THE ASSOCIATION EXEC'S GUIDE TO

IMPROVING ORGANIZATIONAL PERFORMANCE

HOW TO MAKE SURE YOUR BUSINESS STRATEGY DRIVES YOUR TECHNOLOGY INVESTMENTS

ROBERT ALVES AND **DON ROBERTSON**

CONTRIBUTING EDITOR: RAPHAEL BADAGLIACCA

4th Edition

Contents

From the Authors

This is the fourth edition of *The Association Exec's Guide to Improving Organizational Performance*. Everything in the world is always changing, especially when it comes to technology. But core truths remain the same — the value of leadership, the desire to fulfill your mission, the aspiration to grow, the need to meet business goals. The more you can manage your fundamental activities from within a single system — a single source of truth — the more agile you will be in responding to unpredictability when it rears its head.

You don't need a crisis to benefit from this kind of preparedness. But it's nice to know you *are* prepared. The same measures of success in the association world always apply: the engagement of your members and the uninterrupted management of financial transactions, including those involving credit cards (the lifeblood of your organization) are best served by the kind of software system this book will tell you about.

To keep pace in a changing world, you need a software system with features that anticipate change supported by a relationship with a software company that has a long enough history to know how to develop an accurate working vision of the future. And execute it!

To illustrate this point, we'd like to call back two images that appeared on the introductory page of the last edition of this book

and then amplify it with a third image. We think you'll agree that there are few things as important to you as how you communicate with your members. In the last edition, we showed you the first two on the next page, contrasting the inauguration of Pope Benedict in 2005 with that of Pope Francis in 2013. The obvious difference on those two days in St. Peter's Square is the overwhelming number of cell phones on the later date. That was to illustrate that the use of cell phones had become so pervasive that the only way you could serve your membership was with a system that works from anywhere on any device. This was precisely what we had to offer with iMIS.

Now for the third image: In April 2020, Pope Francis is addressing — like no other Pope before him — an empty St. Peter's Square.

We can't know when you're reading this book, but the events of the early part of 2020 make the advantages of iMIS EMS undeniably clear. That members and staff can interact with a single system — where websites and databases emanate from the same source — makes real a wide range of possibilities previously unimaginable. That it can all happen without anyone having to interact in person makes iMIS EMS the ideal solution in a crisis. But it doesn't need a crisis to be ideal.

2005 photo: AP Photo/Luca Bruno; 2013 photo: AP Photo/ Michael Sohn; 2020 photo: Getty Images/Vatican Pool

If you are considering making technology investments anytime in the next three years, Advanced Solutions International (ASI) can help you now. We co-founded ASI in 1991 and have grown it to the largest, founder-owned software company in the world for associations and membership organizations.

We wrote this book specifically with C-level leaders in mind. So please don't delegate looking at it to your department managers. This conversation is simply too important and too high-level. It centers on topics your department managers are not comfortable discussing and ones that, frankly, need your leadership to make the tough decisions that will successfully navigate your organization into the future. You'll want to be sure to take full advantage of what we have to offer. This book is based on our work since 1991 with more than 2,500 associations and 1,500 other non-profit clients in more than 25 countries.

We believe we have found important answers to the questions you should be asking about how to position your association for the future. In the pages that follow, this Guide will introduce you to:

1. User Agility
2. Trustworthy Data
3. Engagement Scoring
4. Eagle Vision
5. Smart Billing
6. Personalized Web Experience
7. Third-Party Application Exchange

We have found our most successful clients make sure their business strategy drives their technology investments. These clients continuously learn about themselves from their operational activities. As a result, they use this knowledge to continuously improve their organizations' performance.

To help prospective clients move forward as quickly and confidently as possible, ASI created a special program called the "Success Partnership Program" (SPP) that identifies your most pressing problems, helps you get organized, saves you time and money and lowers your risk of investing in the wrong technology assets. It keeps you from being disappointed, once again, because you did not achieve the expected return on your investment. This "Performance Improvement Preview" is just one of the valuable resources we offer and that we will discuss in the following pages.

We offer you this book as a practical resource. Use it wisely and the rewards will be great!

Wishing you great success,

Robert Alves
Chairman and CEO
Advanced Solutions International (ASI)

Don Robertson
President and CTO

Foreword: Boldly Looking Forward

As the leader of an association, you face significant challenges.

You have the responsibility to make decisions that not only answer needs, but continually improve the experience and increase the potential of staff and members — all with a single purpose: to make sure that your association remains the primary source of information for your constituents.

We would like to share a recent experience that made abundantly clear something we now realize we already knew.

Each year, we put on our largest conference in the month of March and pick a theme. In 2020, our theme centered on the eagle — the bird that flies the highest and has the keenest vision.

The eagle shares many of the qualities of effective leaders.

No animal's vision compares to that of the eagle, who can see five times better than a human with perfect eyesight. The eagle also has a broader visual spectrum, and can see things invisible to humans. Like the eagle, great leaders have great vision.

At 10,000 feet, the eagle flies higher than any bird. Yet its strong talons make it very grounded. Great leaders think globally, from the perspective of great heights, yet their decisions are well-grounded.

With only ten days' notice, we had to decide whether to cancel our upcoming annual iNNOVATIONS event scheduled to take place March 25-26, 2020 in Orlando, Florida. This is our largest gathering — drawing clients, partners, and staff from three continents and some as far away as Australia. Instead of cancelling, we opted to transform the conference into a 100% virtual event that included an opening video, CEO address, company update, interviews of clients and partners, award ceremonies, dozens of educational sessions with impromptu Q&A, end-of-day happy hours, and unique musical entertainment. Not only did the two-day conference come off exceedingly well, but it brought many more attendees than usual.

Why? Because the same team responsible for putting it together from year to year did what it had always done — made changes and adjustments in rapid motion. In short, they continued in the habit of informed innovation, just at an accelerated pace — like great leaders. The team could do so because it understood, in a deep way, the essence of what it was trying to deliver. New virtual tools came into play. Choosing them and using them to outstanding effect produced a great success.

In the same way, ASI — because it has a history of informed innovation and a clear vision of what it wants to deliver — can put your association on a path of Continuous Performance Improvement through its iMIS product and Success Partnership Program. Continuous Performance Improvement is the goal of every association.

In the pages that follow, we will show you how — with clear thinking and the right systems in place — you can spread your wings, see the future, and take command with confidence. Like the eagle.

Chapter 1: Identifying Your Challenges

Poor Data Quality & Declining Engagement

Our research indicates that associations are facing many challenges now that are likely to continue into the future. Among them, these are the most basic:

The Need to Improve Decision Making: Great decisions lead to great results. But great decisions depend on your data being accurate, complete, and timely. So, the first and last order of business — and everything in between — depends on the quality of your data. Improve your data and you improve your decision making.

Making Accurate and Reliable Decisions
- **Accurate Data**
- **Complete Data**
- **Timely Data**
- **Data Governance**

The Need to Improve Member Engagement: Adding and retaining members is your primary measurable activity. The key to retaining members is keeping them engaged. Increasingly, association business is conducted over mobile devices. It's important that your system can be run from anywhere on any device — you engage more members that way. Mobile devices are the special preference of younger members and prospects, so developing full mobile device capabilities is one way to prepare for the future — a future that is already here.

Improving Engagement

- Member Retention and Acquisition
- Member Satisfaction
- Employee Satisfaction
- Data Integrity
- Brand Enhancement

Our competitors call their solutions "Association Management Systems" (AMS); iMIS is the only EMS or Engagement Management System. Engagement is central to everything we do. If you can't engage members, you won't retain them. How can you know how well you are doing in engaging your members, and what to change to improve engagement? Only iMIS offers you engagement scoring, a dynamic, data-driven, iterative method of measuring and improving engagement. The unique design of the iMIS EMS platform — where the business system and websites are one and the same — means that every system action has the potential to deepen engagement.

Lack of Agility & Costly Customizations

The Need to Improve Your Agility: Can you offer members content online that you know they are interested in? Can your non-technical staff make changes to the systems and websites that they work with? With the iMIS EMS platform, you can meet the demands of your staff, members, and other constituents with flexibility and immediacy in a highly personal manner without the need for IT involvement because your managers can get it done themselves. Everyone benefits from a system where the database and websites come from the same source — a single tool. Stop thinking about your

content management system (CMS) and your database as separate, different things. STOP — because in the iMIS EMS, there *is* no distinction. Staff, especially senior management, can perform functions previously confined to programmers and web designers. You don't need to call on IT for help. Your IT department can concentrate on higher-level activities.

Lack of Agility In Business Systems

- **Reliance on Customization for Billing**
- **Generic Content**
- **Dependence on IT and Consultants**
- **Failure to Keep up with Changing Technology**

The Need to Eliminate Customizations That Drive Up Costs Tremendously: There are a great number of downsides to choosing a systems path that depends on customization, and these are not all financial. The financial consequences *are* daunting, though. Customization costs can run as much as three times the estimates, not to mention cause significant

delays in delivery. Underestimating the cost of customizations is the top explanation for why executives lose their jobs. Just as important, though, is the fact that the more you customize, the higher the risk of not creating a "single source of truth." Leading analyst firms report that 60% of customizations fail. Customizations impede or prevent upgrades. Whatever it is, do it natively with iMIS EMS. It's the better way.

Controlling Costs of Systems

- **Customizations**
- **Integrations**
- **Operating Cost Controls**
- **Staying Current**

Loss of "Eagle Vision"

Vision is the thing we seek most in a leader. We want our leaders to make decisions today that will prove right tomorrow and for years to come. In choosing association software, only a modern system will prepare you for the future. In addition to having the most powerful vision — five times better than a human and able to see an ant crawling on the ground from the roof of a ten-story building — the eagle is a high-flyer at more than 10,000 feet. This is higher than any other bird, which means great vision and great perspective.

The eagle is associated with seeing the past and the future without losing sight of the present. It sees the big picture without losing sight of the fine details. Our Success Partnership Program (SPP) is designed to help leaders make decisions with the acumen of eagles.

No Continuous Performance Improvement

The Lure of Faster Horses

Henry Ford, the imaginative inventor whose Model T® forever changed how we think about transportation, famously said this about vision: "If I had asked the customers what they wanted, they would have said faster horses!"

"If I had asked the customers what they wanted they would have said faster horses!"

Henry Ford, CEO, Ford Motor Co

It is all about answering a need with something so advanced it's different in kind, something that changes the paradigm, creates new possibilities, and sets new expectations. The major difference between a horse and an automobile — if you're interested in getting places — is that the automobile has built-in potential. History has shown us that it can be improved, re-designed to run faster. A horse is a remarkable creature, wonderful in its way, but limited if you are thinking of it as the means to get somewhere quickly.

In the classic book about the 1920's, *Only Yesterday*, by Frederick Lewis Allen, there is a famous quotation from a woman of the time who explains why her family has chosen to purchase a Model T over indoor plumbing: "You can't get to town in a bathtub." This family was interested in engagement! The importance of engaging your members with a system that goes beyond the basics to open new worlds cannot be overstated.

Are you really in any different position when you consider what you want in a new system? How do you really know what is possible? Will you settle for something just a little better? A little faster? A system that ticks all the traditional requirements boxes, so you just end up repeating the same thing you're doing right now? Or do you want something different in kind that lets you achieve Continuous Performance Improvement year in and year out at an affordable cost? Think differently.

Eagle Insight: Confidence

Photo: Canva

The eagle is fearless. The eagle is tenacious. The eagle loves the storm. When all other birds flee the storm, the eagle flies right into it. The eagle has the unique ability to lock its wings so the fiercer the winds, the higher it flies. All organizations face challenges. Be like the eagle and equip yourself with a modern system that will let you face down adversity. Lock your wings and fly higher with an eagle's confidence.

Look for additional "Eagle Insights" at the end of each chapter.

Chapter 2: Assessing the Systems Market

The iMIS EMS Platform Difference

**Traditional AMS and Generic CRM-Based
Software Too Costly**

Member Portal	AMS DMS CRM	Mobile
Social Communities	Financial Transactions	Main Association Website

Complex Integrations + Disparate Products & Vendors = High Cost of Ownership
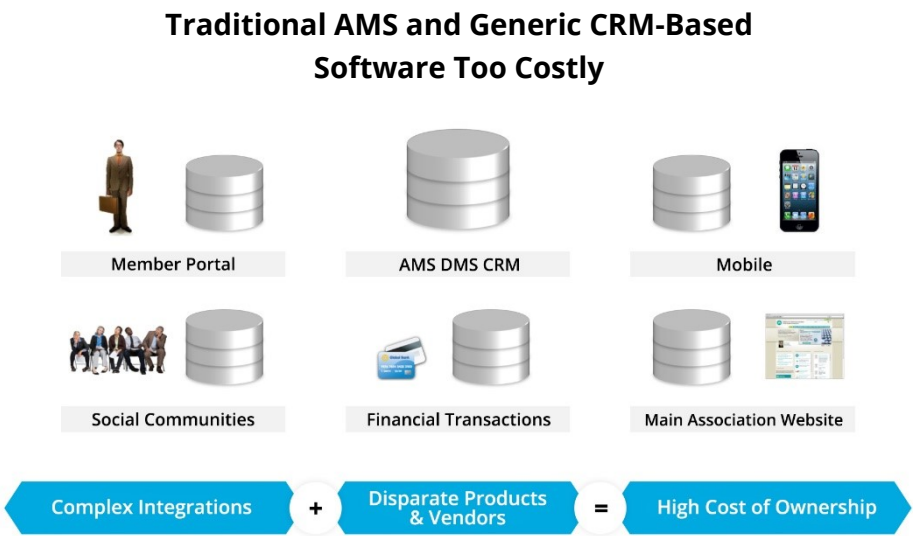
The many problems with traditional AMS systems are easily illustrated by the chart above. These older systems were initially designed for staff who needed to perform administrative tasks, such as processing dues payments and event registrations. Later, clients would add a **member portal**. Then, **social communities** to better engage with members. Let's not forget that **financial transactions come with most of these additions**. Many of the add-ons have their own name and address databases that have to be connected to the main member database by programmers doing expensive and time-consuming customized integrations. All these databases become silos of information not designed to work together. This kind

of complexity leads to all sorts of problems. Not surprisingly, the total cost of ownership of a traditional AMS with so many add-ons is skyrocketing and unnecessary.

The scary thing is that many prospective clients we talk to are still buying into this antiquated model! They are still unaware that buyers do not have to accept these problems any longer. It's a question of modernizing your mindset. Be advised, you cannot achieve better results than you get now if you continue with this outdated approach.

The Continuous Performance Improvement Machine versus Faster Horses

Photos: Shutterstock

The same is true for different reasons with generic CRM-based software where features central to the fundamental activities of associations (already native to the iMIS EMS platform) need to be built at great expense and great time expenditure. Functionality that can't be built needs to be integrated by linking to other programs introducing the silo problem. Customizations of both kinds not only increase costs and introduce delays, they make smooth upgrades impossible. With iMIS, everything associations need is native to the system.

There is a telling difference between the fastest car and the fastest horses. In the early 1900s, the Model T was a high-performance vehicle. Cars, unlike horses, have continuously improved in performance since their appearance. Today, cars like the Ford GT® can reach speeds of 216 mph. The Model T topped out at 45 mph. Cars have come a long way since the Model T.

A modern Engagement Management System in the Cloud is far advanced over traditional AMS or generic CRM-based software, just as the 2020 Ford GT is far advanced over the fastest horses you could ever find. Like the automobile that improved year after year, your EMS will continue to help you achieve better organizational results as the years go by. But here's the irony: unlike the Ford GT — which would cost a *heck* of a lot more than a couple of fast horses — **your EMS will actually cost a lot less to own and operate** than an antiquated, traditional AMS or generic CRM-based software.

What Systems *Actually* Cost

Our Research Shows:
Systems Cost 3x More Than Expected Over 36 Months

Typical Hard Cost of Traditional Approach
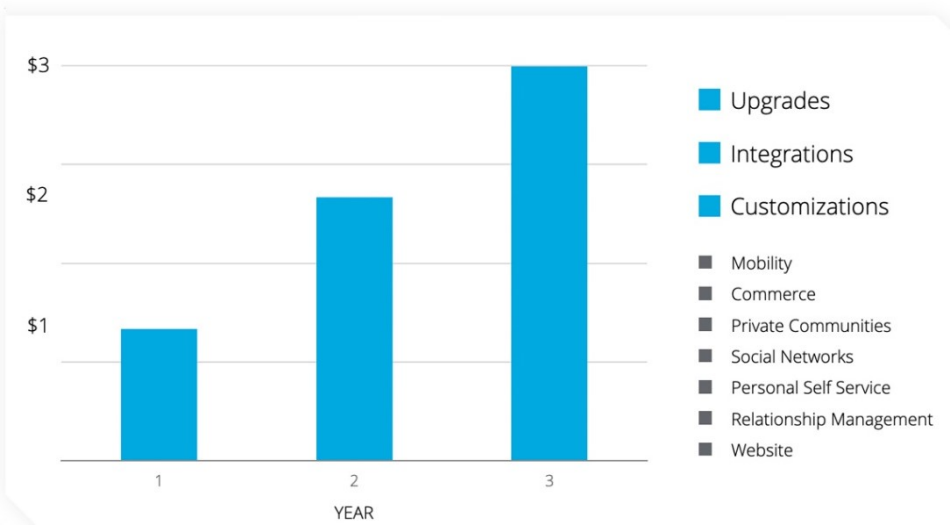
This graph illustrates the **higher cost of the traditional AMS or generic CRM-based software approach over a period of three years** (based on our research). It shows the higher-than-expected cost of ownership when all relevant costs are considered. You need to take all these elements into account when comparing an AMS or generic CRM-based software with a modern EMS. We are not aware of any systems that deliver all of the processes listed in the legend within standard capabilities. In addition to extra costs, these alternative approaches will take longer to implement and be riskier than a modern EMS system.

The legend only identifies hard costs. Also, bear in mind that these costs are only projected for three years. Most organizations keep systems for 10 or more years and the costs keep growing. Be sure to forecast your cost of ownership over five to 10 years. In addition to the costs of the items in the legend — which are hard costs — there are also soft costs not accounted for here. Why will it cost *three times* the initial price over three years? We'll explore this point in Chapter 3.

How the iMIS EMS Platform Outperforms an AMS or CRM

iMIS EMS: Leading-Edge Technology for Today's Associations

iMIS is the #1 solution for associations for a reason: we understand the specific needs of associations. Our latest, most advanced release — iMIS EMS — is much more than just a CRM, like Salesforce.com or Microsoft CRM. They were designed for transactional customer data and weren't intended to manage the complexities of long-term member management. Some CRMs boast about the number of their external applications — but what good are thousands of integrations when only a tiny percentage might actually work for the needs of your organization? The iMIS EMS platform has hundreds of proven applications through our REST API that are ready-made just for associations.

iMIS is a purpose-built EMS with CRM functionality, including:

- Native AMS/association-specific features
- Native accounting/financial management
- Native CMS/Website creation and management capability
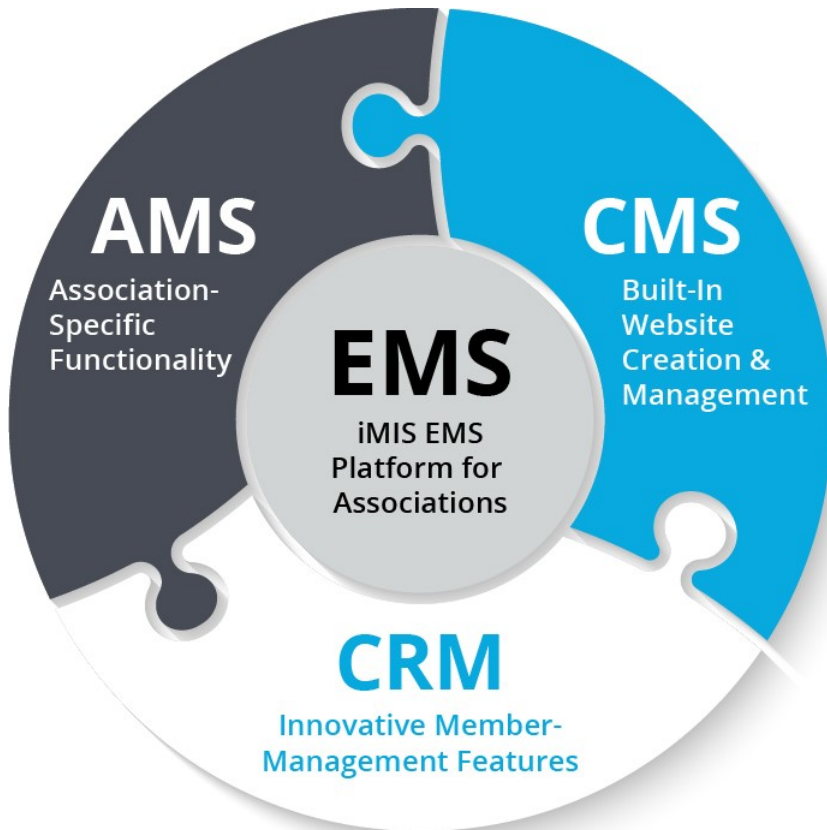
All of this is built right into the core of our leading-edge **iMIS technology that's innovative, scalable, and ready for the demands of today's association.**

The iMIS EMS platform fuses database management and web publishing into a single engagement management system that includes events, dynamic dashboards, engagement scoring certification and educational programs, fundraising, open API and application management, advertising, and much more.

Here's a summary of how other types of software fall short when compared to the iMIS Engagement Management System:

iMIS EMS Platform vs. Traditional AMS Systems

Traditional AMS systems served their day but they've become outdated — today's associations require expanded, modern functionality. **iMIS takes all of our association expertise gleaned over the years and combines it with the latest technology in an innovative, Cloud-based EMS platform**. It's the only system where website and database come from the same source. It's centered around the activity most crucial to an association's success: ENGAGEMENT. But it offers so much more. iMIS EMS: modernize your mindset.

iMIS EMS Platform vs. Generic CRM-Based Software

You may have seen upstart software products that are built on a Salesforce or Microsoft CRM platform and rely on customization and third-party applications to cobble together an offering for the association market. The iMIS EMS platform, by comparison, has **all**

the features you need to attract new members and maintain ongoing, engaging relationships with your constituents — right out of the box.

Generic CRM-based software experiments can only remotely approximate what is already native to iMIS. They depend on layers and layers of customization that are costly in both time and money. They're new to the association market and don't have the knowledge and experience to fully comprehend the unique, complex needs of membership organizations. Their approach is incomplete, and it compromises automatic upgrade paths. **And you have to ask whether these newcomers will have long-term viability. Will they still be around when you need them in the future?**

Compared to iMIS EMS, traditional AMS and generic CRM-based software offer much less at much greater cost. The iMIS EMS platform is uniquely designed with you in mind and gives you everything you need to conduct business and prosper.

Eagle Insight: Learning Organizations

Photo: Canva

Eagles are explorers. The key to success at any organization is to devote energy and resolve to learning — to become a "Learning Organization." This means both staff and members. The best way to encourage learning is to set an example. Go skyward, like the eagle. By leading your organization to become a Continuous Learning Organization, you will transform it into a Continuous Performance Improvement Machine.

Chapter 3: Avoiding Project Failure

Calculate System Hard *and* Soft Costs

Let's focus on the specifics of some of those "hard costs" referenced in the chart on page 22 addressing customizations, integrations, and upgrades. Do you realize that customization of your business systems is the biggest roadblock to building the modern "Continuous Performance Improvement Machine" — the equivalent of a Ford GT — when compared with the horses that represent traditional AMS systems?

A Continuous Performance Improvement Machine will be a game-changer for your organization, just as the Model T changed the idea of travel.

Avoid Project Failure!

Most projects fail due to customization

- Financial complexity
- Integrations
- General applications that lack depth

There are soft costs to customization because it creates roadblocks to accurate data and smoothly operating business processes (like month-end financials), plus it increases the risks of the project. What if members of your staff just won't use the new system and they start using spreadsheets again? Then what? You will be building even more data silos again! What would that cost?

Modern systems offer a better way than customization. Do you have agility in your business systems to adjust and adapt to your changing membership without the need for expensive help from IT? A modern system will empower your staff to make simple adjustments *without* technical help. This is the Ford GT approach. If you choose the traditional approach again and keep customizing, you have chosen the lesser dream of Faster Horses.

Quit Wasting Time and Resources

Empower staff to get work done without the help of IT or Consulting

Here is another soft cost with consequences you are likely facing: most members are not engaged enough with your organization.

There are always going to be competing interests for your members' attention. We're sure you want to improve member engagement in the future. But do your current systems flow together seamlessly to offer a smooth enough, personalized experience for both members and staff to keep everyone fully engaged? Are member transactions recorded from any application or website they use — from any device — creating a reliable history you can use to personalize communications and other offers to members? To achieve this in the future, choose the Ford GT approach. If not, you will be stuck dreaming of faster horses!

RiSE Like an Eagle

RiSE is a powerful, easy-to-use website development tool that even non-technical staff can use. RiSE is an integral part of iMIS EMS where your

websites and business system come from the same source.

iMIS naturally creates a personalized web experience for members — the key to engagement — which, in turn, is the key to member retention.

Eliminate Costly Customizations

There are many other soft costs not included in our costs chart on page 22 — these are either not obvious or are mistakenly considered direct costs. For instance, is your accounting system weak? Is it harder than it should be to close month end? Do you have invoicing problems? Do you find that you are missing demographic data critical to your accounting operation?

Can you set up a complex pricing structure for dues or products based on the member's status without customization?

Choose the Ford GT and these problems will go away in the future. Choose the faster horses and these problems will repeat themselves.

Financial Issues with Traditional AMS Systems

Accounting/Invoicing not aware of data in membership system

Pertinent demographic information is missing or incorrect

Can't manage complex pricing of other products based on member class

We believe the key to building your Continuous Performance Improvement Machine is data accuracy. How confident are you in your data? Is it accessible to everyone who needs it in your organization? How can you be sure it is accurate if some of it lives in silos? Research shows that most executives are not confident in their data accuracy! You can correct this problem with a modern system — the Ford GT approach. You will repeat this problem if you choose the faster horses.

Stop Making Bad Decisions

Continuously improve the reliability and accuracy of your association's data to improve decision-making.

Tear Down Data Silos

The Destroyer of Trust: Data Silos

55% of organizations name data silos and data management difficulties as the biggest challenges to data and analytics strategies.

55% of organizations surveyed in a Harvard Business Review study named data silos and data management difficulties as the biggest challenges to data and analytics strategies. [1]

This image illustrates the many problems of both kinds of standard systems. Most of the time, each of these data silos had its own name and address database that had to be connected to the main membership database by programmers doing expensive and time-consuming customized integrations. Further, this contributed greatly to inaccurate data and poor decision making. A modern Engagement Management System handles all of this activity without creating silos.

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[1] Pulse Survey: Understanding Why Analytics Strategies Fall Short for Some, But Not for Others. Harvard Business Review Analytic Services, July 2019

An outdated traditional AMS or generic CRM-based software will cause you to repeat all of these problems.

Focus on Best Practices

We Have All Experienced...

- **Embarrassment: Silos of data lead to poor decision making**

- **Shame: Staff mistakes lead to poor client service**

- **Humiliation: Loss of credibility due to incorrect financials**

- **Waste: Duplicates cause confusion and extra costs**

- **Incompetence: Errors with billings, invites, registrations, renewals and donations lead to member dissatisfaction**

- **Fear: Missed member retention goals**

We have all experienced the ways in which current systems are not built to implement or encourage "best practices." This is important because these issues often have devastating impact on employee morale and member satisfaction. No one wants to be embarrassed or labeled incompetent. Pick the Ford GT and you get all the best practices. Pick the faster horses and these problems will repeat themselves.

Overcome Obstacles

Standard AMS/CRM Systems are Obstacles to a Best-Practice Culture

- Errors in billings, invites, registrations, renewals, donations
- Staff on the phone apologizing for mistakes
- Time spent fixing financials
- Changes are lost - data doesn't flow throughout the association
- Increased costs due to duplication
- Member attrition

We've worked with many organizations that don't have the right best practices in place to improve member experience. For example, not communicating the right information at the right time — or members who just don't have access to the information they need — and so on. These frustrations can be overwhelming for your team. By aligning your technology investments with your company strategy and implementing a modern EMS system — known for driving best practices that deliver Continuous Performance Improvement — you will make great strides toward adopting a best-practice culture.

Eagle Insight: Efficiency

Photo: Canva

Eagles are efficient hunters. They are such good hunters that they spend very little time doing it. Set your sights on your targets and achieve them, like the eagle, with great efficiency. Enlist a modern system with everything you need already native to it — so you don't waste time and resources trying to make things work.

Chapter 4: Envisioning How Systems *Should* Work

OK, enough doom and gloom! There is hope.

One Source of Truth

What if you had a solution that offered one source of truth — one database, one complete, up-to-date historical member record — that gave you the confidence to completely trust your data?

What if you could save time and money by eliminating costly integration efforts?

What If You Had...

- **One Source of Truth**
- **Confidence**
- **An Easy-to-Use System**
- **Improved Performance**
- **No Stress**
- **Trust**
- **Empowerment**
- **Foresight**

What if you could gather better member intelligence so you can make smarter business decisions?

How valuable would that be to you?

Accounting Systems That Work

What if your accounting system just worked great? No more stressful month ends.

What if you and your team could trust that the data was always up to date?

What if your staff could easily make changes to the software, especially to your web pages, without programmer help?

What if upgrades were someone else's problem… and they happened automatically?

Proven Applications

What if you could add useful, proven, Cloud-based applications — made for associations and certified by the vendors — to work smoothly with your membership database to help complete your Continuous Performance Improvement Machine?

Hundreds of Proven Applications

Mobile App	Marketing	Job Boards
Clowder	higher logic	web scribble

LMS	Expo Events	Payments
TOPCLASS	A2Z EVENTS	globalpayments Integrated

Web CMS		Accounting	
Drupal, WORDPRESS, ektron, Progress Sitefinity, SITECORE, em		Microsoft Dynamics, quickbooks	

Systems Designed Just for Associations

There have been attempts by associations to experiment with generic CRM-based software. In many ways, this experiment has failed. These platforms are not designed for the association client. These systems create higher customization costs for clients: the most basic association requirements live in layers of customization. Plus, customizations challenge data accuracy.

Many association clients who have switched to iMIS EMS after trying generic CRM-based software have shared their feedback with us about the frustrating issues they encountered:

Association Feedback on Generic CRM-Based Software

- Not designed for associations
- Requires extensive and EXPENSIVE customization just to do simple association tasks
- No native CMS/web capability
- System updates often require additional customization
- Customer support regularly offers workarounds vs. fixes
- Vendor may stop supporting customizations you need
- Difficult to extricate your association when the software is just not working for you

"What we're focusing on now is doing our campaign management through iMIS, rebuilding our website, being smarter about how we're segmenting members and talking to our members, and essentially getting everyone onto the one source of truth...we're looking to bring everyone together."

"iMIS is intuitive. It's user-friendly. iMIS has inherently in it a really good understanding of what a system requires within a membership environment."

- Australian Meat Industry Council - National & NSW Office

Like many, you may encounter problems trying to get third-party software to work smoothly with your member database. To successfully build our **Continuous Performance Improvement Machine**, we do rely on some carefully selected third-party applications. We choose to interact only with those products meaningful to the association world. Our focus is to combine these applications with the highly configurable and tailorable iMIS to create the most flexible and powerful engagement management platform for associations available anywhere in the world!

Don't be fooled again

150 association-specific applications are more useful than 3,000 generic for-profit applications from one CRM Platform.
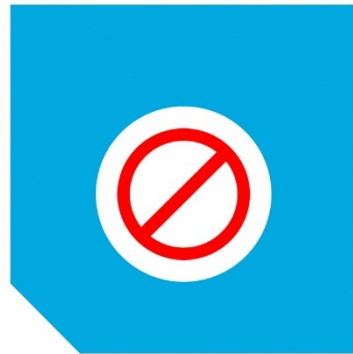
Many may become enamored with generic CRM-based software because of the availability of third-party add-ons and the promise of customization. The fact is that the great majority of what is available for these products is not useful to associations. These add-ons were not built with the association in mind nor are they designed to integrate smoothly with a membership database. This guarantees a

situation with far too much customization, too much delay and huge cost overruns!

You need to find a modern system that offers a standards-based integration approach so data from relevant third parties can be easily shared with the modern EMS system. These third parties need to adhere to the standardization rules of the modern EMS system so the integrity of all data is maintained — and so that automatic upgrades can take place without a glitch. To make your Machine run the way it is supposed to, you need to find a solution that embraces third parties that help solve real-world problems for your association and tightly and smoothly work with the membership database.

Eagle Insight: Leadership

Eagles nurture their young. Leaders, like eagles, take care of the people who depend on them — members and staff — by giving them a system that's easy to use

Photo: Canva

and effective, and that grows in value the more it is used. Members want to feel that the system they use knows them. Staff want to feel empowered. iMIS does all of this and more.

Chapter 5: Choosing the Right Solution

360° Member Engagement

Uniquely Designed for Associations

"The One Source of Truth" available anytime, anywhere, on any device.

The iMIS Engagement Management System has the potential to be your Continuous Performance Improvement Machine year in and year out. The advantages of a 360° Engagement Management

System are numerous. To begin, your member and staff activity are housed in one place and managed by one system, not separate systems. All the information collected on members — such as name, address, interests, and past activities — is available to both staff and members in real time.

If there is something iMIS cannot do, there are simple tools included that your own staff can use to make changes to the way the system works… without needing a programmer. The iMIS platform is a collection of websites you can use for internal business or for member and non-member self-service for all that you offer. Further, there is a full complement of available third-party products certified to work with iMIS in the Cloud because they follow our standards. These certified third parties ensure that your member and staff activity histories are housed in one place as well.

The main focus is to make sure you have accurate, up-to-date data in all places at all times! The system does not need customization at the source-code level, preserving your automatic upgrade path. From private communities to website management and marketing tools, all of the data is in one place and at your staff's fingertips. This also puts your management team in a position to use iMIS as a Continuous Performance Improvement Machine year in and year out. ASI's trained staff and partners work with clients after they go live to ensure they follow best practices to achieve Continuous Performance Improvement.

Powered by the Cloud Leader

ASI has partnered with Microsoft to deliver a cloud experience that is 100% optimized for iMIS EMS. Powered by Microsoft Azure, the world's leading cloud computing platform used by 95% of Fortune 500 companies, ASI Cloud Services offers unparalleled scalability, reliability, and performance.

iMIS is developed with Microsoft .NET, built on top of the proven Microsoft SQL Server and Internet Information Services (IIS) platforms, and offers tight integration with Microsoft applications, including Microsoft Outlook and Microsoft SQL Server Reporting Services (SSRS). Plus, as a Microsoft Gold Certified Partner we are recognized as having the highest level of competence and expertise with Microsoft technologies.

Purpose-Built vs. Generic CRM-Based Software

Let's compare iMIS at its core to generic CRM-based software. The chart on the next page does a great job of explaining why organizations get so much more done so much faster with iMIS, the EMS Platform for associations, than they do with general platform vendors. As you can see, 95% of iMIS is ready to install soon after you buy it! This is not the case for the general platform CRMs. iMIS is #1 worldwide because of the depth of functionality it offers to associations. It is purpose-built. Every time clients or partners

implement iMIS, they do what thousands of clients have done before them. There are best practices and standards for implementing 95% of what iMIS EMS offers. The remaining 5% can be handled by simple changes and third-party add-ons that follow our standards. That way, you implement fast and maintain your automatic upgrade ability. This is not the case for general platform vendors.

		iMIS EMS Platform	vs.	Generic CRM-Based Platforms
Apps	Custom Extensions via API	Yes		Yes
	Integrations via API	Yes		Yes
Web	Public Website	Yes		No
	Member Portal	Yes		No
	Event Microsite	Yes		No
Association	Product Sales	Yes		No
	Education & Certification	Yes		No
	Events Management	Yes		No
	Dues Billing, Committees, Chapters	Yes		No
	Accounts Receivable	Yes		No
CRM	Core CRM Functionality	Yes		Yes

Further, the iMIS platform comes with a website management tool called RiSE, native to all of the iMIS EMS capabilities. This creates a powerful tool no CRM platform comes close to offering. As you see in the chart above, 80% of what you might get from the generic

solutions is open to high risk and high ongoing cost. Platforms like those are not purpose-built for associations — even when you add industry-specific third-party products. iMIS is able to handle a myriad of needs natively from thousands of clients. We've been helping our clients grow for nearly 30 years! There is no way for other kinds of products to catch up — except to spend another 30 years figuring out what iMIS already knows. Meanwhile, we will continue to advance while they are still learning what we already know.

Powerful, Out-of-the-Box Website Templates

**iMIS Powers Award-Winning Association Websites**
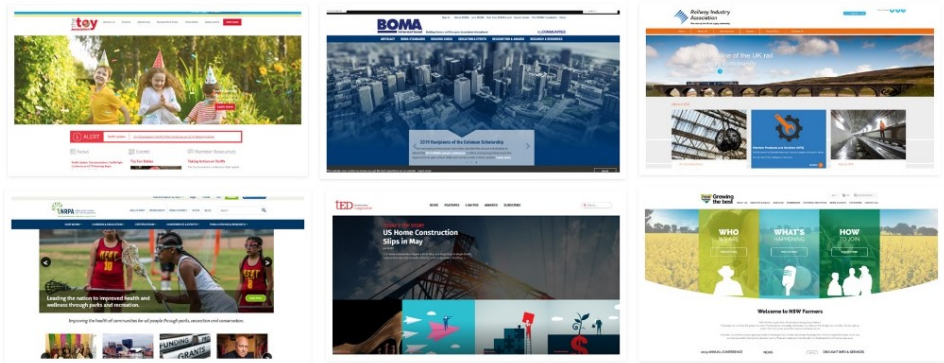
The iMIS EMS platform has powerful website tools that are just not available in other competitive solutions. Once you see how naturally iMIS system data can be accessed and placed on web pages, you will be floored.

A growing number of our clients use iMIS to power the main organization website. Our EMS platform comes with high-quality, highly visual website templates that our clients can simply select to get a website up almost instantly!

Innovative Member Portals and Event Sites

**iMIS Powers Award-Winning Member Portals
& Event Sites**
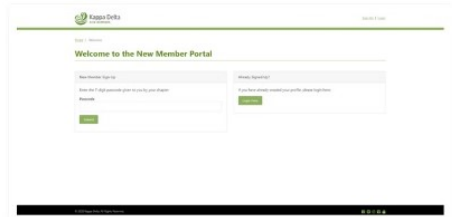
Clients often use this capability to build member portals, members-only websites, websites for chapters, and websites for specific events quickly and easily, drawing upon data from the main membership database.

Do not confuse this iMIS capability with what competitors talk about, which is integration between a Content Management System and a

traditional AMS or generic CRM-based software. With the iMIS EMS platform, there is no separation. It's not two things. It's one thing.

In contrast to this unique iMIS design, using a content manager with a separate membership database has many disadvantages, Namely, lack of ease-of-use for non-technical staff, lack of flexibility, and — most of all — lack of direct access to member data.

A Continuous Performance Improvement Machine

It is true! You can have a Continuous Performance Improvement Machine that works for you day in and day out over the years. One that's designed to engage your members at every point and learn

The Continuous Performance Improvement Machine

EMS Engagement Management System Design
- Contains all member/staff touchpoints from anywhere
- Merges business system and website to one
- Includes Accounting and Smart Billing for complex scenarios

DATA Assures One Source of Truth
- Accurate data comes from everywhere including finance and activity history
- Data is up-to-date and easily accessible
- Data is secure and PCI-compliant

NOT CUSTOM Association Business & Web Applications
- Professionally developed and comprehensive functionality
- Highly tailorable by users without programmer help
- Relevant third-party applications for Cloud
- Automatic upgrades for all applications in the Cloud

You are a Learning Organization!

everything there is to know about them from these interactions. This
will improve your data accuracy and the security of your data many
times over. The days of business systems separate from member
websites are over.

Your business system needs to include the ability to handle business
with your members on the web, on the phone, or using a tablet. The
way you achieve this is to have one system that does it all, in the
Cloud!

"Let your business strategy drive technology decision making!"

Robert S. Alves, ASI CEO

This Continuous Performance Improvement Machine is a unique, completely sensible approach that can be the driver of your business strategy 24 x 7, 365 days a year. It will do the job while you sleep — and you'll sleep better for it!

You have to view your next system as a strategic investment... a giant leap forward... a Ford GT! Not, an incremental technology improvement that only ensures you end up with the dream of faster horses — instead of a game-changing, high-performance Engagement Management System that continues to improve over the years, just as the Model T progressed into cars like the Ford GT. If you want a different, better outcome, you have to take a different approach than the tired, traditional AMS or generic CRM-based software platforms.

> **"Insanity:**
> **doing the same thing**
> **over and over again and**
> **expecting different results."**
>
> **- Albert Einstein**

Support for Learning Organizations

With the iMIS EMS platform, everything begins and continues with the goal that we learn from everything we do. As the leader of an association, you understand this directive matches and advances your own goal to ensure that your organization is the primary source of information for your constituents. To become and remain a Learning Organization, many elements must be aligned — especially membership systems, websites, and mobile devices.

iMIS EMS aligns all of it.
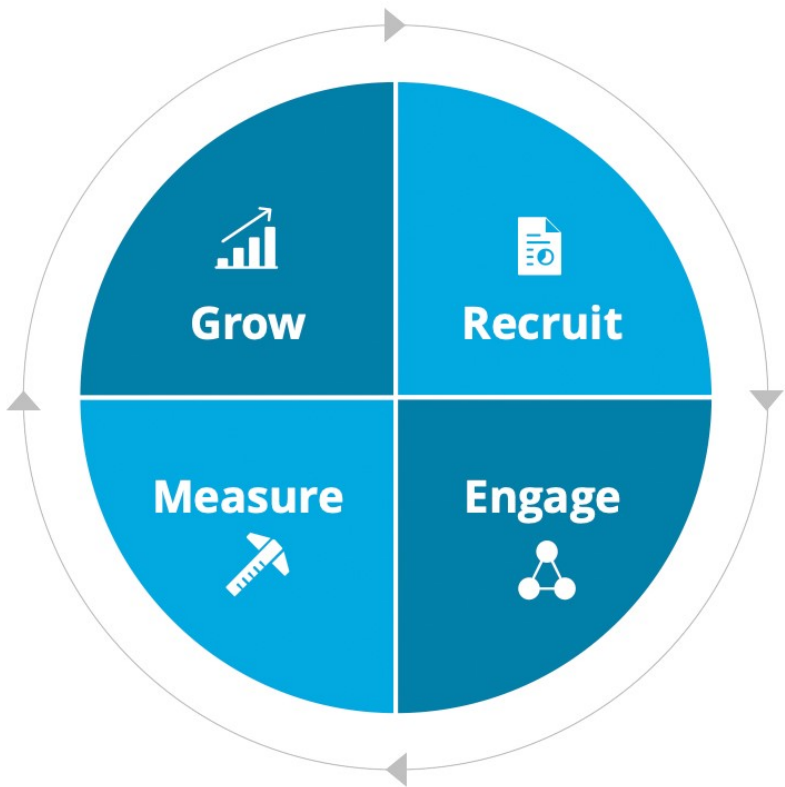
The chart on the previous page begins with RECRUIT in the top-right quadrant. Recruitment and retention are the lifeblood of an association. Then, we move to ENGAGEment anytime, anywhere for whatever the member happens to be doing with you. With this data at hand, you can then MEASURE your progress towards success. These measurements continually chart a new course to Continuous Performance Improvement, ensuring year after year that you GROW. Recruit, Engage, Measure, and Grow.

Eagle Insight: Continuous Renewal

Photo: Canva

Eagles are reborn throughout their lives. An eagle's feathers are replaced one at a time over its lifespan. It is a gradual process of continuous renewal. In the same way, iMIS delivers automatic upgrades, so your system remains constantly new.

Chapter 6: Starting Your Journey to Continuous Performance Improvement

Prospective clients who engage with iMIS put themselves on a path to Continuous Performance Improvement. Our mission is to work with you to ensure that you implement a Performance Improvement Machine. Once that is accomplished, you are positioned to use the Machine to improve organizational performance year in and year out. Our objective is for you to complete this full cycle of Discovery, Consensus and Preview, Foundation Building, and Continuous Performance Improvement.

Let's review how that happens:

> **1. Discovery:** During the **Discovery** stage, our Performance Improvement Leader works with your executive team to complete the Success Assessment Workshop where we assess your current situation. We evaluate the four most important areas that we believe contribute to the success of our clients: how to **Recruit, Engage, Measure, and Grow**.

> This usually results in the identification of operational gaps that may be hindering maximum operational performance. This will help you benchmark where your organization is today versus where it should be. This will take three hours of executive time.

2. Consensus and Preview: During the **Consensus and Preview** stage, we conduct our Success Partnership Program (SPP). The SPP uses our Strategy and Goals measurement workshop where we work with your executive team to identify your key strategic targets. We will also work with your operational team to define your key requirements. In the last step of the SPP, we will Preview the iMIS EMS system as your Engagement Management System and prepare a business performance improvement plan with you. At this point, the vision of the Continuous Performance Improvement Machine will start to become clearer to your executive team and staff. This stage typically takes no more than two months.

After completing the SPP, if you determine that iMIS is not suitable for your organization, the SPP outputs can be used to investigate alternative systems. Recognize, though, these SPP outputs are invaluable to steer you toward the modern approach required to achieve maximum member engagement and continuous performance improvement. We will assist you to build a foundation of knowledge for what is possible with a unique Engagement Management System designed for Continuous Performance Improvement. If you choose to work with us, we can assist you in building an investment justification for your Board of Directors. There is a fee for the SPP, but it is well worth it.

3. Foundation Building: After completing the SPP — if you decide to move forward with iMIS as your Engagement Management System we begin implementing your Performance Improvement Machine. Building upon the knowledge and feedback received during the Consensus & Preview stage, the iMIS implementation team is able to put in place the key elements that your organization identified to achieve Continuous Performance Improvement.

4. Continuous Performance Improvement: The Continuous Performance Improvement Stage begins once your iMIS EMS goes live, and continues year after year. Ongoing Continuous Performance Improvement is realized through a thorough, long-term journey of fine-tuning to ensure your iMIS system is always functioning in a way that maximizes your organizational learning about your constituents. To ensure that you maintain your status as a Learning Organization, ASI and our authorized partners offer a complete array of services and programs for you to choose from.

The Journey to Continuous Performance Improvement
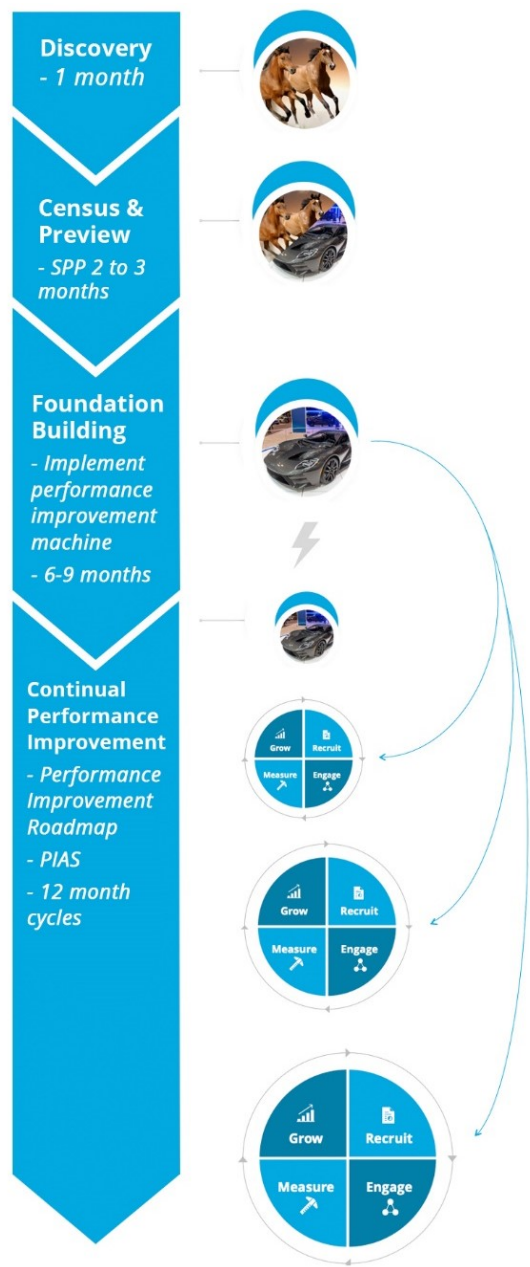
Building a Roadmap
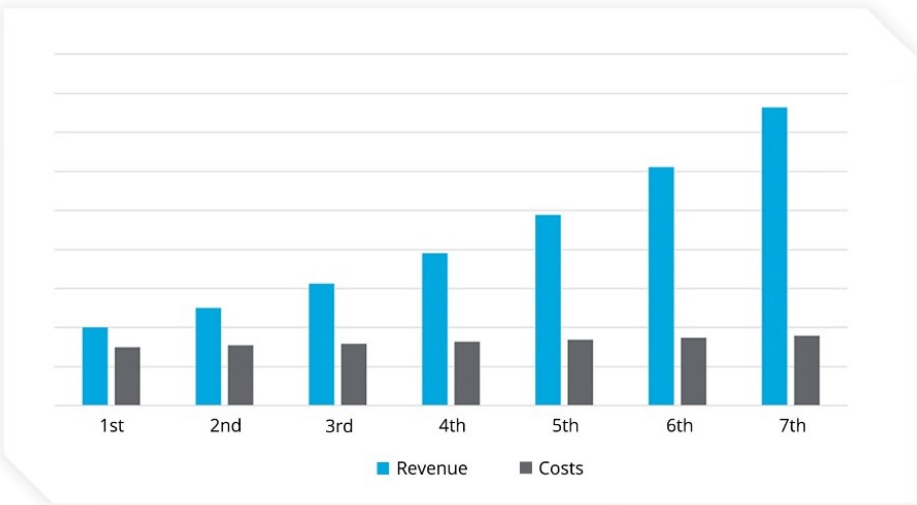
Performance Improvement Advisory
Service (PIAS) for Clients

	Workshop	PIAS
Success Assessment Workshop	✔	
Account Management		
- Dedicated Performance Improvement Specialist		✔
- Regular Review Meetings		✔
Performance Improvement Roadmap		
- Strategy and Goals Measurement Workshop		✔
- Best Practices Review & Workshop		✔
- Team Skills Review & Education Plan		✔
- Performance Maturity Assessment		✔
- RoadMap to next level of Maturity		✔
Other Benefits		
- iNNOVATIONS Client Conference		50%
- ASI Professional Services Discount		5%

We believe your goal should be to achieve a state where you are learning from everything you do, all the time — continuously improving as an organization. This takes focus and commitment to a process. The chart above explains how we can work together to keep

that Continuous Performance Improvement Machine humming and getting stronger year in and year out so your organization gets stronger with it.

Growing Revenue with Flat Costs

**Strong Returns from System Investment
Year by Year**

Continuous Performance Improvement results in increased revenue through strong member engagement and growth. At the same time, Cloud computing — combined with smart business decisions from a modern system — will allow you to control costs due to efficiencies gained from your Continuous Performance Improvement Machine.

Making Better Decisions

Although our clients tell us revenue improvement and expense control are not the main value our Continuous Performance Improvement Machine brings to them, these positive outcomes remain an important consideration.

Perhaps the most important benefit to establishing the Continuous Performance Improvement Machine is the fact that you can create management stability through the system that endures no matter what circumstances your organization faces. The COVID-19 global pandemic of 2020 is an example of Murphy's Law. Whatever can go wrong, will go wrong. With the iMIS Continuous Performance Improvement Machine, you do not need a new plan every time Murphy strikes. Our clients were able to get through this crisis because our modern iMIS EMS platform naturally keeps them in a state of preparedness. Their staffs were able to seamlessly work from home and the Machine continued to deliver the same consistent results without any operational changes.

If this sounds interesting to you, we have a simple way to get started.

The Journey to Continuous Performance Improvement
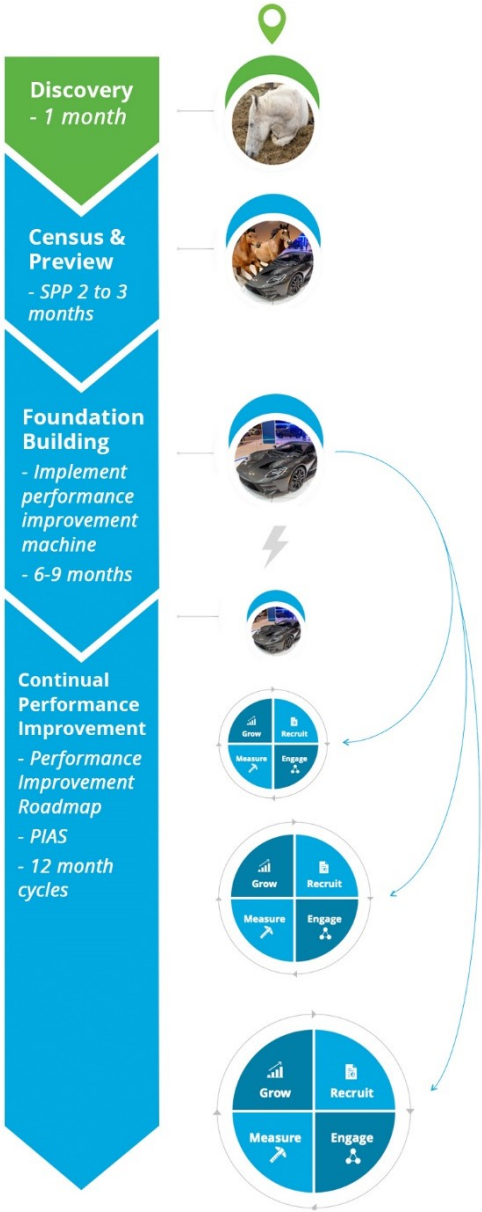
Achieving Eagle Vision

All clients use iMIS in the Cloud with compatible third-parties that create a single source of truth from all data — so clients can learn all they need to know about their members, which enables their Continuous Performance Improvement year in and year out.

"All clients use iMIS in the Cloud with compatible third parties that create a single source of truth from all data so a client can learn all they need to know about their members and donors which enables their continuous performance improvement year in and year out."

Robert S. Alves, ASI CEO

Eagle Insight: Endurance

Eagles mate for life. ASI's primary goal is to develop clients for life, and we have a remarkable record to show for it. Join us.

Photo: Canva

Appendices

A: Glossary and Index

Advanced Solutions
   International
—the company behind iMIS.
The year 2020 marks its 29th
year in business, having served
more than 4,000 clients, ii, 4,
89, 90

AMS. *See* Traditional AMS
   System

Best Practices
—commercial or professional
procedures that are accepted
or prescribed as correct or
most effective, 34, 35, 44, 46

CMS. *See* Content
   Management System

Content Management System
—a software application that
manages digital assets,
typically web content. iMIS is
the only software product for
associations with a built-in
CMS, called RiSE, so business

system and websites come
from the same source with
countless benefits, 13, 48

Continuous Performance
   Improvement
—the resolution by an
organization to find a way to
dedicate its resources and
activities to continually
advance towards achieving its
goals, 9

Continuous Performance
   Improvement Machine
—a software system that
automatically advances an
organization towards achieving
its goals, operating with the
efficiency of a Machine, 16, 27,
38, 43, 44, 49, 51, 59, 60

Dashboards
—this information management tool visually tracks, analyzes and automatically displays key performance indicators (KPIs), metrics, and important data points to monitor the health of an organization, department or specific process. Typically, dashboards can be tailored easily to meet specific needs, 69, 71, 75, 76, 77, 81, 83, 90

Data Silos
—separate, unconnected data files resulting in inefficiencies and duplicate effort, 29, 33

Eagle Vision
—perfect vision. In leadership terms, the ability to see the future and make forward-looking decisions, 15

EMS. *See* Engagement Management System

Engagement Management System
—a Modern System like the iMIS EMS platform, designed to evaluate and increase the level of involvement of its constituents, 12, 21, 33, 43, 44, 51, 55, 56

Engagement Scoring
—an automatic method of measuring the level of engagement of an organization's constituents, 5

Faster Horses
—the limited dream of users unaware of systems capable of evolving over time in a limitless fashion, 16, 30, 31, 32, 34, 51

Ford GT
—the fastest automobile, capable of registering speeds up to 216 mph, representative of a system that evolves over time, ever reaching new heights, 21, 28, 29, 30, 31, 32, 34, 51

General Platform. *See* Generic CRM-Based Software

Generic CRM-Based Software
—highly advertised general systems not designed for associations, very dependent on customizations and with links to third-party applications not useful to associations, 21, 22, 34, 39, 41, 45, 49, 51, 87

Performance Improvement Advisory Service
—ASI's workshop and collection of tools for assuring clients that they are on a path of Continuous Performance Improvement, 58

Performance Improvement Preview
—an advance look at how ASI's Success Partnership Program can guide an association to take steps that will put it on a path of Continuous Performance Improvement, 5

Personalized Web Experience
—the ability to deliver automatically different content suitable to different profile groups or individuals, 5, 87

PIAS. *See* Performance Improvement Advisory Service

Recruit, Engage, Measure and Grow
—the cycle of activities important to every association advanced by the Continuous Performance Improvement Machine that is the iMIS product, 53, 54

RiSE
—the website content management system that is a native, integral part of iMIS, 30, 46

Smart Billing
—the ability of a system to handle complex billing scenarios. Smart Billing can only be accomplished if all necessary data and activity history exists in a single system, 5, 86

Soft Costs
—indirect, associated costs, 23, 29, 87

SPP. *See* Success Partnership Program

Success Partnership Program —ASI's unique thought leadership systematic approach to guiding associations to determine what system aspects they need to continually advance towards their goals. SPP identifies your most pressing problems, helps you get organized, saves you time and money, lowers your risk of investing in the wrong technology assets, and keeps you from being disappointed once again because you did not achieve the expected return on your investment, 5, 9, 15, 55

Third-Party Application Exchange —a select collection of Cloud-ready third-party applications useful to associations with data output deeply integrated with the iMIS product, 5, 88

Traditional AMS Systems —the standard, age-old AMS models, lacking the design of a modern EMS platform, with its innate ability to retain and attract members, 19, 28

Trustworthy Data —data that is accurate, up-to-date, comprehensive and easily accessible — the basis of effective decision making, 5, 85

User Agility —the ability of non-technical users to operate system aspects traditionally handled by programmers, 5, 84

B: Client Case Studies

The following is a brief sampling of case studies that demonstrate how our clients have achieved success with iMIS.

Alpha Chi Omega is an organization of 220,000 strong, talented, genuine women choosing a fun and meaningful way to enhance their college experience and build lifelong bonds.

"We can engage our members more deeply by empowering them to update their member records, including viewing their donation history, volunteer and event history, and deciding how they want to connect with us.

"With the dashboards, our staff can quickly see how many new members we have, how many alumni, is our membership in more of one part of the country or another, what's our top collegiate chapter by size, what are our top alumni chapters by size, what are our largest alumni chapter numbers? Before it was, 'Well, I don't know… '

Now with iMIS they can just go to a dashboard and see it all in a chart.

"Our staff members pull their own reports. Our foundation has a wonderful RiSE page set up just for our board members. iMIS has really freed up staff time so we can use our staff's brain power and energy in better ways to engage with our members and our donors. We're always discovering new ways to put iMIS to work for us."

Amnesty International Canada

Amnesty International is a global movement of over 7 million people in more than 150 countries working together to protect and promote human rights. Its mission is to conduct research and generate action to prevent and end grave abuses of human rights and to demand justice for those whose rights have been violated.

"iMIS dashboards have allowed us to customize reporting and workflows across multiple departments to meet the specific needs of members, staff, and management teams. Through marketing segmentation, Amnesty International Canada has streamlined the issuing of more than 45,000 monthly <u>donor</u> annual receipts.

"We use iMIS for tracking our supporters, our members or donors and our volunteer leaders. We also use it for maintaining all of our committees, communities, as well as our chapter records. In a big way, we use it for managing our volunteers. iMIS gives us a complete view of all interactions between members, donors, and supporters. This is key for frontline staff who answer questions coming in from members and donors on a daily basis. Allowing our frontline staff to access this data directly by using iMIS has created such efficiency.

"iMIS RiSE has enabled donors to do what we used to have to do manually for them. Now they can self-service, creating a huge efficiency across the organization. Marketing segmentation allows us to identify and really personalize the receipts that we are issuing on an annual basis from monthly donors. This is key to our program. iMIS is a single solution for all of our data needs."

Australian Meat Industry Council — National & NSW Office

The Australian Meat Industry Council (AMIC) is the peak body representing retailers, processors, and small goods manufacturers across the country. AMIC is the only industry <u>association</u> representing the post-farmgate Australian meat industry. AMIC works with members, governments and industry groups to influence policy and provide technical and other services to the industry.

"We've been with iMIS for a very long time and we're really excited to be moving into the Cloud environment… iMIS EMS is going to be a fairly seismic shift in our business processes. We're looking to free up capacity, we're looking to be able to streamline processes even more and to bringing everyone forward, the members as well, from a traditional space to something more leading edge.

"What we're focusing on now is doing our campaign management through iMIS, rebuilding our website, being smarter about how we're

segmenting members and talking to our members, and essentially getting everyone onto the one source of truth... we're looking to bring everyone together."

"iMIS is intuitive. It's user-friendly. iMIS has inherently in it a really good understanding of what a system requires within a membership environment."

Board of Certification/Accreditation (BOC)

Founded in 1984, the Board of Certification/Accreditation (BOC) is an independent, non-profit agency dedicated to meeting the demands for quality patient care by offering highly valued credentials for practitioners and suppliers of comprehensive orthotic and prosthetic care and durable medical equipment (DME) services. BOC offers certification programs for six professional areas as well as facility accreditation for prosthetic, orthotic DME suppliers, and pharmacies.

"iMIS has truly helped us with staff efficiency. All of our data is in one place, and we're able to make data-driven decisions that equate to better business practices.

"We use iMIS as our main CRM to house all of our stakeholder data. We use it for online payment processing, applications, for all of our exams. The online portal is a great step forward for our customers as well because they can do a lot of work that our staff used to do. They're able to print certificates, enter in their own continuing education units, pay their renewals, and do many manual things that our staff no longer has to do.

"iMIS truly helps our staff save time. As we move to more advanced versions of iMIS, our staff performs less and less work."

The Children's Hospital Foundation Queensland helps sick and injured kids by funding life-saving medical research, investing in vital new equipment, and providing support and entertainment for children and their families. They are committed to making a difference in the fight against childhood illness and injury so every child can grow up as happy and healthy as possible.

"iMIS has given us a better view of our data — a very holistic view of our data. We use iMIS for our fundraising operations, but we've also expanded it out to our corporate partnerships area. It's also helped to eliminate some of the manual and laborious tasks that we had. Being able to develop dashboards using IQA, alerts and automatic processes have all really been helpful.

"Through the management of the giving program we've been able to get a better view of our supporters and be able to better understand their behavior and tailor our communications and personalize them in a better way.

"The simplicity of the database is nice to see. It's quite easy to understand. Businesses are constantly evolving so having an application that changes to meet those evolving needs is really beneficial to us."

Girl Scouts of Northeastern New York (GSNENY) represents almost 10,000 girls to help build courage, confidence, and character across 15 counties in New York State.

"I believe that having ONE system has really unified our organization as we all come together to use iMIS and see the power and its capabilities! We love that iMIS is our go-to for Events, Camps, Finance, Property Rentals, Volunteers, Website CMS, Communities, Marketing, and Fundraising instead of having four or five different software programs.

"iMIS really breaks down the data silos we used to have and helps us communicate better among ourselves and with our members. We used to see a lot of cancellations because of a non-friendly user interface. iMIS is so user-friendly. Our summer camp went up 34% because of using iMIS.

"My favorite feature is the dashboards. I can go in and see every department, their data, the data integrity and keeping them on track.

My staff used the dashboards to engage with communities, parents, volunteers and each other."

Master Plumbers Gasfitters, and Drainlayers New Zealand, Inc. is a national membership organization that represents excellence in the plumbing, gasfitting and drainlaying trades.

"Member engagement is really, really important... now we've got a way we can measure that, and we can put processes and systems in place to put touch points in and talk to our members on different things. iMIS is just really powerful. Using iMIS has completely changed all of our business processes.

"Previously we had no history of any engagement. Now you go into a company and you see who's been there, who's talked with them, what's happened; that's powerful stuff for us. iMIS gives us a way to know what follow-ups we need to do and who we need to engage with more. We see all that through the dashboards. Previously, we wouldn't have had a clue.

"The staff really likes iMIS. It gives them a one-stop shop in the morning to know what they have to do. And it makes it easy for us to know what they're doing. We hear about new developments in iMIS and we say, "Wow! Now we can do that!" It's continual improvements we can make to our system. It's very exciting."

NAFSA: Association of International Educators is the world's largest non-profit association dedicated to international education and exchange. NAFSA's 10,000 members are located at more than 3,500 institutions worldwide, in over 150 countries.

"Deployment of iMIS to all staff via the Cloud has increased our staff awareness of our customer base and possibilities, provided a basis for business intelligence, and enabled staff teleworking at a new level.

"I've been using iMIS for a long time — almost 20 years — and one thing I could always depend on was that it was a reliable product. At the end of the month, we could balance the books and rely on the accuracy of the data. Now with our business intelligence analysis initiative, that reliable data has proven even more important.

"iMIS is the single repository of information about our customers. This enables us to better target our products and services. Even casual users can open a browser anywhere and do searches of customers and members — something they couldn't do before. Ultimately, iMIS has opened up for us a lot of opportunity."

Established to advance education and research in emergency medicine, the Royal College of Emergency Medicine is responsible for setting standards of training and administering examinations for Members and Fellows. With more than 5,000 Members/Fellows registered internationally, the College ensures high quality care by setting and monitoring care standard, and

providing expert guidance/policy advice to relevant bodies regarding emergency medicine.

"Since moving our examination application processes online, we estimate savings of about nine months of processing administrative work each year. And our membership has quadrupled — from less than 2,000 members in 2008 to more than 8,000 in 2019.

"We use iMIS for lots of things at the College. We started using it just for our membership database, but we've expanded it to cope with our events and our study days — we run about 50 study days a year and two large conferences. We also use it to support our quality work. Our policy team uses it. We recently put our website on the RiSE platform to get greater integration. Everyone in the organization touches iMIS. It underpins all of our operations.

"The biggest change is that we use to have a queue of people standing outside of the College on the closing day for an examination — all clutching their bits of paper and checks to pay for the exam. Same with our conferences. Now it's all online. That's a great thing for us."

SAA

SOCIETY FOR AMERICAN ARCHAEOLOGY

Created in 1943, the Society for American Archeology is an international organization dedicated to the research, interpretation, and protection of the archaeological heritage of the Americas. With about 7,500 members, the society represents professional, student, and avocational archaeologists working in a variety of settings, including government agencies, colleges and universities, museums, and the private sector.

"Managing our website with iMIS has made it possible for staff members to edit their own content and manage their own department web page. iMIS has helped our members by providing easy online joins, online donations, and event registration.

"iMIS helps us make staff more efficient. They use IQA to export data and to look at data in dashboards.

"We like iMIS because it gives access online, and because it makes the staff more efficient and self-sufficient."

Since its inception in 1968, The Southeast Michigan Council of Governments (SEMCOG) has supported local planning through its technical, data, and intergovernmental resources. The work SEMCOG does improves the quality of the region's water, makes the transportation system safer and more efficient, revitalizes communities, and spurs economic development.

"iMIS has allowed us to improve our performance by taking advantage of efficiencies and making what we do behind the scenes seamless to our end-users and our members.

"The IQA query system allows us to pull relevant data and provide solutions in our day-to-day work. Our staff really appreciates being able to code and manage events, as well as maintain updated contact information for our members and our stakeholders.

"Our management really likes having one resource that is mobile friendly and fully tracks the entire membership experience."

The Texas Association of Counties (TAC) is the representative voice for all Texas counties and county officials and, through TAC, counties communicate the county perspective to state officials and the general public.

"I like that iMIS is the total package! We used iMIS to build an internal site where our staff can see what information we have on our members — from office appointment dates to how they interact with our organization. We like that the dashboards are up-to-date and accurate and we can use this information to further the mission of our organization. If management asks the question: '*How many times have our consultants visited Loving County?*' It is now answerable any time, any place, by all staff using a laptop, cell phone, or tablet!

"We take credit card payments online now instead of having to enter them manually. With the member portal we now have confidence that data is up to date because they update it themselves. It's all self-serve.

"iMIS has greatly improved services to our members."

C: Insights

iMIS EMS. Uniquely Designed with You in Mind.

1. **User Agility Insight:** Do you realize you can meet the demands of your staff, members, and other constituents with flexibility and immediacy in a highly personal manner — without the need for IT involvement — because your managers can get it done themselves?

    You can meet the demands of your members, staff, and others in an efficient, very quick manner. Everyone can benefit from a system where database and websites come from the same source — a single tool. Stop thinking about your CMS and your database as separate, different things. STOP — because, in the iMIS EMS platform, there is no distinction. Staff, especially senior management, can perform functions previously confined to programmers and web designers without calling on IT for help. Your IT department can concentrate on higher-level activities. This is what is unique about iMIS; you can reduce dependency on the IT department.

2. **Trustworthy Data (Core, Accuracy) Insight:** Do you realize that you can't trust your decisions based on your analysis if you don't have native data? Disparate systems risk incorrect billing, inaccurate accounting, difficulties getting bills out in a seamless and easy way, etc.

    Data is the key to everything you do. You can't manage your data completely and properly if it does not come from a single source. Only iMIS manages ALL your data easily and in ONE place. Other systems dependent on external data sources work by necessity with a subset of static data that needs to be constantly refreshed. With iMIS EMS, you get all your data all the time — dynamically — in one place. You can't derive accurate insights from inaccurate data.

3. **Customizations Insight:** Do you realize that no one goes into a system evaluation and transition thinking they will have to customize a lot? Do you realize some industry studies have shown that more than 60% of projects with heavy customization result in failure — and can also result in project leaders losing their jobs? If you choose the customization path, you have NO idea on what you are about to embark. It is always a much greater undertaking than you think. The more you customize, the less likely you will create a single source of truth. The more you customize, the higher the risk of not creating a single source of

data truth that you can trust. So, not only are you at risk, so is your organization.

We create standards unique to us. We apply systematic business rules unique to us. The three most dangerous letters in the alphabet are API. Consider the iceberg model, which shows that the estimated cost of customizations is only the tip of the iceberg. Don't customize what is native to iMIS. Don't lose the seamless upgrade path that is one of the major benefits of the Cloud.

4. **Smart Billing Engine Insight:** Do you realize that none of the other systems you may be looking at can do your complicated billing scenarios without extensive customizations? If you have a customized billing system, you will not have a single source of truth.

   No other system can do all the financial-related functions that happen in iMIS. We call it being "billing aware." Only iMIS is fully aware of the complete billing context. Personalized pricing, among many other accounting functions, is unique to us. iMIS EMS is inherently aware of every piece of data (because it's all native) needed to intelligently build complicated billing processes. The alternative is hugely complicated pricing/billing tables, which is not efficient. Accounting is a key core module of iMIS; uniquely in our market it handles complicated billing scenarios, among

other key functions. Purpose-built, flexible, intelligent billing; it's fully aware of the data because it's native.

5. **Cost of Ownership Insight:** Do you fully consider all the relevant factors when you explore purchasing a new system? Do you take into account that in years to come associated costs will persist and continue to increase?

    Standard systems cost three times more than expected in the first 36 months. This is something you should remember when looking at a traditional AMS or generic CRM-based software. Three factors contribute to this overage: Upgrades, Integrations and Customizations. With iMIS EMS, upgrades are automatic and seamless. Integrations are much less of a factor because nearly everything you need happens natively inside of iMIS, especially accounting. Only iMIS EMS offers you the chance to reduce Customizations to zero. Most systems stay in place for 10 years, so you have to do the multiplication to cover future years. Also, these are only hard costs; soft costs also apply.

6. **Personalized Web Experience Insight:** Do you realize that you are wasting your members' and staff's time unless you do this inherently and automatically?

    Do you realize that all those other systems are reactive, while iMIS is dynamic and proactive and signals to you what you need

to do next? Do you realize that iMIS knows who you are? Each member has a personalized and unique experience and the accurate impression it creates for members is: "iMIS is doing it for me." Your staff doesn't have to do any additional work. iMIS is a smart, intuitive system that anticipates what a member needs to do next. Predictive content guides members and staff in the next useful and productive direction.

7. **Third-Party Application Exchange Insight:** Do you realize that our third-party app data is more relevant, more seamless, and better than generic apps — and that those generic app stores don't really perform as advertised or work very well?

Let us show you how our carefully selected association-centric apps work for you. Our solution has a great store of third-party applications specifically relevant to your needs — unlike the generic applications of our competitors. We have a personalized app store just for associations; we are specialists in this space. Are you looking for a generalist provider, or are you looking for a specialist provider attuned to your concerns?

We have a certification process and a set of procedures whereby data generated by third-party applications — when you decide you need them — is brought into our native universe in an unprecedented, complete way. So, the full, complete, accurate data experience characteristic of iMIS, is enhanced.

About the Authors

Robert Alves
Chairman and CEO
Advanced Solutions
International (ASI)

Don Robertson
President and CTO
Advanced Solutions
International (ASI)

Bob Alves is not your average corporate leader. He is unlike the many CEOs who remain faceless atop an organization chart, far removed from the company's everyday operations. An ASI Founding Partner nearly 30 years ago, Bob is involved to this day in every critical aspect of the company — its present and the planning and design of its future.

After receiving his Bachelor of Business Administration degree from George Washington University, Bob went to work in the non-profit industry. He began as Founder and President of DISC in 1982, a non-profit technology consulting company. DISC was acquired by software developer Smith Abbott in 1987, where Bob served as Vice President of Corporate Development.

Bob has always had a strong entrepreneurial spirit. After wrestling with the general lack of proper client service and absence of uniform products for the non-profit technology marketplace, he was inspired to found ASI in 1991. Driven by the mission of "keeping clients for life," ASI developed iMIS — advanced, easily upgradeable, and backed by a world-class, global network of trained client support staff. Email Bob at balves@advsol.com.

Don Robertson is a widely known architect for positive change in the non-profit software industry, deftly building the future — not with concrete or steel, but with the dynamic processes of software. Don's vision has impacted more than 4,000 non-profits around the world.

Before helping to found ASI in 1991, Don honed his craft with Texas Instruments, American Standard, and non-profit software developer Smith Abbott. While providing software consulting services at Smith Abbott, Don was struck by the lack of reliable, flexible, and scalable software solutions for non-profit organizations.

Determined to remedy the situation, Don dedicated himself to the idea of pioneering software that could effectively manage an organization's constituency, communications, and resources. iMIS became that solution.

As President and Chief Technology Officer (CTO) of ASI, Don works hard every day to advance the company's philosophy through its technology. Don has a deep affection for the non-profit industry, is an ardent supporter of the community, and is an active participant within it. Email Don at drobertson@advsol.com.

About ASI

Advanced Solutions International (ASI) is a leading global provider of products, programs, and services that help associations and non-profits improve operational and financial performance. Since 1991 we've helped thousands of clients grow revenue and reduce expenses by providing industry expertise, best practice advice, and proven solutions.

ASI is the developer of iMIS EMS, the world's #1 association and non-profit software solution, and the only Engagement Management System (EMS)™ — fusing database management and web publishing into a single system — leading to operational efficiencies, revenue growth, and continuous performance improvement. Harnessing the power of Microsoft Azure's cloud platform, iMIS EMS is purpose-built to meet the most important challenge facing associations and non-profits — Engagement. We have a global network of nearly 100 partners to provide you with a full range of services to implement and support your iMIS EMS platform.

Locations

USA
Worldwide Sales Headquarters
901 N. Pitt St., STE 200
Alexandria, VA 22314
1-800-727-8682

Canada
251 Consumers Rd., Suite 1200
Toronto, ON Canada M2J 4R3
1-800-727-8682

Europe
Basepoint Shoreham Centre
Little High St., Shoreham-by-Sea
West Sussex, BN43 5EG UK
+44(0)20 3267 0067

Asia-Pacific
Suite 221
189 Queen Street
Melbourne VIC 3000
Australia
+61 3 9869 7500

Connect with Us

www.advsol.com   @advsol   advanced-solutions-international-inc.