



Protech Business Solutions

Free staff to focus on your most important asset—your members. Your entire constituent base is maintained in a single database, so people can quickly access all touch points with members, including detailed histories, profiles, financial transactions, and communications. Robust sales and marketing capabilities empower staff to focus on attracting and retaining loyal, satisfied members.

Realize new business efficiencies. Save time and money with workflows that automate key processes and communications. Reduce training with a solution that's familiar and easy to use. Minimize IT effort with centralized information, streamlined security, and automation that sharply reduces errors and costs.

Make better decisions based on current, centralized information. System-wide updates eliminate data re-entry. Role-based search, query, and built-in Microsoft SQL Server® Reporting Services let people quickly analyze and share information.

Drive success with active member participation. Deliver online member self-service that integrates seamlessly with your member database. Build collaboration networks and communities that make your association the "hub" for connecting your members and your mission.

Invest once in leading technologies that take you into the future. Reduce ownership costs and risks with solutions built on innovative, scalable Microsoft business and productivity applications.

Ensure success with the power of choice. We offer solution packages designed for the way your business works, along with on-premise, hosted, or combined deployment options.

Build lasting member relationships, reduce costs, and improve revenue streams with association management solutions built on Microsoft® business applications, backed by strategic services and support from a trusted Microsoft partner—Protech Associates, Inc.

Protech CRM for Members

Gain a 360-degree member view with a complete AMS solution built and delivered within Microsoft Dynamics® CRM. Working in a familiar Office Outlook® environment, your staff can quickly access information, save time with automated AMS processes, and attract and retain members with sophisticated marketing tools. Front-end information and processes connect with back-office financial management and reporting tools—including built-in integration with Microsoft Dynamics® GP, a proven, widely used business management solution.

Protech Web Portal for Members

Fuel membership satisfaction and simplify business processes with a 24/7, one-stop shop for self-service and e-commerce. Securely connect information and transactions between Web Portal and the CRM for Members database, eliminating data re-entry and simplifying the full range of membership management.

Protech SharePoint for Members

Build collaborative online member networks and communities for members. By taking advantage of Windows® SharePoint® Services or Microsoft Office SharePoint Server 2007, SharePoint for Members brings together people, processes, and information within a solution that works seamlessly with CRM for Members.

CRM FOR MEMBERS



Membership: CRM for Members fits your strategy and business practices with flexible membership plans/packages and dues structures, streamlined processing and renewals, and built-in reports and dashboards for tracking statistics and managing member and association goals.

Chapters/Sections: Ensure efficient, accurate management for chapters and sections, including quick generation and delivery of targeted communications.

Communications: Strengthen membership retention and satisfaction, and reduce costs, with a 360-degree view, targeted communications tools, and robust tracking and reporting capabilities.

Events: Transform planning, marketing, financial management, and analysis for events into a smoothly orchestrated process. Sharply reduce IT overhead and ad-hoc, manual processes with easy-to-use tools and robust automation.

Publishing: Centralized information simplifies processing for your publications—from subscription sales and renewals, to advertising contracts and insertion billing.

Fundraising: Work with integrated marketing capabilities to build and execute focused, efficient campaigns. Gain deep visibility into donor profiles to maximize opportunities, track relationship histories, and nurture donor relationships.

Product Sales: Efficiently manage 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.

Financials Integration: Without leaving CRM for Members, 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.

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 by generating standard reports or create custom reports from scratch. Advanced Find options and a Reporting Wizard enable people to quickly find relevant information and transform it into insight.

Professional Development: Give members the tools they need to select, manage, and track all aspects of continuing education—courses, certifications, progress, renewals, and more.

Seamless Security: Microsoft platform security controls and single-sign on ensure data is protected, while giving people fast access to the information and processes they need.

WEB PORTAL FOR MEMBERS

Membership: Combine convenience, organizational efficiency, and security with a self-service portal. Individuals and organizations can process and manage applications, renewals, profiles; purchase products; post jobs and advertisements—that's just the start.

Chapters/Section and Committees: Give members with appropriate access 24/7 ability to view and manage detailed information for leadership, funds, and reporting.

Professional Development: Deliver online views for course and certification offerings, including search by specific category. At any time, members can go online to determine their eligibility; schedule courses; and track credits, scores, and progress.

Fundraising: Transform fundraising into a self-service opportunity for members to pledge and contribute to campaigns—without adding staff overhead and effort.

Transactions: Straightforward financial integration ensures that all online transactions automatically update within the CRM for Members database. Multi-company and multi-currency capabilities extend the reach of e-commerce.

Events: Give members a single location that provides a full view of all event activities and lets them register at their convenience for events and sessions, manage booth contracts, and more.

Directories/Search: Connect people and activities across your association with online search capabilities, directories, and professional development tools.

<p>SHAREPOINT FOR MEMBERS</p>	<p>Collaboration and Connection: Enable members to publish documents, receive RSS feeds relevant to their interests, join social networking groups, and share information through the use of wikis and blogs.</p> <p>Association Control: Automate approval processes (for example, content posting) to ensure control and reduce staff involvement. Microsoft Platform security, single sign-on, and built-in monitoring tools ensure the right people work with the right information—with minimal IT involvement.</p> <p>Private Communities: Set up specialized sites that let members with appropriate access share relevant information for SIGs, chapters, committees, speakers, rosters, and more.</p> <p>Search: Equip both members and staff to quickly locate people, content, and business intelligence in business applications.</p> <p>Simplified IT Management: Provide a single, integrated platform to manage intranet, extranet, and Internet applications. Built-in design and content management tools sharply reduce IT effort. Hosted deployment options reduce ownership costs.</p>
<p>INTEGRATED SOLUTIONS</p>	<p>ExactTarget® Email Marketing: Execute campaigns with e-mail marketing that targets members' specific preferences and areas of interest. Smooth integration with Web Portal for Members enables members to choose the communications they'd like to receive—for example, upcoming events, new products and services, and leadership updates. All e-mails are delivered through the ExactTarget database, simplifying processes and eliminating “blacklisting” issues. Your association can measure effectiveness, and optimize marketing programs, with accurate tracking of response rates and activity related to campaign communications.</p> <p>Microsoft Dynamics GP: Connect CRM for Members with a complete, scalable financial and business management solution that offers advanced consolidation and reporting, forecasting, and budgeting tools. Key integration points include General Ledger, Accounts Payable, and Bank Reconciliation. Equipped with fast access to centralized information and processes, both your front and back office can save time, improve operational efficiencies, and make smarter business decisions. The solution also offers a familiar, roles-based user interface that fits seamlessly with your AMS. Integration to Microsoft Dynamics GP is built into CRM for Members, ensuring quick deployment and rapid return on investment.</p> <p>EXPOCAD®: Take advantage of a solution that offers end-to-end management for exhibit floor plans and booths—including “intelligent” graphical mapping, rates plans, sponsorships, special requests, and more. EXPOCAD integration enables members to request booths and negotiate contracts via Web Portal. All information flows into the CRM for Members database, with automatic creation of transaction records. Working within CRM for Members, staff can manage booth inventory, recommendations, assignments, and payments.</p>

Ensuring the Best Fit for Your Business Needs

We are committed to leveraging the Microsoft platform to offer you an integrated technology and business strategy. Backed by years of experience and proven best practices, we work with your association to define the solution that best meets your requirements—from core AMS functionality to full enterprise implementations. Our solution offerings are all supported by cost-effective, proven professional services—including project implementation methodologies, application development, data migrations, and rich training and support options.

Business Solutions Essentials offers a cost-effective product package for associations that need core AMS functionality to serve members and support business processes. Streamlined, standardized implementation ensures that your solutions are up and running quickly and minimizes IT costs and maintenance—ideal for organizations with streamlined staff and straightforward dues structures and membership options.

Business Solutions My Way delivers AMS that's tailored to your specific needs—larger staff sizes, unique business processes, complex dues structures, multi-company requirements, multiple membership options, and more. Business Solutions My Way offers a complete suite of products and an implementation process that combines a standardized approach with flexible customization options.

Business Solutions as a Platform provides your association with a customized solution that leverages the Microsoft platform to integrate with other enterprise-wide business applications. This comprehensive offering is designed for associations with a dedicated IT staff and complex membership and financial management requirements.

Proven Industry Leaders

Since 1984, Protech Associates, Inc., has been a leader in developing and implementing superior member relationship software solutions. Protech is a Microsoft Gold Certified Partner and Independent Software Vendor (ISV), and a member of Microsoft's prestigious President's Club for commitment to excellence in customer service.

Take the next step—Discover how Protech Business Solutions and services can help your association optimize operations, empower employees, improve sales and member service, and facilitate decision-making.

For more information, call 800-310-8813 or visit www.protechassociates.com.