

CASE STUDY

Caring for Members through Education and Engagement

American Association of Nurse Assessment Coordination uses technology to increase membership, improve staff productivity and enhance outreach.

The American Association of Nurse Assessment Coordination (AANAC) is a non-profit membership organization dedicated to supporting long-term care professionals who provide quality care for nursing home residents across the nation. Founded in 1999, the association is based in Denver and has 20 employees and more than 14,000 members. AANAC delivers accurate and timely information, certification and educational opportunities, advocacy in legislation, and a peer community of support to members from all 50 states, Puerto Rico, Guam and Thailand. Its members include nursing home administrators, nurse assessment coordinators, DON/ADONs, reimbursement specialists, staff nurses, therapists, and social workers.



Challenges

As AANAC's membership grew and the organization developed as an association, it became apparent it needed a more robust database that could store, manage, and maintain member records. Disparate databases and manual processes could no longer support its growing membership, marketing, and education needs, and AANAC wanted to streamline its invoicing and payment processes across each line of business through both the back office and the AANAC website. Its web-based listserv was not effectively encouraging engagement among members, while its traditional education and event registration were time-consuming and not very user-friendly.

Solution

AANAC identified the necessary functionalities and requirements for a new system and evaluated association management software (AMS) options against these requirements. The best match was Protech Cloud Business Solutions, offered by Protech Associates, Inc., (Protech), the world's first and leading provider of cloud-based association management software powered by Microsoft Dynamics® CRM. Without an IT specialist on staff, the association chose a cloud-based deployment so that security, maintenance, monitoring and upkeep are all taken care of by Protech and its hosting partner, Cetrom Information Technology, Inc., a cloud pioneer.

With Protech Cloud Business Solutions, AANAC would receive the benefits of Protech's nearly 30 years of deep, association-industry and software-development expertise, with the certainty of Microsoft's commitment to world-class innovation and annual multi-billion dollar investment in the Microsoft Dynamics CRM platform.

Using a single sign-on across all systems, AANAC fully integrated Protech Cloud Business Solutions with a learning management system (LMS), website content management system (CMS), email marketing software and a social CRM platform. The association worked closely with Protech's implementation team to plan deployment, coordinate integration with partners, set up a testing environment according to industry best practices, conduct training, and execute a seamless go-live.

Susan Turman, VP of operations, AANAC, said, "Protech Cloud Business Solutions is the core of how we manage our business. With the cloud, we don't have to worry about crashing, data loss or running out of space. The system is fast and scalable to the needs of our growing business."

At a Glance

Background

Non-profit organization supporting long-term care professionals.

Founded in 1999, AANAC is based in Denver with 20 employees.

More than 14,000 members across the U.S., Puerto Rico, Guam and Thailand.

Challenges

Working with two disparate, antiquated databases.

Needed a database system to manage membership, invoicing, and payments.

Required functionality to execute better marketing campaigns and improve member relations.

Wanted advanced Social CRM system to encourage member engagement.

Benefits & Results

As the hub of all membership operations for AANAC, Protech Cloud Business Solutions' centralized database initiates and tracks member contact records, invoicing, billing, and membership status. The system has helped AANAC reduce duplicate records in the database and clean up individual records to realize a more accurate, high-quality picture of its membership. With a single repository for all its data and numerous automated processes, AANAC eliminated redundancy of disparate record keeping and achieved a high level of database accuracy.

Education and certification programs are AANAC's top revenue stream. By integrating the LMS with Protech Cloud Business Solutions, AANAC can track a student's path of courses, scores, and certifications. At predetermined points, automated processes are triggered to open courses with payment, and initiate professional designations and certificates when requirements are met. Renewal billing and recertification reminders are also automated through workflows and members can log on through the website to track the status of their education—all of which translates to improved member service and increased staff productivity.

To replace its listserv and expand its social offerings for members, AANAC selected Higher Logic social networking and collaboration software. By seamlessly integrating the Connected Community software with Protech Cloud Business Solutions, the association created AANACConnect, a community with a member directory, resource libraries, and more than 75 discussion forums. Currently, 95 percent of AANAC's members are subscribed and have rated it the top tangible member benefit. The opportunities AANACConnect offers for learning, engagement, and networking are likely drivers for recent increases in membership and overall engagement.

With real-time, on-site processing of registrations at AANAC's annual conference, data immediately syncs with the association's membership database, minimizing follow up after the event, and saving time and money. To add value for attendees, AANAC auto-populated a custom-branded

conference community within AANACConnect where staff, attendees, and speakers held pre-conference discussions, identified topics for sessions, and shared tips.

For direct member communications, AANAC incorporated ExactTarget cross-channel digital marketing software, which enables staff to use member data for improved outreach and marketing initiatives including segmentation, customized lists, and open rate tracking. The tight integration with Protech Cloud Business Solutions records every interaction and creates significant times savings. In recent campaigns to encourage new memberships, the association saw a 25 percent conversion rate and up to a \$50 return on investment for every \$1 spent.

With the help of these technologies, AANAC staff has been able to do more for their members, resulting in a more than 20 percent increase in membership in two years and a corresponding increase in its education revenue stream. With good data stored in a single location, the association can now make data-driven decisions, communicate better with members, and improve membership loyalty, retention and recruitment efforts.

Turman concluded, "I can't say enough about Protech and its implementation team; they are absolutely incredible to work with. The initial success we have achieved is only the beginning of what we hope to accomplish—and our partnership with Protech will be the basis for helping us realize our plans."

Protech Cloud Business Solutions, association management software powered by Microsoft Dynamics CRM. Seamless integration with third-party systems, including email marketing, social networking and collaboration, website content management, and a volunteer management system.

Founded in 1984, Protech combines deep industry expertise and the technical knowledge of numerous on-staff Microsoft Certified Professionals to deliver a robust, easy-to-use, association management software that is Certified for Microsoft Dynamics, with enterprise-level security, a built-in disaster recovery plan, and a 99.9 percent uptime guarantee. Headquartered in Columbia, Md., the company has been repeatedly named to the Microsoft President's Club, received the Microsoft Distinction in Marketing Award twice, is a Microsoft partner with a gold Customer Relationship Management competency, and partners with CenturyLink, Cetrom, Melissa Data, PayPal, ExactTarget, Higher Logic and Engage.



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Susan Turman
VP of Operations
AANAC

At a Glance

Solution

Protech Cloud Business Solutions association management software powered by the proven Microsoft Dynamics CRM platform.

Integrated with third party systems including email marketing, social networking and collaboration, website content management, and a learning management system.

Results

Membership has increased by more than 20% since 2011.

AANACConnect Community rated by members as the #1 tangible benefit of membership.

Achieved 25% conversion rate and \$50 ROI for every \$1 spent on email marketing campaigns.

Clean database has eliminated duplicate records and achieved a high level of accuracy.