

Stop the Duplicate Record Madness!

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



**NO IMAGE
AVAILABLE**

Presenter:

Brent Sitton

Director of Product Development
Association Technology Solutions, LLC

Direct: (720) 945-7260

Email: bsitton@atsol.org



**NO IMAGE
AVAILABLE**

Moderator:

Richard Banks

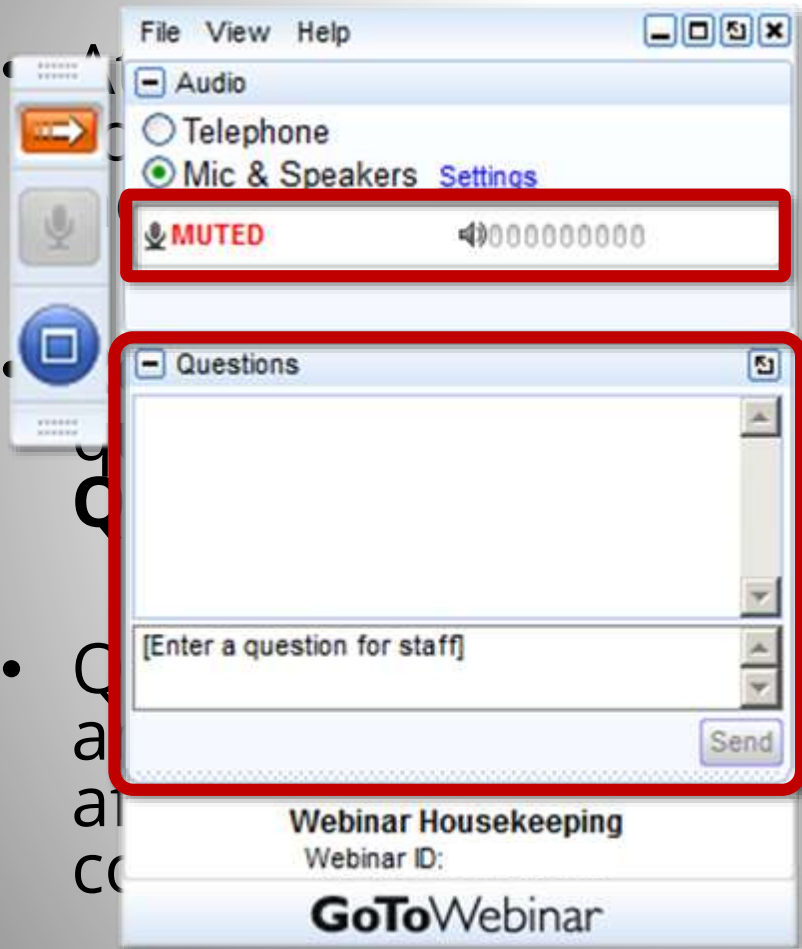
Sales Manager

Association Technology Solutions, LLC

Direct: (571) 213-4785

Email: rbanks@atsol.org

Using GoToWebinar



The Problem with Duplicates

Customer Data is the Lifeblood of your organization

- How bad is the problem?
 - Organizations can have as much as 30% duplicate records.
- REAL Expense
 - Average of 12% additional marketing and mailing cost

The Problem with Duplicates

Customer Data is the Lifeblood of your organization

- Poor Marketing
 - If your history and demographics are split, you can't get the best results.
- ROI and response rates will be artificially low.

The Problem with Duplicates

Customer Data is the Lifeblood of your organization

- Brand Harm
 - Imagine receiving 2+ copies of a member mailing. What's your impression of the organization?

The Problem with Duplicates

Customer Data is the Lifeblood of your organization

- Poor Customer Service
 - How long does it take for you to find my record?
- Why are you asking me to register for the event again? I've registered.
- You say I haven't donated. I donated \$1,000!

It is WORTH the Effort to Prevent and Eliminate Duplicates!

To tame the madness, the effort must be:

- Consistent
- Dedicated
- Focused on Prevention
- Elimination

An Ounce of Prevention is worth a Pound of Cure

Ways to Prevent Duplicates:

- Up Front Instructions
- Up Front Chat
- Video
- Duplicate Check BEFORE creating a new record

Sign In

Create Account

Cart



JCAHPO HOME PAGE

EVENTS

STORE

GIVE NOW

SPONSORED CE COURSES

Sign In



Username

manager

Password

.....

Remember me

Sign In

[Forgot my password or my username](#)

[Create a new account](#)

Problems with your username or password?

Try our live chat.

Currently live chat is only being used for username and password problems. For all other assistance please call (651) 731-2944 / (800) 284-3937.



[View short tutorial for help](#)



Chat to Prevent Duplicates

Benefits

- Reduced Expense
- Can service MORE members than via phone
- Millennials and others prefer to chat
- Recorded chat provides insight
- Members view it as an additional service

Members like Chat

“Very Helpful. Like this new feature.”

“It is delightful having such prompt service!
Thank you.”

“very efficient!!”

Duplicate Check

- Show the User member records that Match what they've entered for name and address.
- Downside is GDPR issues – you are showing one user information about other members in your system.

Search Key Contact

Welcome Mr. Lalit K. Jha - JEO Consulting Group, Inc.

The key contact will be responsible for managing and purchasing licenses for this company/agency. Use this form to search for a new key contact for this company/agency.

Search New Key Contact

First Name

Last Name

Search

No records found. For assistance, contact Matt Rodriguez at mrodriguez@apwa.net

If the person you are searching for does not exist in the database, then you can add a new record for the key contact.

Add a New Record

Back




Duplicate Check

- Display Message to user that they need to Contact Member Services

Duplicate Management

- ASI's Duplicate Manager
 - https://help.imis.com/iMIS2017/Features/Community/Managing_duplicate_contacts.htm
- CSI's iMerge
 - <https://www.csiinc.com/products/imerge>

iMIS Duplicate Manager

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		
▶ Lisa Forsyth (18135)	Leslie Forsyth (18136)	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
▶ Mr. Jacob P. Johnson (18211)	Mr. Jack Z. Johnson (18213)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Ms. Sharon M. Jones (22194)	Mr. Stephen K. Jones (22195)	4/1/2015	ASI	Resolve	Not Duplicates
▶ Mrs. Julie Smith (18074)	Mrs. Julie Anderson Smith (20556)	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

iMIS Duplicate Manager

Merge contacts


	<input checked="" type="radio"/> Keep this contact	<input type="radio"/> Keep this contact
Prefix	Mr.	Mr.
First name	Bruce	Bruce
Middle name	L.	Leonard
Last name	Williams	Williams
Gender	Male	Male
Birth date	7/18/1973	7/14/1973
Status	Active	Active
Date created	4/7/2012 11:19 PM	4/7/2012 11:55 PM
Last updated	1/6/2015 2:13 PM	8/22/2013 5:30 PM
Mobile	(355)180-5512	(370)104-3338
Addresses		
Address	Preferred mailing address Preferred billing address Preferred shipping address	Preferred mailing address Preferred billing address Preferred shipping address
Address	26700 Malibu Hills Rd Agoura Hills, CA 91301-5355 UNITED STATES	26700 Malibu Hills Rd Agoura Hills, CA 91301-5355 UNITED STATES

Merge Not Duplicates Cancel

iMIS Duplicate Manager

Account detail


Mr. Bruce L. Williams
Mobile
(355)180-5512



ID 18945
Member since 7/14/1998
Member type Regular Member
Status Active


[Print Info](#) [Public Profile](#)
[Resolve Duplicates](#)

[Donate](#) [Order](#) [Register](#) [Email](#)

 Possible duplicate contact(s) found.

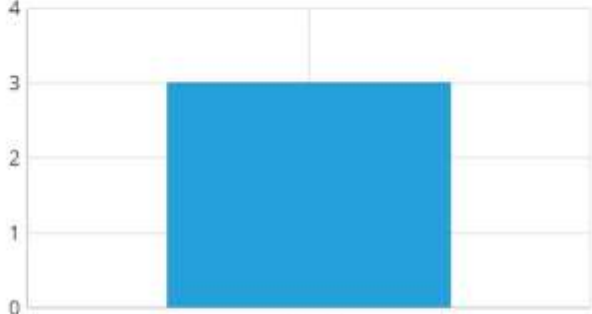
About Participation History Giving Preferences

Engagement score



19
User

Engagement history



Year	Event registrations
2016	3

Membership

iMIS ID	18945	Major key	15583
Member type	Regular Member	Status	Active
Billing category	Billing Category 1	Member since	7/14/1998
Chapter	South Chapter	Paid through	

Stop the Duplicate Record Madness!

It is WORTH the Effort to Prevent and Eliminate Duplicates!

You do have tools to Prevent and Eliminate Duplicates!

To tame the madness, the effort must be:

- Consistent
- Dedicated
- Focused on Prevention
- Elimination

Questions & Answers



NO IMAGE
AVAILABLE

Presenter:

Brent Sitton

Director of Product Development
Association Technology Solutions, LLC
Direct: (720) 945-7260
Email: bsitton@atsol.org



NO IMAGE
AVAILABLE

Moderator:

Richard Banks

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



More from ATS

Looking for more from the experts at ATS?

Upcoming Webinars

<http://atsol.org/Webinars>

schedule of upcoming webinars

Past Webinars

<http://atsol.org/PastWebinars>

*video recordings and
downloadable presentation slides*

Other Questions?

Email: info@atsol.org

Online: <http://www.atsol.org>

Phone: (720) 945-7252