

Moving from the Desktop to Staff Site

Presented by:

Association Technology Solutions



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 Authorized iMIS Solution Provider (AiSP) of the Year



Hosted by



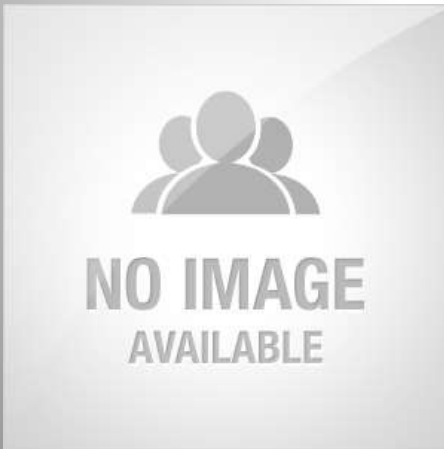
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Moderator:

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Sales Manager

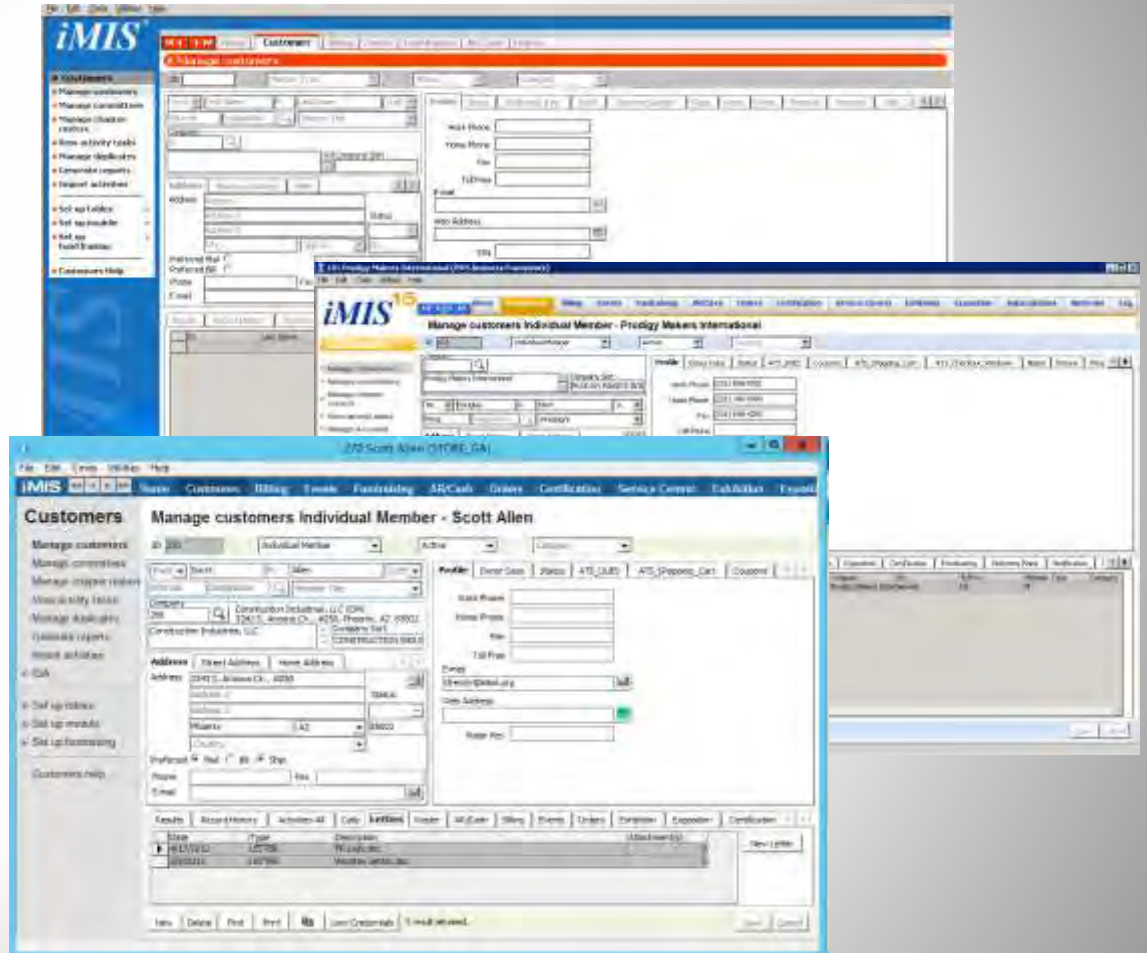
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Desktop Over the Years

- Basic functionality has remained stable
- Long-term staff have great familiarity



Challenges of the Desktop

- Hard to customize
- Several clicks to get things done
- Separate installation process
- Seems cumbersome to new staff and casual users
- Staff wish it were more user friendly to use



Future of the Desktop

- Functionality is moving from the desktop to the staff view
- Some functionality will be replaced
- Prediction – sometime in 2018
- Brian Lindsey – Desktop Farewell Tour
http://www.advsol.com/asi/INNOVATIONS/Presentations/INNOVATIONS/Previous/iNNOVATIONS_2017.aspx



What is not being moved from Desktop

- Legacy Rapid Gift Entry
- Professional Referrals
- xTender API
- Hotel Room Block Management
- Exhibitions
- Expo Management
- EXPOCAD Interface
- Advertising Management (SpaceMaster)
- iMIS Analytics (Standalone application)
- Adhoc search



(from Brian Lindsey presentation at Innovations 2017)

What's new in the 2017 Release?

- Engagement Scoring
- New Security and PCI Upgrades
- 100+ new reports, queries and dashboards
- Over 150+ New Enhancements and Features



(from Brian Lindsey presentation at Innovations 2017)

Engagement Scoring

iMIS

- Community
 - Dashboard
 - Engagement
 - Overall**
 - Organizations
 - Find contacts
 - Add contact
 - Manage duplicates **PLUS**
 - Committees
 - Communities
 - Volunteers
 - Security
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Finance

Keyword search

Mr. Brian Murphy

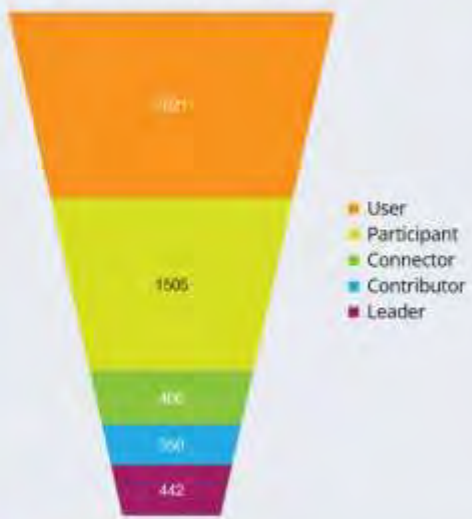
Total engaged contacts
4,346
Total contacts: 5,052

Recently engaged
254
Contacts engaged in the past 6 months

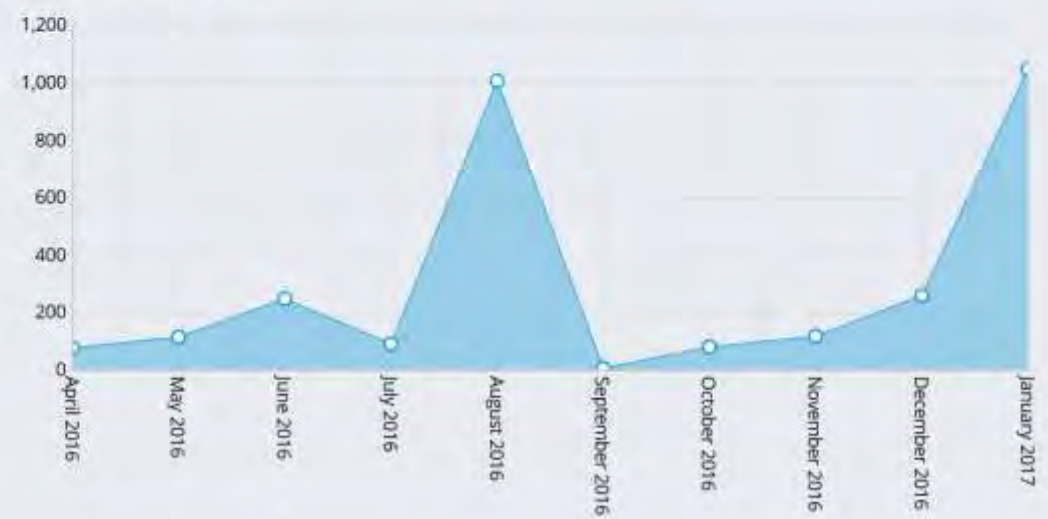
Newly engaged
0
Newly engaged contacts this month

Average score
30

Engagement by category



Engagement by month



By member type | Top contacts | At risk contacts | By component

Individual Contact Account Page

The screenshot displays the iMIS Individual Contact Account Page for Mr. Douglas A. Hunt, Jr. The interface includes a left-hand navigation menu, a top search bar, and a user profile header. The main content area is divided into several sections: a contact information block, an engagement score gauge, an engagement history bar chart, a profile list, and a demographics section.

Navigation Menu:

- Community
 - Dashboard
 - Engagement
 - Find contacts
 - Add contact
 - Manage duplicates **PLUS**
 - Committees
 - Communities
 - Volunteers
 - Security
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Finance
- Continuum
- RiSE

Search Bar: Keyword search

User Profile: Mr. Brian Murphy

Contact Information:

- Mr. Douglas A. Hunt, Jr.**
President
Prodigy Makers International
- Preferred Mailing:**
P.O. Box 4564
Newark, NJ 07107-2564
UNITED STATES
(201) 898-9000
prodigymakers@imisdemo.com
- Join date:** 5/28/1967
- Member type:** Company Member
- Status:** Active
- Paid through:** 4/29/2003

Engagement Score: 33 (At Risk)

Engagement History:

Year	Event Registrations
2016	15

Profile List:

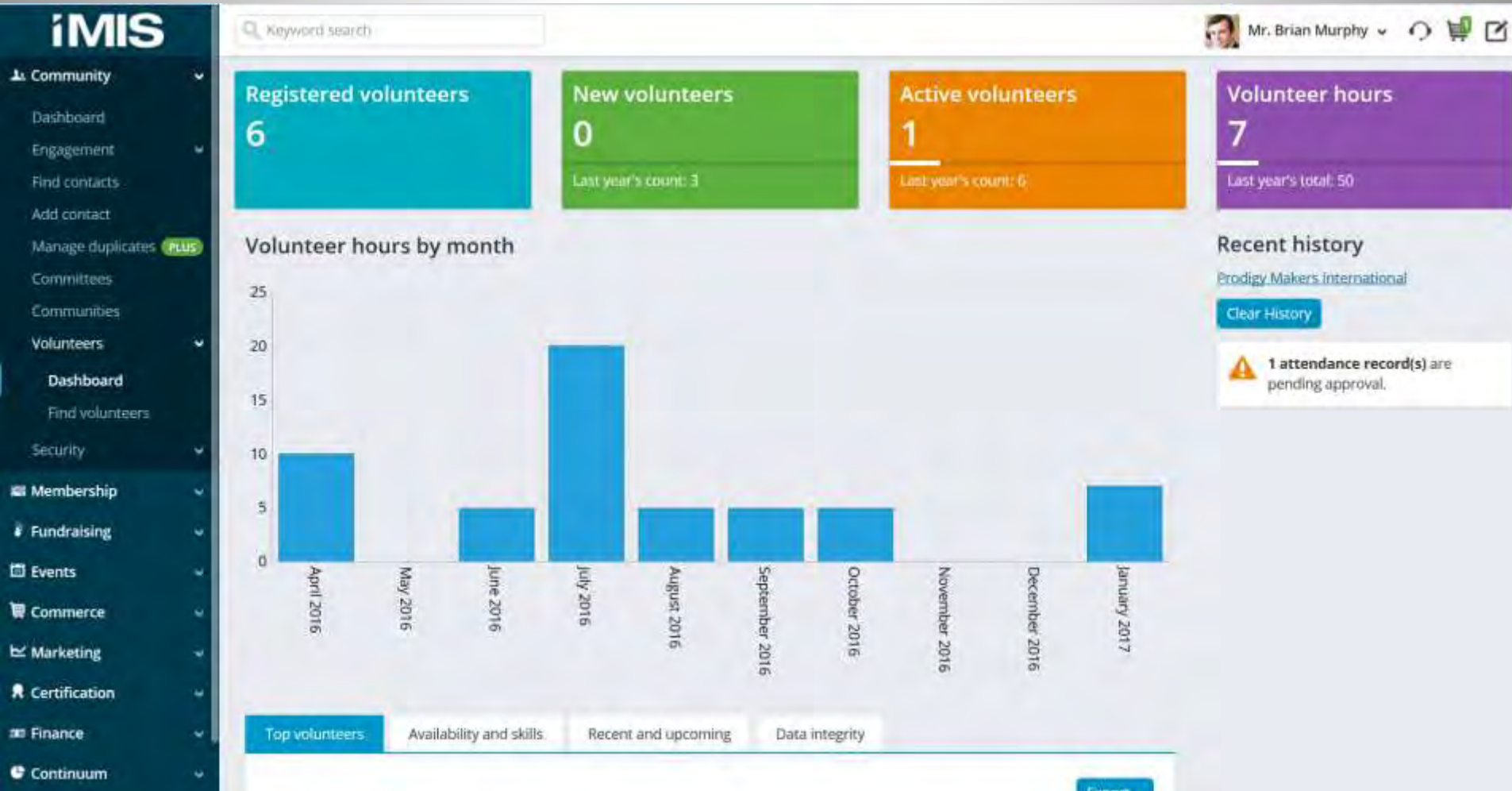
- About
- Locations
- Founded
- Website

Demographics:

- ID: 101
- Staff Size
- Annual Revenue in Millions
- Industry
- Region

Action Buttons: Print Info, Public Profile, Email, Donate, Order

Volunteer Management



Moves Management

iMIS

- Community
- Membership
- Fundraising
 - Dashboard
 - Find gift items
 - Add gift item
 - Find gifts
 - Enter gifts
 - Moves management
 - Dashboard
 - My major donors
 - Tribute notification
 - Import donations
 - Automatic payments
 - Configure premiums
- Events
- Commerce
- Marketing
- Certification
- Finance

Keyword(s) (select)

Mr. Brian Murphy

Major donors

33

Revenue from donors

12,090

Last year's revenue: 2,660

Average gift amount:

345

Potential major donors

0

Stages of cultivation

■ 1 Identify
■ 2 Qualify
■ 3 Cultivate
■ 4 Ask

Type of gifts

Type of Gift	Count
Major & Planned Gift	5
Major Gift	16
Planned Gift	2

Moves managers

Potential major donors

★ Recent Major Donor gifts

- [Ms. Melissa F. Hodges: 30.00](#) on 4/6/2017
- [Ms. Melissa F. Hodges: 50.00](#) on 4/6/2017
- [Xander West: 100.00](#) on 4/6/2017
- [Allyson Smith: 25.00](#) on 4/6/2017
- [William Goh: 75.00](#) on 4/6/2017
- [Dr. Clara Pau: 50.00](#) on 4/6/2017
- [Ms. Pam W. Ballard: 300.00](#) on 4/6/2017
- [Alex Morgan: 500.00](#) on 4/6/2017
- [Ms. Elana Beckett: 500.00](#) on 4/6/2017
- [Randall Martinez: 250.00](#) on 4/6/2017
- [Nadish Verma, PhD.: 400.00](#) on 4/6/2017
- [Ms. Qing Tan: 100.00](#) on 4/6/2017
- [Mrs. Sandra Thomson: 750.00](#) on 4/6/2017

Ecommerce



Advanced Email and Advanced Email Plus

The screenshot displays the iMIS Advanced Email dashboard. On the left is a dark blue sidebar with navigation options: Community, Membership, Fundraising, Events, Commerce, Marketing, Advanced email (PLUS), Communication templates, Communication logs, Campaigns, Segmentation, RFM, Process manager, Certification, Finance, Continuum, RISE, and Settings. The main content area features a search bar, a user profile for Mr. Brian Murphy, and a title 'Advanced email dashboard'. Below the title is a note: 'Results are of advanced email communications sent in the past 12 months, unless otherwise indicated.' The dashboard contains four key performance indicator (KPI) cards: 'Emails sent' (4,977 past 12 months), 'Delivered' (58% of sent), 'Open rate' (72% of delivered), and 'Click rate' (49% of opened). A section titled 'Responses in the past 90 days' shows a yellow box with the text 'No data found'. To the right, there is a section for 'Last response per recipient' with a pie chart and a legend. The legend includes: Bounce (blue), Click (green), Deferred (yellow), Delivered (red), Dropped (black), Open (light blue), Spam Report (light green), and Unsubscribe (orange).

Keyword search

Mr. Brian Murphy

Advanced email dashboard

Results are of advanced email communications sent in the past 12 months, unless otherwise indicated.

Metric	Value	Unit/Context
Emails sent	4,977	past 12 months
Delivered	58%	of sent
Open rate	72%	of delivered
Click rate	49%	of opened

Responses in the past 90 days

No data found

Last response per recipient




- Bounce
- Click
- Deferred
- Delivered
- Dropped
- Open
- Spam Report
- Unsubscribe

Guided Performance Scorecard

iMIS

- Community
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Finance
- Continuum
- Guided Performance Scorecard**
 - All reports
 - Contact reports
 - Membership reports
 - Fundraising reports
 - Event reports
 - Commerce reports
 - Accounting reports
 - Certification reports
 - Content reports
- RISE

Keyword search

Mr. Brian Murphy   

Guided Performance Scorecard

Key Performance Indicators	2014	2015	2016	Goal	Industry
Overall Performance Index	20.60	22.77	23.07	24.60 	26.22 
Recruitment	2014	2015	2016	Goal	Industry
Recruitment Acquisition Index	33.33	37.00	0.84	39.33 	42.00 
Conversion Rate	75.00	76.00	0.00	77.00 	78.00 
New Member Acquisition	20.00	30.00	3.80	35.00 	40.00 
New Visitors to Website	5.00	5.00	79.82	6.00 	8.00 
Engagement	2014	2015	2016	Goal	Industry
Engagement Index	5.08	6.08	69.48	7.08 	7.67 
Activity per Member	8.00	9.00	0.01	10.00 	10.00 
Committee Participation per Member	0.50	1.00	0.01	1.00 	2.00 
Direct Mail per Member	5.00	6.00	0.00	7.00 	7.00 
Emails per Member	10.00	12.00	0.00	15.00 	14.00 
Financial Activities per Member	2.00	2.50	0.58	2.50 	3.00 
Growth	2014	2015	2016	Goal	Industry
Growth Index	23.38	25.25	8.88	27.38 	29.00 
Event Registrations per Member	0.50	1.00	3.23	1.50 	2.00 
Member Increase	1.00	2.00	0.15	5.00 	4.00 
Renewal Rate	92.00	92.00	13.00	95.00 	90.00 



Manage Duplicates Plus

iMIS

Community

- Dashboard
- Engagement
- Find contacts
- Add contact
- Manage duplicates PLUS**
- Committees
- Communities
- Volunteers
- Security

Membership

Fundraising

Events

Commerce

Marketing

Certification

Finance

Continuum

RISE

Settings

Keyword search

Mr. Brian Murphy

Manage duplicates

Review contacts who have been identified as possible duplicates, and resolve by either merging the contacts or indicating that they are not duplicates.

Manage duplicates | Settings

Name contains

ID equals

Date found between and

Filter

Expand All | Collapse All

Contact 1	Contact 2	Date Found	Formula		
▶ Mrs. Julie Smith (18074)	Mrs. Julie Anderson Smith (20556)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Lisa Forsyth (18135)	Leslie Forsyth (18136)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Mr. Jacob P. Johnson (18211)	Mr. Jack Z. Johnson (18213)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Ms. Kristen Tate (18583)	Ms. Karen K. Tate (21375)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Mr. Bruce L. Williams (18945)	Mr. Bruce Leonard Williams (20340)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Mrs. Michael Garcia (20010)	Mr. Mike Garcia (22116)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Mr. Mark Goldberg (21234)	Ms. Maggie K. Goldberg (21235)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Ms. Sharon M. Jones (22194)	Mr. Stephen K. Jones (22195)	4/1/2015	ASI	Resolve	Not Duplicates

Resolve As Duplicates

Confirm they are NOT duplicates

Responsive Staff Site

Mr. Douglas A. Hunt, Jr.
President
Prodigy Makers International

Preferred Mailing
P.O. Box 4564
Newark, NJ 07107-2564
UNITED STATES
(201) 898-9000
prodigy_makers@imisdemo.com

Join date: 5/28/1967
Member type: Company Member
Status: Active
Paid through: 4/29/2003

Print Info Public Profile Email
Donate Order
Renew Now

Event revenue
274,900
Last year's total: 3,821,905

Event registrations
1,299
Last year's count: 3,464

Program item registrations
12
Last year's count: 63,932

Scheduled events
20
Last year's count: 20

Top 10 event revenue

iMIS
Conference Venue

The Reef Hotel Cairns
35 Wharf Street, Cairns, Queensland, 4870, Australia

The hotel is located 20 minutes from Cairns Airport. Situated adjacent to Trinity Inlet, and just a 5 minute walk to the shops and eateries in the CBD.

HOME
MY ITINERARY
PROGRAM SESSIONS
SOCIAL ACTIVITIES
VENUE
ATTENDEES

Keyword Search

Connect with us on
f t in y+ g+

Sign Out Full Site

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Reporting Made Easy

The screenshot displays the iMIS dashboard with a dark sidebar on the left containing navigation options like Community, Membership, Fundraising, and Settings. The main content area features a search bar, user profile (Mr. Brian Murphy), and four summary cards: Total members (2,627), New members (2), Renewals (0), and Lapsed members (0). Below these are two charts: a pie chart for 'Members by member type' and a bar chart for 'Members by region'. A table at the bottom shows 'New members' with columns for Name, Member Type, and Join Date. Two callout boxes highlight 'Export to Multiple Formats' and 'Email Contacts' features.

Total members
2,627

New members
2
Last year's count: 5

Renewals
0

Lapsed members
0

Members by member type

Member Type	Count
Regular Member	2391
Associate Member	1
Company Member	1
Retired Member	1
Student Member	1

Members by region

Region	Count
Asia	100
Australia & South Pacific	400
Europe	600
North America	1700
South America	0

Recent history
[Policy Makes Intentional](#)
[Clear History](#)

Chapters | **New members** | Lapsed members

Name	Member Type	Join Date
Kallie Dorstwan	Regular Member	1/13/2017
Francis Olose	Regular Member	1/4/2017

Export to Multiple Formats

Email Contacts

Searching Made Easy

The screenshot shows the iMIS search interface. On the left is a dark blue sidebar with navigation options: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Continuum, RISE, and Settings. The main content area has a search bar at the top with the text "Keyword search". To the right of the search bar is a user profile for "Mr. Brian Murphy" and icons for refresh, shopping cart, and help. Below the search bar are two tabs: "People" (selected) and "Organizations". The main section is titled "Enter search criteria to find people". It features a "Select a query" dropdown menu set to "By all common criteria". Below this are several search criteria fields: "Last name starts with", "First name starts with", "City starts with", "State Province" (dropdown), "Country" (dropdown), "ID equals", and "Organization starts with". A blue "Find" button is located below these fields. A message at the bottom of the search area reads "Please enter your search criteria to view results". Below the search area is a "Recent contacts" section with a link to "Prodigy Makers International" and a "Clear history" button. Three red callout boxes are overlaid on the image: one pointing to the "Select a query" dropdown with the text "Out of the Box IQA", one pointing to the user profile with the text "On Behalf Of for Impersonation", and one pointing to the "Recent contacts" section with the text "Remember Recent Contacts".

Keyword search

Mr. Brian Murphy

People Organizations

Enter search criteria to find people

Select a query: By all common criteria

Last name starts with

First name starts with

City starts with

State Province: (Any)

Country: (Any)

ID equals

Organization starts with

Find

Please enter your search criteria to view results

Recent contacts

Prodigy Makers International

Clear history

Out of the Box IQA

On Behalf Of for Impersonation

Remember Recent Contacts

Custom Dashboards

The screenshot displays the iMIS Boxwood Dashboard. On the left is a dark sidebar with navigation links for various services. The main content area features a search bar at the top right, a user profile for 'MANAGER', and two pie charts. The 'Jobseeker Usage' chart shows 2 registrations (green), 1 application (yellow), and 1 agent (orange). The 'Employer Usage' chart shows 2 registrations (green), 1 jobposting (yellow), and 1 agent (orange). Below these is a table titled 'Boxwood Jobseekers' with columns for id, Full Name, Activity Type, Description, and Date.

id	Full Name	Activity Type	Description	Date
104	Dr. Charles R. Corwin	AGENT	Job Agent Created:	8/26/2016 3:33:14 PM
162	Mr. Duane D. Bell	REGISTRATION	Registered for the site	4/22/2016 6:43:51 AM
101	Mr. Douglas X. Hunt, Jr.	APPLICATION	Applied for a job	4/22/2016 6:06:45 AM

Custom Dashboards

The screenshot displays the iMIS iCohere Dashboard. The left sidebar lists various modules such as ATS Bridges, American Tradeshow Services, BlueSky, Boxwood, Bridge2Think, CommPartners, Elections Online, Expo Logic, Freestone, Highwire, iCohere, Peach New Media, Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE, and Settings. The main dashboard area is titled "iCohere Dashboard" and features a search bar, a user profile (MANAGER), and three charts: "Quantity Ordered By Month", "Dollars Sold By Month", and "Credit Hours Earned". Below the charts is a table of "iCohere Unsynced Orders" and a section for "iCohere Incomplete Courses" with a search input field and a "Find" button. A red callout bubble points to the search field with the text "Make Dashboards Useful".

iCohere Dashboard

Quantity Ordered By Month

Month	Quantity
03/2016	1
10/2016	2

Dollars Sold By Month

Month	Dollars Sold
03/2016	50.00
10/2016	100.00

Credit Hours Earned

Month	Credit Hours
03/2016	1.0

iCohere Unsynced Orders

iMIS Id	Full Name	Email	Order Number	Order Date	Product Code Imis	Product Code L M S
101	Mr. Douglas X. Hunt, Jr.	mrichter@atsol.org	1197.00	10/25/2016 12:00:00 AM	ICTEST	APIBridge-Test1
330	Larry L. Perry, CPA		1198.00	10/25/2016 12:00:00 AM	ICTEST	APIBridge-Test1

iCohere Incomplete Courses

iCohere Incomplete Courses

iMIS Id Equals:

Find

Make Dashboards Useful

How do we get there?

- Upgrade
- Plan
- Prepare
- Deploy



Upgrade

- Position your organization to be able to upgrade frequently
- Upgrades do not need to be costly
- Facebook updates it's website software twice per day
- Would you not upgrade your iPhone for years?
- Each ASI release should seriously be considered



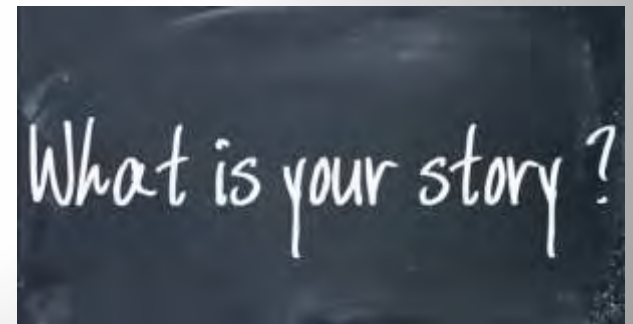
Plan

- Reinvent how you use iMIS
- Evaluate how people work
- Identify what people need to get their job done
- Explore new avenues
 - Track Engagement
 - Staff running their own reports
 - Executive Dashboards



Find out what people REALLY need!

- Ask what staff really need and worry about each day
- How many new members do we have?
- How many attendees do we have?
- Which speakers haven't registered yet?
- How many new jobs have been posted?
- Who are my newest members?



Look for quick wins

- Find staff who will actively embrace change and new ideas
- Create solutions to replace manual processes
- Create solutions for non-traditional iMIS users
- Involve Marketing, Communications, Finance, Chapter managers, Sales team



Prepare

- Get training!
 - IQA
 - RiSE
- Resources
 - AiSP
 - ASI
 - NiUG

The screenshot shows the Intelligent Query Architect interface. The title bar reads 'Intelligent Query Architect'. Below it, the main title is 'Dues Renewals - Regular Members'. There are buttons for 'Advanced mode', 'Save As', 'Save', and 'Close'. A menu bar includes 'Define', 'Run', 'Report', 'Group', and 'Security'. Below the menu bar, there are tabs for 'Summary', 'Sources', 'Filters', 'Display', and 'Sorting'. The 'Display' tab is active, showing a table with columns: 'Display', 'Property', 'Function', 'Alias', 'Link', 'Subtotal', 'Order', and 'Length'. The table contains 9 rows of data, each with a radio button in the 'Display' column. A 'Refresh' button is located in the top right corner of the table area.

Display	Property	Function	Alias	Link	Subtotal	Order	Length
<input type="radio"/>	NetContact.Company	None				1	
<input type="radio"/>	NetContact.Member Type	None				2	
<input type="radio"/>	NetContact.MIS ID	None				3	
<input type="radio"/>	NetContact.Full Name	None				4	
<input type="radio"/>	NetContact.Is a Company	None				5	
<input type="radio"/>	CsSubscriptions.Begin Date	None				6	
<input type="radio"/>	CsSubscriptions.Bill Amount	None				7	
<input type="radio"/>	CsSubscriptions.Product Code	None				8	
<input type="radio"/>	CsSubscriptions.Balance	None				9	

Considerations

- How do you want to show legacy data? (e.g., Change Log)
- How do you want to manage user defined tables?
- Should you convert them to panels? (probably)
- What new features will we start using? (e.g., new event and product options)
- What do you want the individual and company pages to look like? What information is needed on each page?
- Are you using iMIS the right way?
- Does some data need cleaned?



Reports

- Crystal Reports will not be supported
- SSRS reports are supported
- Do you really need to print reports?
- IQA's will result in online interactive reports that can be clicked
- Consider SSRS for reports that are to be printed and handed to someone
- The same techniques can be used for external users (chapter officers, board, vendors) to access information



Deploy

- Start small. You don't have to do everything at once!
- Don't wait for everything to be perfect!
- You can always copy, undo, revert
- If concerned test on a sandbox and export and import into production



Lessons Learned

- Don't just deliver out-of-the-box and expect that to meet user needs?
- Have an expert (yourself or AiSP) take a first shot at getting it close to what the end user wants then demonstrate, take feedback, and fine tune.



Summary

- Moving from the desktop to the staff view is something you should start preparing for now. It is an option today but won't be in the future
- Make the business case if budget is an issue
- Find low hanging fruit and easy wins
- Plan, Prepare, and Deploy



How can ATS help?

- Design Study to review business processes
- Documenting user stories
- Upgrades
- Building Dashboards
- Training
- Design
- Bridges



Questions & Answers



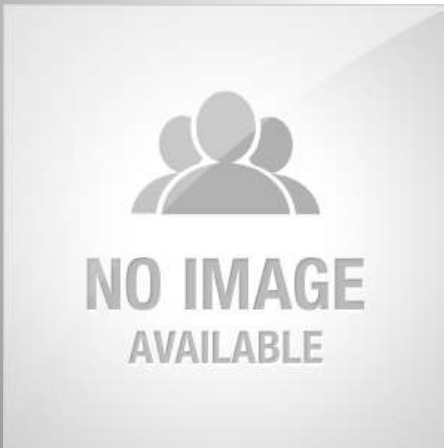
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