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CASE STUDY: THE ASSOCIATION OF ACCOUNTING TECHNICIANS (AAT).

The Association of Accounting Technicians (AAT) is a professional membership body with around 140,000 members in more than 90 countries.

In early 2017 AAT proposed a set of developments to its members, including revising its governance structure and changing the sponsoring body relationships AAT had in place for many years. Given the significance of the changes, AAT felt it was important to engage its membership earlier in the AGM process than they have in previous years. They wanted our recommendations to increase membership engagement during this process.

OUR RESPONSE TO THE BRIEF:

We built AAT an AGM platform with enhanced feedback functionality and customised the ERSvotes platform to include a video from AAT's President, as well as supporting information about the governance changes. The site architecture was intuitive and the platform enabled members to submit qualitative feedback about the proposed changes.



The feedback submitted by AAT's members was securely hosted by ERS. Sister company MES then conducted detailed research and analysis of the responses. The output was a fully coded report detailing member insight and sentiment in respect of the proposed changes.

With the benefit of this insight, AAT issued an additional communication ahead of the AGM and proxy voting process, responding to the comments raised by members. The ERSvotes platform was used to host all information about the AGM and to facilitate proxy voting before the AGM. The dialogue was continued with members that attended the AGM before they voted in the meeting.

RESULTS:

- The voter turnout for the 2017 AGM was the highest it had been in recent years and the resolutions were all passed with a significant majority.
- The majority of the proxy votes were cast through the ERSvotes digital platform, although many still chose to return a postal proxy form.

“Having worked with ERS for a number of years they were the natural choice to help us raise awareness and understanding of significant governance changes ahead of our AGM. The digital platform enabled the process to be managed online, enhanced our communications and ultimately raised member engagement. The success of the project, which was supported end to end by the team at ERS, was evidenced by increased voter turnout and members' approval of resolutions presented – objective achieved!”

Karen Marshall - The Association of Accounting Technicians (AAT)

“We believe that this pro-active approach to member engagement and dialogue ahead of the ballot was a contributing factor to the success of the project. We are proud to have been helping the AAT with governance and democracy since 2009 and look forward to helping them increase member engagement further in future.”

Sian Roberts – ERS Chief Executive