CASE STUDY

AMS Increases Data Gathering Performance

New System Enables Fact-Based Decision Making and Improved Member Relationships

In today's uncertain economy, more organizations than ever are looking to make critical decisions based on hard data, not just gut instinct. American Health Lawyers Association (AHLA) is no exception. "We have a goal of becoming a much more data-driven decision making organization," says Thad Lurie, Director of Technology.

However, AHLA's previous association management system (AMS) wasn't able to deliver the data needed for confident decision making. Critical information was scattered across multiple databases, spreadsheets and documents, making it difficult and time-consuming to obtain and even harder to act upon. In addition, the system didn't integrate with two of AHLA's critical systems: its Microsoft Dynamics® GP financial system, and its website, which is built on Microsoft SharePoint®.

AHLA sought a new AMS system—one that would provide ready access to decision-driving data as well as tight integration with its accounting system and website. The organization evaluated a number of different systems and ultimately chose Protech Business Solutions. Among the reasons for the choice, Thad says, was the fact that CRM for Members is based on Microsoft Dynamics® CRM, which means it provides solid integration with AHLA's Microsoft Dynamics GP and SharePoint technologies today, and ensures compatibility of the solutions in the future. It also integrates tightly with the productivity tools AHLA's approximately 40 employees use every day, such as Microsoft Word, Excel® and Outlook®.

Better Data for Better Decision Making

Integration between Protech Business Solutions and AHLA's accounting system provides rapid access to decision-driving information because data flows quickly and directly between the systems. "In the past, there was a lot of 'we think' decision making going on—decisions made without much data to back them," Thad says. "Protech Business Solutions has done a good job of making data available to us so we can analyze things as they really are—and not just the way we think they are." AHLA's previous system was difficult to customize and lacked the flexibility to share information. As a result, employees kept the data they needed in their own personal files, such as Microsoft Excel and Word documents. "That meant that no one person could go into a single system and find the information they needed about a particular member," says Maurice Harris, AHLA's Database Manager. "Instead, you had to go to multiple people to try to find what you were looking for." The combination of multiple databases, poor synchronization across them and data-entry errors required the IT staff to spend long hours cleaning data.

Now, with a single, integrated system, employees spend significantly less time tracking down and requesting information from coworkers. Powerful features included in CRM for Members, such as easy-to-use queries and Advanced Find capabilities, provide employees with the data they need in just a few keystrokes. In addition, since implementing CRM for Members, data integrity is noticeably higher and the IT staff spends less time cleaning data, Maurice says.

Enabling Web Sales and Online Registration

In the past, integration between AHLA's previous system and its website was "essentially nonexistent," Thad says. To pay dues, purchase services or register for events, members followed a cumbersome, sometimes error-prone process that required them to complete a web form to generate a secure email that was sent to AHLA. From there, a staffer decrypted the note and hand-keyed the request into AHLA's system. By implementing Protech Business Solutions, electronic commerce transactions performed in AHLA's web portal flow into CRM for Members and then into Microsoft Dynamics GP. The new system not only allows members to register for events online at any time, it enabled AHLA to develop an online shopping cart to sell downloadable products via the web. Invoices and payments are processed automatically through the site, eliminating the need for manual processing. "Having Protech Web Portal for Members has really been a big win for us; the more our members use the web, the more money we save."

Easy Customization for Better Usability

AHLA also benefits from the ease with which CRM for Members and Web Portal for Members can be customized, which saves time and money. "I like the fact that I can easily add screens and fields to CRM for Members," Maurice says. "We don't need to go back to Protech and say 'I need you to build this for me.'"

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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Thad Lurie
Director of Technology
American Health Lawyers Association

At a Glance

Solution

AHLA integrated its accounting system with Protech Business Solutions

New integration was customized to enable data to flow quickly and directly through systems

Results

Rapid access to decision-making information

Employees spend significantly less time tracking down and requesting information from coworkers

New system allows members to register for events online at any time

AHLA is now able to sell downloadable products via the web

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