



CRM for Members

Focus on building strong member relationships. Gain a 360-degree view that spans detailed histories and profiles, all interactions, and insights into constituent needs. Equipped with end-to-end visibility, staff can focus on attracting new members; build and maintain personalized relationships; and deliver targeted, relevant communications when and how members want them.

Deliver fast access to current, centralized information.

Your entire constituent base is maintained in a single database, with system-wide updates to reduce data re-entry. Role-based search, queries, dashboards and reporting tools built on Microsoft SQL Server Reporting Services let people quickly analyze and share the right information—without IT assistance.

Improve staff efficiency. Save time by automating routine business rules and communications with workflows. Streamline processes for membership administration, events, product sales, advertising, subscriptions, fundraising, and more.

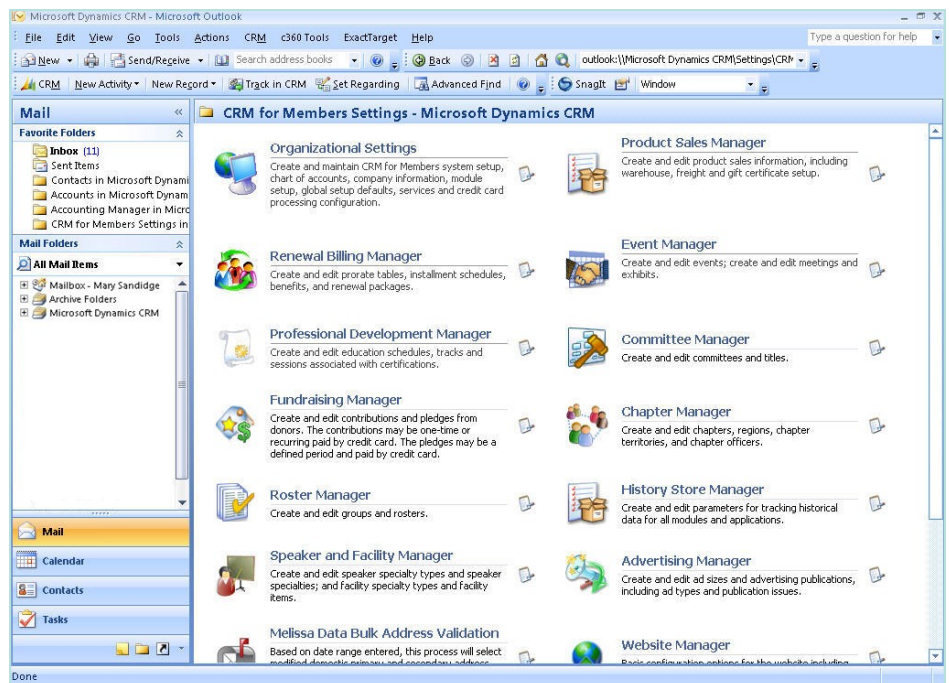
Improve your bottom line with integrated financial management.

Membership financial information flows seamlessly across your entire system to connect your front and back office. Built-in financial reporting delivers both the details and the big picture you need to monitor and improve membership transactions and overall organizational performance.

Invest once in leading technologies and reap long-term business benefits.

Reduce ownership costs and risks with a solution built on proven technologies, rich partner and vendor support, and flexible deployment and customization options.

Fuel success with Protech CRM for Members, a complete association management solution (AMS) designed to help you build lasting member relationships, reduce costs, and improve revenue streams. CRM for Members combines the best of both worlds: a solution tailored to specific association needs, built and delivered directly within Microsoft Dynamics® CRM.



Give people a solution that works the way they do. No more juggling applications—without leaving a familiar Microsoft® Office Outlook® environment, your people can take advantage of a comprehensive AMS system that's easy to learn and use. Working away from the office? No problem—CRM for Members is a web-based application, so you can access your entire membership system through any web browser.

Enhance your web presence to connect people and processes. Combine CRM for Members with other Protech Business Solutions—like Web Portal for Members or SharePoint for Members—to deliver online self-service that integrates seamlessly with your total solution. You can also step up to advanced collaboration and networking by taking advantage of Microsoft SharePoint® technologies.

<p>MEMBERSHIP</p> <p>Out of the box, CRM for Members fits your membership strategy and business practices. Rather than squeezing your processes to work within your AMS, you're free to meet unique needs with an eye to maximizing revenue.</p>	<ul style="list-style-type: none"> • Work with flexible rate structures and installment plans, including individual/corporate membership, calendar and anniversary membership, volume-based dues, and quantity-based dues. • Create new member packages by bundling subscriptions, chapter/section memberships, and more. • Streamline complex prorating structures. • Automate reimbursements for chapters/sections. • Recognize deferred revenue. • Access membership statistics using built-in reports and dashboards.
<p>COMMUNICATIONS</p> <p>Strengthen membership retention and satisfaction and reduce costs with a 360-degree view, targeted communications tools, and robust tracking and reporting capabilities.</p>	<ul style="list-style-type: none"> • Centralize storage for all member communications and histories, including accurate addresses and record re-duping. • Define, store, and view targeted groups—including chapters/sections, committees, lists, rosters, and special interest groups—for targeted communications. • Simplify communications with Office Word merges; Microsoft Office Excel® integration; ExactTarget e-mail integration; and integration with fax, mobile, and telephone systems. • Define and manage communications preferences. • Create, schedule, and deliver communications with customized e-mail templates and workflows.
<p>EVENTS</p> <p>Transform planning, marketing, financial management, and analysis for events into a smoothly orchestrated process. Sharply reduce IT overhead and ad-hoc, manual processes. Easy-to-use tools and robust automation free staff to focus on what's important—executing on meetings and events that meet attendee expectations and help you build your organization.</p>	<ul style="list-style-type: none"> • Plan meetings with precision using date-sensitive registration promotions; waiting list and capacity management; unlimited sessions with date-time conflict checking; and unlimited registration types (including packages), setup, and price levels. • Streamline exhibit pricing with flat rate, square foot, and date-sensitive booth options; representative registration based on booth sales; and more. • Save time with Copy Meeting and Copy Exhibit functionality. Quickly define custom fields for tracking special needs and requirements. • Automate meeting and exhibit cancellation fees. • Market events using Microsoft Dynamics CRM marketing tools, target the right people with marketing lists, and track promotions. • Manage profiles and evaluations for speakers. • Recognize meeting and event revenue by event or incrementally by date. • Easily access and view meeting participants and exhibitors. • Manage exhibit booth space assignments with EXPOCAD® integration.
<p>PROFESSIONAL DEVELOPMENT</p> <p>Members and the organizations they serve simply can't exist without robust continuing education. CRM for Members gives members the tools they need to select and manage their professional development with precision and flexibility.</p>	<ul style="list-style-type: none"> • Define certification or accreditation programs with flexible setup options for tracking education, fees, credits, and other requirements. • Set pre-requisites and offer multiple tracks for achievement. • Enable members to track enrollment, status, and progression with clear views of eligibility details and education history. • Link courses to meeting sessions or products for earning credits. • Manage renewal cycles with automated renewal processing, based on members completing all requirements.

<p>FUNDRAISING</p> <p>Work with integrated marketing capabilities to build and execute focused, efficient campaigns. Gain deep visibility into donor profiles to maximize opportunities and track relationship histories. Nurture donor relationships by delivering the right message at the right time.</p>	<ul style="list-style-type: none"> • Build campaigns based on accurate analysis of past campaigns and donor histories, trends, and opportunities. • Filter profiles to generate targeted marketing lists. • Track campaign responses and measure campaign effectiveness, including costs and results. • Manage multiple contribution types including one-time monetary gifts, recurring gifts, in-kind, and pledges. • Automate processing of donor acknowledgements and tax receipts. • Associate donation tributes such as “In Honor of” and “In Memoriam.” • Assign and track soft-credit contributions. • Enable auto-pay by credit card for pledge installments and recurring gifts. • Easily upgrade or downgrade pledges. • Automate billing and enable auto-pay for pledge installments and recurring gifts.
<p>CHAPTERS/SECTIONS</p> <p>Ensure efficient, accurate management for chapters and sections, including quick generation and delivery of targeted communications.</p>	<ul style="list-style-type: none"> • Automate chapter/section reimbursement for dues. • Track chapter membership and leadership, including terms and titles. • Cross-reference zip codes to automatically place members in the correct chapter/section. • Send targeted communications to chapter/section members and leaders.
<p>PRODUCT SALES</p> <p>Accurate order management and fulfillment is key to maximizing revenue and ensuring member satisfaction. CRM for Members offers a one-stop shop for managing the full range of sales order processing requirements—including inventory control, order entry and billing, full and partial backorders, order fulfillment, and automated product returns.</p>	<ul style="list-style-type: none"> • Manage and update product catalogs, including easy setup and maintenance for products, product kits, and warehouses. • Speed orders and accuracy with member type, date-sensitive, and volume pricing structures. • Ensure product availability through internal inventory control or inventory that integrates seamlessly with Microsoft Dynamics GP. • Set up and track product promotions, gift certificates, and coupons. • Automate freight calculations based on product weight or value. • Shop for real-time shipping costs with e-Ship integration. • Automate tax calculations based on location. • Automate back order fulfillment processing. • Streamline returns with RMA functionality and optional restocking fees. • Automatically generate invoices, packing lists, and statements.
<p>PUBLISHING</p> <p>Ensure that advertising sales and subscriptions serve business goals for attracting and retaining members and increasing revenue. Drawing from your centralized AMS database, you’ll have all the information you need to simplify the full range of processing for your publications—from subscription sales and renewals to advertising contracts and insertion billing.</p>	<ul style="list-style-type: none"> • Create unlimited subscription and advertising offerings with flexible rate structures and durations. • Automate mailing list generation for publishers and mail houses. • Track subscriber profile information for managing ABC and BPA reporting requirements. • Automate advertising insertion billing by publication and issue. • Monitor advertising space to optimize ad placement and avoid over- or under-selling.

FINANCIALS

CRM for Members is designed for easy integration with your existing financial management applications. Without leaving your AMS, staff can manage complex financial structures, process and invoice transactions, gain fast access to member-specific and organization-wide financial information, and run financial reports.

- Streamline payments with lockbox processing.
- Apply a single payment across multiple invoices with RapidPay.
- Manage multiple companies with multiple charts of accounts and separate General Ledgers— all within your AMS.
- Manage multi-currency pricing.
- Process one-time and auto-pay credit card transactions without storing credit card data in your database—essential for meeting PCI compliance guidelines.
- Simplify invoicing and statements with multiple transaction types on a single invoice—for example, membership dues and product sales.
- Process multiple payment types within the same batch.
- Create and share granular and organization-wide financial reports.
- Quickly generate pro forma invoices.

REPORTING

Free people from relying on IT staff or outside resources for reports. Microsoft SQL Server® Reporting Services are built right into the system, so people can make full use of database information to generate standard reports or create custom reports from scratch—both print and web-based. Equipped with tight integration with the Microsoft Office system, role-based dashboards, and easy-to-use reporting tools, staff and managers can access and analyze information to make informed, strategic decisions.

- CRM for Members includes more than 190 standard reports that users can personalize, store, and re-use.
- Quickly find and analyze information with query and reporting capabilities that include:
 - Advanced Find
 - Create/Share views
 - SQL Server Reporting Services Report Wizard
- Take advantage of tight Microsoft Office system integration to quickly export information for Office Excel-based reports or Office Word merge.
- Role-based dashboards display customizable key performance indicators (KPIs) for monitoring business conditions and performance.
- Built-in, roles-based security features protect sensitive information, while ensuring that people have fast access to appropriate information.

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