ACL USER GROUP

manifesto

2017

acl

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foundation

ACL User Group Objective

An ACL user group is a platform created by users for users. Its main objective is to provide social and educational resource for ACL users of all levels.

ACL user groups are meant for ACL AN, AX or GRC users. It is intended for its members to learn more about the product and how their peers use it regardless of the industry they belong to. User group members get the opportunity to share their success stories, best practices, pain points, partake in discussions and network with their fellow audit, risk, compliance and finance peers to build a strong community in their local city or region.

ACL user groups are casual. There is no expectation to have a formal structure with by-laws and officers and voting quorums. If any group wishes to do that, then by all means they are free to do so.

It is important to note that ACL User Groups should never be used by leaders or members as a venue to promote businesses, or products, or services.

ACL USER GROUP

being a leader

Eligibility and Requirements

We require the leader to possess an active ACL license under an active subscription. We highly encourage professionals who possess an ACDA Intermediate – Level 4 and/or who have been using ACL actively for at least 2 years to become leaders of user groups.

Time Commitment

Since leading and being a member of a user group is 100% voluntary, we suggest, but not oblige, leaders to commit about 2 hours per week to maintain the group. This includes planning upcoming meetup, promoting upcoming meetup and engaging with members on the ACL community.

Co-Leader

Having a co-leader is not essential but highly recommended. This will help ease the load of managing the group especially if the group becomes hyperactive and starts growing bigger. Co-leaders could be from the same company where the primary leader is from or from another organization within the same city/region.

Customer's List

Due to our privacy policy, we regret that we are unable to give user group leaders access to the list of ACL customers in the city/region. ACL can help send an email inviting customers under active subscription to join the user group from their area.

Speak at Our Events

We expect user group leaders to actively participate in ACL organized events near them. This could be in the form of speaking at our events or promoting our events within their user group.

Connect with Other Leaders

We encourage that you connect with other user group leaders to learn best practices. To facilitate this, we have platforms ready for user group leaders to use for networking and share best practices. Check out the "User Group Leaders" group under Peer Community in Launchpad.

ACL Channel Partners Leading a User Group

We allow our channel partners to lead user groups in their area if there really is a high demand. We would want to ensure that such groups remain an education and social resource for our customers and users. User Groups are not intended to be used as a marketing/sales platform to drive leads or traffic to any of their corporate assets.
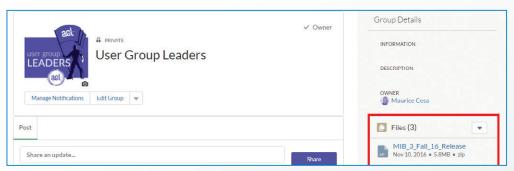
READY TO BE A LEADER?

Apply here. Please fully read the guidelines to ensure you accept the terms of the program. Applications will undergo approval process. We will notify you in 3-5 business days whether your application is approved or rejected.

acl support

Content

We provide meeting content in a form of MIB (meeting-in-a-box). MIBs contain a specific topic with PowerPoint presentation and exercises included. We also inform the user group leaders of product releases ahead of time. This way, we give the leaders a chance to communicate to their members exciting releases as soon as possible.

MIBs can be accessed inside the User Group Leaders group in Community under "Files". Here's where you will find it in the channel.

Activity Promotions

ACL will help promote any of your activities through a variety of ways. This includes email blasts, social media, ACL Community, and an event registration page for your meetup, to name a few.

We encourage that you let us know of your upcoming events so we could also promote and post it on our events calendar.

Logo

ACL will help create logos for the user groups. Once a leader has been assigned and the application has been approved, we will create a logo for the group and ensure that their group is included and logo is displayed in all user group assets.

After which, we will then create a group in ACL Community that they can use to facilitate conversations with their members.
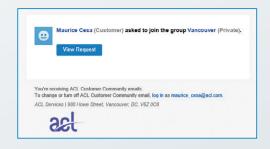
Community in Launchpad

New Release ACL has invested in platforms to serve our customers better. We now have a platform inside Launchpad to better facilitate user group discussions. Please ensure that you visit https://community.acl.com/s/groups and start connecting with your peers.

Membership Alerts

ACL user group leaders will receive an automated alert for every new membership request. User group leaders will have to log in to Community and approve such membership requests.

We also encourage leaders to reach out to these folks and give a brief information about the group or inform them of any upcoming meetups.

Here's a preview of how the alerts would look:

Certificate of Completion

ACL can provide certificate of completion to every member attending an online or physical meetup. Please ensure that you submit a timed agenda, electronic copy of the attendee list with email addresses together with scanned copy of the actual attendee list with wet signatures. Certificates of completion will be sent via email 1 week after you submit the required documents.

Subsidy

ACL provides $10 per head to help cover meetup cost. Keep in mind that we require a minimum of 6 people attending a meetup for you to qualify for subsidy.

After a meetup, please ensure that you submit the documents below:

1/ Expense Claim Template could be found here. (acl.box.com/v/UG-expense)

2/ Excel template for expense claims (1st tab)

3/ Excel template for attendee list (2nd tab), not your registration list

4/ Scanned copy of receipts saved in pdf format or line item of your credit card statement

5/ Scanned copy of attendee lists with wet signature saved in pdf format

Email all materials to usergroup@acl.com and we will process your reimbursement and submit to our finance department. Please expect a turnaround time of 3-6 weeks for your cheque to be prepared. Cheques are sent out via mail/courier.

Alternatively, if you select a commercial locale such as restaurants, coffee shops, brewery, etc, you may inform us at least 2 weeks in advance and we can arrange the payment straight to the venue via means of credit card. We will still require 2-4 list of documents above within 2 days after the meetup.

Connections, Customer Conference

We provide a fully paid registration pass for Connections to all user group leaders as long as they have led a group for minimum of 2 years. We also extend a $200 discount off the current registration rate to all members of user groups.

ACL USER GROUP

planning a
meeting

Overview

Meetups are 100% organized and planned by leaders and/or co-leaders. There should be no expectation that ACL will help plan logistics for your event. However, ACL is more than glad to provide support by:

1/ Promoting your meetup via email send

2/ Sending experts from ACL to your meetup – if time permits (this is only applicable if any of our experts are flying to your city that coincide with the date of your meetup)

3/ Send swags and giveaway items for your event

4/ Create an event registration page for your event

If you have any meetups coming up, we highly encourage that you inform us to help you plot your event in the calendar provided here. Please note that our ability to support a meetup is never guaranteed but we will try out best to accommodate the request.

Meeting Frequency

Anywhere from monthly to quarterly, dependent on group demand and availability as well as accessibility to free meeting locales.

User groups meeting at least 4 times a year is considered active and anything less than that is considered inactive. Please do inform ACL or ensure that you plot your events in the calendar provided about your meetings so we can properly track this.

Meeting Attendees

We will require at least 6 people attending a physical meetup to be able to qualify for subsidy.

Meeting Location

The majority of the meetups happen in a member's office space, auditorium or conference room. This method works best as there are no rental fees incurred. If renting a space is inevitable, we encourage that leaders look for something low-cost and casual such as coffee shops, restaurants with large enough room, breweries, and schools to name a few.

Meeting Duration

Meetups generally last anywhere from 1-4 hours. We suggest that you keep the meeting as short and relevant as possible to be respectful of your members' time.

Day and Time of the Week

We recommend picking a date that is mid-week. Be aware of major holidays as people tend to travel, which can affect your attendance. Your best bet would be to choose a Tuesday, Wednesday, or Thursday date.

Ultimately, there is no secret formula when it comes to planning your user group meetups. It all depends on what works best for you and your members. You have various options – you may opt to schedule a meetup for breakfast, brunch, lunch, afternoon or after work.

Suggested Requirements

» Create a meeting agenda

» 1-3 speakers, preferably from different organizations and levels...welcome any ACL topic when looking for speakers

» One meeting emcee

» Free/paid meeting venue with laptop projector (internet not necessary, but projector is necessary)

» Enough seating for attendees is recommended, tables are suggested.

» Provide refreshments for everyone either through purchase option or by bringing with them, depending on the venue

» Ensure electronic and manual attendance sheets are in place

Suggested Agenda

» ACL News Provided by ACL & any User Group News (Emcee/User Group Leader typically shares these)
  – Minimum: 10 minutes
  – Maximum: 1 hour, depending on whether you want to demo new ACL features

» Speaker presentations (formal or informal, as each volunteer speaker prefers, MIBs)
  – Minimum: 10 minutes per speaker
  – Maximum: 1 hour per speaker

» Group Discussion Time (facilitated by Emcee)
  – Encourage attendees to submit questions ahead of time &/or during meeting. If there is a lack of discussion, emcee should bring up various Launchpad features and new ACL enhancements/products and ask if anyone has used each one, and if so, what their opinion was. This will often get the conversation rolling.
  – Minimum: 30 minutes
  – Maximum: 1 hour

» Networking
  – Encourage attendees to eat and network and chat about ACL
  – Minimum: 30 minutes
  – Maximum: Use Discretion

ACL can help issue Certificate of Completion after every event. Timed agenda and completed sign-in sheet will be needed by ACL to process such certificates.

Non-ACL Users in Meetups

All are welcome to attend as long as they are interested in the topic at hand and bring value to the meetup. Please note that non-ACL users will not be granted access to the ACL Community in Launchpad which means they don't get the opportunity to actively participate in online discussions. Leaders would have to monitor these individuals and ensure that they are invited separately during meetups (if invitation is done in ACL Community).

promoting a meeting

Timeline for Promoting

We recommend giving user group leaders at least 4 weeks of promotion. This gives the customers in the area plenty of notice and helps maintain your attendance numbers.

Best Practices for Promoting

Promote your meetups in ACL Community and through your personal social media channels. Take note of non-ACL users who might not be in Community, ensure that they receive the invitation should you need to do it differently amongst the rest of the group.

Also, please keep in mind that sending reminder emails a day or two before the meetup is effective in keeping your attendance high.

ACL Promoting Support

User group leaders should ensure that they notify ACL about their planned meetups. On behalf of the group, we can help craft and send one invitation email to members and active customers in the city/region. The email will include links where they could register to attend for the event.

ACL can also provide an event registration page for your event. Please send your request at least 4 weeks in advance before the promotion pieces go live.

We will need this information:

1/ Event Name

2/ Event Date

3/ Event Venue

4/ Event Speaker and Brief Bio (Optional)

Email such request to usergroup@acl.com. Last minute requests will not be honored.

Here is a sample of how the event registration page will look:

We encourage that you let us know of your upcoming events so we could help promote and post it on our events calendar.

post meetup actions

Reimbursement for Subsidy

Please see Subsidy section of this document.

Follow-Up with Attendees

Feel free to share any relevant meetup information, event recap, photos or videos to those who have attended the meetup.

We encourage that you include ACL in the follow-up emails so we share your success as well.

Plan Ahead

Plan your next meetup ahead of time. It is always best to have the dates picked out in advance so members can save the date and mark them on their calendars. Try to set a goal to announce the next meetup date at every meetup. The more time you have to plan your meetup, the more successful it will be.

in a nutshell…

User Group Leaders' Responsibilities and Entitlements

Maintain group activity by:

1/ Facilitating discussions in your local user group channel in Community

2/ Maintaining an accurate list of your members

3/ Organizing a minimum of 4 events (online or physical meetup) per calendar year

4/ Ensure that each event will have at least 6 people attending and all post-event activities are done in a timely manner

In return, leaders and co-leaders are eligible for:

1/ First notice of ACL's product releases and content enhancements

2/ Complimentary registration to our annual user conference, ACL Connections, plus an exclusive dinner with other user group leaders and co-leaders

3/ An exclusive icon in ACL Community to signify your leadership

If your group becomes inactive, ACL has the right to take away such privileges without prior notice.

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