

New Year, New Goals: Planning Checklist for Associations



SET YOUR ASSOCIATION UP FOR SUCCESS WITH THIS 2025 GUIDE!



Strategic Planning & Goal Setting

- Review Mission and Vision Alignment**
Assess if current initiatives align with your association's core purpose and future direction
- Set SMART Goals for the Year**
Define specific, measurable, achievable, relevant, and time-bound objectives for each department
- Create a Performance Metrics Dashboard**
Establish KPIs and reporting mechanisms to track progress throughout the year



Member Experience Enhancement

- Conduct Member Needs Assessment**
Survey members to understand evolving needs and expectations for the coming year
- Update Member Journey Map**
Review and optimize touchpoints across the entire member lifecycle
- Plan Engagement Initiatives**
Design programs that increase member participation and value perception



Digital Transformation

- Evaluate Current Technology Stack**
Assess effectiveness of existing systems and identify gaps or improvement opportunities
- Plan Data Integration Strategy**
Ensure all systems work together seamlessly to provide a unified member experience
- Define Digital Security Protocols**
Review and update data protection measures and compliance procedures



Data & Analytics

- Clean and Organize Member Data**
Ensure member database is accurate, complete, and properly segmented
- Set Up Automated Reports**
Create regular reporting schedules for key metrics and insights
- Plan Data-Driven Initiatives**
Identify opportunities to use data analytics for improved decision-making



Communication Strategy

- Review Communication Channels**
Evaluate effectiveness of current communication methods and platforms
- Create Content Calendar**
Plan regular, valuable content that addresses member needs and interests
- Set Up Feedback Loops**
Establish mechanisms for collecting and acting on member feedback



Industry Trends & Innovation

- Research Industry Developments**
Stay informed about emerging trends and their potential impact on your association
- Plan Innovation Initiatives**
Identify opportunities to implement new technologies or processes
- Allocate Resources for Growth**
Budget for technological improvements and strategic initiatives



Need assistance reaching your association's goals? IBC can help.



intuitive
business
concepts

ibconcepts.com