

## CASE STUDY

# NADO Transforms Staff and Member Experience

*Association uses Protech AMS built for Microsoft Dynamics 365 to streamline back-office processes and enhance online member services*

Since its founding in 1967, the National Association of Development Organizations (NADO) has worked to strengthen the economic competitiveness and quality of life across America's local communities. Together with its 400 member organizations, NADO advocates for the building blocks needed for competitive and sustainable communities, such as housing, transportation, infrastructure, workforce development, entrepreneurship, disaster resilience, and social and aging services.

Contributing to NADO's mission is the NADO Research Foundation, a 501(c)(3) nonprofit affiliate of the organization. The Foundation continually examines new and innovative practices in regional development, and regularly publishes case studies, guides and relevant reports. It also provides professional development training and peer networking services to NADO's members.

## Challenge

A long-time Protech customer, NADO had used a prior version of Protech's association management software (AMS) for many years and wanted access to the new Protech AMS tools and functionality to enhance programs and service for its members. NADO sought to use the Protech AMS to help optimize processes for event registrations, accounts receivables and membership engagement for both the association and the Foundation. Modernizing its member portal and e-commerce solution was also a top priority to improve the online member experience.

While NADO was happy with the Protech relationship, the board insisted on a complete system evaluation to ensure the Protech AMS still met all the needs of the organization. So, NADO engaged an outside consultant who took an in-depth look at what NADO wanted to do with the system and compared multiple similar AMSS on the market.

In the end, the consultant recommended staying with Protech and moving forward with the latest product release. The familiarity of the system would shorten the user adoption process. Updated features for the member portal would simplify the process for members to update their information and pay invoices online, while streamlining back-office payment processing for staff.



## At a Glance

### Background

National trade association providing advocacy, education, research and training for the nation's regional development organizations.

Founded in 1967, NADO is located in Washington, D.C.

400 member organizations throughout the United States

### Challenges

Association management software lacked functionality to enhance member programs and services.

Member portal did not support e-commerce and was cumbersome to manage.



*“The Protech solution addresses who we are as an organization and gives our staff good data that helps us to better communicate with our members.”*

*Joe McKinney  
Executive Director*

## Solution

The association implemented Protech’s UX 365 association management software to improve data quality and optimize its business processes. Built specifically for Microsoft Dynamics 365 and the Power Platform with a Common Data Model, UX 365 connects staff to data and insights from both the association and Foundation. UX 365 is a true SaaS solution with free, regular updates and product releases that ensure the organization is always on the current software version. With UX 365, NADO can also leverage the Microsoft ecosystem to easily connect to third-party applications through Protech’s open API and Microsoft’s Power Automate and Flow Connectors.

To enhance the online member experience, NADO chose Protech’s MX 365 member-facing e-commerce solution. The secure members-only website features a single sign-on for a seamless online experience and gives members the option to register for events, renew memberships, track education, pay invoices and manage their profile at their convenience.

## Results

The transition to MX 365 improved the member online experience with new functionalities, including online payment processing. The event and professional development registration processes now enable NADO members to easily access and pay invoices online, as well as add guest registrations to in-process event registrations. Additionally, dynamic pricing capabilities automatically adjust event fees if an individual adds a membership when they are registering for an event.

With UX 365, NADO improved its business processes and gave its staff more visibility into both the association’s and Foundation’s event activities and member engagement. NADO leadership expects UX 365 to improve communication, efficiency and productivity among the staff. UX 365 will also serve as a quick reference tool that provides easily accessible, process-specific information from both organizations.

Staff members are taking advantage of the system’s data and analytics capabilities to setup their own personal dashboards – making it even easier to make data-driven, informed decisions.

## At a Glance

### Solution

Protech AMS built for Microsoft Dynamics 365.

Centralized UX 365 database and MX 365 e-commerce solution and web interface.

### Results

Customizable reporting provides greater insight to make informed business decisions for overall improvement and better member experiences.