

## Planning for Disaster

Business recovery planning is a crucial part of any business. In today's corporate world, the effects of a long-term operations outage can have a catastrophic impact on a business and a client. The development of a viable recovery strategy can help organizations reestablish normal business operations in the event of a natural or man-made disaster. In order to survive such a disaster, organizations must ensure that they are able to maintain their critical core operational functions and be able to continue the viability of their clients within a reasonable time frame.

Statistically, the probability of an event of this magnitude is extremely remote, but the consequences of an unprepared office could be catastrophic in terms of operational impact and in the eyes of clients.

The development of a proper plan will emphasize these key points:

- Management has total understanding of the recovery plan
- Commitment from management on their roles in the effort
- Recovery of business function
- Ease of business resumption plan

When preparing a business resumption plan, an organization needs to:

- Identify weaknesses in infrastructure that could jeopardize reaching data
- Plan how to minimize the duration of a disruption to business operations
- Effectively plan the responsibilities and responses of each staff member

The key ingredient in any business resumption plan is the thorough education of employees on their roles and responsibilities should a disaster strike. Each member of the staff must be attuned to his or her specific role and course of action to ensure the con-

tinuity of responsibilities. All employees must be aware of the plan and should be provided with orientation materials that outline the plan's implementation.

The quintessential business resumption plan will include three important items:

1. Backing up of essential resources (financial, data)
2. Procedures for plan implementation, everything from the notification to the mobilization of the staff
3. Inventory of accessible resources, including equipment

Association Resources has developed a comprehensive business resumption plan to ensure that our clients maintain business as usual quickly and seamlessly. In the event of a disaster, Association Resources' goal is to have the office up and running within two days.

This past March, Association Resources' staff member Account Executive Karen Hinen, CAE gave an overview of the business resumption plan to the staff at the quarterly Munch & Learn staff meeting. This plan involves many staff members, including Peter Pagani, IT; Marcia Firetto, Human Resources; and Raphaël Deh-Athéba, Technology Planning.

Association Resources is properly prepared to open for business in the event of a disaster. Business recovery plans must keep pace with changes made in technologies and staff roles. Regular maintenance of the plan is essential in ensuring that recovery capability will occur effectively. The Association Resources business recovery plan is a living document and will continue to evolve to ensure that the same top level of service is provided to our clients in the event of a disaster.

### AR's Recovery Plan Goals

- Within two days of the event, the office is in full operation
- All clients are routed to the emergency headquarters location
- Client calendars are adjusted and conferences and events take place as scheduled
- Operation of AR is transparent to clients (all appears to be business as usual)

## Association Resources Launches New Brand, Web Site

Association Resources, Inc. has recently revamped its Web site, [www.associationresources.com](http://www.associationresources.com).

The site has been completely restructured and its content overhauled to include more information about the company and more resources for current and potential clients. While the new launch was within the past few months, it continues to be a work in progress and will grow further to provide even more information resources for our constituents.

The redevelopment of the site started with the design of a new look, which evolved into a complete aesthetic rebranding of the organization. The graphic design team developed a new logo built on Association Resources' new tagline, Building Lasting Partnerships with Associations Worldwide. The use of blocks signifies the solid foundation that Association Resources builds its relationships on, as it has done for over 20 years.

One of the key additions to the site is the use of testimonials. The testimonials have been voluntarily given by our clients for exemplary work by our staff members and acknowledge the hard work we put into meeting the needs of our clients.

We have worked hard to develop the site into a user-friendly vehicle that provides information about Association Resources. If you have any comments or suggestions, please send them to Christer Osterling at [costerling@associationresources.com](mailto:costerling@associationresources.com).

## INSIDE AR

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# Simple Truths – My Name Is George

By Martin Rotblatt, CAE, Account Executive

Association Resources (AR) conducts a quarterly Munch & Learn event for the entire staff. Since staff has grown too big for our in-house meeting room (we are now 55 and growing), Munch & Learn morning or afternoon programs are conducted off-site. The purpose of these programs is to meet AR's commitment to professional development as well as provide a forum to discuss issues of importance to the AR staff, which translates to better meeting the needs of AR clients.

The highlight of our March 9, 2006 morning program was a presentation by George Salpietro, Executive Director of the Fidelco Guide Dog Foundation, Inc. Salpietro knows firsthand about adversity; specifically, the gripping fear of suddenly losing his sight. He found himself in a familiar world, but with unfamiliar skills to navigate that world. From this adversity, he experienced the thrill of regaining his zest for life and the joy of having a guide dog provide him with a renewed opportunity for freedom and independence.

Salpietro speaks of a few simple truths, including:

- "You can't go through life with a catcher's mitt on both hands, because sometimes you have to throw something back."



- Always seek the positive. Eleven years ago at age 39 Salpietro lost his sight. After 22 years in product design with a Fortune 500 company, he lost his job. How can anyone seek the positive in this? Salpietro did. He decided that his experience taught him lessons he could teach to others.
- Even though you might have pain, it doesn't mean you have to be one!

- Don't label people – it limits their possibilities. "Blind" is not a name. His name is George and he happens to be blind. He said, "Find out what you can do in life and be the best at it as you can be."
- Don't make assumptions based on labels. People are often surprised to learn that George is blind. They often say that he doesn't look blind. George says, "What is a blind person supposed to look like?" So he whips out his sunglasses and asks "Do I look blind now?"
- Every day reach out and touch someone.
- Things that make you strong are the things that test you. The adversities and challenges and how one handles them separate the leaders from the followers. No matter what happens, George says, in most cases you are given a second chance.

The March Munch & Learn program was a great experience. We feasted on George Salpietro's energy and positive outlook. We learned from his example. He left us impressed, empowered and uplifted. He made us laugh and cry. To rephrase another one of his simple truths, we might forget his words, but we will not forget how he made us feel.

# Making the Call: Guidelines for Switching Phone Systems

By Raphaël Deh-Athéba, M.S., M.B.A.

Think it's easy to purchase a new phone system? At Association Resources, Inc., we discovered it takes more than a phone call to get a project like this off the ground.

Eleven years ago, when we purchased our Panasonic PBX (private branch exchange phone system), it was considered state-of-the-art technology and allowed us to offer a unique phone number to each client. What our system lacked was the ability to generate reports based on client usage, number of calls received per client, number of calls made on behalf of clients, and length of time on the calls. We knew we needed a new phone system. We also knew that because technology had changed so much since our last investment, we'd have some homework to do.

The step-by-step process that we followed can serve as a basis for any AMC looking to make a switch.

1. Inventory your phone system's features. List what features you like and those you don't use. Also note the features that you don't have but need. (Keep this list handy

as you can use it again later.) To cover all bases, involve staff members responsible for information technology and training in the process. Once the new system is installed, they will be the ones who need to support it and train the rest of your staff on how to use it.

2. Research available systems. There are three main types of systems:

- A PBX connects many office lines with user extensions. It is essentially your own, smaller version of the phone company's central switching office. It controls all your incoming and outgoing calls, connecting outside callers with inside extension lines and internal extensions with each other. Typically, less expensive analog phones are used and users dial nine to get an outside line.
- Key systems provide as few as 3 and as many as 90 stations. The biggest benefit for small businesses is that key systems don't require an operator to route calls. Instead, an auto attendant electronically answers the phone and connects callers to requested extensions.

- Hybrid systems incorporate features of key and PBX systems.

A key or hybrid phone system will meet the needs of most AMCs.

3. Shop around. Internet search engines are a good place to start. A simple search for "phone system vendors" will generate pages of useful links. At the top of the list is [www.buyerzone.com](http://www.buyerzone.com), BuyerZone.com, where you can submit one request and receive multiple quotes. (A word of warning: You will be contacted by a world of providers, vendors, and suppliers.)

E-mail lists, such as ASAEs, also are good places to look for vendor referrals. Members of the Finance & Business Operations Section were quite helpful in providing vendor and systems data for our research phase.

Once you have good size vendor list, you can then prompt vendors for solutions that model your organization's goals.

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## New Staff

AR's new Mail Center Administrator, **Anthony Fazzino**, joined AR in January 2006 and handles the day to day duties of the mailroom, copying, binding, metering mail, preparing bulk mailings and overseeing courier shipments.

Prior to joining AR, Tony was employed at the CT Bar Association where he ran the mailroom and copy center. His career started in engineering, designing engine components for Pratt and Whitney. In addition, he ran his own computer-aided drafting company before leaving the industry.

Tony lives in Portland with Jean, his wife of 26 years, and has two sons ages 18 and 21.



**Donna Fiorentino** is the newest member of the AR staff. She began at AR in May 2006 and serves as the Manager of Public Policy Affairs for the International Society for Clinical Densitometry. In this position, Donna will serve as the staff liaison with the client's Public Policy Committee, working to identify, analyze and execute advocacy activities relating to public policy issues. She will manage grassroots operations and write policy updates, position statements, testimonies, alerts and other advocacy materials.

Donna has most recently been a part of the Connecticut Bar Association, where she developed pilot programs for the certification of lawyers as specialists in workers' compensation law. She also represented the interests of the Association before the Connecticut General Assembly.

Donna has worked as counsel for the International Brotherhood of Police Officers, the National Association of Government Employees and has served the Connecticut General Assembly as a Legislative Attorney.

Donna graduated from Bates College with a degree in History and earned her J.D. from the University of Connecticut School of Law. She was admitted to the Connecticut Bar in 1983.

Donna lives in West Hartford with her husband, Terry, and their two children.



**Debbie Rondeau** joined the AR staff in January 2006. She works with the International Association of Campus Law Enforcement Administrators (IACLEA) as Membership Services Coordinator and with the Connecticut Podiatric Medical Association (CPMA) as Association Administrator. As a Membership Service Coordinator with IACLEA, Debbie is responsible for processing annual conference registrations and sending acknowledgements, processing new members/prospects, fulfilling publication orders, and coordinating dues invoicing/acknowledgements. As the Association



Administrator for CPMA, Debbie is responsible not only for handling/processing annual conference registrations, processing new/renewing members, and coordinating dues invoicing but also for taking minutes at Board Meetings, updating/maintaining the CPMA Web site and listserv, providing excellent and prompt customer service to its members, maintaining client databases, creating the Membership Directory, and coordinating the Radiology Courses and other CE programs.

Debbie has prior association management experience, working for two years with the Connecticut Recreation and Parks Association in Rocky Hill and at the Connecticut Automobile Retailers Association in Hartford.

Debbie lives in Newington with her husband, Joe, and her daughter, Stefanie.

**Lynn Sedlak** started at AR in April 2006, working with AR's newest client, the Association for Experimental Neurotherapeutics (ASENT) and with the International Association of Campus Law Enforcement Administrators (IACLEA).

Lynn has more than thirteen years' experience in Association Management. Prior to joining Association Resources, Lynn was the Director of Member Services for the Greater Hartford Association of Realtors® (GHAR), a local real estate organization with more than 4,000 members. While there, she managed a staff of four people. Her varied responsibilities also included staff liaison to several volunteer committees, planning all education and events and membership recruitment and retention.

Lynn received her bachelor's degree in Political Science from Albertus Magnus College in New Haven and graduated in May with her Master's of Business Administration from the University of Hartford. During her senior year of college, Lynn interned in Washington, D.C. for Congresswoman Barbara Kennelly.

Lynn is a past board member of Rebuilding Together, Hartford. She currently volunteers for the Bushnell Center for the Performing Arts and is the personnel director for the Avon Volunteer Fire Department.

Lynn lives in Avon with her husband Ken.



AR's ever-growing Digital Group has added another Web Developer, **Jason Stein**, who joined the AR staff in February 2006.

Jason has six years of experience in Web development, Web site usability analysis and design. In addition Jason has extensive experience developing and managing online marketing campaigns, campaign analysis and tests, e-mail marketing, and search engine marketing.

Jason attended Eastern Connecticut State University and graduated with a B.A. in Psychology in 1998.

Jason lives in Kensington with his wife Kim.



4. Review new phone technologies. Find out what system features are available and determine which ones best fit your organization's needs (you can refer back to the list you made in step one). We developed a mini-decision analysis, listing our criteria, and then rated each vendor against the set goals. We divided the grid into two sections:

- **Musts:** These were our hard-line requirements. For example, the system had to accommodate 55-plus people with room to grow and provide staff with conferencing and reporting capabilities.
- **Needs:** These included features that would be nice to have and in some cases were highly weighted, but not mandatory, such as conference calling capability, headset jacks, and the ability to network multiple locations.

At this point, we tried to stay away from price and focus on the systems from a best-fit standpoint.

5. Make your first cut. Select the top three to four vendors that best meet your criteria, then arrange for them to make in-person demonstrations. A live demonstration will allow you to learn more about the available features and benefits of each vendor's system. At this time, pricing can be firmed up.

6. Discuss pricing and financing options. Once you've narrowed your selections and have price quotes, develop a method to compare apples to apples. This can be easily accomplished using a pricing grid that

also includes a comparison of service structure.

Some vendors offer a trade-in discount. This discount can be negotiated to your advantage when you have bargaining power (i.e., the age or fair market value of your old system or the freedom to choose the best competitive bid).

How you pay for the new system is another matter. Leasing versus buying decisions should be made from a financial impact perspective. A basic balance sheet analysis can assist in this process:

Initial balance sheet stage. Start with a debt-to-assets ratio of 50 percent. Assuming that the planned acquisition is worth \$100, let's see the impact on the balance sheet.

- **Cash outlay.** In an outright purchase through a cash disbursement, the debt-to-assets ratio remains constant and still favorable. However, the company has depleted its working capital and consequently shows signs of vulnerability with regard to its cash flow. This option might be best for a company with a high level of cash.
- **Debt financing.** This increases your debt-to-assets ratio. Should your company require additional funds for any other purposes, lenders may be less likely to assist.
- **Leasing.** Until buyout occurs, your company does not own the equipment. In exchange for a lesser periodic cash outlay, your company rents the system to

generate revenue and consequently profit.

Consider these options carefully and make the decision to buy, finance, or lease based on your company's financial condition at the time of the acquisition.

7. Establish a transition plan. Or better yet, ask your vendor – the expert – to work with you on developing an implementation plan. Be sure this includes staff training. General information about the system can be shared with staff before the transition, and then you should conduct small training groups and schedule follow-up sessions to answer any questions once the phone system is installed.

We purchased a system (NEC Aspire) that accommodated our current environment and provided us ample room for improvement. For example, our new system can support voice over Internet protocol should we make that leap and also supports a unified messaging system, where employees can get all their messages – voice, fax, and e-mail – delivered to their e-mail inbox.

We never would have thought 11 years ago that that phone systems would integrate with our PCs.

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## Telephone Technology 101

Technology has changed how phone systems are and can be used. The following features are just a sampling of the options now available to businesses.

- **Live recording into voice mail.** This optional feature allows users to record conversations on-demand. The user simply presses a key to start the recording and the conversation is stored as a voice message in the user's mailbox. This might be used for recording board or committee conference calls.
- **Conference bridge.** This feature can handle up to four simultaneous conferences of eight parties each, or three conferences, one with 16 and two of eight, or two conferences of 16, or one conference of 32 parties.
- **Direct inward dialing (DID).** This standard feature is delivered via an ISDN or PRI (primary rate interface) circuit. DID allows a series of numbers to ring in a smaller number of trunks (lines in and out). For example, for six DID trunks, you can have up to 100 telephone numbers. The obvious benefit is not having to pay for 100 lines. Another benefit is that DID trunks channel incoming calls only. As a result, they allow staff members to use regular lines for outgoing calls. In an AMC's case, having DID trunks with

reserved lines allows the company to easily assign a personalized number to each of its clients as opposed to having to bring in another phone line.

- **Remote workers/telecommuters.** Phone systems can handle remote workers in many ways. One option is with Internet protocol phones in the worker's home, operating on a hardware-to-hardware virtual private network over high-speed Internet access. Another option also includes soft IP phones to allow traveling staff members to use a phone application loaded onto their laptop.
- **Call accounting/toll fraud monitoring.** This allows you to measure the entire communications network: inbound and outbound, the numbers dialed out and in, the caller ID, station-to-station calls, station-to-voice mail calls, and all aspects of your trunking.
- **T1/ISDN BRI/PRI voice trunks.** These functions are standard or optional depending on the system. This feature can come with circuits that if networked properly can offer an unlimited number of T1 lines, PRIs, BRI (basic rate interface) trunks, or BRI stations (usually used for videoconferencing). This would give an AMC the flexibility for needed growth in the system, either for more phones or Internet capability.

- **Networking multiple locations.** There are limits on how many locations can be networked: no more than 512. And you also are limited to 120,000 phones on the network. This shouldn't be a problem for most AMCs.
- **Least-cost routing.** A standard feature, least-cost routing is included in most PBX systems. When a user dials nine to make an outgoing call, the system decides which line to use based on long-distance rates. Additionally, local calls will go through over the local lines.
- **Alpha/numeric speed dial directory.** Every display phone has this standard feature, and both the station users' personal and/or company standard speed dials can be navigated and accessed through the phone.
- **Unified messaging.** This optional feature integrates voice, fax, and e-mail in one location, typically your Microsoft Outlook inbox. Voice messages are converted to a .wav file and sent to your e-mail inbox. Faxes also can be integrated with the voice mail system, allowing a caller to send a private fax document to your e-mail inbox. The major benefit of unified messaging is that it allows users to better manage all their messages from a centralized location. The Active Voice unified messaging tool has by far the most tight and efficient integration to Microsoft Outlook.