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The Navigator for Enterprise Solutions

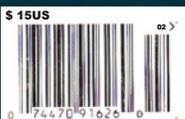## MICROSOFT
PARTNER
EDITION

BOB ALVES,
CHAIRMAN & CEO

ADVANCED SOLUTIONS INTERNATIONAL

IMPROVING MEMBER ENGAGEMENT THROUGH INNOVATION

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Successful nonprofits, including associations, charities and similar organizations offer invaluable service and support to communities everywhere. But their work can only reach the outside world if their internal operations are managed with efficiency and acumen. To a large extent this means engaging members and donors, the lifeblood of nonprofit organizations. In an increasingly complex world, the right technology is crucial to the survival of nonprofit entities and the achievement of their missions.

Advanced Solutions International (ASI) is a specialist in the field, offering software solutions specifically designed to address the needs of nonprofits of all kinds, including associations, charities, unions, clubs, regulatory agencies, faith-based organizations, and others. Cloud-based, professionally packaged and highly flexible, iMIS EMS is the only Engagement Management System (EMS) in this market. Designed to engage, it looks outward and inward, enabling dynamic, ongoing interactions with constituents, while keeping internal staff on a path of continuous learning and performance improvement.

PROVIDING A 360 DEGREE VIEW
Designed specifically for nonprofits, iMIS mitigates numerous challenges by various types of organizations including nonprofit corporations, trusts, and unincorporated associations. These organizations face

certain unique challenges. Typically, they are governed by a board of directors. The board directs a team to manage and operate the nonprofit. But, when compared with leadership teams at commercial businesses, management teams at nonprofits tend to serve for relatively short periods of time, usually giving way to a whole new team. These frequent changes in leadership present a great challenge to operational consistency and stability which can have a negative financial impact. By deploying its solution, ASI not only facilitates the day-to-day nonprofit activities, but it also keeps its clients on an uninterrupted, ongoing path of continuous performance improvement, despite the uncertainty caused by frequent leadership changes. "No matter who comes or leaves, our system continues to work and drives the organization forward," says Bob Alves, CEO of ASI.

iMIS EMS comes with numerous, unique benefits, primary among them is the fact that the fabric of the system naturally expresses client constituent data through a web portal. No other product has this capability. iMIS EMS is designed to build engagement. The solution alleviates the inefficiency of data silos by bringing member or donor data into a single easy-to-access repository. Since data is readily available through the portal and always up to date as of the last keystroke, staff can easily obtain a 360-degree view of all relevant information. This includes member or donor past financial transactions. With iMIS EMS, membership and donor-centric organizations can ensure transparency in financial dealings with minimum effort. Using the web portal, members and donors under their own personal views can update contact information, subscribe to new services, make donations, renew dues, make product purchases, sign up for continuing education classes and conference registrations, and engage in any of the other ways organizations interact with their constituents.

ACCOUNTING COUNTS

iMIS EMS in the Cloud enables nonprofit organizations to run campaigns promoting various causes more frequently. The solution works like a souped-up CRM system -- with greater appeal, power, and reach -- that optimizes the organization's ability to promote and manage its constituent activities, including payments and donations, while managing personalized engagement at the highest level. ASI understands that most nonprofits lack enough in-house IT staff to manage various processes simultaneously. For that reason, ASI's solution takes care of accounting, manages general ledgers, and handles cash receipts and billing. All of this is properly integrated and follows accounting best practices. "Our solution acts as a CRM system and a cash receipts system at the same time," says Alves. The solution handles complex accounting processes such as cash receipt management and more. Many nonprofits dabble with using systems built on generic CRM-based software to handle accounting processes. These efforts fail because they do not

address the unique accounting practices followed by nonprofit organizations. This happens primarily because these generic CRM-based systems focus more on the CRM side than the accounting side, which is vital to the nonprofit's survival. Unlike iMIS EMS, none of them are designed from the ground up as a properly integrated financial system for nonprofits, resulting in costly workarounds and lost revenue.

ENGAGEMENT AT EVERY TURN

ASI's iMIS EMS solution comes with an integrated web content feature set that is layered within the database functionality resulting in a unique and powerful capability to quickly and easily create complete web pages populated by data from the member/donor. This unique and powerful layer of technology is named RiSE because it lifts the experience of all users – members, donors and staff – and continually moves the organization towards achieving its goals. Uniquely, RiSE is at the foundation of iMIS EMS, but also in evidence throughout the system, in its farthest reaches. It's what makes obsolete such distinctions as "database" and "website" while facilitating the data interactions for organizations with other external public facing websites. The capabilities of RiSE enable an organization's database and website to interact. This allows clients to communicate and interact with their respective constituencies faster. Moreover, RiSE like all of iMIS EMS, can also be used together with all Microsoft tools, including Microsoft Office and Microsoft 365.

Since ASI integrates MS Office and Office365 with iMIS, most client staff with minimal IT skills can become productive with iMIS. Users can easily enlist the option "Query" from the menu, to generate a report in Excel or create a mail merge list with MS Word. In addition, ASI integrates Outlook with iMIS EMS, enabling the staff to access email addresses directly through the solution. This function increases the data accuracy and system proficiencies significantly. RiSE joins with the iMIS CRM and Accounting capability creating a unique and powerful Engagement Management System.

> ## "No matter who comes or leaves, our system continues to work and drives the organization forward

PURPOSE-BUILT FOR NONPROFITS' SUCCESS

ASI comes with two versions of the engagement management system: iMIS Enterprise and iMIS Professional. iMIS Professional is built for associations and charities that employ a small staff. The solution comes with standard implementation methods that allow clients to get up and running in just a few weeks. On the other hand, the iMIS Enterprise versions of the solution allow for extensive configuration and tailoring that caters to specific client requirements. ASI presents affordable and reasonable subscription plans for all its clients.

ASI and its unique channel of implementation partners apply agreed-upon standards that limit the need for customization as it can hinder upgrades and defeat the purpose of moving to the Cloud. Plus, so much of the nonprofit core needs come directly from iMIS that customization becomes an unnecessary cost. ASI leverages an extensive network of Authorized iMIS Solution Providers (AiSP) and Microsoft partners to facilitate expert usage, support, and extension of the software, including major functional add-ons.

In one instance, the Centre for Veterinary Education (CVE) at the University of Sydney collaborated with ASI to boost member engagement. After deploying iMIS EMS in the cloud, this client successfully maximized offerings given to its members. The client found the reporting functionality and the accessibility of the database indispensable as they provided real-time actionable information to help members. "iMIS is a great platform, really suited to all aspects of our organization," said the happy customer.

ACHIEVING GREATNESS THROUGH INNOVATION

ASI's customers found iMIS EMS extremely beneficial in the wake of the COVID-19 pandemic. Customers accelerated cloud migration to facilitate remote work. They continue to move to the subscription model as it opens up ways to mitigate the impacts of the pandemic, while relieving cash flow pressure. As the restrictions on live events continue in many regions, several associations are looking to find alternate ways to conduct events, and iMIS EMS in the Cloud is perfectly suited to make that happen. ASI helps such clients set up virtual events using its system.

ASI has been serving its clients for over 30 years. The secret sauce to the company's success is its founding principle: keep the client happy forever. "We help our clients achieve great things by providing innovative solutions," says Alves. The company also hands out numerous awards to clients as a token of gratitude for achieving great things with iMIS EMS. At ASI, all employees share three core values: excellence, courage, and respect, and these values form the roots of its corporate culture. Moving ahead, as many nonprofits are sometimes a little late when it comes to technology adoption, ASI plans to help by facilitating their migration to iMIS EMS in the Cloud. By doing that, the company aims to keep assisting nonprofits in achieving continuous success. CR

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The annual listing of 50 companies that are at the forefront of providing Microsoft solutions and transforming businesses