GET YOUR STAFF ONLINE WITH YOUR STAFF SITE

BILAL JEEWA - PSEUDO CODE

YOUR TRAINER

CONTACT ME

Bilal Jeewa
Product Solutions Consultant
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0416 369 408

- 10 years solutions Lead at ASI
- 2 years as co-founder of PseudoCode
- Worked on projects in Australia, New Zealand, UK and Europe
AGENDA

• WHAT
• WHY
• HOW
• WHEN
• WHERE
• DEMO?

WHAT?

• It is a fusion of database management and web publishing in a single cloud-based Engagement Management System

- Contacts
- Membership
- Fundraising
- Events
- Commerce
- Email
- Automation
- Dashboards
- Website
WHAT?
CONTACTS

Enter search criteria to find people

Sophisticated search

Contact management and demographic information

Membership

Addresses

Social profiles

Relationships
WHAT?
CONTACTS

Membership

<table>
<thead>
<tr>
<th>IMIS ID</th>
<th>Major key</th>
<th>Billing category</th>
<th>Status</th>
<th>Member status</th>
<th>Last updated by</th>
</tr>
</thead>
<tbody>
<tr>
<td>18052</td>
<td></td>
<td></td>
<td>Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Manage Address and Relationships

Address

8910 Sylvan Rd
Eden Prairie, MN 55347-3336
UNITED STATES

Show map
(516) 967-2222
(516) 967-0000 fax
brianmurphy@niugdirect.com

Preferred Mailing Address
Preferred Billing Address
Notes P.S.I. Code 9450

Social profiles

There are no social profiles defined.

Relationships

Add relationship

WHAT?
MEMBERSHIP

Total members 2,630
New members 0
Renewals 0
Lapsed members 2

Members by member type

Members by region

Recent history

Manage and boost member engagement, satisfaction, and retention
WHAT?
CONTACTS

Separation of Individual records

WHAT?
ORGANISATION PROFILE
CREATE A CONTENT PAGE TO DISPLAY AN ORGANISATION DETAILS

Different view for Organisation records
### WHAT? MEMBERSHIP

**Manage and process membership renewals on behalf of individuals or companies**

#### REGULAR MEMBERSHIP FEES

<table>
<thead>
<tr>
<th>Item</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Member Fees</td>
<td>200.00</td>
<td></td>
<td>200.00</td>
</tr>
</tbody>
</table>

#### Chapter Membership Fees

<table>
<thead>
<tr>
<th>Item</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>South China</td>
<td>45.00</td>
<td>1</td>
<td>45.00</td>
</tr>
</tbody>
</table>

#### Sections and Specialty Groups

<table>
<thead>
<tr>
<th>Item</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance Section</td>
<td>20.00</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Marketing Section</td>
<td>20.00</td>
<td>0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

#### Journals and Other Subscriptions

<table>
<thead>
<tr>
<th>Item</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Leader Magazine</td>
<td>34.75</td>
<td>0</td>
<td>0.00</td>
</tr>
<tr>
<td>Journal of Professional Leadership</td>
<td>34.95</td>
<td>0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

#### Voluntary Contributions

<table>
<thead>
<tr>
<th>Item</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAC Contribution</td>
<td>N/A</td>
<td>1</td>
<td>20.00</td>
</tr>
<tr>
<td>Scholarship Fund Contribution</td>
<td>N/A</td>
<td>0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

*Subtotal: 263.00*

[Updated Cart | View Cart]

### WHAT? EVENTS

**Manage the planning, logistics, communication, and registration for events of all types and sizes**

#### Edit Event

<table>
<thead>
<tr>
<th>General Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event code</td>
</tr>
<tr>
<td>Event name</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Country</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Postal code</td>
</tr>
<tr>
<td>Start date and time</td>
</tr>
<tr>
<td>End date and time</td>
</tr>
<tr>
<td>Event contact</td>
</tr>
</tbody>
</table>
Offer flexible pricing based on registration date, membership type, or other demographic information.

Emails and Marketing Emails with Delivered, Opened and Clicked Metrics.
WHAT? COMMUNICATION

Send marketing and communication emails based on pre-configured templates.

Log recent interactions on Individual profile page.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Type</th>
<th>Details</th>
<th>Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/8/2016</td>
<td>12:16 AM</td>
<td>email</td>
<td>Facebook - Save us!</td>
<td>Mozilla</td>
</tr>
<tr>
<td>7/5/2016</td>
<td>12:11 AM</td>
<td>email</td>
<td>Delivered</td>
<td>Mozilla</td>
</tr>
<tr>
<td>7/5/2016</td>
<td>12:11 AM</td>
<td>email</td>
<td>Queued</td>
<td>Mozilla</td>
</tr>
<tr>
<td>5/9/2016</td>
<td>11:45 PM</td>
<td>email</td>
<td>Order Confirmation</td>
<td>Mozilla</td>
</tr>
<tr>
<td>5/9/2016</td>
<td>11:45 PM</td>
<td>email</td>
<td>Delivered</td>
<td>Mozilla</td>
</tr>
<tr>
<td>6/9/2016</td>
<td>11:45 AM</td>
<td>email</td>
<td>Queued</td>
<td>Mozilla</td>
</tr>
</tbody>
</table>
### WHAT? AUTOMATION

**Process automation**

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Time</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event confirmation email</td>
<td>Sends a confirmation email to event registrants when they submit their registration.</td>
<td>09:00 AM</td>
<td>1x/Day</td>
</tr>
<tr>
<td>Staff reminder alert</td>
<td>Sends a reminder to staff for upcoming tasks.</td>
<td>11:00 AM</td>
<td>1x/Day</td>
</tr>
<tr>
<td>Staff event reminder</td>
<td>Sends a reminder to staff for upcoming events.</td>
<td>02:00 PM</td>
<td>1x/Day</td>
</tr>
<tr>
<td>Staff meeting reminder</td>
<td>Sends a reminder to staff for upcoming meetings.</td>
<td>03:00 PM</td>
<td>1x/Day</td>
</tr>
<tr>
<td>Staff leave reminder</td>
<td>Sends a reminder to staff for upcoming leave.</td>
<td>04:00 PM</td>
<td>1x/Day</td>
</tr>
</tbody>
</table>

**Automation benefits:**

- Improve staff productivity and constituent engagement by automating manual tasks and communications.
- Schedule tasks — such as an email, report, or stored procedure — based on changes to database tables in iMIS.

### WHAT? COMMUNICATION

Automate emails, including new-member welcomes, donation thank yous, and event reminders without burdening your staff — so nothing falls through the cracks.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donation thank you email</td>
<td>Sends a thank you email to donors who have made a donation.</td>
<td>01:30 PM</td>
</tr>
<tr>
<td>New member welcome email</td>
<td>Sends a welcome email on a weekly basis to members who have joined in the past week.</td>
<td>01:30 PM</td>
</tr>
</tbody>
</table>
Alert staff of missing data or of special status like volunteer, committee member or major donor.
WHAT?
COMMUNICATION

Merge Contacts

WHAT?
DASHBOARDS - CONTACT
WHAT?
DASHBOARDS - MEMBERSHIP

Total members: 2,630
New members: 0
Renewals: 0
Lapsed members: 2

Members by member type:
- Associate Member: 88
- Company Member: 23
- Bag or Boxholder: 7
- Affiliate Member: 7
- Student Member: 24

Members by region:
- North America: 900
- Europe: 700
- Asia Pacific: 300
- Middle East: 200
- Other: 50

Recent History:
- Event date: 12/03/2016
- Registrations: 5

WHAT?
DASHBOARDS - EVENTS OVERVIEW

Event revenue: 3,003,507
Event registrations: 5,594
Program item registrations: 25,169
Scheduled events: 37

Top 10 event revenue:
1. Event A: $1,200,000
2. Event B: $800,000
3. Event C: $600,000

Registrations by member type:
- New member: 20%
- Renewal: 30%
- Other: 50%

Scheduled events:
- Event A: 12/03/2016
- Event B: 13/03/2016
- Event C: 14/03/2016
WHAT?
DASHBOARDS – EVENTS DETAILED VIEW

Policy Symposium
07/10/2016 – 10/11/2016

1% of capacity filled
5 total registrants
57 days remaining until event

900 revenue from registrations

WHY?

• iMIS Desktop Farewell Party

• Highly configurable – Easy to Implement – Standard out-of-the-box tools

• New features and modules: Communication suite – Process Automation – Website Management – Contact Merge

• Best sets of Tools to increase Engagement at all levels

• Anywhere on Any Device

• Empowering for Staff
HOW?

Training + iMIS 20 upgrade

1. Succeeding with iMIS 20 and at Your Desk Training by ASI

1. iMIS Help site - Videos of how to and documentation

1. NiUG Training

1. Personalised Training

HOW?

Approach

1. Take the Easy Prototyped Method

1. Take the Generalised Method

1. Take the Dashboard, KPI and Measure Method
HOW?

Method

1. Use Balsamiq as a screen mockup tool
2. Start with the Search screen
1. Taylor the Individual and Organisation screens
1. Build dashboards to achieve continuous performance improvement through real-time measurement of KPIs

WHEN?

• When you have a new idea
• When your competition surges
• When you identify an opportunity
• When you need to measure results and performance
• When you need to Automate
• When your staff are unhappy with iMIS Desktop
• When you want to empower your staff
• When you need to refine your business process
• When you feel iMIS is underused
• When you want to increase engagement at all levels
WHERE?
ON ANY DEVICE - ANYWHERE  (CONTACT)

WHERE?
ON ANY DEVICE - ANYWHERE  (FUNDRAISING)
WHERE?
ON ANY DEVICE – ANYWHERE  (CERTIFICATION)

WHERE?
ON ANY DEVICE – ANYWHERE  (COMMUNITIES)
Demo

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