



Evolving Through Innovation with Mary Byers

Leading Learning Podcast
Transcript for Episode 459

Celisa Steele: [00:00:03] If you want to grow the reach, revenue, and impact of your learning business, you're in the right place. I'm Celisa Steele.

Jeff Cobb: [00:00:10] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Celisa Steele: [00:00:17] If you know your learning offerings need to evolve, but you're not sure where to start or how to bring others along, this episode can help. Whether you're struggling with risk tolerance, engagement, or relevance, you're not alone. And you don't have to figure it out alone either.

Jeff Cobb: [00:00:33] This episode, number 459, features a conversation with Mary Byers. Mary is an association consultant and author of the books *Race for Relevance* and *Road to Relevance*. She's been on the show before, and she always brings grounded, practical insights for learning leaders.

Celisa Steele: [00:00:50] This time around, Mary and I talk about how learning businesses can evolve through intentional, consistent innovation. We explore what it really means to adapt and improve in uncertain times—without chasing every trend and without upending your core mission.

Jeff Cobb: [00:01:06] Mary shares thoughts on evaluating programs, increasing risk tolerance, and making change part of your culture, not just a one-time event.

Celisa Steele: [00:01:16] And we get into trends—from microlearning to AI to peer learning—and how learning businesses can respond in ways that keep them relevant and valuable.

Jeff Cobb: [00:01:26] There's a lot here to learn from and act on, so here's the conversation with Mary Byers.

Celisa Steele: [00:01:37] You've been on the Leading Learning Podcast before, and I thought it could be interesting to start with a phrase that you used the last time that you were on the podcast: "go-forward strategy." I would be curious what "go forward" means to you now, and I'm thinking especially of so much uncertainty that we're dealing with. It feels like there's political uncertainty, economic uncertainty. There's upheaval in the technology space. What do you think about now when you're thinking about a forward-focused strategy for associations and other learning businesses?

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode459.*

Mary Byers: [00:02:14] Go forward, to me, means looking out the windshield and not the rearview mirror. It means looking at trends, anticipating what's going to happen. There is a lot of uncertainty now, but the reality is there's always uncertainty. We might feel like we have certainty—maybe it's because things are a little less volatile—but the reality is we're always working in an uncertain environment. When we think about that, it's really helpful to go back to our north star. For associations, that means going back to your mission and your vision and letting that guide you. I believe that lends clarity to decisions that need to be made, and it, in some cases, may also lend clarity to things that are no longer serving the association or your members in the same way. One of the things that was a silver lining in the pandemic for associations is we took a leadership role in helping our members figure out what they could and couldn't do, what they should and shouldn't do, and that helped us have a definitive value proposition. Our north star also will help us with a definitive value proposition, and the associations that are really thriving have a strong value proposition. The ones that are just surviving really don't, and it's something that we need to take time to articulate and think deeply about.

Celisa Steele: [00:03:40] I'm hearing in your response there that go forward is about looking out the windshield, not the rearview mirror, and, to a certain extent, it doesn't matter how uncertain the times feel. That's what we should always be doing—looking ahead but referring to our north star, our mission, our purpose, the reason we exist.

Mary Byers: [00:03:58] I think that helps simplify the environment that we're currently working in. I'm not suggesting that we don't have uncertainty or volatility and that we shouldn't be asking what that means for the association and our members, but, to a certain extent, the best strategy is to focus on what you can control, and a lot of what you can't control are the things that create uncertainty in the first place. From a strategic standpoint, simplifying and asking yourself, "Is this something we can control?" and our mission and vision is. It's our reason for being, and doubling down and focusing on those areas and making an impact in those areas that are your reason for being to begin with.

Celisa Steele: [00:04:43] You've talked about the need for evolution and continually evolving. I'm curious to get your thoughts around what it looks like to be an innovative organization versus an organization that's saying, "Yes, innovation is important," without necessarily doing a whole lot to support real innovation.

Mary Byers: [00:03:40] It can be overwhelming to call yourself an innovative organization because that conjures up creating something from nothing or having the next big hit. When I talk about innovation, I like to use this very simple definition: doing something differently. When I think about being an innovative organization, I think about making a small percentage commitment to doing things differently going forward. The way that this applies to learning companies is a lot of times we use the exact same format for our learning and education that we've always used. If we're having an in-person meeting, we might change the date and the location but keep the format. There's an invitation for us to change our format, to make things a little different, interesting in a new way, unexpected, surprising our audiences—even though

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode459.*

we know they also like the similarity and the comfort level that comes along with attending events. The best way to do it is simply to say, “We’re going to change 10 percent of what we do every time we do it”—10 percent of your blog posts, 10 percent of your Webinars, 10 percent of your in-person meetings. Small changes over time lead to evolution, and then it doesn’t become a thing that you have to do. It becomes a practice of who you are.

Celisa Steele: [00:06:38] I’m guessing that 10 percent is more of a guideline than a strong recommendation. The point being, you don’t have to change everything but some significant portion, which might be in that 10 percent range, and, if you’re doing that, then you become accustomed to that as an organization, that this is something we do. We don’t just always do everything 100 percent the same way.

Mary Byers: [00:07:02] It helps your board too to recognize that this whole idea of continuous learning is part and parcel of what makes an association relevant. If you wait and have big innovations on occasions or infrequently, then it’s a higher hurdle to get your board to go along with. But, if you are constantly asking for money for your own CE on staff or money for some innovations, and that becomes part of what you do.... Many organizations have an innovation budget, or they have a percentage of their reserves set aside for innovation. If that becomes part of your habit, and you do it reflexively, then it’s built into the culture of the organization rather than having to be a heavy lift, which, a lot of times, innovation is. We decide we’re going to be innovative, and so now we’ve got to put together a team; now we’ve got to figure out what we mean, and we make it harder than it has to be sometimes, honestly.

Celisa Steele: [00:08:06] Talk a little bit about how you see things like pilots, experimentation feeding into this continuous evolution that associations should be aiming for.

Mary Byers: [00:08:16] What I love about the education space is that it’s easy to try things and place small bets, to do things a little bit differently, and then get people’s feedback. It’s not that you have to redo the entire meeting or totally change educational format. You can launch a Webinar that tries to do things a little bit differently than you’ve done before and get some feedback. With that feedback, you can recalibrate. Keep some of what you like; get rid of some of what didn’t work—understanding, though, that sometimes we have to try things more than once before we can get true feedback. I was on a call with a client yesterday who was talking about a meeting he had been to, and he said, “This is what I liked about what we did, and this is what I didn’t like about what we did.” Immediately I thought, “That is the kind of feedback that is essential to meeting planners, education planners, curriculum developers.” Sometimes we just send a survey. We hope people will fill it out. It’s really nice to talk to people as they’re coming out of a meeting or following up with them and saying, “Hey, do you have 10 minutes? I’d love to get your thoughts.” The in-person conversation, like we’re doing now, can be its own market research and is really valuable.

Celisa Steele: [00:09:40] Another thing that you often encourage organizations to think about is sunseting things that aren’t doing what they need to do any longer. With an innovation lens on that, is sunseting a way of being innovative sometimes?

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode459.*

Mary Byers: [00:10:00] I think so. A lot of people don't look at it that way because they look at the loss or the change that goes away with whatever you're sunseting. But I believe that sunseting opens up time, money, and expertise to do the innovation that you need to do. I've worked with some associations whose certifications have been on the downward trend for 10 years because perhaps another certification came up, or states no longer required the certification. And I asked the question, "If this is costing you money every year, why are you still doing this?" Or, "If you have three certifications and only two of them are doing well, why are you doing the third one?" "What about meetings that used to draw a lot of attendance that are no longer doing so?"

Mary Byers: [00:10:49] I don't think it's a matter of sunseting; it's a matter of asking, "Is there something that we could be doing differently that would help us refresh this meeting or reengage attendees? Is our marketing what it needs to be? Are we providing proper incentive? Is the timing of the meeting good?" There are a lot of things that we can be asking. Sunseting or purposely abandoning programs and education might be what you end up doing, but it doesn't necessarily have to be. You might start out with the idea that you're making a decision about keeping or not keeping, but, as you do your discovery, you might decide that there are some things that you could do that could help promote the program or service and give it a new life.

Celisa Steele: [00:11:38] Particularly in the association world, sometimes there's tension that can come out of mission and feeling like you need to be everything to everyone. As you were giving as an example, maybe there's a certification that's no longer as strong as it used to be. Talk a little bit about how you think about or help associations think about that tension and when to balance the revenue that might come from an educational offering versus what it might mean to the mission overall.

Mary Byers: [00:12:11] It's a challenge when there is a program that is a cash cow that might not be perfectly mission-related because that revenue coming in then does ultimately support mission and vision because it enables you to operate, and, in covering your operational expenses, then you can meet your mission. The best-case scenario is when you have a program that provides revenue or sometimes purposely breaks even—that can be part of your strategy too—that also meets mission. It needs to be an overall conversation and a conversation that is association-wide, not just in the learning department but in all of the departments that provide programs and services. It makes sense to take a holistic look, although each individual department can have its own conversation as well.

Mary Byers: [00:13:10] I'll also say that there's no one right way to do this. The main thing that I advocate for is being intentional and deliberate and questioning year to year, month to month, week to week perhaps, our activities that we're providing to members. Sometimes we're trying to do so much that members end up tuning out everything we do because it's just too overwhelming for them. We call it "communications clutter." If your legislative activities are competing with your education activities or competing with your charitable activities, it can be overwhelming for members. If we're not careful, they tune us out altogether. And I hear that all

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode459.*

the time from clients: “How can we get members to see the value of what we’re doing?” Part of the question is, “Are you trying to communicate too much?” And so they’re hearing nothing.

Celisa Steele: [00:14:07] Sunsetting programs, particularly ones that maybe if they’re not doing particularly well but are valued by a vocal subset of folks, that can feel risky. Risk is something that can inhibit evolution and innovation, experimentation—a lot of these things that we’ve been talking about. How do you think about talking about risk when you’re dealing with associations? Is there a way to reframe it and make it be a little bit less scary to staff or boards or other stakeholders who might be contemplating something that they think is risky?

Mary Byers: [00:14:46] One of the ways that I’ve done this with clients is to have a risk conversation. If I’m doing it with the board, I’ll ask the board, “On a scale from 1 to 5, with 1 being very conservative and 5 being willing to take risks, what number would you give yourself in your personal life, in your professional life, and as an association leader?” We ask everybody on the board to give themselves a number in each of those areas, and then we get an average. What we often find is that people are more willing to take risk in their personal life because they have full control or in their professional life because they’re paid to take risk. But, when they walk into the boardroom, they may feel risk-averse because they don’t want to be embarrassed in front of their colleagues. They want to do a good job for their colleagues.

Mary Byers: [00:15:43] Often board members will tell me, “Well, it’s the members’ money that we’re spending, and so I feel risk-averse to doing that.” It’s a great conversation for staff to have together as well, either departmentally, senior staff, or association-wide. You need to have a balance—people who are willing to ask questions, who are curious, who are willing to run small pilots, and balance that with people who are watching the bottom line and making sure you’re not getting out too far over your skis. But, if we don’t have those conversations, and we don’t know how risk-averse we are, then we don’t have a sense of what’s possible for the organization and how we need to balance experimenting. How many pilots are we doing simultaneously? What kind of expectations do we have over what they will show? Are departments working together? Are committees working together?

Mary Byers: [00:16:41] It’s so much easier to talk about innovation than it is to actually do it. I’ll be the first to admit it. But that risk conversation, and having it on a regular basis as your staff turns over, and your board turns over, being able to say, as one of my clients did, “On a scale from 1 to 5, we’re at 2.7. And we aspire to add to that. We aspire to be a 3+.” We had a great conversation about “What would it take to add a little more comfort to you as a board?” Some of it was simply as easy as having more than one proposal to look at. One proposal was more risky. One was less risky. They wanted to have an opportunity to look at both rather than having to vote one up or down. A very small shift, but it made a huge difference for the organization.

Celisa Steele: [00:17:35] What are you keeping your eye on today in terms of engagement—engagement in learning, engagement with associations in general? In particular, you maybe

have some thoughts around the younger generations and professionals that are coming into work and into potentially being members of associations.

Mary Byers: [00:17:56] We know that microlearning has been a trend since TED Talks began—the short opportunity to learn. Anecdotally, I’m hearing that new dentists are going to YouTube to find out how to do procedures, which could be good, and it could be bad. But, if you think about just-in-time education and the opportunity for associations—“I’m stuck. I need some help. Who do I turn to?” If I know I can turn to my association, there’s value then in the membership. I was working with a nursing group—it was pediatric nurses—and they were talking about when very few nurses are on the floor, and it’s late at night, and a nurse has a question about something that’s going on, where can they turn to get that information? This was years ago, before artificial intelligence. Now, artificial intelligence is, I think, both an opportunity and a threat for associations, especially as we talk in terms of younger generations. If I can go on to Claude, Copilot, or any other AI platform and get an instantaneous answer without having to log on to my association Web site or search the association Web site or go to the association online community, ask the question, and wait for answers, that’s a real threat to associations. Very similar to social media and how it changed the game for associations.

Mary Byers: [00:19:33] I also think it’s a wonderful opportunity because we have the opportunity to teach our members how to use AI, to talk about ethics, to talk about how it’s going to change in the workforce. Many associations that I’m familiar with now are building their own bots. I can go ask my association the question, very specific to my industry, not a general question, but a very specific question—that’s an opportunity. I know of some organizations that are building AI study buddies. So, if I am studying for an exam or a certification or simply have a question, I can go to a vetted source that I know has been updated, and it’s using the current material that I need to know—the rules, the laws, the regulations, the requirements—and I can find it from a reliable resource, and that is my association, again, that has value. So I’m really looking at microlearning. I’m watching what AI is going to do, but I believe that everything that’s a threat to an association is also an opportunity.

Celisa Steele: [00:20:44] That partnership between associations and AI that you were pointing towards does hold a lot of potential because when you marry up that instancy of the AI, but you have that vetted content that associations can usually bring to bear and have all the subject matter experts having it up-to-date, then that’s a very, very powerful combination. Then we get additional tools too that can then serve up that content. It doesn’t have to just be a text chat with a bot. You can have podcast-style content generated on the fly for that learner. It’s really interesting and exciting, and I’m looking forward to seeing where things head over the next few years.

Mary Byers: [00:21:27] I am curious what you’re seeing in your environment, from the AI standpoint. There are the aids that help us, but, if you are an association or institute of higher learning, and you’re providing continuing education, where would you say we are in the

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode459.*

process? I think we're still very early. There's a lot of interest in watching, but do you see a lot of people jumping in?

Celisa Steele: [00:21:53] You're right to say that we're fairly early on. Back to what we were talking about earlier, there's some experimentation and some pilots going on, and people are trying to figure out where things will land. Of course, that is further complicated by the fact that these tools are changing so quickly. What's working now in the current pilot or current experiment could be very different from what's possible just a few months from now. That is an added layer that is interesting to follow. But one of the things that particularly an association learning business has to potentially capitalize on is community. When you want the human interaction, that human mentor, yes, to a certain extent, a chatbot can simulate that or give you that feel. But, if you really want that connection—it may be a cohort of learners going through an experience together, supporting each other, not only with content but emotionally—then that's an area where associations certainly have a head start over something like a more generic AI tool—ChatGPT, Copilot, or anything like that.

Mary Byers: [00:23:07] I'm glad you brought that up because I think peer-to-peer learning is an opportunity, and I don't know that we do enough of it in associations. I've had the privilege of facilitating a couple of mastermind groups, and I love the ability to take a cohort, meet monthly, quarterly, and do deep dives in topics of interest and to challenge each other and to learn from each other. Frankly, I don't understand why more associations aren't starting their own masterminds. We're certainly seeing for-profit companies do it. Consultants do it. Vistage does it. EOS does it. A lot of groups are doing it, and yet we have the subject matter experts in our associations. We have the ability to organize. We have the ability to pull together. That's a real opportunity for associations going forward too, especially in the impersonal environment of AI.

Mary Byers: [00:24:08] But, as you said, that whole opportunity to learn together with colleagues, to learn with and from, but also the peer-to-peer learning aspect of it too, so it's not just a sage on the stage, but it is an opportunity to hear some learning, then to personally decide, "How does this affect me?" and then to talk with colleagues and debate with colleagues to decide, if this is good information, how we can use this information. "What's the takeaway from this new learning that we've done together?" There are real opportunities for associations there. And that's not the typical learning that we've done before.

Celisa Steele: [00:24:50] We're in the process of talking with a number of association CEOs about the role of learning—the broad umbrella of things that go into learning—and also the role of education, so a little bit more narrowly, more of the formal experiences, but the role of learning and education in the association's value proposition. You work with association boards, association leaders, and so I would love to get your perspective. How often does learning and/or education come up as an aspect of that overall association value proposition?

Mary Byers: [00:25:28] If you look at association mission and vision, you'll see it baked in. I was working with a CPA organization recently, and their vision says they want to be viewed as leaders in professional competency. The only way that you can be a leader in professional

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode459.*

competency is if you are providing education and learning on an ongoing basis for your members. Their mission also says they want to contribute to the success of their members. I don't know how you contribute to the success of your members if you're not educating them, helping them learn, helping them look at what's ahead. Many medical organizations, part of their mission is to improve patient outcomes. I don't know how you improve a patient outcome if you aren't helping your physicians with their continuing medical education requirements and emerging best practices when it comes to specific illnesses or diseases. I think it is part and parcel of who we are, and sometimes, if we haven't specifically stated it, it's worth recognizing it because, if it doesn't say "education" in your purpose, we have to recognize the value of education in helping us with our mission and purpose.

Celisa Steele: [00:26:51] That's definitely consistent with what we're hearing. It is usually baked into the mission at some level—the importance of learning or education—which then points to the association's need to help provide that learning and that education. You've been doing this for years at this point, so have you noticed any change in the relative value or importance placed on learning or education over the time, or has it been pretty much consistent in your time working with associations?

Mary Byers: [00:27:20] It's been pretty consistent. Perhaps—and this is a blanket statement—the revenue opportunities for education have shifted. I know for a fact that the competitive environment has gotten more challenging for organizations because associations used to be the primary way that members were educated, but now we have competition from sometimes the association's consultants. Sometimes the organization that the member is part of itself is doing more in continuing education. We have for-profit companies that are offering certification and education. There is more competition than there ever has been before, and I think that's challenging associations because part of our question is, "Do we have the capacity to keep up with the rapidly changing environment?" And, as you just said, what we're looking at with AI now is going to be different in a matter of months.

Mary Byers: [00:28:25] In some ways, it feels to me like the train has left the station, and we are running after the train trying to catch it. That's why we need to be looking through the windshield and not looking at what education was yesterday but where the possibilities are going forward. The landscape has changed. I don't think the importance has changed. We're more revenue-challenged than we've ever been before. Some discussions about that. If your education provided a profit, and now it's providing less of a profit or break-even, there's value for a discussion. If it's part of our mission to educate, then maybe break-even is okay, maybe smaller revenue is okay, and, as we talked about, maybe there are some programs that need to be sunset so that we have the necessary expertise, capacity, time, and financial resources to invent the future of education for our profession or industry.

Celisa Steele: [00:29:26] We're talking about the learning that associations can provide. You yourself exist in the world, and you need to continue to learn and evolve. I'm curious to hear about how you approach your own lifelong learning, Mary. Are there sources, habits, or practices that you go back to?

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode459.*

Mary Byers: [00:29:43] I have an education process map that I use annually, and I'm happy to share it with you, and you can share it with your listeners. It helps me identify each year what I need to learn and takes me a step further and asks, "Where can I learn that? Is it something I can learn in small bites in a little bit of free time in my office? Would it make more sense for me to go do a deep dive? And, if I'm going to do that, who am I doing the deep dive with?" At the beginning of every year, I set some learning goals. I'll confess I haven't hit 100 percent of those learning goals, but I hit more than if I wasn't setting any goals to begin with at all. For me, it's very intentional and deliberate. Where do I feel like I'm falling behind? What do I need to know? For me, I'm asking, "Where are my client's being challenged, and how does my education need to change so that I can help them in those challenges?"

Celisa Steele: [00:30:47] Would you be willing to give us a glimpse of what you're focused on this year in terms of what you're trying to learn?

Mary Byers: [00:30:54] Absolutely. Just for fun, I'll let you know that I set professional goals, but I also set personal goals. One of my personal goals is I would like to learn to surf next year, so that's in the future. For me, AI continues to be an important piece of my learning, partly because it is changing so rapidly. I help facilitate a mastermind, and that is how I am reaching that goal, by leading that mastermind. I'm not the subject matter expert, but I'm being exposed on a monthly basis to learning in that area, so that's how I'm meeting that challenge. Another thing that I have identified as being important is looking at how for-profit companies are developing strategy and making sure that, as I help associations with their strategy, what we can learn from for-profits is coming into the not-for-profit arena. But also I'm challenging myself to make sure that the process that I'm using is as up-to-date as possible. And, as I see an opportunity for improvement and change, then I'm borrowing from what I'm learning in the strategy environment. I've taken two different strategy classes this year. It's been interesting for me in affirming that I'm where I need to be there, and sometimes that's the purpose of education too—it's not to learn something new, but it's to affirm what you already know, and I think there's value in that too.

Celisa Steele: [00:32:25] We've covered a fair amount of ground in our time together. If you were to try to pull out one to three things that you are hoping listeners might take away from our conversation, what would you highlight?

Mary Byers: [00:32:38] I would go back to focusing on innovating in small percentages, whether it's 10—a number that I just pulled out of the air because I thought it was doable. For some organizations, it might be 5 percent. Other organizations who've gotten behind, it may be 30 or 40 percent. If you innovate small percentages regularly, that naturally leads to evolution, and that's healthy for organizations. The second thing I would say and repeat is that threats are also opportunities. I mentioned the threat of AI, but there's a teaching opportunity there. We can use AI for things like study buddies, help with certification prep. Anywhere that's a threat, take a step back, and look at where the opportunities are. And then the last thing that I would say is that comfort and complacency are associations' biggest risks, both on the leadership side and on the membership side. When members have become comfortable and complacent with our

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode459.*

programs, services, and offerings, and they're not taking advantage of them, that's not good for the association. And, if our leadership, either on the staff side or the board side, has become comfortable and complacent, and they're not innovating, and they're not doing pilots or placing small bets, then that is a surefire way to become irrelevant very quickly. It's really important to make sure that we haven't gotten too comfortable or complacent and that our members haven't.

Jeff Cobb: [00:34:30] We're not done quite yet—keep listening for our recap.

Celisa Steele: [00:34:33] You'll find show notes and a transcript at leadinglearning.com/episode459, along with a link to Mary's Web site, where you can learn more about her work.

Jeff Cobb: [00:34:43] If you got value from this episode, please share it with a colleague or leave a rating and review. Those things help others find the show and support the work we're doing on the Leading Learning Podcast.

Celisa Steele: [00:34:55] Mary shared a lot of helpful advice. One point that stood out for me is that innovation doesn't have to be flashy or a big breakthrough epiphany. Small, consistent changes can add up to real evolution.

Jeff Cobb: [00:35:09] She also made the point that every threat also presents an opportunity. This is why so much strategy work focuses on really understanding the situation, so that threats can be seen, and opportunities teased out. As you and Mary discussed, AI, for example, may be a challenge, but it's also a chance to better serve learners.

Celisa Steele: [00:35:31] Lastly, I'll echo Mary's assertion that comfort and complacency are real risks, for leaders and for learners. Staying relevant requires intentional action and sometimes uncomfortable change.

Jeff Cobb: [00:35:46] Thanks again for listening—and see you next time on the Leading Learning Podcast.

[music for this episode by Moarn]