

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



COMPLETELY REVISED & UPDATED
New 5th Edition

The Association Exec's Guide To Improving Organizational Performance

How To Make Sure Your Business Strategy
Drives Your Technology Investments

by

Robert Alves

Don Robertson

Contributing Editor: Raphael Badagliacca

5th Edition

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Advanced Solutions International, Inc. (ASI)

1800 Diagonal Road, Suite 600

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www.advsol.com

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From the Authors

This is the fifth edition of *The Association Exec's Guide to Improving Organizational Performance*.

The fourth edition was about managing change. It recognized the dynamic nature of technology and its role in achieving core truths — the value of leadership, the desire to fulfill your mission, the aspiration to grow, the need to meet business goals.

This edition is about how change can lead to greater abundance by addressing the wider needs of non-profits through the advance of digital evolution and by the addition of software focused on new areas of meaningful value.

Ecosystem has become an increasingly popular term to describe how different elements work together as a unit to drive sustainable business outcomes. Advanced Solutions International has extended its ecosystem by the addition of four premier elements critical to the missions of non-profits:

- 1) Application and review management through the acquisition of **OpenWater**.
- 2) Learning management through the acquisition of **TopClass LMS**.

- 3) Advertising, sponsorships and expo sales through integration of the **SpaceMaster** design, now native to the iMIS® Engagement Management System (EMS).
- 4) Mobile engagement app management through the acquisition of **Clowder**®.

All four of these extensions to our ecosystem increase both revenue and engagement for our clients by addressing needs at the heart of every non-profit organization's mission. The more you can manage fundamental activities within a single ecosystem — a Single Source of Truth — the more control you have over your future. That includes the ability to handle sophisticated financial transactions, such as those involving credit cards (the lifeblood of your organization) best served by the kind of software described in this book.

iMIS is at the center of this ecosystem. It is the product of industry focus and ongoing digital evolution. The phrase *digital transformation* emerged from the pandemic to describe the urgent imperative that companies promote and deliver products and services virtually. But, in truth, this seemingly transactional moment was only one more step in ongoing digital evolution that has been going on for decades and will continue into the future.

Because ASI has been involved in this evolution for so many years, it was prepared for the moment of transformation, as were its clients. Greater numbers of our clients move to the iMIS® Engagement Management System every day. Focus on a single industry turns *experience* into *vision*, moving the entire ecosystem speedily down the pathways of digital evolution.

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!

The rewards for our clients are clear: continuous learning and continuous performance improvement in an ever-expanding ecosystem.

Each chapter in this book ends with one of our “Eagle Insights.” We’ve chosen to identify the eagle with these insights — the building blocks of digital maturity — because of its strength, its speed, its vision (five times better than that of a human), but most of all because of its tenacity. When the storm hits, the eagle flies above it, gliding on the power of the storm.

Our Eagle Insights:

- **Strategic Alignment:** Ensures that your overall strategy aligns with your processes.
- **Continuous Learning:** Enlists every interaction with your members to put you on an ongoing path of continuous performance improvement.
- **Data Accuracy:** Recognizes that real-time accurate data is the lifeblood of today's associations.
- **Integrated Systems:** Eliminate data silos, the major obstacle to digital evolution.
- **Defined Processes:** Clearly outline the roadmap to your organizational goals.
- **System Knowledge:** Deepens staff understanding of how to use the tools at your disposal.
- **Digital Maturity:** Provides the only way in today's world to know where your organization is headed and how to get there.

We believe we have found answers to the important questions you should be asking on how to best position your non-profit for the future, as the pages that follow will show you.

Wishing you great success,



Robert Alves
Chairman and CEO
Advanced Solutions International (ASI)



Don Robertson
President and CTO

Chapter 1: Identifying the Problems You Are Facing Now

As an association executive, you are likely facing numerous challenges that are unique to the non-profit community. Your issues do not fall into easy-to-solve boxes. There are many solutions on the market for commercial entities, but member-centric organizations have specific challenges that are not easily addressed by commercial solutions.

It can feel like you are on your own when it comes to managing your member data — but you are not. In our work with thousands of clients around the world, ASI has identified what we call the Top 10 Association Problems. **How many of these are you facing?**

Top 10 Association Problems

1) Your Members Are Frustrated by Your Incorrect/Incomplete Data

Your members rely on you to maintain their profile, purchase, event, and billing data. When it is wrong or incomplete, they become frustrated and lose patience. They expect you to keep your database up-to-date and **make it easy for them to update their own information. This is particularly true when it comes to billing.** If your accounting software does not integrate with your member data, dues/membership fee invoices can be wrong. Members

do not want to waste their time — they expect you to get it right the first time.

2) Your System Is Too Expensive To Maintain

When you selected the member management software you have now, you may have based your budget projections on licensing fees as well as maintenance. But you quickly realized the need for customization because the system was not purpose-built for member-centric organizations — it was likely a Contact Relationship Management System (CRM) that was designed for a commercial entity. And every time you customized the system, your costs to update the system grew.

We've heard from associations that saw actual costs total three times what was originally anticipated. Much of this is due to soft or "hidden costs," such as upgrades, integrations with disparate systems, unexpected API call charges and customizations. Given that the average system is in place for five to 10 years, the long-term costs of a system that was not built for associations can be staggering.

3) Your Data Is Not Reliable

We often hear association executives say they cannot trust the data that is coming out of the system. This is because of data silos. You are probably using so many different applications to meet your organization's needs, and many do not integrate well with your current association management system.

Comprehensive and accurate reporting can become extremely difficult. Your staff may need to piece together data from the various systems, or you might have to rely on your IT department to pull together the information you need. **When it is this hard to get complete, real-time data, it makes informed business decision-making nearly impossible.**

And let us not forget about accounting and finance. If your accounting system is not talking to your member management system, you could be flying blind when it comes to forecasting.

Issuing accurate invoices can be very difficult or very time-consuming if your staff is forced to generate them manually. There are very few things that make a member more frustrated than an incorrect invoice. This affects member satisfaction and can jeopardize your retention rates.

4) You Have to Rely Too Much on IT

Because your system has been customized, it is likely that you must go through your IT department to get the comprehensive reporting you need. Or perhaps you need to insert a new field in your database, add a webpage, launch an event site or create a new dashboard. Chances are your staff members cannot do any of this themselves — they have to go through IT or your consultants. **This slows you down — making it difficult to respond to changing member needs.** It is also likely that your IT department is already overwhelmed with all the requests they are receiving. This complicated system is not working for anyone — especially not your members.

“

We created our new website so that we could manage our annual conference. At the time everything was being done using very administratively heavy processes on our Wordpress website.

Over the years we discovered all the functionality that iMIS and its websites could offer and we learned to utilize those tools and match them with our existing work flows.



BCNPHA

BC Non-Profit Housing Association



5) It Is Tough To Find a System That Does Not Need To Be Customized

If you're like many association executives, you may find your current system is outdated. You may be considering a new one, possibly a generic solution with a low per-license cost. However, be advised that many new systems on the market are not designed for member-centric organizations. So, to accomplish even the most basic association tasks, you will be looking at expensive, ongoing, risky customizations that will impact your upgrade path.

These customizations can exponentially increase time, complexity, training and maintenance costs. Such expenses are very difficult to budget for because they are unpredictable and just keep rising.

Then there is the upgrade path to consider. Customizations compromise it and limit your ability to respond to changing needs in the future. The IT department must manage the upgrades for you, and this is time-consuming, expensive and an added burden for that team.

6) Your Members Have To Wait for Answers Because Your System Cannot Keep Up

When your system has been customized, any upgrade can be long and expensive. You need to rely on IT or consultants to conduct the upgrade and then suffer through extended delays. There are glitches to work through each time, slowing you down even more.

So, how does this affect your members? When they log in to your portal, email your member services department, or call your office, you often cannot quickly resolve their issues, such as incorrect data, missing information, log in problems or access denials. You are unable to do this because your customized system is rigid and inflexible. These days, **members expect to be able to do most business online at their convenience, not yours.** If they cannot, they might turn to other organizations to meet their needs — putting your retention rates at risk.

7) You Need Specialty Apps but Do Not Know Where To Turn

There is a lot of talk about how hundreds — or even thousands — of apps work with some generic CRM-based systems on the market today. **This is a great selling point until you really look at the solution's offerings. The vast majority of these apps are not designed for member-centric organizations** — so they will not work for you without a lot of customization. Or you may be forced to add disparate systems that do not integrate with your member management system, leaving you with even more data silos to complicate your upgrade path.

Customization adds time and expense, putting you back on the hamster wheel — endlessly spinning to keep up with customization demands.

8) Your Members Are Not Engaging Online

If your website or member portal does not create a personalized member experience, your members may stop engaging with your organization. **A static, hard-to-use website that is one-size-fits-all can turn off members.** And they may not even express their dissatisfaction; they might simply drop off at renewal time. Younger members are particularly unwilling to work with a website that is not personalized to their specific needs and interests. They

quickly become frustrated — especially when their experience with other types of organizations is so easy. Members know what they are missing from you and expect you to fix it.

9) You Are on Your Own When It Comes To System Support

Associations like yours regularly face a lack of system support; when you encounter an issue, there are few choices available. **Customer support is often no more than an email address — and it can take days before someone gets back to you.** When the vendor does respond, it is often with a work-around rather than a real resolution to your problem. Of course, this is assuming the company that sold your solution is still in the picture — more and more software companies are being acquired. In some cases, support wanes or is eventually phased out — leaving you hanging. You can always hire consultants to help, but this will increase your costs.

10) Your Member Data Does Not Integrate With the Accounting System — So Billing Is a Nightmare

When your accounting system is not native to your member management platform, your association faces a slew of challenges. The resulting data silos create an unwieldy, complicated environment that is inflexible.

Billing and renewals can be a huge lift, especially if you have sophisticated billing structures. Your staff is likely forced to perform manual processes that can result in incorrect billing, excruciating month-end closings and even additional time required by your auditors.

All of this leads to increased member frustration when dues/membership fee invoices are wrong simply because you do not have a 360° view of the member record.

And, when your dues/membership fee billing logic changes or you need to expand member billing categories, it can be very difficult to update the system. Members become angry and your revenue can be affected.

If you have even one of these 10 problems, keep reading. In the coming chapters, we'll review the specific needs of the association community, how solutions on the market are addressing them, what to look for, how to optimize your software selection and how to ensure successful digital evolution.

Eagle Insight: Strategic Alignment

Ensuring your association's overall strategy aligns with your processes is critical to your success. For top performance, make sure you:

- Clearly articulate your vision, document your objectives in writing, and create goals that can be easily measured.
- Directly correlate departmental goals to your overall organizational goals.
- Educate your staff members about your goals and how their work supports the mission.
- Make technology decisions based on your business goals.

Chapter 2: Setting the Stage for a New Solution

Assessing Your Current Situation

Before you begin the quest to improve your organizational performance, it is important to benchmark where you are now and where you want to go. We have developed several tools over the years to help member-centric organizations and we share them with you below:

Digital Maturity Self-Assessment

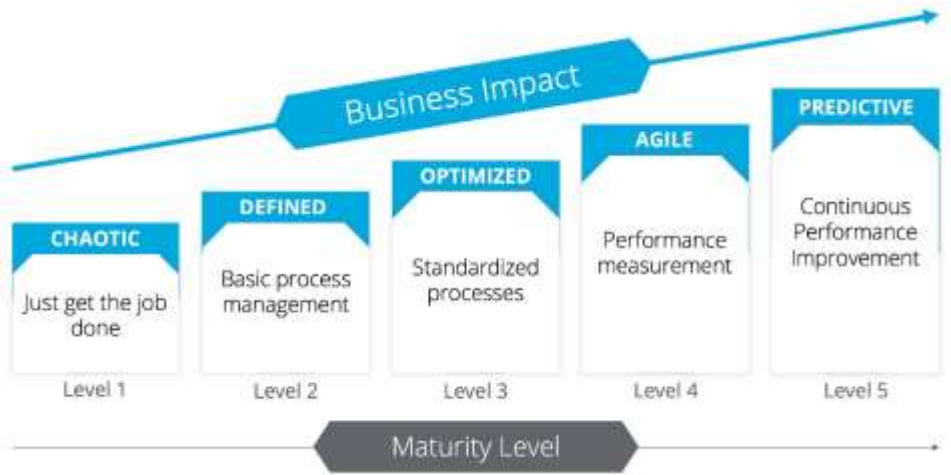
Over the years in working with clients around the globe, we have identified seven major areas you need to consider to determine how best to proceed:

1. Strategic Alignment
2. Continuous Learning
3. Data Accuracy
4. Integrated Systems
5. Defined Processes
6. System Knowledge
7. Digital Maturity

Get your digital maturity analysis in just 5 minutes.

Scan to start your assessment.

We can help you determine where you are in each area. We have a **complimentary, online Digital Maturity Self-Assessment you can take to get started right away.** It is only seven questions and can help you get a quick reading on where you may fall on the Digital Maturity scale:



Or if you would like to take a more in-depth look, you can find our full assessment in the Appendices of this book. You can then work with us to interpret your answers and craft a plan of action.

Digital Evolution

By now, you are familiar with the digital transformation strategies most non-profits have at least begun to put in place to better prepare for the days ahead. The Covid-19 pandemic that began in early 2020 highlighted the need to digitize content and services so they can be accessed from anywhere at any time. But a truly effective plan goes well beyond this bare minimum.

What Is Digital Transformation?

Digital transformation is the next huge opportunity for both associations and non-profit organizations to improve operations to deliver more value to members and donors. But what exactly is it?

Digital transformation is a very simple — but extremely powerful — concept. Digital transformation is the successful adoption of cloud-based business systems, CRM, websites and learning systems for your entire organization.

For associations and non-profit organizations, digital transformation breaks down barriers between departments and more importantly provides a great opportunity to create a more intimate experience for members and donors, inevitably leading to more member and donor engagement.

Digital transformation must deliver data as a Single Source of Truth for management decision making. Only then can the organization begin to accurately learn from its member and donor interactions to create a sustaining path to continuous performance improvement.

Why It Is Important

A digital strategy is a great opportunity to embrace change and look for fresh ways to accomplish organizational goals. But it takes commitment to question the status quo, continually experiment and possibly even revamp your corporate culture.

Why It Is an Ongoing Process That Will Never Be “Done”

Some organizations believed it was only necessary to create a digital strategy — a “one and done” item that could just be checked off the list when completed. But savvy association executives like you understand a truly effective strategy is agile — it is an ongoing process that evolves with your needs and will, quite simply, never be done. We call it *digital evolution* — a plan that will change and grow as your organization changes and grows.

Tips To Create Your Plan

Here are a few suggestions to help you get started on your journey:

- Create an “Innovation Team” composed of a diverse group of individuals from around your organization who will guide the plan’s development.
- Identify:
 - Business processes that just do not work for you any longer,
 - Legacy association software that is holding you back and

- Data silos that prevent a 360° view of your members.
- Look at everything you do with fresh eyes to see how it can be improved.

Understanding the Market for Your Core Association Software

With all the systems available to you now, it is easy to get confused or overwhelmed by the choices. Here is a quick overview of the primary options, what they mean and who can benefit most from implementing them.

Cloud-Based Systems

Regardless of the exact system you choose, it is in your best interest to choose a cloud-based option. This will ensure your staff can access your data from anywhere at any time and will ensure you are prepared for challenges ahead.

When the pandemic hit, the member-centric organizations with cloud-based systems in place were much better prepared to continue operations nearly uninterrupted.

These systems can be more cost-effective than hosting a system on your own servers and significantly more secure.

CRM-Based Systems

Contact Relationship Management (CRM) systems are popular, well-advertised cloud-based solutions originally designed for corporate sales teams. These systems were not intended to manage the complexities of long-term member management.

CRM-Based Systems	
✓ Positives	✗ Negatives
<div>✓ Are Cloud-based</div>	<div>✗ Weren't designed for member-centric organizations</div>
<div>✓ Charge low per-license fees</div>	<div>✗ Require extensive & expensive ongoing customization</div>
<div>✓ Integrate with 1000s of applications</div>	<div>✗ Mostly integrate with apps that won't work for associations</div>
	<div>✗ Need long implementation times due to customization</div>
	<div>✗ Have a difficult upgrade path due to customization</div>

Customization

Associations that choose generic CRM solutions may initially believe that building a customized system will be better for them in the long run ("We will get JUST what we want!"). But how much will this cost you? Why should you create functionality that is standard in pay for extensive customization solutions that were purpose-built for member-centric organizations right out of the box?

Integrations

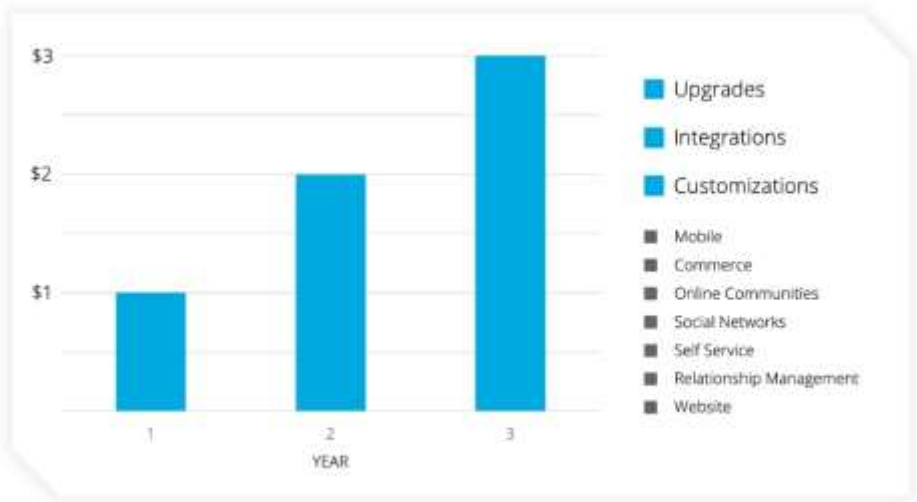
Functionality that is not built-in needs to be integrated by linking to other applications. But this can introduce data silos when the app and system integration is not seamless. You will be left with systems that will not talk to each other and will keep you from gaining a 360°, real-time view of your membership base.

Costs

The following graph illustrates the higher cost of generic CRM-based traditional AMS software over a period of just 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 to a modern EMS.

CRM and Traditional Systems Cost 3X More Than Expected Over Three Years



We are not aware of any CRM or traditional systems that deliver all of the processes listed in the above legend within standard capabilities.

Long-Term Viability

Generic CRM systems are new to the association market and do not have the experience to fully comprehend the unique needs of membership organizations. Many are built on Salesforce.com or Microsoft Dynamics platforms.

Nearly every day it seems, these types of startup software vendors are acquired by other companies outside the association market and quite often decide to discontinue support for a solution that is no longer profitable for them. You have to consider whether these newcomers will be there for you in the long run.

Traditional Systems

These older legacy systems were initially designed for associations that needed to process dues/membership fee payments and event registrations. As time went on, organizations needed to add a member portal, email marketing, social and financial transactions. This additional functionality required third-party add-ons — each with its own name and address database. This is how data silos were born and proliferated.

Difficult Forecasting

The typical association software system is in place for five to 10 years; you will want to calculate your total cost of ownership over this period to get an accurate budgetary assessment. Consider the hard costs (licensing, integrations, upgrades) as well as the soft costs required to support the system (training, staffing, additional functionality, etc.).

Traditional Systems	
✓ Positives	✗ Negatives
✓ Were initially designed for associations	✗ Typically can't be accessed remotely and are outdated /not cloud-based
✓ Have a simple interface that is familiar to users	✗ Require extensive & expensive ongoing customization
✓ Often have many years of experience in the association /nonprofit market	✗ Need add-ons to meet modern association functionality requirements
	✗ Take longer to implement
	✗ Require add-ons that create data silos and interfere with the upgrade path

Engagement Management Systems

Cloud-based Engagement Management Systems are far more advanced than traditional AMS or generic CRM-based software. An EMS fuses database management and web publishing into a single system that includes event management, dynamic dashboards, engagement scoring, certification and educational programs, fundraising, learning management, open API and application management, advertising and more.

An EMS provides a foundation for guiding the member experience as well as recording, in a single place, the totality of member engagement. The net result is that the EMS is a Single Source of Truth (SSoT) — it knows when the member pays dues/ membership fees, registers for an event, finishes an education class, votes in an association election or even opens an email.



All of this is recorded in a central hub that allows you to create content and communications **targeting the right message to the right person at the right time.**

A purpose-built EMS offers:

- 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 technology that's innovative, scalable and ready for the demands of today's member-centric organization.

And, as the years go by, your EMS will continue to help you achieve better organizational results. But here is the irony: **your EMS will actually cost a lot less to own and operate** than an antiquated traditional AMS or generic CRM-based system.

Engagement Management Systems

✓ *Positives*

- ✓ Are often Cloud-based and purpose-built for member-centric organizations
- ✓ Offer a significantly lower cost over the system's lifetime
- ✓ Integrate with hundreds of apps specifically made for association use
- ✓ Can deliver on-time, on-budget implementations because so much is already built in
- ✓ Provide automatic updates

✗ *Negatives*

- ✗ Aren't highly marketed or endorsed by celebrities
- ✗ Have a higher perceived initial cost
- ✗ Don't integrate with some commercial apps that weren't designed for associations

Determining What You Need To Look For in Your System

So, now that you understand the differences between the various systems on the market, how do you decide what is going to work best for you? Here are some of the top things to look for:

Single Source of Truth: The End of Data Silos

What It Is

A Single Source of Truth (SSoT) is a cloud-based system that brings all interactions with your members together in one database, including:

Member Interactions	
Joins	Publications and Resources
Renewals	Donations
Purchases	Professional Education
Event Registrations	

It also **integrates your data with your organization's website and your accounting system** — so you have a complete 360° view of your membership base and how it interacts with you.

With an SSoT, you can **always access the most current data** from anywhere at any time with greater levels of security than you could likely provide on your own in-house server.

“—
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Our members enjoy the member portal; our members are able to join or renew quickly and easily without staff assistance ... By the end of 2021, still in the pandemic, our membership skyrocketed to 86,000. We attribute this growth to the capability of iMIS and the ability of iMIS to manage big data.



ACRM

AMERICAN CONGRESS OF REHABILITATION MEDICINE

ACRM exponentially grew their membership with iMIS.

Scan to watch their story.



Why an SSoT Is So Important to Your Association

Benefit	Detail
No Need for Customization	With a powerful core system and purpose-built functionality, you will not have to spend time and money customizing your system, which reduces your costs, decreases your reliance on IT and does not compromise your upgrade path.
Better Intelligence, Better Decisions	An SSoT delivers business intelligence that is light-years ahead of traditional association software. You can use the real-time data for predictive modeling and make informed business decisions.

Benefit	Detail
Personalized Member Experience	When you have a complete view of your members' total engagement, your staff can deepen relationships and deliver on your value proposition.
Increased Retention	By improving member engagement (including the onboarding experience), your retention rates will rise — along with your financial performance.
No Data Silos	With an SSoT, you no longer worry about manually reentering data from one application to another or waiting for IT to generate the reports you need.
Smooth Integrations	If an integration is needed for a specialty app, the right Single Source of Truth — such as an Engagement Management System (EMS) — will offer seamless, two-way integrations.

Why It Is Important to Your Members

Benefit	Detail
One Simple Transaction	Members can pay dues/membership fees, make purchases, register for events and sign up for professional education courses in one simple transaction.
Personalized Content	Members see content that is personalized to their interests and needs — based on rules or member personas — and you can even offer predictive content that guides members to the next step.
One Login for Everything	Your portal can offer Single Sign-On (SSO) access, so members only need to remember one login — thereby increasing convenience and reducing frustration.
Self-Service Options	Members can update their profiles and other information at their convenience.
Faster Response Times	When all the data is easily accessible to your staff, members get their questions answered faster and more completely.

Creating a “Learning Organization”

An SSoT provides a 360°, real-time view of all member interactions that you can use for analytics and predictive modeling. It provides insights from every touch point, which helps you become a “Learning Organization” — one that is constantly absorbing new information, growing, stretching and expanding its vision. And by becoming a learning organization, you put your association solidly on the path to continuous performance improvement. Next, you need the processes in place that support that strategy.

Why It Is Not Just for Large Organizations

An SSoT is the right choice for member-centric organizations of all sizes. There are affordable, all-in-one solutions for smaller non-profits that offer the same convenience, integration of data and applications as those used by large non-profits.

How To Get Your Own SSoT

- **Choose a Purpose-Built Core Platform:** You need a robust member management platform, such as an Engagement Management System (EMS), designed to support the way your organization works both now and well into the future. Look for a purpose-built system that can meet the unique complexities your organization faces every day. A true SSoT needs the following three components built into the core platform:
 - 1) **Membership Management:** This unifies data from every interaction with your members into a single record.

2) **Member Engagement/Website**

Management: A powerful platform can manage your entire public-facing web presence, portals, event sites and special-purpose microsites while being user-friendly, dynamic and mobile-ready.

3) **Accounting and Finance:** Complete integration to/synchronization with the accounting system — and end-to-end payment processing that handles refunds and reconciliations — ensures full confidence in your finances.

- **Add the Departmental Modules You Need:** An association software system with an SSoT will allow you to select departmental modules **specifically designed for member-centric organizations.** This can be embedded functionality or tightly integrated solutions such as:

Departmental Modules		
Event Management	Advertising & Sponsorships	Automation & Workflows
Learning Management	Product Sales & Online Store	Engagement Scoring
Application & Review Management	Email Marketing & Communication	Analytics & Reporting
Certification Management	Fundraising Management	Mobile App Management

- **Extend Your System With Integration Tools:**

Your core platform needs to be extensible and capable of integrating with the latest solutions to provide the specialized support you need. Look for a solution that will:

- **Integrate with best-of-breed solutions** designed for the non-profit market.
 - Empower tight, **no-code integrations** to best-of-breed applications that help you deliver the specialized services you need.
 - Offer a fully documented **Open REST API** with hundreds of exposed endpoints and thousands of proven integrations with **full support for industry-standard integration platforms** like Microsoft Power Automate and Zapier.
- **Provide out-of-the-box support for Single Sign-On (SSO), Open ID and Identity Server integrations.**

“

The reporting functionality and the accessibility of the database is giving us real time actionable information to help maximise the offering that we're giving to our members.

iMIS is really a great platform, really suited to all aspects of our organisation.



THE UNIVERSITY OF
SYDNEY

—
Centre for
Veterinary
Education



Additional Considerations

When exploring an SSoT, the following key attributes will help take your system from ordinary to extraordinary:

- **World-Class Partnerships:** Look for a trusted cloud-computing platform, such as Microsoft Azure (the #1 cloud-computing platform), which can **support the MS Power Business platform** and integrate your system with other Microsoft applications.
- **Configuration Without Coding:** Find a system that allows you to modify the database structure, business logic/workflows and user interfaces without custom coding or development. You should be able to deploy pre-built and configurable widgets as well as **create new modules, interfaces and functionality without coding.**

- **Embedded Functionality:** Look for a solution that utilizes the following services as part of its core to **deliver enhanced functionality without IT involvement:**
 - **Business intelligence** (BI) and analytics, data visualization and dashboards
 - Communications (email)
 - Address data verification
- **Fixed Annual Usage Costs:** Hidden costs can significantly raise your system's Total Cost of Ownership (TCO). **Ask about usage fees** — including excess API calls and data storage costs. If these are not guaranteed/fixed, you may need to rethink your budget.
- **Artificial Intelligence (AI):** You can use AI to generate content, automate routine tasks, provide reliable, accurate information to members, and offer round-the-clock availability to your members.

Eagle Insight: Continuous Learning

Learning from every interaction with your members will help you achieve continuous performance improvement. You'll want to:

- Base your business decisions on accurate, real-time data.
- Document your key measures and seek buy-in/ownership from stake holders.
- Make key measures easy to understand; measure performance, not people.
- Outline the steps you'll take to reach your goals.

Executive Perspective: Beau Harbin, ASI



Beau Harbin
Vice President, Client Success
Advanced Solutions International

Beau Harbin and his team think about continuous performance improvement all the time. Client Success, which he leads, works with clients at every stage of their journey, beginning in the sales process.

As Beau explains, when clients are looking for new software, what they are really doing is trying to fix problems within their organizations and reach for new areas of potential. That's just another way of saying they are seeking continuous performance improvement.

We raise questions like: Is your data in one place? Or is it so scattered across multiple silos that you just cannot get a good sense of it? Or: Does your staff have the skills to do what you need them to do with the software? Have you ever gotten training?

The Client Success team is focused not only on the specifics of setting up features and functionality, but also asking the bigger questions such as: What are your business goals? What are your strategies? We know that implementing a software system is just step one of a journey that could be 100 steps. It could be 1000 steps.

It is never ending, just like an organization's mission. Things happen. You go live on Monday and the board announces some organizational change on Tuesday. It is just part of the journey. You have to keep steering a clear course to advance your mission. The software is a tool that helps make it happen. Client Success is here to guide the process.

Client websites are a good example. When we work with clients these days, they're not setting up a website for the first time. They're looking at their fifth, sixth, seventh website over the course of the last 20 years, so they understand what it is they're looking for and what their members are looking for, but often they do not know exactly how to get there. The million-dollar question becomes: Is this website for us or is it for our clients? To get it right, should we look inward or outward? And the answer is always: both ways simultaneously. Doing that with intelligence and feeling is the definition of client success.

Chapter 3: Building the System Your Organization Deserves

The Importance of the Right Tech Stack

Your association is likely encountering several significant challenges — and many of these issues can be resolved with the right association software platform. But sometimes it can be hard to know what is even possible and what to ask for from a vendor. You need the right “tech stack” behind you. What is a tech stack? It is all the software and tools your association uses to fulfill your mission and deliver member value.

How To Build Your Personalized Stack

If you start with the right association software, you can easily integrate the specialty functionality that is important to your organization. There are many best-in-class solutions that can:

- Increase your productivity
- Eliminate manual tasks
- Help you focus more attention on members
- Drive your growth

Core Platform

It all begins with the core platform. You will need a cloud-based system that is purpose-built for member-centric organizations — so you have a firm foundation on which to build your stack. It should provide a true Single Source of Truth and a 360° view of your members. The core should include:

- **Member Management:** This manages all your contact data, ensures data integrity, supports member personas, enables self-service options, includes volunteer management and empowers staff to tailor database fields to your needs without IT.
- **Member Engagement/Web Portal:** The right system can manage your entire public-facing web presence, member portals, event sites and special-purpose microsites. It must include a Content Management System (CMS) — so you can easily create webpages without waiting for IT and deliver the personalized web experience your members need.

- **Accounting and Finance:** With this native functionality, you have a comprehensive view of your association's finances, which allows you to:
 - Manage financial batches, invoices and adjustments.
 - Use separate bank accounts for different types of payments.
 - Offer secure, integrated payment processing.
 - Seamlessly integrate with leading accounting software.

Departmental Modules

When you have a strong, flexible core, you can add the specific best-of-breed modules you need for your particular organization. Some of the applications gaining popularity in the association market include:

- **Application and Review Management:** This type of solution can manage awards, grants, scholarships, fellowships, certifications and calls for papers. It should empower your program administrators to judge with in-person, online or print core sheets, streamline submission intake, and optimize reviewer workflows.
- **Learning Management Systems (LMS):** Look for an education platform that includes secure, turnkey, two-way integration bridges and Single-Sign-On solutions for your member management system and website, web conferencing, online community and payment software. It should manage certificate programs and instructor-led online courses as well as self-study.
- **Advertising, Sponsorships and Expo Sales:** Whether you manage your advertising operation in-house or use an outside media agency, you need a solution that can handle every kind of media asset with a rate card — from sale through insertion order and invoice. It should allow you to seamlessly develop and control all of your sponsorship opportunities and exhibit floor booth sales and inventory through your member management system.

“

We have now transitioned from a labor-intensive pen and paper system to a sophisticated, intuitive, and auto-scored system that will allow our Fellows Group to quickly and efficiently review the applications.

A huge thanks to the entire OpenWater team!



AsMA streamlines fellow program with OpenWater.

Scan to read the case study.



Additional Modules To Consider

Events & Learning	Commerce	Communications & Engagement	Tools & Analytics
Event Mgmt.	Product Sales	Email Marketing	Engagement Scoring
Online Events	Online Store	Campaign Mgmt.	Workflow Automation
Certification	Inventory Mgmt.	Mobile App	Reports & Dashboards

Integration Tools

Your core platform needs to be able to integrate with the latest solutions on the market to provide the specific support you need in key areas. Your particular needs may vary but for the greatest power and flexibility, look for solutions that can:

- Integrate with best-in-class applications as well as Microsoft applications.
- Help you build **no-code, two-way integrations** to avoid expensive one-off bridges or customizations.
- Provide an **open, fully documented API with hundreds of exposed endpoints** to allow you to build your own integrations.
- Support **Single Sign On (SSO)** with SAML, OAuth and other protocols for added member and staff convenience.
- Offer a network of certified partners who can help you.

Addressing the Key Problems You Are Facing

In Chapter 1, we outlined 10 of the most pressing problems member-centric organizations are facing, based on what we've seen from working with thousands of organizations around the world.

Now, we are going to provide a blueprint for how you can solve them:

1) Your Members Are Frustrated by Your Incorrect/Incomplete Data

If your dues/membership fee invoices are incorrect or you waste members' time doing multiple online transactions, they may turn elsewhere to get the information and resources they need. To minimize member frustration, your association software should ensure:

- Members can easily update their own information online at their convenience.
- Staff can easily generate accurate invoices — even with sophisticated billing structures — with built-in member management and native accounting.
- Members can pay their dues/membership fees, buy a book/product and register for a conference in one simple, easy-to-complete online transaction.

2) Your System Is Too Expensive To Maintain

Some of our clients report the actual costs of their previous systems were about three times the original estimate over the course of the first three years due to “soft” or hidden costs. These soft costs can include integrations with disparate systems, unexpected API call charges, additional staffing and customizations. To avoid this, your new system should offer:

- A purpose-built solution designed for member-centric organizations so nearly all the functionality you need is already native.
- Seamless, automatic upgrades that are handled by the vendor — not your staff.
- Predictable and controllable operating costs with no surprises.

3) Your Data Is Not Reliable

When accounting is not native to your system, billing can be extremely difficult. And if real-time, accurate, comprehensive reporting is a problem, it is nearly impossible to make fully informed business decisions — leaving you flying blind.

There are solutions on the market that:

- Provide a Single Source of Truth — so all your data is managed through one platform.
- Have accounting built into the core so invoicing is accurate and easy — even for sophisticated billing structures.
- Deliver a 360° view of all your member interactions.
- Will not need expensive customization because they are designed for member-centric organizations right out of the box.

4) You Have To Rely Too Much on IT and Consultants

Whenever you need to make even a simple update to your database or website, chances are your current system requires you to go through IT or your consultants. This slows you down, overwhelms your IT department, or increases your costs. The right association software:

- Is intuitive — fewer changes need to be made because it is already designed for associations.
- Allows staff to easily add database fields, customize dashboards, deliver personalized content, create webpages, launch a microsite in minutes, build sophisticated forms, etc.
- Enables “plug-and-play,” no-code integrations so you do not need IT help to connect with the most popular applications on the market.
- Offers extensive online training and certification programs for your staff.

5) It Is Tough To Find a System That Does Not Need To Be Customized

While every association is unique, yours is probably not *SO* different from most other associations. There are many solutions, including Engagement Management Systems that can solve nearly all of your issues right out of the box. Look for solutions that:

- Are purpose-built for member-centric organizations to work without customization.
- Include membership data, member engagement portal/website and accounting in the core platform so you have an SSoT.
- Have extensive association experience — you do not have time to train your vendor on the ins and outs of association management.
- Have a great track record: Check independent review sites for unbiased client reviews.

6) Members Have To Wait for Answers Because Your System Cannot Keep Up

When your system is highly customized, upgrades can be long and expensive. There are always glitches you need to resolve; members become frustrated when they cannot get the answers they need because your system is too rigid and inflexible. You need a system that can:

- Offer a seamless, cost-effective upgrade path where updates are done for you automatically (while you sleep).
- Empower your staff to make changes to fields and dashboards as well as set up new webpages, etc. without waiting for your IT department to do it for them.
- Deliver best-in-class functionality with the flexibility and scalability to meet your needs today and tomorrow.

7) You Need Specialty Apps but Do Not Know Where To Turn

There are a lot of third-party apps on the market today — but many were not designed to address the complexities of association management or are not compatible with association software. Look for systems that:

- Are purpose-built for associations with the native functionality you need — so there is less need to use third-party apps.
- Offer tight, plug-and-play integrations to best-of-breed applications built for associations.
- Enable Single Sign On (SSO) so your staff and members can access these apps through your system with just one simple login.

8) Your Members Are Not Engaging Online

If your website is impersonal and hard-to-use, your members will avoid it. Lack of engagement can result in lower retention rates and lower revenue performance. You can solve this with a system that:

- Offers an SSoT so you have a 360° view of all your members' interactions, likes/dislikes, interests and attitudes.
- Enables you to serve up tailored content that creates a highly personalized experience on your website, mobile app, events, online store and more.
- Allows you to create member personas that help you better anticipate and respond to your members' unique needs.
- Helps you deliver predictive content that guides members and staff to the next step easily and seamlessly.

9) You Are on Your Own When It Comes to System Support

With your current system, you probably have to email or enter a support ticket when you have a problem. It can take days before someone gets back to you and when they do, your issue is not always resolved. Or it costs you a lot more money. The right association software should offer:

- Exceptional phone and email support and extensive documentation.
- Complimentary, in-depth new client support/training that guides you through your first few months.
- Online (and on-demand) training courses as well as certifications your staff can earn.
- An extensive partner network for specialized help.
- An independent user group.

10) Your Member Data Does Not Integrate With the Accounting System So Billing Is a Nightmare

When your accounting system is not native to your member management software system, you experience a never-ending host of problems. Your staff is forced to perform manual processes that can result in incorrect billing, and you can experience excruciatingly difficult month-end closings. If your dues/membership fee billing logic changes or you need to expand member billing categories, it can be very difficult. Here's what to look for in a new system:

- A single source of data you can trust.
- Accounting and finance built into the core platform.
- Personalized pricing — the system should provide you with all the data you need to intelligently build complicated billing scenarios without extensive customization.

Executive Perspective: Kunal Johar, OpenWater



Kunal Johar
Chief Technology Officer and Co-Founder
OpenWater, Inc.

OpenWater Chief Technology Officer and Co-Founder Kunal Johar answered the question why his company chose to join Advanced Solutions International as one of ASI's newest acquisitions by pointing to iMIS® and its ecosystem. He described iMIS as the industry's most comprehensive management system for associations.

He noted that the iMIS ecosystem includes a wide range of third-party applications that integrate with iMIS and that OpenWater's software is one such application. The end result is an end-to-end association solution that now includes managing abstracts, awards, scholarships and grants. The interaction between ASI and OpenWater benefits clients by providing a seamless experience that eliminates the need for multiple systems and ensures data is accurate and up to date across all systems.

The ASI partner channel helps OpenWater achieve its goals by providing access to a large network of iMIS users and partners. The

channel enables OpenWater to reach new customers, expanding its reach within the association management market. Additionally, the channel provides OpenWater with valuable insights into the needs and requirements of iMIS users, allowing the company to tailor its software to meet those needs.

The digital evolution of the OpenWater product began with the development of a web-based platform for managing abstracts and other submissions. Over time, the company added new features and capabilities, such as certification management and review functionality. The alliance with ASI moves both parties further down the path of digital evolution by providing a more complete and integrated solution for managing association activities. The integration of OpenWater's software with the iMIS system allows for greater automation and efficiency, while also providing a more seamless experience for users.

OpenWater's dedication to completeness, particularly with regard to its inclusion of reviews with submissions, was a key factor in its early success and capture of the market. By offering a comprehensive solution including all aspects of the submission and review process, OpenWater differentiated itself from competitors and provided greater value to clients. This dedication to completeness is aligned with ASI's ideal of continuous performance improvement, as it ensures that the association management process is continually refined and optimized to provide the best possible outcomes for clients. By partnering with ASI and integrating its software with the iMIS system, OpenWater further advances its commitment to completeness and delivers even greater value to its clients.

Eagle Insight: Data Accuracy

Data is the lifeblood of today's associations. Be sure to:

- Create a specifically defined data structure that is used organization-wide.
- Establish a cross-departmental group to ensure consistent data usage and accuracy.
- Regularly review your data.
- Ensure your staff can easily generate and access clean, concise reporting.

Chapter 4: Balancing Other Critical Elements

Improving your organizational performance definitely starts by choosing the right core platform and building your ideal tech stack to help carry out your mission. The average system will be in place for five to 10 years, so you need to choose a solution provider that can go the distance and provide the long-term stability and flexibility you will need well into the future.

The Right Partners

Knowing that your vendor has strong partnerships is crucial. This is going to ensure your solution keeps up with changing technology and is agile enough to take on unexpected challenges.

Microsoft Azure

Microsoft Azure is the world's #1 cloud-computing platform. Look for member management software that's developed with Microsoft.NET, built on top of the proven Microsoft SQL Server and Internet Information Services (IIS) platforms and is deployed through Microsoft Azure. It

also helps to have tight integration with Microsoft applications, including Power Automate, Outlook, and Power Apps. Your vendor should be a Microsoft Partner to demonstrate the highest level of competence and expertise with Microsoft technologies.



For example: ASI's iMIS® is powered by the world-class Microsoft Azure platform.

App Store

To meet your organization's unique needs, there may be times when you need a specialty solution. You will need a platform that can be infinitely extended with an unlimited number of best-of-breed add-on applications. In particular, look for an app store with:

- A **searchable, curated collection** of association-specific solutions.
- Sophisticated **"point-to-point" integrations with the most popular solutions on the market.**
- Tailored and comprehensive solutions that do not require IT support.
- **No proprietary lock-in** — you should not be limited to just one app store or app exchange.

“

We use OpenWater not only for our awards programs, but also for grants, fellowships and generally anything that requires an application or judging process.

All of this in one central system that integrates nicely with our association management system.”



The Center for Association Leadership



Partner Network

The most responsive vendors will have a **large network of trained, certified and authorized partners you can call on** to solve any of your association's unique business challenges and help with implementations, upgrades and add-ons.

Top-Tier Security

The protection of your data is paramount. So, you need to ensure you are working with a vendor that adheres to the most rigorous industry standards. The company should monitor all production operation environments with immediate remediation using:

- Monthly vulnerability scans
- Third-party supply chain monitoring
- Malware script monitoring

Consider solutions that offer:

Microsoft Azure: Microsoft spends \$1 billion annually on security research and development and 3,500 cybersecurity experts. A solution powered by Azure will help ensure your data is safe.

Operational Layers of Protection:

- Managed Detection Response (MDR) antimalware agents
- MDR agent monitoring
- Web application firewall
- File integrity monitoring

Testing Protocols:

- OWASP compliance
- Penetration testing
- Annual web application penetration testing
- Annual regional environment penetration

As well as:

- Multi-factor authentication of all remote access enforced by Azure Active Directory policy
- Microsoft's Privileged Access Workstation (PAWS) and Local Administrator Password (LAPS) systems
- Azure SQL Database Transparent Data Encryption (TDE)

Non-Dues Revenue Generation

As an association executive, you understand that to truly optimize your organizational performance, you must create new sources of non-dues/non-membership fee revenue. Your system should not only support but accelerate these efforts, such as through:

- **Advertising Management:** Regardless of whether you manage your advertising operations in-house or use an outside media agency, your system should be able to handle every kind of media asset with a rate card — from sale through insertion order and invoice.
- **Sponsorships and Expo Floor Sales:** You will want a system that will seamlessly develop and control all of your sponsorship opportunities and exhibit floor booth sales and inventory.
- **Certification Management:** This can be an important revenue stream for your organization, but it can also be time-intensive; you will need a module that can manage the entire process for you.
- **Professional Education:** A Learning Management System (LMS) can help you expand your online learning options and streamline the process for you.

- **Product Sales:** By making it easy for members to access your online store and process orders in one-click, your new association software should help you increase online store receipts.
- **Event registrations:** If your system makes it easy for members to register for your events, it can also positively affect your bottom line.

Additional Qualifications

When considering possible software vendors, keep in mind:

- **Association Experience:** The vendor needs to demonstrate experience in delivering on-time, on-budget implementations for many member-centric clients — especially those similar in size and scope to yours.
- **Happy Clients:** Most companies can point to a few satisfied clients, but a trusted vendor will have a large pool of associations who can vouch for its work. Look at independent client review sites for unbiased feedback before you commit.
- **Adherence to Industry Standards:** The vendor should be GDPR-compliant and PCI-validated. It should comply with virtually every industry, regional and global regulation, including ISO, W3C, WCAG, WCF and OWASP. If the company does not know what these acronyms mean, be wary.

Embedded Functionality

Embedded functionality is one of the fastest growing areas of software development. It is designed for white label use to embed best-in-class functionality right into the software platform so you can enjoy a seamless and optimal experience. Functionality can include:

- Business intelligence (BI) and analytics, data visualization and dashboards
- Email communications
- Address data verification



For example: ASI uses Exago BI, ranked #1 by Gartner for reporting and business intelligence.

Integration Tools

Your system should support no-code, plug-and-play integrations with the most popular application exchanges so you can trigger cloud-friendly system data updates and easily manage all of your automated workflows in one place with no IT or coding experience required.

With this approach, you can access the applications that meet your particular needs while still maintaining a Single Source of Truth and not compromising your upgrade path.

For example: ASI solutions integrate with the Zapier exchange, providing clients with access to 4,000+ apps, including Zoom, SurveyMonkey, HubSpot, Google Sheets and DocuSign.



If your solution is built on the Microsoft Azure platform, also look for seamless integration between your system and all of Microsoft's own applications.

Implementation Method

Implementation can make or break a system. A potential vendor should be able to provide numerous examples of **on-time, on-budget implementations**.

It is also important to ask about the implementation methodology. It should be a dynamic, versatile process designed to deliver a solution that is finely tailored to your particular requirements. Avoid outdated/inflexible "waterfall" implementations and instead look for:

- **Demonstrated implementation experience** with member-centric organizations like yours in terms of size and scope
- **Rapid return-on-investment (ROI)** by going live in the shortest possible timeframe
- Maximum end-user engagement
- True project transparency

Training

Your solution provider should offer training on all implemented functionality that follows a “Train the Trainer” model. It should help you develop a training plan for your end users and work with you to create a Go-Live plan to ensure your success.

On-Demand Training

Your staff members should be able to access training at their convenience and at their own speed through an online portal. Learning pathways should guide them to receive the training they need, monitor their progress and view completed courses/badges they have earned. Management should also be able to track staff progress.

Certifications

Your team members should be able to expand their skills and earn certifications in the software system to address your changing needs and professional development goals.

Conferences

Your vendor should offer online as well as in-person training at meetings and conferences. These are opportunities for your staff members to grow professionally, pick up new ideas, and network with peers.

Support

It is important to know your vendor will be with you well after Go-Live. A great system can become a disaster if you cannot get quick answers to your questions and issues. The vendor needs to offer more than just help desk email support that can take days to get back to you while your association grinds to a halt. Make sure there is an **online ticketing system with phone and/or screenshare support**. Also look for:

- **Complimentary Two-Month New User Program:** The vendor should offer a program to smoothly transition you from Go-Live. It should include about two months of biweekly meetings to discuss how things are going with the system, escalate issues as needed, and address any training needs.
- **24/7 Support Portal:** You will need to be able to submit support requests, review request status and access other support resources such as product news, FAQs and discussion forums at your convenience.
- **Help Documentation:** The company should provide extensive help files and guides with step-by-step instructions and detailed information on system features.
- **Video Tutorials:** Some of your staff might learn faster by watching short video tutorials — make sure the vendor offers an interactive support approach in addition to documentation.
- **Independent User Group:** This can be a great resource for your staff, offering training, forums, and professional networking opportunities.
- **Microsoft Expertise:** If your solution is powered by Microsoft Azure, your vendor needs to demonstrate the highest level of competence and expertise with Microsoft technologies.

Microsoft
Partner

For example, ASI is a Microsoft Partner.

Eagle Insight: Integrated Systems

Eliminating data silos should be one of your top priorities. Look for a system that will:

- Create a single source of truth that you and your staff can rely on to make highly informed business decisions.
- Easily integrate to any specialty functionality you need while maintaining your upgrade path.

Executive Perspective: Raphael Badagliacca, SpaceMaster



Raphael Badagliacca
ASI Company Ambassador / Business
Development Executive / Media Specialist
SpaceMaster, Inc.

Company Ambassador and Media Specialist Raphael Badagliacca references the name of the ASI acquisition he founded, SpaceMaster, Inc. — now inside of iMIS® — to make a fundamental point. There is no significant difference in system terms between managing space in a print magazine, on a website, on a trade show floor or in the many elements that make up sponsorship packages. It pays to consider all three of these non-dues/non-membership fee revenue sources — advertising, sponsorships and expo sales — simply as different media formats. It is what he means when he encourages associations to look at the world through the media lens.

The SpaceMaster design not only streamlines processes, but also increases revenue and engagement. By managing all three types of media in one place, SpaceMaster extends the degree to which native iMIS answers the basic needs of non-profit organizations. The creation of multi-media packages is easy and natural in SpaceMaster, enabling the different formats to sell each other.

Detailed proposals articulate loyalty and other special discounts, including package discounts, increasing engagement with the organization's most important members and vendors.

Sales and orders, production (which tracks everything that must happen in each format to execute the sale), inventory for items of limited supply, billing as the final desired step after proposals and insertion orders, and thorough analytics at which iMIS excels — outline the process in a step-by-step organic fashion.

Invoicing takes place in iMIS accounting where payments and all other aspects of the financial system apply, giving organizations a more complete financial picture. As in other parts of the program, flexible, dynamic dashboards, a unique iMIS feature, tell the full data story. With the addition of the SpaceMaster design, the single record of truth in iMIS now includes non-dues/non-membership fee revenue activity.

It is not just about software. It goes beyond functionality. Associations and other non-profits own a privileged place in the world of media that they sometimes do not take actions to realize. The new capabilities within iMIS are structured to provide media guidance, turning what the software reveals into an ongoing learning process leading to continuous performance improvement.

Chapter 5: Evaluating Potential Solutions

The Pros and Cons of an RFP

It is likely that your organization's procurement policies mandate that you use a Request for Proposal (RFP) or competitive bidding process for technology purchases. And while you probably already know that RFPs, Requests for Information (RFIs) or Requests for Quote (RFQs) are not always the best predictors of success, you still have to work with the cards you are dealt. The good news is that there are new ways to improve your odds of finding the best member management system for your association. But first, let us look at the pros and cons of RFPs:

The Pros

- You are already familiar with the RFP process.
- You document all your requirements in one place.
- The selection committee is inclusive — everyone is heard.
- You compare apples to apples.
- You have documented justification for your decision.

The Cons

- It is the same process that found the system you are trying to get rid of now.
- It can be expensive and **very time-consuming**.
- Some selection committee members may not be qualified to make technological decisions.
- Vendors answer your specific questions — but they may not tell you what you need to hear.
- The “price” may not be the *real* price.
- The provider with the best solution for you may not be willing to go through a protracted RFP process — so you have already potentially limited your success.

A Better Way: System Previews

A system preview is a newer approach that helps you move forward as quickly and confidently as possible. In a system preview, you test the solution provider’s offering in a real-world environment using your own information and processes to see what you can realistically achieve — before you commit.

A system preview can be a cost-effective way to assess a new system and be used to complement and enhance the traditional RFP and demos approach. It can also provide a higher level of proof and build greater confidence in the solution you choose.

The system preview process includes:

- Identifying your most key issues and challenges.
- Employing proven best practices to save you time and money.
- Discovering new technological advances on the market.
- Lowering your risk of investing in the wrong technology.
- Documenting your needs.
- Ensuring you reach your expected return on your investment.

If your solution provider offers a system preview (and if they do not, you need to ask why), processes may vary. As an example, here is the process ASI follows for system previews:

Discovery

We collaborate with your executive team to assess your current situation. We evaluate the four most important areas that contribute to your association's success:

- Recruiting members
- Engaging and retaining members
- Measuring your performance
- Increasing your growth

This analysis benchmarks where you are today versus where you need to be — it will identify operational gaps that may be hindering your optimal performance.

This phase typically takes about three hours of executive time.

Consensus and Preview

Once your benchmarks are in place, we:

- Work with your executive team to identify key strategic targets
- Help your operational team define key requirements
- **Preview the system using your data and processes** — so there is no guessing about how the system will or will not work for you
- Prepare a detailed, personalized business performance improvement plan documenting all your requirements

This phase should take no more than two months.

Informed Decision

After completing the preview, you can decide whether our system will address your challenges and help you meet your goals. If it cannot, you will still have highly detailed documentation you can use to assess alternative association software.

“

“Since moving our examination application processes online, we estimate savings of about 9 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.”



Royal College *of*
Emergency Medicine



Hybrid Process

The preview option is clearly the better way to find your next system. But if your organization still requires a formal RFP, you can use the detailed requirements document created in the system preview to build a highly targeted, streamlined RFP that will speak to your specific needs and will be much easier to review.

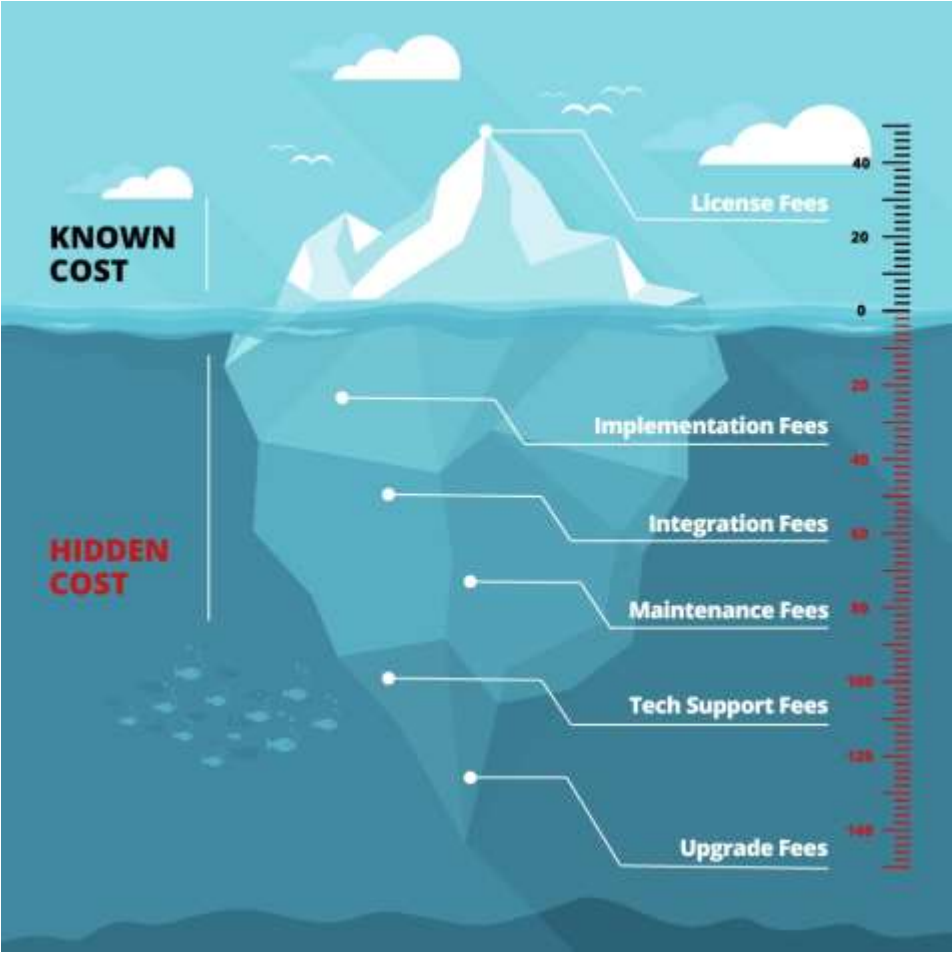
Total Cost of Ownership

Of course, system cost is an important factor when selecting new software but remember that a vendor's licensing fees are just the beginning. It is important to estimate your total cost of ownership (TCO) when evaluating a new system. Be sure to ask:

1. How will maintenance and support fees increase over the years?
2. Will we need additional staff to manage the system?
3. What's the upgrade path — will it be automatic or require expensive customization?

4. How flexible is the platform in connecting with association-specific apps?

Hidden Costs of a Customized System



Hard Costs

Customizations, integrations and upgrades can be some of your biggest expenses. And while customization sounds like a great idea — getting exactly what you are looking for can come at a very steep and never-ending price. Each time you customize your system, you will **slow down your implementation and increase your costs.**

Customization also often interferes with the upgrade path — which will continue to cost you in the future. It can also impact **your integrations with other solutions** that may be required to meet your overall needs.

Skyrocketing maintenance fees can be another revelation when you start to calculate your costs. But, If you start with a system that is purpose-built for associations, you will likely have 95% of what you need right out of the gate.

Soft Costs

Soft costs are harder to identify and quantify but certainly add up. Ask yourself:

- What if the new system is not fully embraced by our team — what kind of lasting consequences will this create?

- What if the new system does not integrate with our website? Could our engagement and retention rates suffer?
- What if the system cannot adjust and adapt to our members' changing needs?
- Will we need additional staff to manage the system?
- What if Accounting does not integrate with our member data — how many members will we lose due to their frustration?

Usage Fees

This is another “gotcha” you need to ask about. Some vendors will charge for excess API calls or excess data storage. These unpredictable fees can really blow your budget — so be sure to ask about them.

Support for Best-Practice Strategies

Each year, ASI conducts a global membership performance benchmark survey to gain a better understanding of what is working for association executives — and what is not. The following are some of the best-practices strategies executives point to again and again. Make sure your system helps you excel in these areas:

- **Remaining Agile:** The global Covid-19 pandemic demonstrated that every organization has to be flexible to ensure long-term sustainability. A system that is too rigid and customized will not help you respond to changing member needs and can actually hold you back.
- **Increasing New Member Recruiting:** Events and meetings, member referrals and email are the top new member recruiting strategies cited in our survey. Your system needs to have a single source of data that tracks all interactions with your members, helps you easily manage events, delivers personalized communications and manages multi-faceted outreach campaigns.

- **Creating a Digital Transformation Strategy:** Digital transformation is the process of integrating digital technology into every aspect of your organization. This takes a commitment to embracing change and looking for new ways to accomplish your goals. It is an evolutionary process and for many, the first step is selecting association software.
- **Developing a Formal Engagement Plan:** Organizations with a formal engagement plan have reported significant increases in event/webinar attendance, annual conference attendance, renewals and volunteerism. The plan can be simple or complex — it is just important to start measuring. Newer systems, such as an Engagement Management System, have built-in engagement scoring that can make this painless for you.
- **Boosting Overall Member Engagement:** By offering compelling content and useful tools on a dynamic website, you can ensure your members take full advantage of the value you deliver. A system with native member management and website/portal management can streamline the entire process for you.

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Now I can truly say our learning portal is self-service and easy to use. The LMS automatically sends reminders to attendees about their upcoming program, which they can access through TopClass or Zoom.

The smoother evaluation and certificate process has made a big difference—support calls to the CME team have dropped by 90%.



OKLAHOMA STATE
MEDICAL
ASSOCIATION



- **Expanding First-Year Member Strategies:** This starts with an orchestrated onboarding plan that gets new members engaged quickly, keeps them engaged online and follows through to the renewal. The right system will make this a breeze. The wrong system could make it clunky and ineffective.
- **Launching Win-Back Campaigns:** Budgetary constraints and lack of engagement are two of the most-cited reasons for attrition in our surveys. But these same respondents report that the best ways to win back lapsed members are email campaigns, phone calls and Board/Executive outreach. Your system should support your multi-faceted campaigns and keep the trains running on time.

- **Offering Recurring Memberships:** With a recurring membership model, your association automatically charges membership fees on a monthly or annual basis — on an open-ended schedule. A member management system that does this for you can substantially increase your renewal rates. By making it easy for members, you also make it easy for your organization.

- **Designing a Personalized Member Experience:** You need to:
 - Deliver tailored content based on member interests.
 - Provide convenient self-service options.
 - Ensure members only need to remember one log in.
 - Empower members to easily pay dues/membership fees.
 - Allow members to purchase products and register for events all in one transaction.

Eagle Insight: Defined Processes

Use these tactics to prevent errors and keep your team on-task:

- Clearly document your processes so staff have a roadmap to follow (and your onboarding process is streamlined).
- Schedule periodic reviews/updates for your processes to ensure they remain accurate and relevant.
- Verify that appropriate staff can easily access and update documented processes as needed.

Executive Perspective: Linda Bowers, TopClass LMS



Linda Bowers
Chief Technical Officer
TopClass LMS

Learning is an essential component of the relationship between a non-profit organization and the people it serves, if not the most essential component. It goes beyond that. Learning is what advances the world. So, it makes perfect sense that learning is at the heart of what non-profits — whose missions are to make the world a better place — are all about.

Linda Bowers, Chief Technology Officer at TopClass LMS, one of newest additions to the ASI ecosystem, has a modern take on learning. That also makes perfect sense in a world where pursuits of every kind become increasingly digital with each passing day. Online learning management systems were already moving down the path of digital evolution when the pandemic added accelerant to the fire of that movement. As Linda points out, it suddenly became less expensive to reach a wider audience with virtually no geographical restrictions by making the offering virtual. It also helped every organization's bottom line.

But it did more than that. According to Linda, it streamlined the learning process and made possible and more immediate detailed record-keeping concerning each learner's progress and profile. By exchanging data with ASI's iMIS database a powerful single record of truth across systems became the norm, increasing engagement and advancing learning itself.

The online learning focus of TopClass LMS, along with abstracts and certification from OpenWater and SpaceMaster's management of advertising, sponsorships and expo sales inside of iMIS, advances ASI's overarching plan to create an ecosystem that serves every need of the non-profit world.

ASI has always promoted the use of its software as an ongoing learning experience leading to continuous performance improvement, which should be the goal of every organization and individual. Adding TopClass LMS to the mix, according to Linda, takes it a step further — learning about learning at the edge of digital evolution. Now that makes sense.

Chapter 6: Creating Your Action Plan

We have covered a lot of territory in this book, and you are probably looking for a summary to tie everything together so you can create your own action plan for moving forward.

Your next system is a strategic investment. So let us review the concepts and attributes you need to keep in mind to ensure your organization maximizes its performance:

Key Concepts To Remember

Single Source of Truth

A Single Source of Truth (SSoT) is designed to **eliminate data silos and bring all interactions with your members and other stakeholders together in one database**. And because it is in the Cloud, you can **always access real-time data** from anywhere with greater security than you could likely provide on your own in-house server.

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ACC leadership fosters a culture of innovation and experimentation. Few associations offer a year-round membership app, and it's exciting to explore the possibilities of this medium. Not only are we continually building a strong community, but we're also tapping into an exciting avenue for potential non-dues revenue.



ACC's mobile app crushes member engagement goals with Clowder.

Scan to read their story.



Continuous Performance Improvement

This is a systematic process that focuses all of your organization's efforts on achieving the goals you have set. This process can include implementing technology that fosters recruiting and engagement, encourages growth, measures results, and leads to exceptional overall operational performance.



Learning Organizations

A true learning organization learns from every member interaction and uses that information to better deliver on its value proposition. By fostering this type of environment, you will help ensure your non-profit achieves continuous performance improvement.

Clearly Defined Objectives

Once you are comfortable with the concepts above, there are a few steps you need to take to prepare your association for a system search:

Conduct a Digital Maturity Self-Assessment

You need to benchmark where you are starting from so you can measure your progress and modify your goals as circumstances require. In Chapter 7, we offer a free self-assessment you can take to evaluate your organization and start you on your way.

Create Your Digital Evolution Strategy

Develop a digital plan — but do not stop there. You should regularly review and update your digital evolution strategy to ensure your processes, policies and corporate culture are delivering value to your members.

“

We implemented TopClass LMS to solve two of our problems: the desire to have both an LMS and a tool to run our virtual conference. We did a lot of research and learned most tools would cost us between A\$10K and A\$25K to run one event, whereas with the LMS we can run as many events and courses online as we wish and get more benefits from it.





Document the Problems You Need To Solve

As part of your digital review, you undoubtedly identified issues and challenges you need to resolve. It is important to keep these top of mind when considering new association software. Review your issues and make sure the system can support them using the blueprints we laid out in Chapter 5.

Must-Have System Checklist

You will want to insist on a system that includes the following critical components:

Status	Component
✓	<p>Purpose-Built Core Platform</p> <p>You want to start with a system that has been designed for member-centric organizations and has nearly all the functionality you need right out of the box — such as an Engagement Management System (EMS). A purpose-built platform that integrates your member data with your website and accounting system, so you have a Single Source of Truth (SSoT) with a full 360° view of your members.</p>
✓	<p>No-Code Integration to Best-of-Breed Applications</p> <p>Your core platform needs to be able to integrate with the latest solutions on the market to provide the specialty functionality your association needs. Look for a system that can support no-code, two-way integrations and provide an open API with hundreds of exposed endpoints. It should support Single Sign On (SSO) for added member convenience.</p>
✓	<p>Unparalleled Security</p> <p>The solution provider should adhere to the highest industry standards. It should monitor all production operation environments with immediate remediation using monthly vulnerability scans, third-party supply chain monitoring and malware script monitoring. The company should also employ operational layers of protection and the latest testing protocols.</p>

Status	Component
✓	World-Class Partnerships Microsoft Azure is the world's #1 cloud-computing platform — a solution powered by Azure will ensure your system keeps up with changing technology and is agile enough to take on unexpected challenges.
✓	Embedded Functionality Robust query and report generation along with embedded functionality — such as best-in-class business intelligence (BI) — will help you make informed decisions based on accurate, real-time data.
✓	Proven Implementation Track Record Ask for several examples of on-time, on-budget implementations for organizations that are similar to yours. And check the online client review sites for unfiltered feedback.
✓	Flexible Training In addition to a Train-the-Trainer program, the vendor should provide on-demand learning, certifications and in-person conferences to expand your staff's knowledge of the system.
✓	24/7 Support It is important to know your vendor will be with you well after Go-Live. Make sure there is an online ticketing system with phone and/or screenshare support , a 24/7 support portal, help documentation and video tutorials.

Status	Component
✓	<p>Stability Behind the Solution</p> <p>A strong, financially viable company behind the solution is essential. Your system will last for five to 10 years, and you have to question whether newcomers will still be around in the future when you need them.</p>
✓	<p>Extensive Partner Network</p> <p>Look for vendors with a large network of trained, certified and authorized partners you can call on to solve any of your association's unique business challenges and help with implementations, upgrades and add-ons.</p>

Evaluation Tips

- **Digital Evolution Plan:** Start with your digital evolution plan to identify exactly what you need and then base your evaluation around how well the system supports your real requirements. Consider the key challenges we addressed in Chapter 5 and determine whether the system can help you overcome them.
- **RFP Alternatives:** Consider a system preview to determine exactly how your own data and processes will work in the system you are considering. It is a great predictor of success and can help you avoid choosing a system that will disappoint you in the future.

By following the advice in this guide, you will create a true learning organization that can achieve continuous performance improvement. Well done!

Eagle Insight: System Knowledge

Your business system is the heart of your association. To get the most out of it, encourage your team to embrace it and learn all they can about it, including:

- Ensure staff have direct access to system Technical Support.
- Generate departmental training plans with defined learning paths.
- Make sure one or more staff are certified system users/administrators.
- Consider including system training in yearly professional goals.
- Communicate your commitment to the system and its success.
- Conduct automatic updates — so you don't have to worry about them.

Executive Perspective: Alexa Kade, Clowder



Alexa Kade
General Manager
Clowder

The dictionary definition of the word *clowder* is a gathering of cats. Anyone familiar with feline behavior knows how difficult it is to corral a collection of cats, but substitute for these creatures the wide variety of tasks an association must perform to succeed for its members and that is exactly what the Clowder® product does so well. And it does it on the most ubiquitous invention of our age — the cell phone.

As Alexa Kade, Clowder CEO, points out, you have an app for everything today. You have an app to order your coffee. You have an app to order your food. You have an app to do your banking. You have an app to shop. Why wouldn't you have an app to engage with your association? Clowder® is that app.

By concentrating into a single place seminal elements to association growth in revenue and engagement, Clowder – fourth in a series of ASI acquisitions – parallels the advancing expansion of the entire ASI ecosystem.

Take one example. For SpaceMaster, the earliest of the four acquisitions, now native to iMIS®, Clowder is one more media asset — a vehicle in which advertising takes place and sponsorships happen. What's sold on Clowder can be processed, tracked, inventoried, and invoiced in SpaceMaster, and paid in iMIS along with the rest of the association's financial activity.

Clowder, in Alexa Kade's words, "sets out to fill an obvious gap." She notes that there are other event apps. But they are all narrowly focused on the event itself. After association staff, clients and members pour resources into them, they just sit on the shelf until the next event. By contrast, Clowder is designed for yearlong use and for deep integration with all parts of the association enterprise.

Clowder focuses not just on event modules but also on engagement modules, communication modules like a news feed, push notifications, messaging, community building with forums, a resource library that allows members to have access to pertinent information while they're on the go.

It links to other aspects that may be important on an association-by-association basis, such as donations, grassroots advocacy, government affairs, depending on the association.

This aligns with ASI's most basic concepts: a Single Source of Truth across applications and continuous performance improvement with every keystroke. The benefits are also basic and far-reaching: increased revenue and increased engagement.

Chapter 7: Leveraging Available Resources

You now have a blueprint for achieving exceptional organizational performance and were also providing a few additional assets you can use on your journey:

Digital Maturity Assessment

We offer a complimentary assessment of your organization's digital maturity that you can take at your convenience. It starts with a high-level review of seven areas:

1. Strategic alignment
2. Continuous learning
3. Data accuracy
4. Integrated systems
5. Defined processes
6. System knowledge
7. Digital maturity



From there, we can do a more in-depth review that looks at nearly 40 different measures of your organization to give you an invaluable assessment you can use to determine your next moves.

Performance Improvement Advisory Service

ASI's Performance Improvement Advisory Service (PIAS) can help you build a personalized roadmap to success. Our advisers will help you thoroughly analyze your organization, team and business goals through in-depth assessments, workshops and best-practice reviews, including:

- **Organizational Maturity Assessment** to see how you compare to the top 10% of ASI clients.
- **Operational Assessment** to determine how to align your system to support your business goals.

- **Knowledge Assessment** to improve your team members' system knowledge by reviewing their current skill levels to create personalized training plans.
- **Technical Assessment** to identify technical obstacles and align your environment to proven best practices.

**Strategize your digital
transformation journey.**

Scan to get started.





Clowder's federated module provided exactly what CREW Network needed. The platform can provide multiple chapters access to a single app in a siloed and gated experience. CREW remains the overarching owner, servicing the Chapters events, posts, and timely announcements in a single instance without having to manage multiple applications.

By participating in the federated app model, our chapters are now weaving in their local information amongst CREW Network's global news, resources and events.



**CREW Network centralizes
connection and engagement
with Clowder.**

Scan to read their story.



Additional Resources

Tap into ASI's complimentary resources:

Whitepapers

From tips for creating an effective digital evolution plan, establishing your own Single Source of Truth, designing an effective tech stack and eliminating data silos, we have a library of complimentary resources you can draw on for expert help.

Webcasts

If you prefer visual learning, we also have an extensive collection of complimentary on-demand webcasts you can watch at your convenience.



Events

ASI hosts an annual conference for clients and prospective clients who want to learn more about our suite of solutions. Our regional iNNOVATIONS conferences are held in convenient locations around the world to provide technical training and education, networking opportunities, product development insights and case studies.

Blogs

Our blogs offer deep dives into the topics you're most interested in and provide insights from industry experts.



Eagle Insight: Digital Maturity

Understanding where your association is now and where you want to go is one of the keys to digital maturity. Be sure your system helps you:

- Provide a highly personalized member experience.
- Communicate with your members according to their needs, interests, and preferences.
- Offer easy access to your organization's resources.
- Deliver on your value proposition.

About the Authors



Robert Alves
Chairman and CEO
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 more than 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
President and CTO
Advanced Solutions
International (ASI)

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 cloud software and services for associations and non-profits. We help clients digitally transform, streamline operations and grow revenue through industry expertise, best-practice advice and high-quality solutions. Our portfolio of solutions includes iMIS® for association and non-profit management, TopClass LMS for learning management, OpenWater for application and review management, and Clowder® for year-round mobile app management.

Locations:

Asia-Pacific

Suite 221, 189 Queen Street *
Melbourne VIC 3000
Australia
+61 3 9869 7500
* *Mailing address only.*

Canada

251 Consumers Road, 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
+44(0)20 3267 0067

USA

Worldwide Sales Headquarters
1800 Diagonal Road
Suite 600
Alexandria, VA 22314
1-800-727-8682

Center for Technical Excellence
9600 Great Hills Trail
Suite 150W
Austin, TX 78759
1-800-727-8682

Appendices

A. Glossary

Advanced Solutions
International

—a leading global provider of cloud software and services for associations and non-profits whose portfolio of solutions includes the iMIS® Engagement Management System, OpenWater application and review management software, and the TopClass LMS learning management platform

AMS. See Traditional AMS
System

Artificial Intelligence (AI)
Brittanica defines this as
“the ability of a digital computer
or computer-controlled robot
to perform tasks
commonly associated with
intelligent beings.”

Best Practices

—commercial or professional
procedures that are accepted
or prescribed as correct or
most effective

Clowder®

—part of ASI’s portfolio of solutions, Clowder is a multi-purpose native mobile engagement app designed to drive year-round engagement for member-centric organizations. With Clowder, organizations can replace one-time use event apps, open new communication channels, facilitate networking, and generate additional sources of non-dues/non-membership fee revenue.

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

Continuous Performance Improvement

—the resolution by an organization to find a way to dedicate its resources and activities to continually advance toward achieving its goals

Dashboards

—an information management tool that 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

Data Silos

—separate, unconnected data files resulting in inefficiencies and duplicate effort

Data Conscious

—the use of human judgement as well as data to inform business decisions rather than data alone

Digital Evolution

—the expansion of the digital transformation plan to a never-ending process of delivering greater value to members

Digital Transformation

—the successful adoption of cloud-based business systems, CRM, websites and learning systems for the entire organization

EMS. See Engagement Management System

Engagement Management System

—a modern system like the iMIS platform, designed to evaluate and increase the level of involvement of its constituents

Engagement Scoring

—an automatic method of measuring the level of engagement of an organization's constituents
General Platform. See Generic CRM-Based Software

Generic CRM-Based Software
—the highly advertised general systems not designed for associations, very dependent on customizations and with links to third-party applications not useful to associations

Hard Costs
—the direct costs of a system that can include upgrades, integrations and customizations — particularly related to the websites, mobility, social networking, e-commerce, private communities, self-service and relationship management

unique management needs of associations, unions, clubs and other non-profits. iMIS offers the features non-profits need to effectively manage their organizations plus a powerful API with hundreds of proven integrations, easy-to-use dashboards and reports and an optional web CMS

iNNOVATIONS

—ASI's yearly conferences that educate and celebrate the growing community of iMIS, OpenWater and TopClass LMS users and partners. The conferences feature educational tracks, product development insights, case studies and recognition of clients who are achieving great things using the company's suite of non-profit solutions

iMIS®

—part of ASI's portfolio of solutions, the world's only Engagement Management System designed to meet the

Learning Organization

—a commercial entity dedicated to advancing its staff and constituents by creating a learning environment and continually encouraging and incentivizing participation in it

Member Personas

—the analysis of the entire personality of certain members (beyond simple demographic details/segmentation) to understand not only what members do but why they do it; may include capturing specific interests, attitudes on key issues and professional goals to deliver a more personalized member experience

Modern System

—a software product like iMIS centered around engagement and designed to foster Continuous Performance Improvement. iMIS® is the only Engagement Management System for associations

OpenWater

—part of ASI's portfolio of solutions, the application and review management software that empowers administrators with a robust end-to-end solution, streamlines the collection of grant and scholarship applications and proposals and manages the reviewing, judging, and acceptance process all in one system

Performance Improvement Advisory Service

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

Personalized Member Experience

—the delivery of tailored content through the website/portal and member communications that reflects the member's specific interests, needs, feedback and attitudes; often draws on member personas to personalize the interactions and deepen the relationship

Personalized Web Experience

—the ability to deliver automatically different content suitable to different profile groups or individuals

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 iMIS

RiSE

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

Single Source of Truth

—a cloud-based platform that brings all interactions with members together in one place by integrating member data with the website and accounting system for a complete 360° view of the membership base

Smart Billing

—the ability of a system to handle sophisticated billing scenarios. Smart Billing can only be accomplished if all

necessary data and activity history exists in a single system

Soft Costs

—indirect, associated costs

SPP. See Success Partnership Program

Success Partnership Program

—ASI's unique thought leadership systematic approach to guiding an association to determine what system aspects it needs to continually advance toward its 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

Third-Party Application Exchange

—a select collection of Cloud-ready third-party applications useful to associations with data output deeply integrated with iMIS

TopClass LMS

—part of ASI's portfolio of solutions, the powerful learning platform connects learners to transformative education and certification programs

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

Trustworthy Data

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

User Agility

—the ability of non-technical users to operate system aspects traditionally handled by programmers

B. Digital Maturity Self-Assessment

Our quick self-assessment can be accessed online:

Get your digital maturity analysis in just 5 minutes.

Scan to start your assessment.



You can also review the following in-depth assessment questions in advance and contact ASI using the QR code for more information about how to score your answers and evaluate your results.

Section	Question	Score
Strategic Alignment		
	Our organization has a documented mission, vision and goals.	
	Our mission, vision and goals are clearly written and easily understood with regards to the business results we are looking to achieve.	
	Departmental goals are directly correlated to the organizational goals.	
	Departmental staff members are aware and can articulate the relationship between their work and the organizations mission, vision and goals.	
	Technology choices are made based on their contribution to organizational goals.	
	Key measures are directly attributable to the business results of the mission, vision and goals.	

Section	Question	Score
Continuous Learning		
	We practice evidence-based leadership.	
	Key measures are documented in detail.	
	Targets are based on accurate historical result sets.	
	Key measures show actionable results.	
	Key measures have buy-in and ownership from stakeholders.	
	Key measures can be easily read and understood	
	We measure performance, not people.	
Data Accuracy		
	We trust our data implicitly.	
	We have a defined data structure or data dictionary that is used across the organization.	
	Our organization has a cross departmental group for ensuring data usage and accuracy.	
	Our data is regularly scrutinized.	
	Our reporting system is clean, concise, and easy to locate the information you need.	
Integrated Systems		
	Our organization has a primary source of truth for our data.	
	Systems integration is automated, timely and accurate.	
	Our software is consistently kept up-to-date.	
Defined Processes		
	Our business processes are documented	
	Our business processes are regularly reviewed and updated	
	Staff can easily locate, access and update business process documentation	

Section	Question	Score
System Knowledge		
	Staff have received firsthand training from the vendor in the system.	
	Staff have individual or departmental training plans that are regularly reviewed and updated.	
	One or more staff are certified users of our system.	
	Staff have attended webinars or training classes within the last six months.	
	Staff have knowledge of and refer to system documentation when needed.	
	Staff have direct access to system Technical Support as needed.	
Digital Maturity		
	Our digital experience provides value to all our key audiences.	
	Our digital experience communicates with our key audiences in the way they wish to be communicated with.	
	Our digital experience provides access to all our organization's offerings.	
	Our digital experience enables our staff to focus on high value work for the organization.	
	Our digital experience is always available and accessible to our users (anytime on any device).	
	Our digital experience makes it easy for our audiences to engage with our organization.	
	Our digital experience empowers us to measure our offerings (financial, engagement, impact).	
	Our digital experience positively impacts our ability to fund our organization.	

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