Cadmium

The Member Growth Playbook: *Events & Education United*

Events and continuing education are more connected than ever, with many associations already proving what's possible when they treat them as one continuous member journey. Even during a time where teams are being asked to move faster with fewer resources, we are seeing a clear pattern: the associations that thrive are the ones intentionally connecting their goals, simplify their workflows, and use their data to guide high impact decisions.

That's what this playbook is here to support.

Your teams have already been doing the most important part. You've found ways to keep programs moving forward, adapted quickly to changes, and created meaningful experiences for members. The opportunity now is to take that momentum and turn it into something sustainable by design.

This playbook is built around one core truth: Members experience your association as one continuous journey.

When events and education flow together, the member experience becomes more intuitive, and the impact becomes easier to measure. Over the next few sections, we'll explore four practical "plays" that help you strengthen that connection.

You'll learn strategies to help you:

- Align goals across departments so events and education reinforce one another and tell a stronger story of impact.
- Streamline workflows and reduce operational strain by designing repeatable processes that protect your team's efforts.
- Build a supportive ecosystem where technology enables work instead of complicating it.
- Track meaningful metrics that show engagement, growth, and progress over time.

As you move through this playbook, remember to keep this in mind: you don't have to change everything at once. Progress can come from choosing one program, one workflow, or even one shared outcome, and then building up from there.

Play 1: Align Goals Across Your Teams

Share outcomes, not more meeting invites.

Despite an event delivering a strong experience and an education program delivering valuable learning, the member journey can still feel fragmented when events and education are planned in parallel.

This play is about changing that.

Alignment doesn't mean restructuring teams or adding layers of coordination. It simply requires agreeing on shared outcomes so that decisions across planning, content, communications, and measurement reinforce one another. It becomes easier to plan intentionally and tell a stronger impact story when teams align early.

What this play unlocks:

- A clearer member journey where each experience naturally leads to the next.
- Stronger year-round engagement since each event becomes a launching point for ongoing learning.
- Less internal friction since teams can coordinate time, effort, and resources.
- A stronger ROI narrative that connects investment to outcomes over time (not just attendance).

Alignment questions (use these every time):

1. Who is this for?
2. What behavior are we trying to drive?
3. How does success show up over time?

These questions can be applied to all different types of situations, such as a flagship annual meeting, a webinar series, a certification, or even a full-year CE program.

Implementing Play 1 (in 30 days)

Start with one program (one event, track, or audience segment) and complete these actions:

1. Create a shared outcomes snapshot (one page, created together).
   Example: For your Annual Meeting, have your events and education team agree that the primary audience is first-time attendees. Then make the target behavior post-event CE completing and define long-term success as returning participation in at least one additional program within 6 months.

2. Map the member journey from pre-event -> event -> post-event -> ongoing engagement.
   Example:
   Pre-event: "Top 5 Sessions for Healthcare Professionals" email + recommended learning goals.
   During event: Session engagement + prompts like "Save this session for CME later".
   Post-event: Curated on-demand playlist + CME pathway.
   Ongoing: Monthly microlearning series tied to event themes.

3. Align the calendar by using event themes to inform education planning.
   Example: If your event tracks include themes like Innovation, Leadership, and Quality Improvement, your education team builds a 90-day post-event calendar with one follow-up webinar per theme and an on-demand bundle that stays available year-round.

4. Agree on shared reporting so your success can be measured consistently over time.
   Example: Instead of reporting only "attendance", teams can share a scorecard that includes:
   Event participation (attendance/session engagement)
   Post-event learning (on-demand views + CE/CME completion)
   Long-term engagement (cross-program participation or returning attendance)

Cheat Sheet: Metrics to Track

At the event:

- Attendance/participation
- Session engagement indicators (polls, Q&A, scans)

Post-event:

- On-demand content views
- CE/CME completion rate
- Repeat logins or return visits

Long-term:

- Cross-program participation (event + education)
- Returning attendance
- Renewal or retention indicators (if available)

Common Pitfalls

Treating alignment as a "meeting problem".

- It's tempting to assume alignment means more syncs, committees, and even time on calendars. This often creates frustration without changing outcomes.
- What to do instead: Keep alignment lightweight and decision based. A single shared outcomes snapshot is often enough to align planning, messaging, and measurement without adding overhead.

Optimizing too many audiences at once.

- Many associations want to serve everyone, from first-time attendees and loyal members all the way to learners and non-learners. The result is a program that becomes overly complex and general.
- What to do instead: Choose one primary audience segment for your first alignment pilot (for example, focusing on first-time attendees). Once you've built a repeatable model, scaling up to additional segments becomes easier.

Defining success only at the event moment.

- Usually events are measured by registration and attendance because those are visible and immediate. But if success is only defined as "what happened this week", you'll miss the longer member story.
- What to do instead: define success across time horizons:
  - At-event engagement
  - Post-event learning and CE/CME completion
  - Long-term return engagement across programs

  This creates a shared scorecard that purposefully connects events and education.

Alignment creates a stronger, more connected experience for members. It also gives your teams a shared definition of success that makes planning and execution far more effective. Once you've aligned that "why" and the "what", the next step is to make execution easier.

Play 2: Simplify Workflows to Protect Your Team

Reduce manual work but keep expectations high.

Volume is often treated as the cause of major burnout, but it is actually one of the side effects of it. Burnout is usually driven by repetitive manual work and disconnected systems that force teams to manage the same information in multiple places.

This second play is all about protecting your team by designing workflows that are easier to execute, repeat, and scale.

What this play unlocks:

- A more predictable event cycle with fewer last-minute scenarios.
- Less manual effort and rework across events, education, and reporting tasks.
- Consistent content quality without requiring manual perfection checks.
- More capacity for innovation since time can be spent on improving programs.

Simplification questions (use these every time)

1. Why are we re-entering data in multiple places?
2. Where do handoffs and communication break down?
3. Do we have a single source of truth, or multiple versions of the same information?
4. What could become self-service or automated?

These questions help you identify what's actually causing operational strain, and where simplification will have the biggest impact.

Implementing Play 2 (in 30 days)

Start with high-volume workflow (i.e., speaker/session data, CE/CME processing, or post-event on-demand publishing) and complete these actions:

1. Map your data pathway from start to finish: Before you can simplify, you need to see the full chain of work and identify where steps become repetitive or unclear.
   Example:
   Map the pathway for session data:
   Speaker submits abstract, bio, and disclosures.
   Team reviews and edit content.
   Content is copied into the agenda.
   Learning objectives are reformatted for CE/CME compliance.
   Slides are uploaded (or emailed) and re-uploaded into a second system.
   Post-event slides and recordings are reviewed again for publishing.
   Content is packaged for on-demand and credits are awarded.

   Then mark where:
   Versions multiply.
   Information is re-entered.
   Approvals cause slowdowns.
   Manual formatting happens repeatedly.

2. Identify your “single source of truth”: If multiple teams maintain their own official version of the truth, your workflow will become fragile.
   Example:
   Choose one system/document as the source of truth for:
   Speaker + bio credentials.
   Disclosures.
   Learning objectives.
   Session titles/abstracts.
   Slide deck version.
   Credit designation details.

   Then make this rule: If it isn’t updated in the source of truth, it’s not updated

3. Standardize inputs to reduce manual cleanup: Standardization is all about removing preventable variability that creates more downstream work.
   Example:
   You can standardize:
   Learning objective format (ex., 3 bullets max).
   Disclosure collection process.
   Speaker deadlines and reminder cadence.
   Slide template requirements (branding and footer).
   Evaluation templates (so surveys won’t need to be rebuilt every time).

4. Build self-service where possible: Repeated questions and requests can be some of the biggest drivers of operational overload. But you can reduce these instances through established rules and self-service options.
   Examples:
   Speaker exception: one presenter refuses to upload slides and always emails them late. Create an escalation policy, scheduled notifications, and a document exception workflow so it doesn’t disrupt the whole team.

   Attendee self-service: Instead of answering “How do I claim credit” hundreds of times via email, create a CE/CME Help Center with step-by-step instructions and an FAQ section.

Cheat Sheet: Metrics to Track

Before the event (operational strain indicators)

- # of manual touchpoints per session/speaker.
- # of version changes (how many times content has to be edited/re-uploaded).
- # of “urgent” speaker requests in the final 2 weeks.
- # of support emails and questions received.

After the event (rework indicators)

- Time to publish on-demand content
- Time to complete CE/CME processing.
- # of credit-related support tickets.
- # of session requiring manual reformatting/review.

Team sustainability indicators
- Workflow coverage (documented vs. Undocumented)
- Single points of failure (processes only one person knows)

Common Pitfalls

Treating burnout as a volume problem.
- Real drivers of burnout are rework, duplicated effort, and disconnected systems that force teams to manually reconcile information.
- What to do instead: Focus on eliminating repetitive manual tasks (reformatting and version chasing).

Letting exceptions gradually become the workflow.
- One-off exceptions can be well-intentioned, but they often create extra configuration and communication. Once this repeats over time, they eventually become part of the real workflow.
- What to do instead: Track exceptions and decide intentionally on which items to keep, automate, or eliminate.

Relying on tribal knowledge instead of documentation.
- When processes live in people's heads, execution becomes difficult to perform, especially during peak season with compressed timelines.
- What to do instead: Document the workflows that would cause the most disruption if the owner were out unexpectedly.

Simplifying workflows creates stability for your team and your association members. Once your processes are repeatable and your data is trustworthy, you're ready to move onto Play 3, where we focus on finding ways for events and education to easily share information and make reporting far faster.

Play 3: Build an Ecosystem that Supports Your Work

Let technology do the heavy lifting instead of becoming your burden.

Technology should be your team's main engine, but when teams don't connect, they end up compensating with manual effort. They end up assembling reports by hand, just to get a complete view of what happened.

This third play is all about adopting an ecosystem mindset that connects events and education, so data can flow easily, and teams can operate from the same foundation. This will make it easier to scale, deliver a better member experience, and measure impact.

What this play unlocks:
- Less operational strain by reducing manual exports, re-entry, and reconciliation.
- Reliable data and reporting your teams can trust and use with confidence.
- A better overall member experience since content can move between event and education.
- More value from event content, by expanding its reach through content repurposing.

Ecosystem questions (use these every time):
1. Where does data have gaps and require export, manipulation, or re-entry?
2. Are we spending more time managing systems than delivering programs?
3. Are we choosing complexity for "nice-to-have" features, or planning for reliability?
4. If we had to scale attendance or content volume by 25%, would our ecosystem hold up?

These questions help reveal where gaps in data could be, weaknesses in your existing ecosystem, and areas of improvement.

Implementing Play 3 (in 30 days)

Start with one workflow that span both events and education (session data, on-demand publishing, CME/CE credit workflows, reporting) and complete these actions.

1. Identify systems and handoffs across the content lifecycle: An ecosystem should account for how data moves across it from start to finish.
   Example:
   Map the full lifecycle of one session:
   Speaker submits session details.
   Session is published to agenda.
   Slides/recording become on-demand content.
   Learners complete evaluations and earn CME/CE credit.
   Reporting is delivered to internal leadership and external stakeholders.

   Then, identify the handoffs where teams:
   Export data.
   Copy/paste content.
   Reconcile reports.
   Rebuild the same information in another system.

2. Reduce multiple sources of truth by aligning your data foundation: Multiple sources of truth create version confusion and slow execution.
   Example:
   Choose one official location for core data such as:
   Session titles and abstracts.
   Speaker credentials.
   Learning objectives.
   CE/CME requirements.
   Final slide deck and recording links.

   Establish a simple rule: If it isn't updated in the source of truth, it isn't updated anywhere else.

3. Prioritize flow over features (KISS principle): A single vendor won't be able to do everything perfectly, but your most important workflows should be simple and sustainable.
   Example: If a feature requires heavy manual work, created exceptions, or makes reporting precarious, treat it as a risk.
   Instead, prioritize:
   Reliable data flow.
   Fewer manual steps.
   Consistent user experience.
   Workflows that are easy to teach and sustain.

   A useful mindset is the KISS principle (Keep It Simple, Silly): Systems work best when they are intuitive and designed for usability over complexity.

4. Simplify reporting by eliminating manual assembly: When manual assembly is required, this could be a sign your ecosystem isn't serving the full workflow.
   Example:
   If your team currently:
   Runs reports in multiple systems.
   Stitches them together in spreadsheets.
   Spends hours explaining discrepancies.

   Then choose one shared reporting approach where event and education data can be viewed together. Even small improvements can save significant time and increase trust in your results.

Cheat Sheet: Metrics to Track

Ecosystem health indicators:

- # of systems used to execute one end-to-end workflow.
- # of experts/re-uploads required per event cycle.
- # of manual reconciliations needed for reporting.
- % of reporting requiring spreadsheets.

Data trust indicators:

- # of version conflicts identified.
- # of discrepancies between systems (i.e., attendance, credits, completion).
- % of time spent validating versus using insights.

Scale indicators:

- Time required to publish on-demand content as volume increases.
- Time required to award CE/CME credit.
- $ of workflow steps that require specialized knowledge or workaround.

Common Pitfalls

Chasing bells and whistles instead of reliability.

- Fancy features are appealing, but if they aren't used or increase complexity, they can gradually drain time and energy from your team.
- What to do instead: Prioritize usability and stability. Most end users can pick up features that are simple when filling in for someone else.

Adding vendors without planning for operational cost.

- Multiple vendors can work, but they introduce integration complexity that many teams make up for through manual work.
- What to do instead: Choose the features you can't compromise on, then simplify the rest so your ecosystem can stay scalable.

Reporting becomes a manual project every cycle.

- If reporting requires manual support, it can become slow and error-prone, limiting your ability to use insights strategically.
- What to do instead: Design reporting as part of the ecosystem so spreadsheet stitching can be reduced and data can flow naturally into insights.

A strong ecosystem reduces friction and allows your technology to carry the brunt of the operational load. Once your ecosystem supports your team, you're ready for Play 4. This is where we focus on using the right metrics to tell a meaningful impact story.

Play 4: Measure What Matters

Measure impact across the full member journey.

Attendance and completion of education courses should be the start of your members' journeys. Those numbers matter, but they only capture what happened in a single moment. If you want to understand true member growth and long-term program impact, measurement needs to reflect how your members engage across events, education, and everything in between.

The fourth play is about shifting measurements from activity metrics to impact metrics, so you can justify investment and make smarter decisions.

What this play unlocks:

- A clearer story of member impact beyond one-time participation.
- Stronger justification for investment through outcomes over time.
- Better visibility into year-round engagement across events and education.
- Higher confidence in reporting to leadership, boards, sponsors, and stakeholders.

Measurement questions (use these every time):

1. Are members returning?
2. Are they progressing?
3. Are they engaging across programs?

When measurement reflects the full member journey, it becomes one of your most powerful tools for sustainable growth.

Implementing Play 4 (in 30 days)

Choose one program (can fall under an event or education initiative) and complete these actions:

1. Define success across time horizons: Measurement becomes meaningful when it reflects how engagement evolves over a set time.
   Example:
   Define success as:
   At event (0-7 Days): Participation and session engagement.
   Post-event (7-60 Days): On-demand consumption and CE/CME completion.
   Long-term (60-365 Days): Return participation in another program or event.

2. Build one shared grading card: This makes measurement repeatable and easier to communicate.
   Example:
   Create a one-page grading card that includes:
   Attendance and engagement indicators.
   Content utilization metrics.
   CE/CME completion.
   Cross-program completion.
   Returning engagement signals.

3. Turn data into a narrative: Data becomes invaluable when it's communicated as a story with clear direction.
   Example:
   Replace "here are the numbers" with:
   What happened: Attendees increased 12% and engagement was the highest in Track A.
   What it means: Members are seeking practical content and shorter formats.
   What we're doing next: Expand Track A into a 90-day learning pathway and promote it to new members.

4. Use measurement to guide decisions: Metrics should drive both action and documentation.
   Example:
   Use results to decide:
   What themes to expand into education offerings.
   Which sessions should become on-demand pathways.
   Which topics or formats are declining and can be retired.
   Where to invest for next year's growth.

Cheat Sheet: Metrics to Track

Engagement over time:

- Repeat logins & return visits.
- Returning attendance year-over-year.
- Time between event participation and next program engagement.
- Engagement trends across 30/60/90 days.

Content utilization:

- On-demand views per session.
- Completion rate by content type.
- Most saved, shared, and downloaded sessions.
- Utilization by audience segment (new versus returning members).

Cross-program participation:

- % of event attendees who complete CE/CME afterward.
- % of education learners who register for an event.
- Participation overlaps across event and education programs.
- Pathway progression (intro -> intermediate -> advanced learning).

Common Pitfalls

Measuring only what's easiest to count.

- Attendance and completions are useful data points to collect, but it can be difficult to use them to explain behavior or long-term impact.
- What to do instead: Add at least one metric in each category: engagement over time, content utilization, and cross-program participation.

Reporting numbers without interruption.

- Raw dashboards don't build confidence or guide effective decisions for your team.
- What to do instead: Pair every metric with meaning that answers the following questions. What happened? Why does it matter? What will we choose to do next?

Tracking too many metrics at once.

- Too many metrics can dilute your association's focus and create reporting fatigue.
- What to do instead: Start with a small set of shared metrics, then expand them once the grading card becomes repeatable and trusted.

Measuring what matters helps you show real impact. When you can tell that full events and education story with confidence, you're demonstrating true value over reporting vague activities.

Closing Remarks

Events and education are two parts of one continuous member journey, and associations that successfully connect them will be positioned to scale their impact without causing strain. By aligning goals, simplifying workflows, building a supportive ecosystem, and measuring what matters, you and your teams can create experiences that makes your members feel more connected to your association.

You don't have to change everything at once. Start with one program, one workflow, or one shared metric. Then you can build from there.

Ready to get started? Learn more here.