



# Benchmarking & Best Practices

## A Decade of Progress

By Jim Pealow, CAE

In the late 1990s, CSAE strengthened its Certified Association Executive program. The list of core competencies covered was expanded, and opportunities for participants to gain practical experience in continuous improvement were added. The latter was accomplished by making benchmarking and best practices an integral part of the program. The impact on the association sector has been significant.

What exactly is benchmarking? It's comparing strategy, structure, policy, products, services and practices against those in other organizations (inside or outside the association sector). The

purpose is to identify best practices that an organization can use for planning, taking action and continuous improvement at the strategic, functional or operational level. When used properly, benchmarking yields a list of potential process improvements and an understanding of the changes needed to implement them. Benchmarking can save an association a lot of time and trouble. Organizations with limited resources should not be reinventing something that already exists!

As a result of the changes made to the CAE program, three of the five courses now include real-life benchmarking assignments in

which candidates compare their association to others in order to come up with best practices. Hundreds of CSAE members in associations across Canada have thus now used benchmarking to develop something new or fix something for their organizations.

Has this learning activity made a difference in the association community? Based on the quality of papers I've evaluated as a CAE instructor and feedback received from candidates and their employers, the answer is a resounding "yes!" Association executives pursuing the CAE have used their benchmarking assignments to improve productivity and member satisfaction and made change happen in their associations. The really good news is that even after earning the designation, many CAEs continue benchmarking, proactively seeking out the "next practices."

**HOW TO BENCHMARK**

There are some critical steps to take if benchmarking is to be a success at your organization. Here are some tips.

- Be humble enough to admit that you can learn from other organizations.
- Involve key people and those who will be implementing changes.
- Provide the necessary training and resources.
- Focus on areas where there is greatest potential for cost savings and effectiveness.
- Keep the strategically linked benchmarking project focused and small, and the communications flowing.

# BENEFITS OF BENCHMARKING

- Promotes innovative thinking
- Implements strategic direction
- Accelerates the change process
- Introduces rigour
- Overcomes resistance
- Establishes accountability
- Engages culture change
- Enhances your reputation

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- Focus benchmarking on numerical performance indicators.
- Start the benchmarking process in areas where data collection is easier and success is more likely.
- Understand all parts (policies, tools, processes, etc.) of the practice being benchmarked to see why it is truly successful.
- Don't implement another association's successful practices without adjusting for your association's unique requirements.
- Don't expect too much too soon; understand the impact of the change process on people, roles, culture, systems, processes, methods and structure.
- Build a benchmarking network.

### **BENCHMARKING SHORTCUTS**

If you are thinking about benchmarking your practices, a quick way to find out where you face challenges and opportunities is with standards, guidelines and other evaluation tools. A number of these are available on the web, including my own Association Management Evaluation Tool at [www.amces.com/resources.htm](http://www.amces.com/resources.htm). This will give you a quick reading on where your association stands in relation to more than 40 competency areas.

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While using such tools can pay dividends, the information gained is often high-level, serving as a starting point for formal benchmarking.

Association executives resistant to full-fledged benchmarking often seek out best practices through informal means. These include conferences, seminars, workshops, courses, websites, publications, online networking and, above all, good old-fashioned face-to-face networking. Such contacts can be used to identify organizations with impressive performance indicators. A consistent 97 per cent membership retention rate would be an example. Such indicators often reflect a practice that you may want to investigate and copy.

Another resource is the Best Practices Library on the CSAE website. Log in to the site, and click on CSAE Resources.

### **USING BEST PRACTICES**

Don't get hung up on whether a practice has undergone a rigorous peer review process to decide what is "best in class." If the practice can improve your situation and reduce the gap, it deserves consideration. Ask these questions:

- Is this better than what we do now?
- Is this something we would like to do?
- What components of this practice can be adopted to improve our performance?
- What benefit would result?
- Is this consistent with our current strategic direction?

The best practices you find may or may not be the best for your association. There is no one practice that fits every association. Associations are often at different levels of development. Also bear in mind that what is new and exciting today may be old and routine a couple of years from now. Practices are always changing to take advantage of innovation and creativity.

As I look back at the efforts to promote benchmarking for best practices over the last decade, I'm heartened to see that more and more associations are getting on board. The benefits are clear. If you or your association is not there yet, what's holding you back?

*Editor of the CSAE publication **Benchmarking and Best Practices for Associations**, Jim Pealow, MBA, CMA, CAE, has served as chief staff officer and chief volunteer leader in a number of associations. A researcher, writer, instructor/coach, author, speaker and consultant in association leadership and management, Jim is Managing Partner of Association Management Consulting and Evaluation Services. He can be reached at [jim@amces.com](mailto:jim@amces.com).*