# The Accidental CIO

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# Rules for the day…

1. This is being recorded for posterity.
2. This is for you, please ask questions if you have them. Use the chat function or text Kim Grever at 703-582-6898.
3. The presentation and discussion will be available to view later this week. We will forward a link.

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# Which hats do you wear?

- CEO
- CFO
- CMO
- Head of HR
- CIO
- CISO

THE GREAT CIO ANTICIPATES.

THE ACCIDENTAL CIO REACTS.
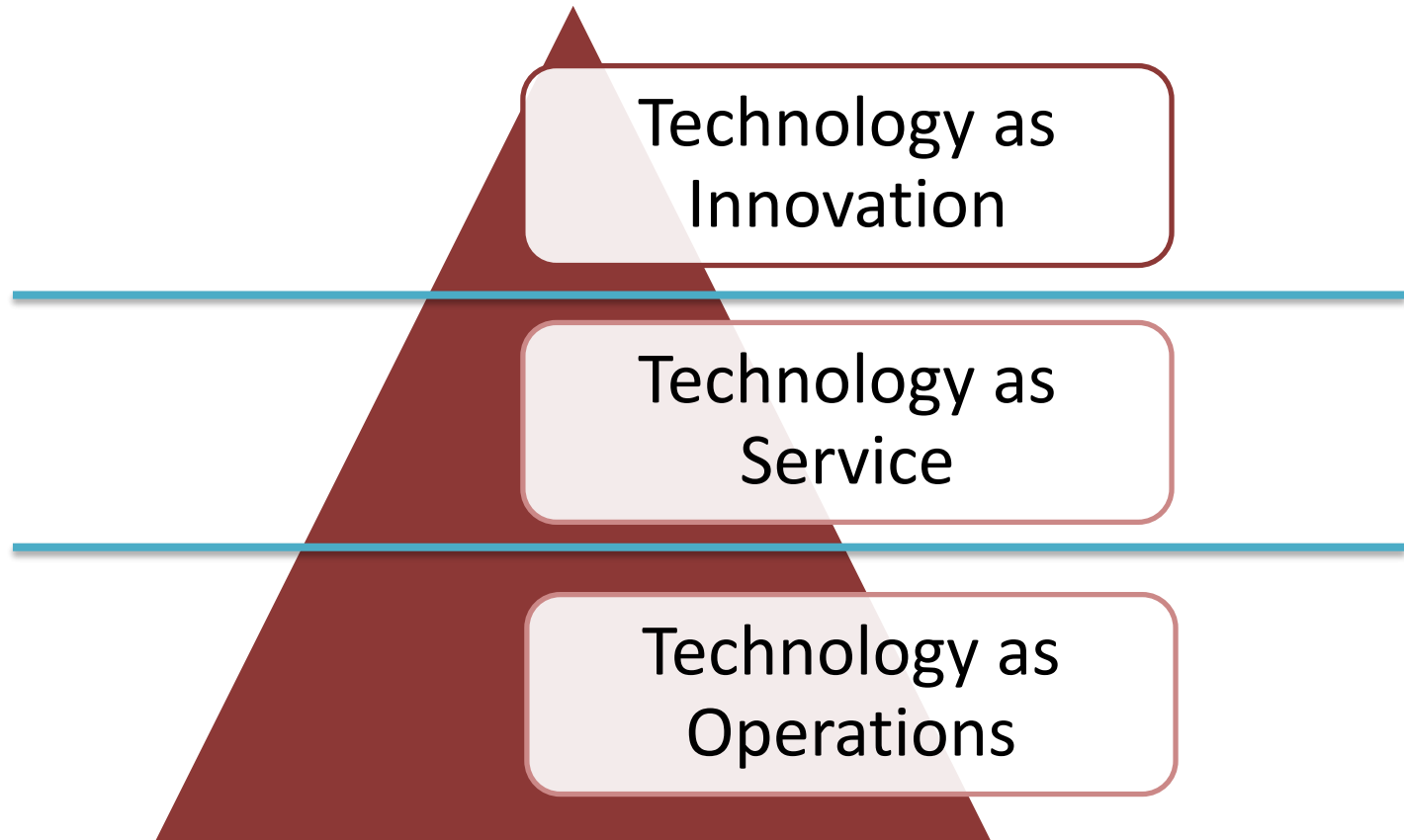
*James Marquis*

WELL

*Moira Edwards*

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# Overwhelming

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# Let's talk about how we talk about technology

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# Three Levels of Technology

Technology as Innovation

Technology as Service

Technology as Operations
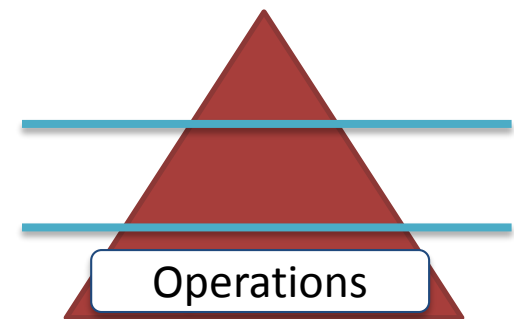
# Technology as Operations

- Do things work?

- Do we have the tools we need?

- Do staff members have the skills they need?

- Are our systems secure?

- Are our systems reliable?

- Are systems current?
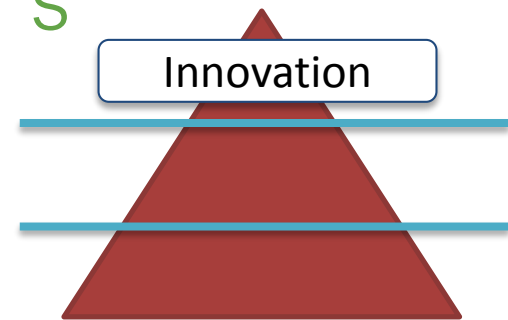
Operations

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# Technology as Service

- Are staff able to be effective in their work?
- Are members easily able to do what they need to do?
- Are staff able to get the information they need relatively easily?
- Does leadership have unanswered questions?
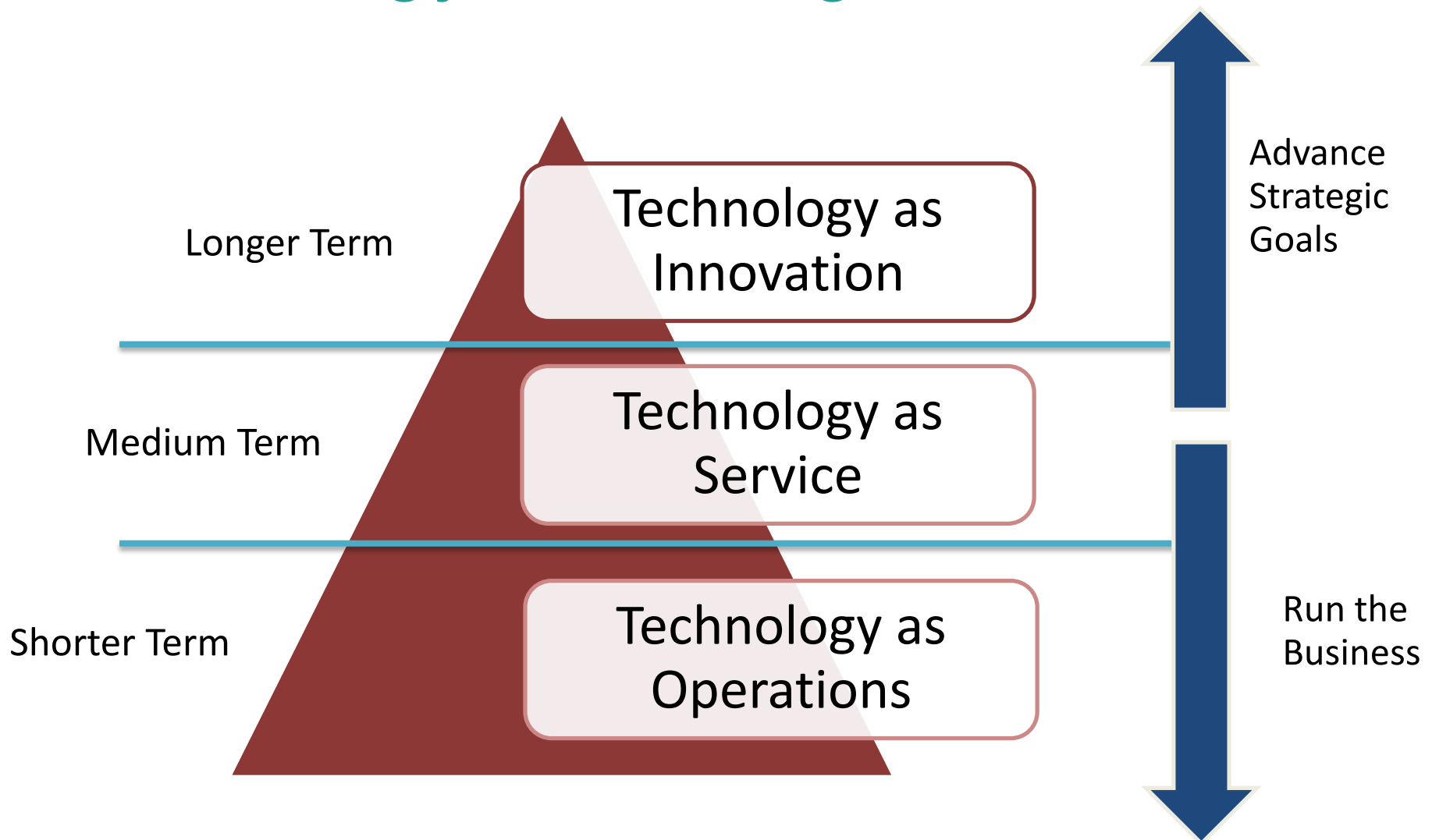
Service

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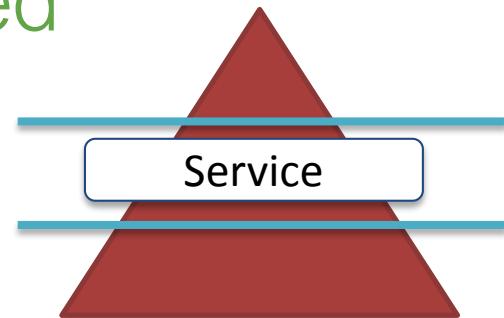
# Technology as Innovation

- What do members need? And when?

- What could members do as a group that they can't do individually?

- What could the association do for members that they cannot do for themselves?

- How might we serve our member's customers?

Innovation

# Technology Planning

Longer Term

**Technology as Innovation**

Medium Term

**Technology as Service**

Shorter Term

**Technology as Operations**

Advance Strategic Goals

Run the Business

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What is urgent at each level?

# Operations: Security

Associations can no longer assume that they are under the radar of hackers

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# Security Management

1. Get a security audit
2. Ask your vendors about their data security policies & practices
3. Train staff to recognize phishing emails
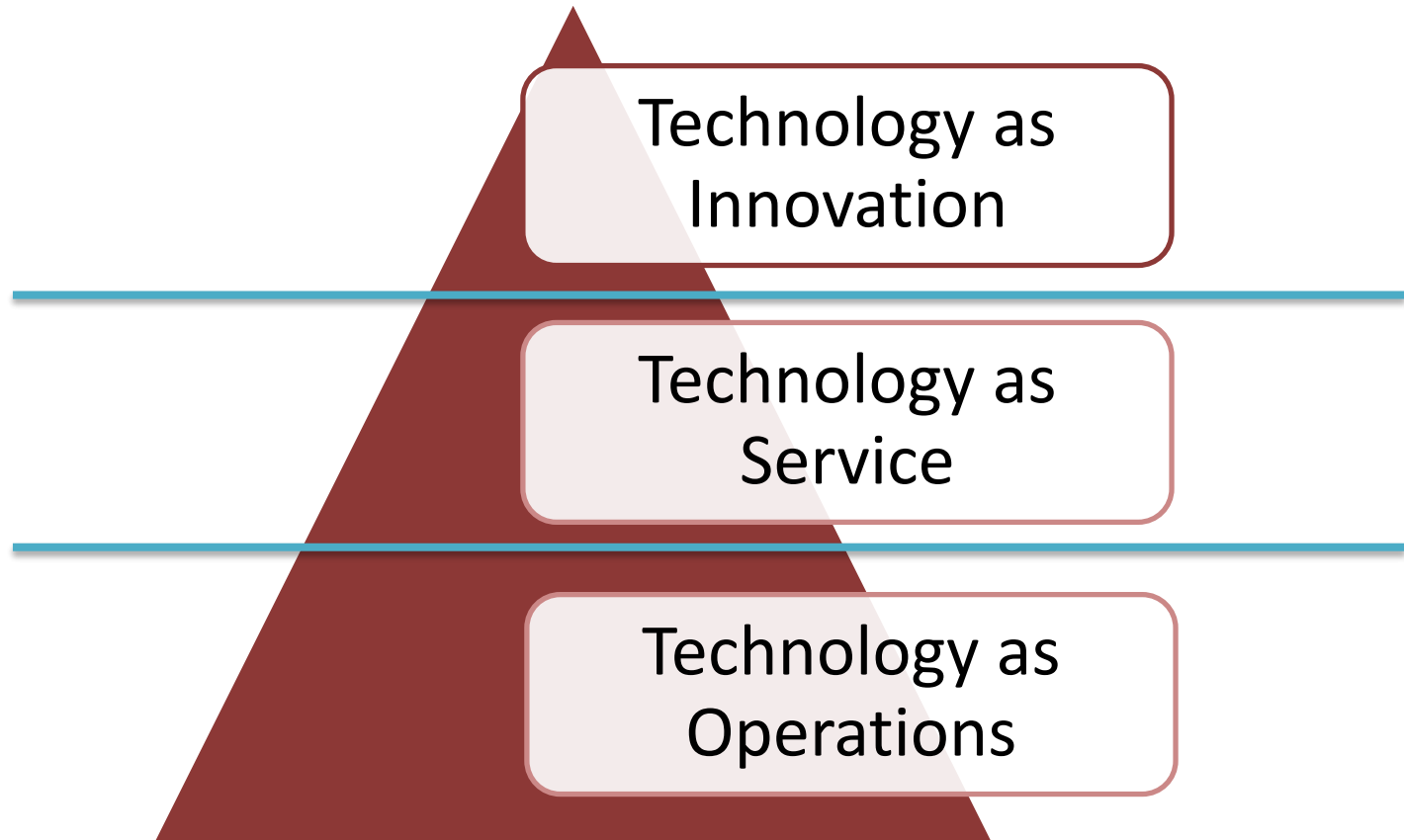4. Plan your response to a data breach

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# Hardware & Infrastructure

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# Hardware and Infrastructure

1. Check our contracts for auto-renew clauses and know the triggers.

2. What are you struggling with?

3. When was the last time we restored a file from backup?

4. What are our ~~disaster~~ chaos recovery plans?

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# Three Levels of Technology



Technology as Innovation

Technology as Service

Technology as Operations

# Technology as Service

- Are staff being served well by our systems
  - Are they doing a lot of workarounds?
  - How many Excel spreadsheets are there?
  - How many 'cheat sheets' are there?
- Are members being served well?
  - Do they call us to complete routine tasks?
  - Is data entered by members often wrong or incomplete?

Operations: Data Privacy

GDPR

CCPA

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Photo by NeONBRAND on Unsplash

# Data Privacy

1. Get consent (email, cookies)
2. Refresh Terms of Use and Privacy Statement
3. Do a data inventory
4. Ask vendors how to anonymize data
5. Make staff aware

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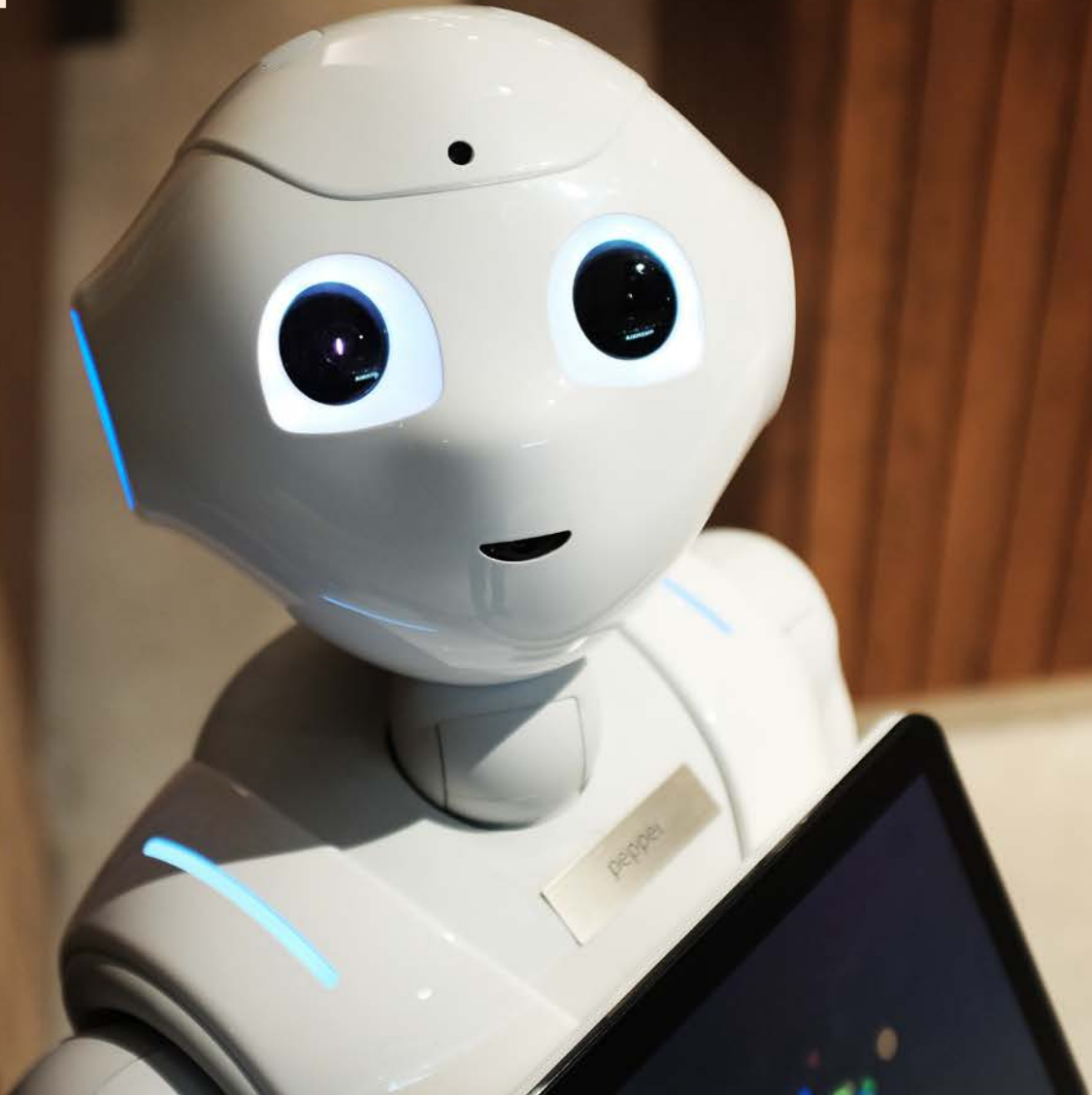LLC

# Data Hygiene

1. When was data last affirmed?
2. Are data fields really needed?

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# Data Analytics

1. Start really simply
2. Figure out your assumptions
3. Test hypotheses
4. Ask increasingly deeper questions

# Innovation

# "See a need, fill a need"

1. What can you do for your members that they cannot do for themselves?

2. What keeps them awake at night?

3. What could they do together that they can't do separately?

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# Real Life can still be a bit clunky

Good IT is about process. It's repeatable. It's never one-and-done.

*James Marquis*

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# Thank you for attending!

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# Questions