

# Revitalising Professional Institutes and Associations



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## Executive Summary

Professional institutes and associations are at a cross roads. They face a variety of pressures at a time when their resources are stretched. While their governing bodies consider the options a realistic and affordable way ahead has emerged.

A new model of operation could simultaneously address multiple challenges of professional institutes and associations and improve performance and standards in a number of areas. The model is based upon an established framework and the successful experience of early adopters in the corporate sector

The integrated and comprehensive approach uses a new way of managing the knowledge base of a profession, and associated tools to support the training, assessment and qualification; continuing professional education and development; communications; member updating; practice support; compliance and standards; and other activities of a professional body.

Implementation is manageable, affordable and achievable within an acceptable timescale. Benefits include greater understanding, improved performance, reduced costs, quicker responses, less stress, higher standards and enforced and evidenced compliance.

## Introduction

**Professional organisations and their members face multiple challenges. A changing and uncertain environment confronts them with both threats and opportunities. Perhaps the greatest challenge of all is how to remain relevant, current and vital. Whether or not professional bodies are successful in addressing this challenge will depend upon how effectively they embrace new ways of engaging and supporting their members.**

**This white paper considers challenges that relate to the core functions of a professional body, and how a framework for managing knowledge and professional support tools can be used to successfully address them and enhance member services.**

### Professional Bodies at a Watershed

Economic slowdown and recession have compounded the problems of some professional bodies. As fewer people register for places on courses, book advertisements in their journals, or renew their subscriptions, thought turns to ways of cutting costs.

Some go further. As others encroach upon their space – from developers of websites to serve the networking and support needs of particular communities of professionals to universities and colleges eager to offer new work and practice related qualifications and courses – they ask more fundamental questions. Can some of the traditional roles of professional bodies be sustained?

Governing bodies of professional institutes and associations face a variety of dilemmas. For example, mergers and alliances might create some economies of scale, but professional memberships are often fragmenting into particular areas of practice with distinct support requirements. While some council members call for prioritisation and focus upon a small number of top priority issues, others point out that the various functions of professional bodies are often inter-related and continuing membership and ultimate protection of the public depend upon a combination or portfolio of services.

### Key Decisions and Choices

What is clear is that the Councils of many professional bodies accept the need for change. The temptation to go back to basics and re-think the role and purpose of a professional body is tempered by the realisation that many aspects of our lives and professional and business practice, including relevant laws and regulations, assume the continuing existence and effective operation of today's professional bodies.

Perhaps the key to what needs to be done lies in the phrase "effective operation". Rather than start from scratch and re-invent a new form of professional organisation, is it possible simply to rethink current ways of operating and find a better and more effective way of undertaking the traditional activities of a professional body?

There are options – very real and practical options - that are manageable, affordable and achievable within an acceptable timescale. Certain approaches can also address multiple challenges and improve performance and standards in a number of areas.



## A Knowledge Based Approach

**One integrated and comprehensive approach ... has been effectively used with professionals and knowledge workers in over 100 countries.**

One integrated and comprehensive approach is to employ a new way of managing the knowledge base of a profession and associated tools to support the training, assessment and qualification; continuing professional education and development; communications; member updating; practice support; compliance and standards; and other activities of a professional body. It has been effectively used with professionals and knowledge workers in over 100 countries. There are over 11,000 users of one professional support tool in a single international company.

The approach makes it much easier for professionals to handle complex tasks and average practitioners can be enabled to emulate the approaches of high performers. Returns on investment of over 20, 30 or 70 times have been quickly obtained when only one or two of a number of possible outcome measures have been used. Benefits include greater understanding, improved performance, reduced costs, quicker responses, less stress, higher standards and enforced and evidenced compliance.



To illustrate what can be achieved we will now examine some of the core activities of a professional body and how the new approach can enable them to be done more effectively.

### Professional Standards

Protecting the public by ensuring compliance with the highest standards of professional practice is a priority requirement. Yet even if all members do observe minimum standards the author's continuing 'winning companies; winning people' research programme has found that among the communities of professionals observed there are usually a small number of high performers or superstars and a long tale of adequate performers.

Problems with standards of practice, especially when new developments occur, often arise because individual practitioners are not always systematic in their attendance at meetings and in perusing professional journals. Even when they do notice and read a relevant briefing they may have difficulty in remembering it, or relating it to particular situations when confronted with client problems in daily practice.

A new generation of tools can provide practicing professionals with easy access to the information and knowledge they require and day to day support to help them to adopt the approaches of high performers when confronted with difficult tasks. A thousand word overview in a journal article can be supplemented or replaced by a support package, including checklists and templates, processes and procedures, related documentation that can be bespoke for individual clients, algorithms and tools.

Such tools can build confidence and equip a professional to assess and address an unfamiliar situation. They can be used to capture and share best practice and built-in checks can ensure compliance with relevant standards. They can also be designed to raise professional standards by ensuring that users learn with each application, while on-line up-dating ensures they are kept current with regulatory and other developments.

## Education, Training and Qualification

Similar tools can be used to support the initial training, development and preparation of new candidates for the profession, as one of their strengths is helping people to understand complex requirements. Self-assessment tests can be used by students to help them judge their readiness for examination.

Direct access to a profession's continually updated repository of knowledge and best practice ensures the exposure of students and trainee professionals to current thinking and provides early exposure to a way of working that can ensure they remain up to date throughout their professional careers, while at the same time generating evidence of their commitment to continuing professional development (CPD).

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## Continuing Professional Development

The CPD requirement is an increasingly important one and this is an arena in which the latest approaches to supporting communities of professionals excel, particularly when they are operating in fields that are inherently complex and frequently changing.

Support can be off-line or on-line. Practising professionals can be provided with relevant practising and CPD support as and when they need it. With applications that can be delivered via laptops, palm tops and the latest generation of mobile phones support is available at the point and place of work, even when people are on the move.

Most existing methods of updating are relatively ineffective in comparison with the use of professional support tools. Events and courses can be difficult and expensive to organise and run. They require people to leave their place of work and inputs provided are often quickly forgotten.

Integrating learning and practice so that support is provided as, when and where required is preferable from a member perspective, particularly when it is provided in such a way as to help understanding, raise standards of practice and directly benefit clients.

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## Member Communications

Support tools are particularly suited to communication with members and can be much more accessible, current and cost-effective than traditional alternatives such as journals, newsletters, reports and events. The dissemination of technical updates can be automatic and instant. Mechanisms can be built in to allow instant and continuing feedback and the sharing of insights and ideas.

Different language versions of tools ranging from Arabic to Mandarin have been produced, which means the approach being described can be particularly well suited to the communication requirements of professional bodies with an international membership and communities of members for whom English is a second language. Tools can facilitate networking and experience sharing within particular practice, geographic or other communities.



## Supporting Professional Practice

Many members are likely to be suffering from an overload of information. Far too often they are offered general briefings when what they need is specific help and support that is directly related to individual assignments and the problems of particular clients. Receiving what they need in a format that is easy to use and understand is greatly appreciated by busy professionals. A one-off evening meeting is no substitute for on-going day to day support.

Each professional may have a different requirement, and people are also increasingly specialising in particular areas of practice. The support they receive needs to reflect this, and be capable of accommodating career moves.

The use of support tools makes it easier for the professional bodies concerned to identify areas in which members require assistance and avoid devoting effort to developing services that are not appreciated and whose use does not justify their cost

It is relatively straight forward to build support for different and distinct professional communities into a regularly updated tool, including the ability to assess the requirements of individual clients, identify and select preferred courses of action and generate any bespoke documentation that may be required. Built in checks can ensure that users cannot generate reports, forms, proposals and other documentation that do not comply with regulatory and other requirements and contain appropriate clauses.

## Monitoring Members

Should it wish to do so a professional body could monitor the use of information and support it provides. Information generated could include the proportion of members accessing a particular update and the extent to which members are fulfilling CPD requirements.

Members themselves are more likely to use a particular source of information if they are confident that it will be relevant and up to date.

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## Providing Technical Advice

Accessing specialist expertise in order to respond to technical questions from members is a challenge for certain professional bodies, and the internal staff resources to handle queries can be expensive and difficult to recruit and retain.

The experience of early adopters is that the number of people required and their level of expertise can be

significantly reduced when a professional support tool framework is in place.

Developments such as new technical requirements, regulatory changes or legal decisions can be quickly disseminated. Users can be directed to the relevant sections of long documents such as particular provisions in new and complex legislation as and when it is relevant to a particular task they are undertaking through their use of the appropriate tool.

## Managing Professional Practices

For professional practices the cost of the time taken to locate relevant information and undertake an initial analysis of a client's situation and problem can also be considerable. A consortium of eight professional practices, each of which was concerned with a particular category of risk, collaborated to produce a support tool that enables clients themselves to undertake an initial audit and assessment of risks.

The resulting risk management tool supports clients to the point at which they do require personal, face-to-face and specialist help in which case there is a link to the appropriate expert in the relevant firm. If activated the specialist receives the information that has been assembled, and by avoiding its collection can undertake chargeable professional work earlier than would otherwise be the case.

Users of professional support tools report large improvements in performance.

One company operating in a regulated sector found that tasks such as analysing a requirement, developing a compliant solution and preparing a proposal that used to take days or even weeks could be undertaken in around 40 minutes, and with only a third of the specialist support previously required.

## Revenue Generation

Because of the importance of revenue generation, many professional bodies are looking for new services that their members would both value and be willing to pay for. Because of the high returns on investment being achieved by pioneering users of professional support tools these could be provided on a commercial basis. A core tool could be provided as part of a member's subscription with supplements being paid for additional support, such as tools related to particular activities or specialisms.

Access to support tools linked to a profession's knowledge base could both attract people into professional membership and help member retention. It would also help to differentiate a professional body from other suppliers of services and educational providers, and provide the basis of new forms of collaboration with them, for example offering access on a favourable subscription basis to the alumni of relevant courses.

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## Knowledge Management Framework

Central to enabling improvements in the different areas of operation mentioned above is the use of a knowledge management framework to assemble, manage and update a profession's knowledge base in a variety of formats, which can include electronic data bases, animations, graphics, and audio and visual material. It sounds complex, but can be cost-effectively achieved using the knowledge management framework (K-frame) which has been developed by Cotoco.

An investigation led by the author which produced the report 'Managing Intellectual Capital to Grow Shareholder Value' found that many organisations were failing to exploit areas of 'know-how' and intellectual property because they were not able to capture and manage them. K-frame has been developed specifically to do this and support the knowledge based tools described which have been so successful at transforming the performance of various groups of professionals.

Professional support tools developed by Cotoco can be automatically updated and make use of animations

and graphics to engage users and help them to understand complex issues and do difficult jobs.

Because its framework for holding an underlying knowledge base is internet compatible support can be provided - and versions of tools on lap tops and palm tops can be updated - whenever people are on-line.

## Summary of Benefits

The approach described could replace and improve some of the existing services provided by a professional body and complement others. It could both embrace and offer a more accessible and cost-effective channel for the delivery of many of the core activities of a professional body. Experience of early users suggests that once set up a profession's knowledge management framework and support tools can be easily updated and managed by a relatively small team.

When in place the approach could be used to deliver specialist support services developed by partner organisations that are relevant to member needs in certain areas of practice. Firms could be offered a customised version carrying their logo and practice related information for use with their clients and prospects. Licenses could be granted by national institutes and associations to similar bodies in other countries.

Subscriptions to support tools could be sold to non-members, although if this is done thought may need to be given to whether members should pay a preferential rate, or the charging structure be such as to encourage people to seek professional membership. Given that members would be covered by relevant codes and disciplinary procedures this would provide further protection for the public.

## Implementation Issues

Experience suggests that the take up of a professional support framework along the lines described above would be relatively quick. Management of change programmes are unlikely to be required. People tend to rapidly adopt and use whatever makes it easy for them to understand something that is complex and to do a difficult job.

Orders for one CD-ROM based engineers toolkit soon greatly exceeded the number of telecoms engineers that were employed. It was realised that the tool was also being used by the managers and colleagues of the professionals for whom it had been designed because it enabled them also to quickly understand features of the company's technology and aspects of its operations that had hitherto been a mystery.

## Competitive Advantage of Professional Bodies

Huge rates of return have been achieved by early adopters of professional support tools. Unit costs fall rapidly with larger communities as initial set up costs are spread over a greater number of users.

Many professional bodies have an inbuilt advantage in that their memberships are usually much greater than the numbers of professionals employed by the largest of professional firms in their fields. Costs can be spread across practices that themselves might find collaboration to provide an equivalent service difficult to organise.

Professional bodies also have an inbuilt competitive advantage over companies and professional practices when it comes to updating a support tool or suite of tools. They generally have easier access to those whose role is to monitor developments and remain current. When commissioned on a project basis, and when people change jobs, ensuring a tool commissioned for a particular purpose is kept up to date can be a challenge for an individual commercial company or firm.



Even though Cotoco, the pioneer developer of the professional support tools described, encourages the building of automatic update facilities into the tools it provides, these have still to be managed and the content supplied. Professional bodies do not need to be reminded about updating. It is a core activity for most of them and something they just do.

## Revitalisation Checklist

- How could the knowledge base of your profession be best brought together into a single and easily accessible and undated repository that can handle knowledge in a variety of formats and support a family of tools for enhancing member services?
- How could a professional support tool be used to capture and share best practice and ensure that regulatory requirements and standards are observed and complied with at the point at which professional practice occurs?
- How could a development tool be used to make it easier for students and trainee professionals to understand complex areas of current knowledge and good practice and prepare themselves for qualification and responsible practice?
- How could a support tool be used to ensure that members receive and can access and deploy continuing professional development at times and places when it is relevant and required, while at the same time recording the steps they are taking to remain current and competent?
- How could a support tool be used to improve two-way communication with members and provide better support and technical advice to members in practice as and when it is needed throughout their professional careers? Could such a tool help members to address some of the problems they encounter when managing professional practices?
- Given the large returns on investment being obtained by users of support tools would members and professional firms pay for new support tools? As well as aiding member recruitment and retention could their development and use generate new revenues?

## Conclusion

One could argue that the new generation of professional knowledge frameworks and support tools described above can not only benefit from the involvement of professional bodies, but they actually need it if their full potential is to be realised.

Professional knowledge frameworks and support tools do more than enable existing activities to be undertaken more quickly and effectively at lower cost and provide a noticeably enhanced service to members. They also provide a new rationale for the professions and a new purpose for professional bodies.

Professional bodies can be revitalised to such an extent that the heyday of many of these institutions that originated in the Victorian age may be yet to come. They can be instrumental in creating a better future for their members and the wider public.



## Further Information

Information on professional support tools and the knowledge management framework developed by Cotoco can be found on [www.cotoco.com](http://www.cotoco.com). A summary of how best practice toolkits can benefit professional bodies and their members can also be obtained from Cotoco.

Further examples of how support tools can be used to help average professionals to adopt the superior approaches of high performers can be found in 'Winning Companies; Winning People' by Colin Coulson-Thomas, which is published by Policy Publications and available from [www.policypublications.com](http://www.policypublications.com).

The use of support tools to manage and exploit professional knowledge is also described in 'The Knowledge Entrepreneur' by Colin Coulson-Thomas which is published by Kogan Page ([www.kogan-page.co.uk](http://www.kogan-page.co.uk)) and includes a CD-ROM on how knowledge based support tools can boost performance.

The research based reports 'Developing a Corporate Learning Strategy' by Colin Coulson-Thomas and 'Managing Intellectual Capital to Grow Shareholder Value' by Sara Perrin dealing respectively with the creation and exploitation of knowledge and understanding are also published by Policy Publications and available from [www.policypublications.com](http://www.policypublications.com).



### Author

Prof. Colin Coulson-Thomas, chairman of Cotoco and a part-time academic at the University of Greenwich is an experienced consultant to the professions. A fellow of seven chartered bodies he has served as Chairman and President of professional and representative bodies. His PhD was a comparative study of professional bodies and he was the founder director of the Centre for the Study of the Professions.

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