

# Case Study - AFOA Membership Survey

## Company Environment

The Australian Financial Operations Association Limited (AFOA) is the industry association representing the full range of financial operations activities undertaken in Australia. AFOA provides their Members with the opportunity to discuss relevant industry issues and gain information on a wide range of operational issues. As a world leader in establishing industry standards for treasury operations and defining global best practice, AFOA has also played a significant role in the implementation of industry training and professional development programmes.

Axis was established by the Australian Government to promote Australia as a regional financial centre. Axis supports financial services companies who are contemplating establishing or expanding their activities in Australia, provides advice to Government on policy, regulatory and market structure issues, and liaises with the private and public sectors on matters affecting Australia's development as a global financial services centre.

## Business Challenge

Future Platform was appointed by AFOA and Axis to design and distribute a survey to gather information that would allow AFOA to profile its member base and develop a greater understanding of their members' operational capabilities. AFOA wanted to use the data to drive internal initiatives, provide their member base with practical information, and contribute to raising the association's profile. Axis, as a key financier of the project, wanted to gain an accurate understanding of members' operational activities.

## Evolution in partnership with Future Platform

### Stage 1

Gathering Information - Future Platform to confirm survey objectives through discussions with the client and then formalise content priorities.

### Stage 2

Draft report dimension development and question development

### Stage 3

Communication session with internal stakeholders to discuss the items developed in Stage 2

### Stage 4

Incorporating all feedback provided, produced second draft level content for distribution back to those involved in development process

### Stage 5

Internal pilot distribution of final content to select individuals

### Stage 6

Distribution of survey to all AFOA members

### Stage 7

Live period for survey completion

### Stage 8

Collation of data and subsequent reporting conducted by Future Platform for feedback to members through AFOA's website, presentation at the Sibos Conference, media release

## Business Benefits

- AFOA gained an accurate profile of its member base and members were given the opportunity to provide feedback around AFOA's service provision so AFOA can now address any concerns or suggestions raised, leading to increased member satisfaction
- Axis has a clearer understanding of the operational activity of Australian based operations so can now promote Australia's role in global financial markets with more objective facts