

CASE STUDY on Strategic Planning



The purpose of the United Motorcoach Association is to protect and promote the interests and welfare of privately owned common carriers of passengers by motorcoach.



amcinstitute.org

AMPED Association Management is a full-service association management company working with associations across the globe. We work in partnership with boards of directors to provide high energy leadership and operational management. Our clients are primarily national and international trade and professional associations.

Challenge: With the help of AMPED, the United Motorcoach Association (UMA) held its strategic planning session in June 2020, amid the uncertainties of the COVID-19 pandemic. Travel was impossible, so the session was held virtually via Zoom over two separate days, one week apart. The challenge was to execute a successful session and deliver a strong strategy for the association.

Actions Taken

Step 1 Extensive pre-meeting preparation, including live interviews and surveys of staff and members

Step 2 Developed a virtual-friendly agenda with clear direction and purpose

Step 3 Benchmarked UMA against other related organizations

Step 4 Involved additional staff to monitor virtual breakout room discussions and record results

Goals

- Provide key information in a virtual environment to drive decisions that resulted in a strong, actionable strategic plan

Results

- Broad engagement, clear strategy to move the association forward, and a happy client.

"We were so happy with the outcome of the strategic session for UMA. Given the circumstances, we pulled it off with creative solutions that we might not otherwise have tried. And many that we'll continue to utilize in our strategic planning going forward."

Insights/Learnings

The advantage of virtual is that multiple AMPED staff could attend without the extra travel costs. More staff meant more expertise and more hands on-deck. When the association leaders separated into three Zoom breakout rooms, an AMPED staff member was there to facilitate and add notes in a prepared Google doc. Staff leaders monitored the doc and could see instantly the results of each group's discussion and identify the most common themes. Notes were already organized and ready to move the exercise forward as soon as the breakouts ended — a task that would have taken far more time to complete in-person.

With the 2-day agenda nearly accomplished on the first day, there was ample time for discussion on day two. Plus, where participants in a typical strategic session would only have overnight to reflect on the results of the day, holding the two sessions a week apart provided more time to digest ideas, concluding in clearer strategy development on day two.