



# Turning Members into Advocates with CQ Roll Call and iMIS

*Presented by:*

Association Technology Solutions, LLC



# About ATS



- Serving iMIS community since 1996
- Award-winning, full-service Authorized iMIS Solutions Provider (AiSP)
- Specialization in extending the functionality of iMIS
- 60+ bridges to integrate iMIS with popular third-party products



# Hosted by



*Presenter:*

Chris Hoponick  
Partnership Team Executive  
CQ Roll Call  
Direct: (202) 650-6403  
Email: [chrishoponick@cqrollcall.com](mailto:chrishoponick@cqrollcall.com)



*Presenter:*

Randy Richter  
Director of Technology Solutions, Partner  
Association Technology Solutions, LLC  
Direct: (720) 945-7256  
Email: [rrichter@atsol.org](mailto:rrichter@atsol.org)



*Moderator:*

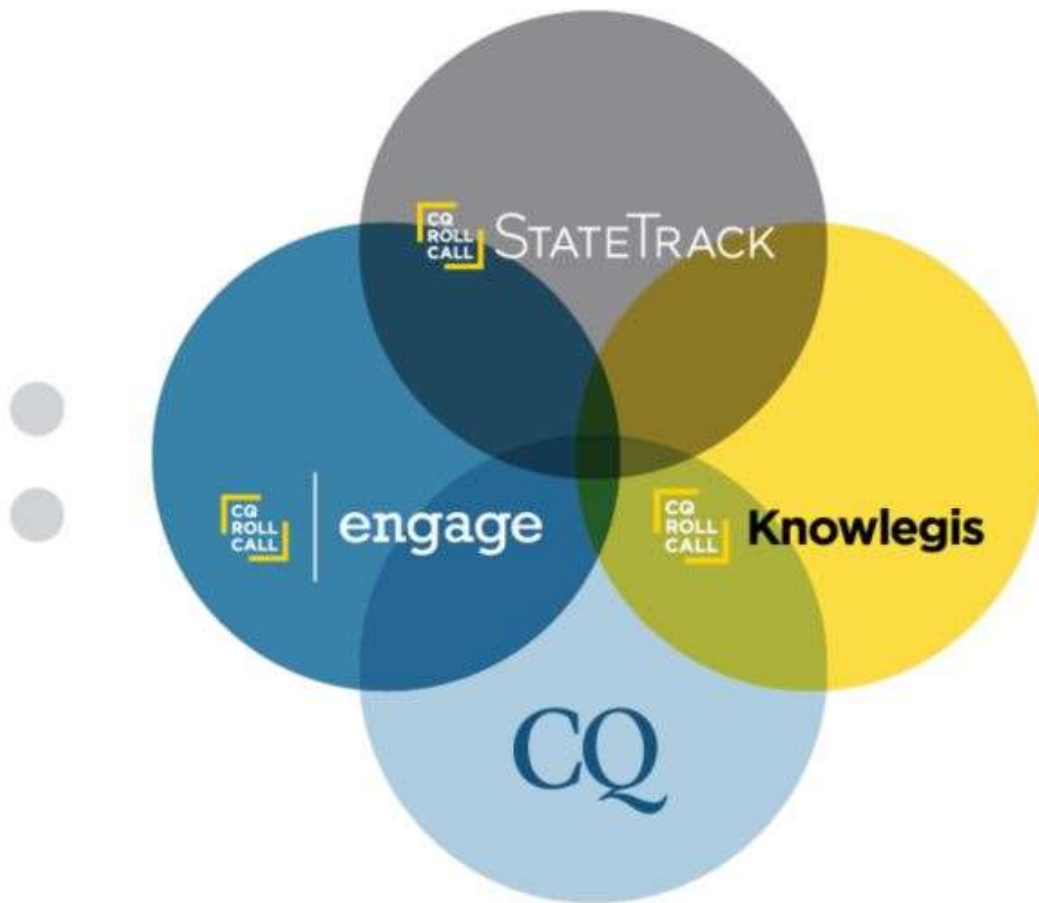
Richard Banks  
Sales Manager  
Association Technology Solutions, LLC  
Direct: (571) 213-4785  
Email: [rbanks@atsol.org](mailto:rbanks@atsol.org)



# Digital Advocacy Solutions



An Economist Group business





# Who We Are



Since 1945, CQ Roll Call has been the source of congressional news, legislative tracking, and elections coverage.



In 1998 CQ Roll Call led the market into creating digital advocacy software solutions, with *CapWiz*.



Market leader in delivering advocate messages to Congress and State elected officials.



Technology solutions that support data driven advocacy.



# Digital Advocacy Needs



CQRC Engage provides a guaranteed method for your advocates to take action by contacting Congress, State, and Local elected officials and candidates

Social Media  
Integration

iMIS Integration via ATS syncs contact records & Advocate Activity between platforms

Mobile  
Responsive

Grasstops  
Relationship  
Management

Campaign  
Analytics

Content  
Management  
System

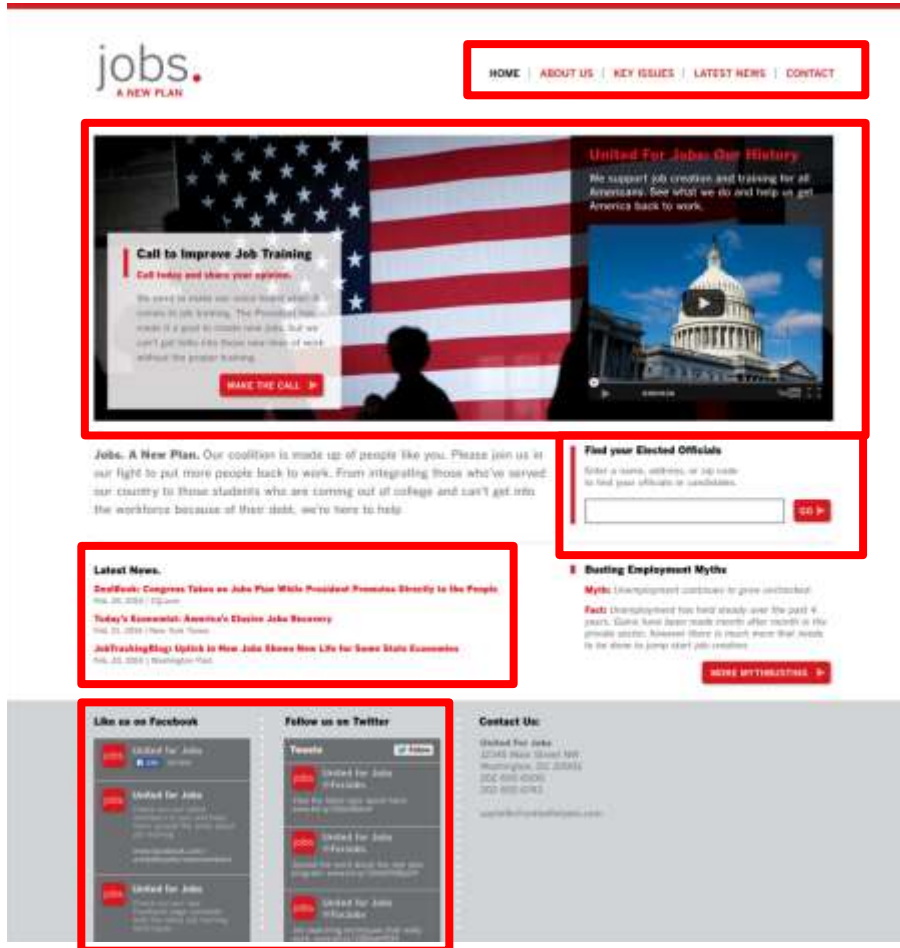


## Engage: Grassroots Calls to Action

- Write a Letter
- Sign a Petition
- Register to Vote
- Tweet an Official 
- Facebook Integration 
- Share Your Story
- Make a Call

## Knowlegis: Grasstops Management

- Elected official & Congressional staff look-up & outreach  
CRM system
- Manage Fly-Ins & Lobby Days



## Modular and customizable

### Highlight your calls to action

- Share your story
- Write a letter
- Make a call
- Sign a petition
- Tweet
- Social sharing

### Offer news specific to your issue

- 4500+ fully licensed sources
- Align content with your messaging
- Authoritative content from CQ Roll Call
- Federal and State Bill and Vote content

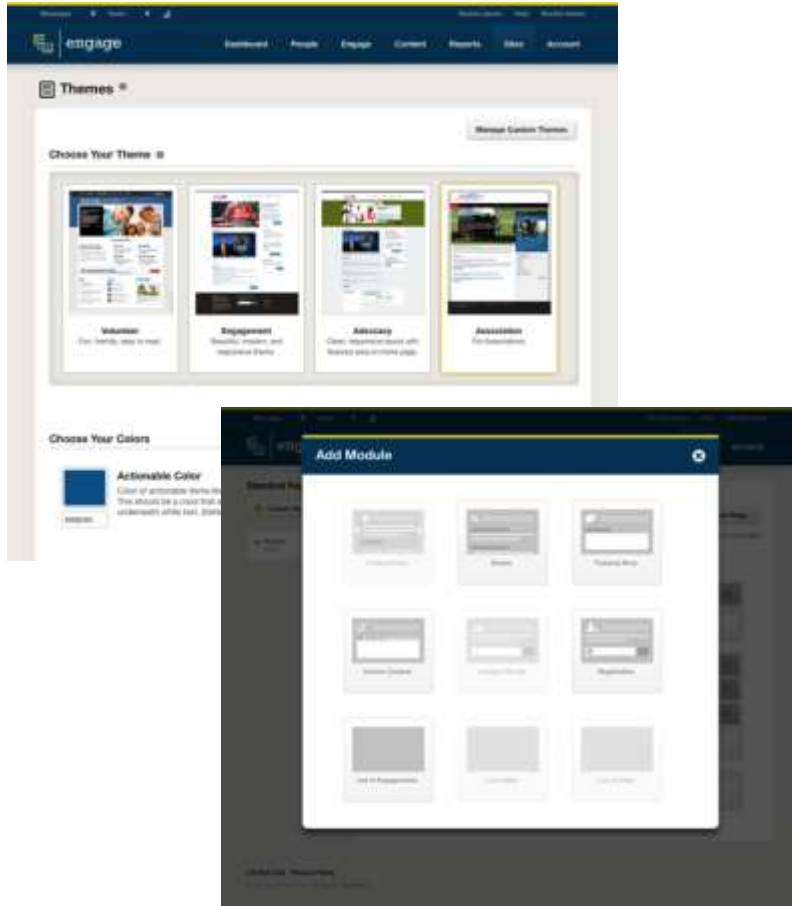
### Find your representative

- Look up federal, state and local.





# Customize Advocacy Destination



- Directly integrate modules into your existing website using IFrames, plug-ins and API' s, or link to a stand-alone Microsite.
- Customize the site with custom templates, fonts, colors, custom logo, custom header images.
- Add modules for greater engagements
- Add custom content , white papers , Video' s, User-generated content.
- Integrate Social Media Tools



**ZERO**  
THE END OF PROSTATE CANCER

*Advocacy in action to end prostate cancer*

ZEROCANCER.ORG

ISSUES

TAKE ACTION

SUMMIT

PROCLAMATIONS TOOLKIT

RESOURCES

**DONATE**



### Early Detection

Prostate cancer kills almost 30,000 men every year making it the No. 2 cancer killer for men. Early detection is the key to beating prostate cancer and lowering the mortality rate. When detected early, the chance of survival is nearly 100 percent. However, if left unchecked and allowed to spread beyond the region of the prostate, the chance of survival drops to just 28 percent. The United States Preventive Services Task Force (USPSTF) recommends against testing men for prostate cancer. This recommendation is important as it guides primary care physicians in preventive care and which services are required to be covered by insurance companies under the new Affordable Care Act.

### Our Position

ZERO supports early detection and the role of the PSA test as the key to defeating prostate cancer. ZERO believes the guidelines of the National Comprehensive Cancer Network (NCCN) is a more practical approach for the early detection of prostate cancer. ZERO works to ensure men are educated about the importance of early detection and have the opportunity to be tested for prostate cancer.

**“Early detection buys time - time to be with loved ones, time for new treatments to be discovered, time to live. With more lives lost every day to prostate cancer since the USPSTF recommendation, advocacy on Capitol Hill is**

- A recent study showed that potential advocates are 20% more likely to take action when you give them context about the issue.

- Use Engage’s Issue Page templates and Engage’s Custom News Feeds to give context to your action alerts.

**ZERO** *Advocacy in action to end prostate cancer*  
THE END OF PROSTATE CANCER

ZEROCANCER.ORG

ISSUES TAKE ACTION SUMMIT PROCLAMATIONS TOOLKIT RESOURCES **DONATE**

### Gov. Wolf's diagnosis promotes discussion of prostate cancer

2016-02-29 | The Morning Call

Feb. 29—The doctors who lead the fight against prostate cancer have seized Gov. Tom Wolf's diagnosis as a teachable moment.

"All men at the age of 40 should start thinking about their prostate health," said urologist Vanessa Elliott. "They need to at least start thinking about it."

Prostate cancer, though rarely diagnosed before 40, is the most common cancer in American men. In the United States, there were an estimated 220,000 new cases and 27,500 deaths from the disease last year.

While early diagnosis may offer the best chance of beating the disease, the question of when – and even if – to start screening is so controversial that some doctors, including Elliott, do not follow the guidelines of a leading medical authority, the U.S. Preventive Services Task Force.

"There are a lot of nuances," said Elliott, who works for Urology of Central Pennsylvania based in Harrisburg. "A lot of this is dependent on family history and race."

#### Take Action Today


[Help Continue Vital Federal Prostate Cancer Programs](#)

Please contact your representatives and your senators and ask them to sign onto the "Dear Colleague" letter in support of the prostate cancer programs at the Department of Defense.

#### Find your elected officials

Enter a name, address or zip code to find your officials or candidates.

- Engage's Custom News Feeds pull articles into your website from over 4,000 newspapers and 2,000 blogs.
- These articles are filtered by YOUR issues to drive return web traffic to your site and to give people additional information about the issues you are trying to impact.


jobs   
A NEW PLAN FOR ALL OF US


HOME | LATEST NEWS | KEY ISSUES | STATES


### Tweet your elected officials and get the attention we need!


The time is now to show our men and women in the service our support

Text goes here regarding the issue

 Rep. Barbara Comstock (R-VA)

Characters Left: 48 

 Sen. Mark Warner (D-VA)

Characters Left: 48 

- Give potential advocates the ability to take action via social media engagements such as “Tweet Your Legislator”.
- Advocacy via social media is sometimes preferable for potential advocates (and can receive more immediate notice from legislators.)

Diabetes Patient Advocacy Coalition

Chris Home 20+

**WE ARE DPAC**  
DIABETES PATIENT ADVOCACY COALITION™  
Diabetes Patient Advocacy Coalition  
Non-Profit Organization

Sign Up Like Message

Timeline About Email Signup **CQRC Engage** More ▾

**QUALITY.**  
5 years since a Diabetes Hearing - **ACT NOW.**

**QUALITY: We Need A Hearing on Diabetes**

Ask Congress for a Hearing on Diabetes

We need a Congressional hearing on diabetes. In the five years since the last Congressional hearing on diabetes, the number of Americans diagnosed with pre diabetes has increased to 86 million, the cost of diabetes care in the U.S. has exploded to \$322 billion annually and

**SEND A MESSAGE NOW!**

- CQRC Engage's Facebook integration enables Facebook users to write their legislators, look up their elected officials, or register for newsletters / alerts without ever leaving Facebook.
- Increase conversion rate by keeping potential advocates on the Facebook platform.





**SECULAR**  
COALITION FOR AMERICA

HOME ABOUT ISSUES RESOURCES NEWS STATES EVENTS **DONATE**

**Action Alert! Tell Congress to Act on Bangladesh**  
Extremists Attack Secular Publisher in Dhaka  
H. Res. 396 would send a strong message that the United States is committed to protecting international religious freedom for everybody, including nonbelievers.

**Take Action!**  
Petition: Ask the Armed Forces to Recognize the Humanist Identity  
This Veteran's Day, please take a moment to sign our petition to the Pentagon urging the Navy, Coast Guard, Marines, and Air Force to recognize humanism as a religious preference.

**Action Alert! Tell Congress to Act on Bangladesh**  
H. Res. 396 would send a strong message that the United States is committed to protecting international religious freedom for everybody, including nonbelievers.

**Look up your federal and state elected officials**  
Enter your zip code  
 **GO**

\*Engage provides **content modules** for your website including “Take Action” engagements, news feeds, bills, votes, elected official look-up & scorecarding, an elections page, video, registration, and more.

- **Website options include:**
- Stand-alone *microsite*
- *iFrame* into your website
- *Plug-ins* into your website

## How to Increase Advocacy Participation by 116% and Grow Your Membership List in 10 Days



Acquiring new members isn't easy. And getting those members to participate in your advocacy or donation

- Consider CQ Roll Call's **Advocate Acquisition Program** to recruit new advocates & donors or to build your list with guaranteed, timely results on a cost per action (CPA) basis.
- View the Case Study at: [Connectivity.cqrollcall.com](http://Connectivity.cqrollcall.com)

<http://connectivity.cqrollcall.com>



**connectivity**  
Help for Associations, Nonprofits and Advocacy Professionals from CQ Roll Call

Advocacy in Action / Advocacy Tools

## What Your Digital Advocacy Program Can Learn from Bernie Sanders and Ted Cruz

March 10, 2016, by Dana Mann



Every political presidential cycle brings us a new wave of technology that eventually trickles down to the ho

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\* First Name:   
\* Last Name:   
\* Email:

Confirm Email Option

SIGN UP

Top Resources

### The 50 State Project

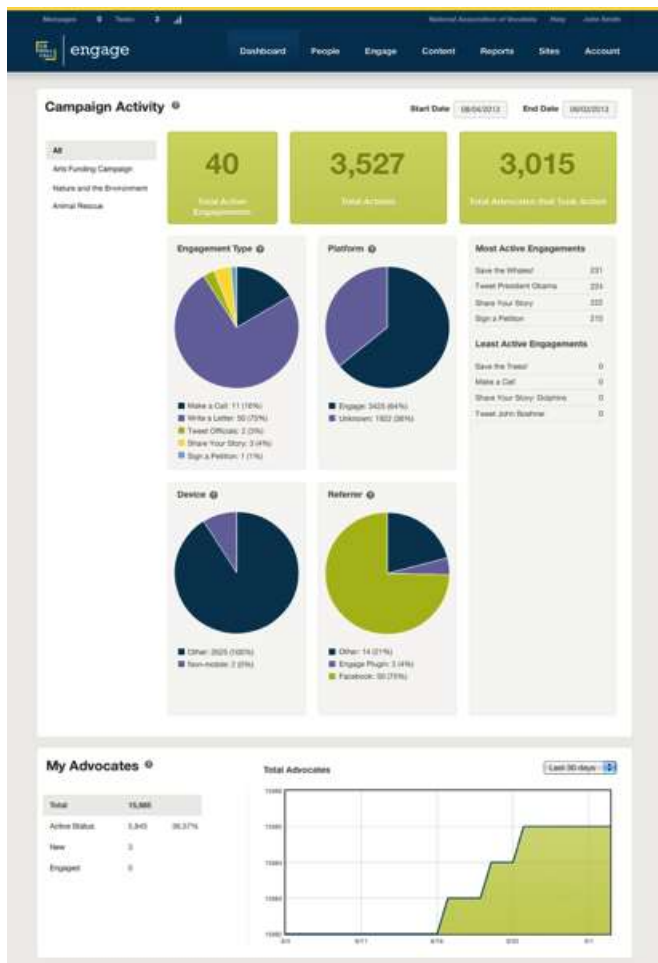
This report gives a synopsis of the Top 5 policy issues each state



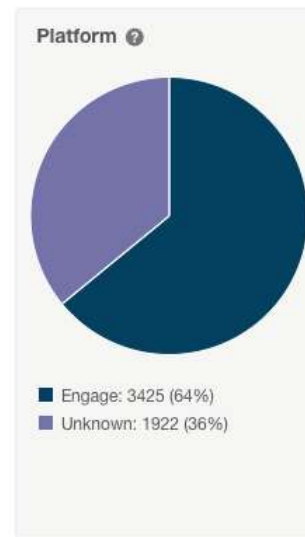
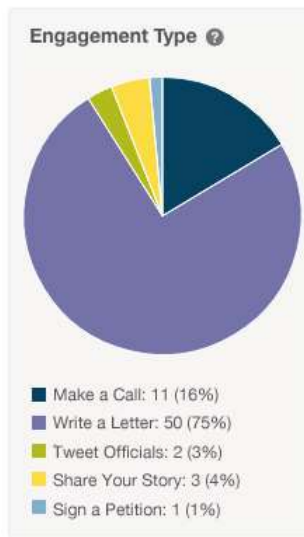




# Measure Success with Ease, view reports in Engage OR iMIS



- Monitor your campaigns for greater effectiveness both within Engage & within iMIS.
- Create customized reports showing Advocate, Campaign and Engagement data





# Advocate Profile within Engage (records synced with iMIS)



**engage** Dashboard People Engage Content Reports

Advocates Find Advocates Advocate Profile

### Advocate Profile

**Sebastian Smith**  
Burley, Idaho  
Last update: 06/21/2012 Profile Status: Active Phoenix ID: 33305  
Authentication Status:

**203**  
Total Actions

**Engagement Breakdown**

Total Donations	\$0.00 (0)
Call Alerts	10
Letters	19
Submitted Stories	18
Signed Petitions	5

**Engagement History**

Made 3 Calls	05/09/2012
Subscribed to "Privacy Newsletter"	05/12/2012
Shared a Story	04/24/2012
Signed a Petition	04/12/2012
Signed a Petition	04/09/2012

[View Call Record](#)

**Newsletter Subscriptions**

This advocate does not subscribe to any newsletters.

**Mail Messages to Advocate**

<a href="#">Stop Capital Punishment</a>	05/04/2012
<a href="#">He Should Be Executed</a>	05/04/2012
<a href="#">By Some Means or Manner</a>	05/04/2012
<a href="#">Taryn's Grand Assault Victim</a>	05/04/2012
<a href="#">Mortimer's Privacy Law</a>	05/04/2012

- Build and maintain Advocate Profiles.
- Automatic zip to district matching.
- Track all Engagements made by your advocates
- Micro-target your supporters effectively.
- Directly integrate advocate data with your IMIS platform.



# IMIS Integration (Contact Record shows Advocate Activity)



1008 Graham Webb (iMIS Business Framework)

File Edit Cmds Utilities Help

**iMIS<sup>15</sup>** Home Customers Billing Events Fundraising AR/Cash Orders

**Manage customers Individual Member - Graham Webb**

ID 1008 Individual Member Active Category

Prefix: Graham M Webb Suffix: Informal Designation Member Title

Company: 362 Anon Ltd (CM) Orchard Brae House, 30 Queensferry Road, Anon Ltd Company Sort ANON LTD

**Address** Street Address Home Address

Address: Orchard Brae House  
30 Queensferry Road Status  
Address 3  
Denver CO 80212  
Country

Preferred:  Mail  Bill  Ship

Phone: Fax: E-mail: Graham@anon.com

Profile Donor Data Status

Work Phone  
Home Phone  
Fax  
Toll Free  
E-mail: Graham@anon.com  
Web Address  
Major Key

Results Record History Activities-All **CQRCEngage** Calls Letters Roster AR/Cash Billing

* Date	Activity Type	Issue name	Campaign Name	Engagement Name	Att
2/3/2014 10:00:00	Made Call	Issue with Organizat	Benel Solutions - Tes	Call to Improve Job	
▶ 2/3/2014 10:00:00	Signed Petition	Issue with Organizat	Benel Solutions - Tes	Support Real Change	
2/3/2014 10:00:00	Made Call	Issue with Organizat	Benel Solutions - Tes	Call to Improve Job	
2/3/2014 10:00:00	Made Call	Issue with Organizat	Benel Solutions - Tes	Call to Improve Job	
2/3/2014 10:00:00	Made Call	Issue with Organizat	Benel Solutions - Tes	Call to Improve Job	

New Delete Find Print User Credentials 1 result returned.

**CQRC Engage's iMIS integration syncs contact records and advocate activity between Engage & iMIS.**

- Eliminate duplicate entry and manual imports of contact information as data is automatically pulled from iMIS
- Centralize your view of your advocacy campaign
- Add value to your advocacy data by tracking member engagement activities in iMIS as members take action.
- Run reports to see what issue areas your members are engaging in and how often your members take action.



# iMIS CQ Roll Call Bridge



*iMIS*



**iMIS20**<sup>EMS</sup>  
ONE SYSTEM  
ENGAGES EVERYONE



- Works with all versions of iMIS from 10.x to 20.x
- Uses standard iMIS API's for reading and writing data from and to iMIS
- Installs as a Webservice on your server or at your hosting location
- Allows for creation of custom groups in iMIS for targeting campaigns
- Developed and supported by award winning AiSP, Association Technology Solutions



**engage**

*Grassroots Advocacy*

*For questions or to schedule a personalized demo & to receive discounted ATS / iMIS pricing, please contact the CQ Roll Call Partnership Team DIRECTLY:*

**Chris Hoponick, Partnership Team Executive**

Email: [chrishoponick@cqrollcall.com](mailto:chrishoponick@cqrollcall.com)

Phone: 202-650-6403

For iMIS Bridge questions contact: [info@atsol.org](mailto:info@atsol.org)



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Chris Hoponick  
Partnership Team Executive  
CQ Roll Call  
Direct: (202) 650-6403  
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Association Technology Solutions, LLC  
Direct: (720) 945-7256  
Email: [rrichter@atsol.org](mailto:rrichter@atsol.org)



*Moderator:*

Richard Banks  
Sales Manager  
Association Technology Solutions, LLC  
Direct: (571) 213-4785  
Email: [rbanks@atsol.org](mailto:rbanks@atsol.org)



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Email: [chrishoponick@cqrollcall.com](mailto:chrishoponick@cqrollcall.com)



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Question:

If we'd like to see a proposal and pricing, what would be the process?





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Chris Hoponick  
Partnership Team Executive  
CQ Roll Call  
Direct: (202) 650-6403  
Email: [chrishoponick@cqrollcall.com](mailto:chrishoponick@cqrollcall.com)



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Direct: (720) 945-7256  
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Question:

How long does it take to implement the solution from end-to-end?





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Partnership Team Executive  
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Question:

Can you anticipate any additional functionalities being built into the bridge?



# More from ATS



Looking for more from the experts at ATS?

## Upcoming Webinars

<http://atsol.org/Webinars>

## Past Webinars

<http://atsol.org/PastWebinars>

*including video recordings, and downloadable presentation slides*