on budget and schedule, which allowed NACUBO to keep their commitment to the board.

IN THEIR OWN WORDS

"We came to McKinley with a mission critical project on a tight deadline. Their expert analysis, focused attention and support through implementation meant the difference between a goal envisioned and a project completed."

—CARLA BALAKGIE, Senior Vice President
National Association of College and University Business Officers

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Select Client List



Science & Engineering

American Assn of Pharmaceutical Scientists
American Ceramic Society
American Chemical Society
American Industrial Hygiene Assn
American Institute of Architects
American Institute of Chemical Engineers
American Society of Civil Engineers
American Statistical Assn
American Traffic Safety Services Assn
American Water Resources Assn
American Water Works Assn
Industrial Designers Society of America
Institute of Electrical & Electronics Engineers
Optical Society of America
Society of Manufacturing Engineers
Society for Neuroscience
Women in Cable Telecommunications

Healthcare

AcademyHealth
Academy of General Dentistry
American Academy of Periodontology
American Assn of Diabetes Educators
American College of Cardiology
American Dental Assn
American Health Care Assn
American Hospital Assn
American Occupational Therapy Assn
American Organization of Nurse Executives
American Psychiatric Assn
American Psychological Assn

American Society for Healthcare Human Resources Administration
American Society for Parenteral & Enteral Nutrition
American Speech-Language-Hearing Assn
Assn for Community Health Improvement
Assn of Perioperative Registered Nurses
Assn of Public Health Laboratories
Assn of Women's Health, Obstetric & Neonatal Nurses
Emergency Nurses Assn
Healthcare Information & Management Systems Society
National Assn of Children's Hospitals & Related Institutions
National Assn of County & City Health Officials
National Assn of Social Workers
National Community Pharmacists Assn
Oncology Nursing Society
Society of Nuclear Medicine
Society for Healthcare Strategy & Market Development

Education & Humanities

American Assn of Physics Teachers
American Assn of University Women
American Library Assn
Assn of College & Research Libraries
Assn of Governing Boards of Universities & Colleges
Missouri State Teachers Assn
National Assn for Campus Activities
National Assn for College Admission Counseling
National Assn of College & University Business Officers
National Assn of Independent Schools

National Assn of Secondary School Principals
National PTA
Urban Libraries Council

Professional Services

American Bar Assn
American Society of Interior Designers
APICS - The Assn for Operations Management
Assn of Fundraising Professionals
Cosmetic Executive Women
Independent Community Bankers Assn of America
Licensing Executives Society
National Business Travel Assn
National Court Reporters Assn
National Investor Relations Institute
SOCAP International
Society for Marketing Professional Services

Trade Associations

American Forest & Paper Assn
Biotechnology Industry Organization
Building Industry Assn of Southern California
Consumer Electronics Assn
Direct Selling Assn
Door & Hardware Institute
Electronic Transactions Assn
Equipment Leasing Assn
Food & Drug Law Institute
Independent Lubricant Manufacturers Assn
Industrial Supply Assn
International Bridge, Tunnel & Turnpike Assn
National Assn for Retail Marketing Services
National Assn of Chain Drug Stores
National Assn of Counties

National Assn of Home Builders
National Assn of Wholesaler-Distributors
National Corn Growers Assn
National Golf Course Owners Assn
National Kitchen & Bath Assn
National RV Dealers Assn
National Spa & Pool Institute
NOFMA - The Wood Flooring Manufacturers Assn
Society of Independent Gasoline Marketers of America

Finance / Accounting

American Institute of Certified Public Accountants
California Society of CPA's
CFA Institute
Institute of Management Accountants
National Assn of Mortgage Brokers
National Society of Accountants
New Jersey Society of CPAs
Ohio Society of CPAs

Association Management

ASAE & The Center for Assn Leadership
Assn for Research on Nonprofit Organizations & Voluntary Action
Association Forum of Chicagoland
South Carolina Society of Assn Executives
Wisconsin Society of Assn Executives

Philanthropic

Hostelling International - USA
National Trust for Historic Preservation
Paralyzed Veterans of America
The Humane Society of the United States



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