Agenda

• History
• Initiatives
  • Dues
  • Member Newsletters
  • Rosters
  • Registration
  • Receipts
  • Annual Report
  • Invoicing
History

- Strategic Initiative from Board of Directors
- Action
  - Review of Paper Usage
  - Scheduled Changes
    - A number of years of work
      - Changed Phone Systems, MLS® System
  - Costs Involved
    - Our mailing costs are down over $50,000/year.
- iMIS version 20.2.1.235
  - Out of the Box unless mentioned
- AiSP – Bursting Silver
Common Risk/Speed Bump

• Fear of Change
  • Created a Communication Plan Expressing No One Left Behind
    • This included
      • Emails
      • Social media
      • Mail outs
      • Newsletter articles
    • Explained the process thoroughly
    • Support Options
  • Trained multiple staff to assist
    • Every point of direct contact.
Dues
Dues - Overview

• Historically
  • Manual Process
  • Mailed out
    • 2 pages
    • Full color
    • ~3,500 copies
  • Newsletter reminders
  • Costs
    • $1,600 in printing
    • 2 people a full day
    • Mailing fees

• New Initiative
  • Invoice Emailed
  • Reminders Emailed
  • Costs
    • $0 in printing
    • 1 person – 2 hours to do initial email with invoices
    • Emailed reminders are negligible
Dues - Risks/Speed Bumps

- Failure to Pay
  - Multiple reminders
    - Dues are coming email
    - Initial email with invoice
    - Reminder email sent half way through the month
    - An email notice to Brokers who have agents who have not paid
    - Targeted email in the last 3 days to those who have not paid
    - There is a reminder on Paragon - our MLS® System
    - There is a reminder on the front page of iMIS when they log in
Dues - Risks/Speed Bumps

- Failure to Pay
- Custom Broker Functionality

<table>
<thead>
<tr>
<th>Staff Name</th>
<th>Item</th>
<th>Invoice Date</th>
<th>Invoice Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elizabeth Noble</td>
<td>EREB Fees</td>
<td>Aug 15 2017</td>
<td>$1,800.75</td>
</tr>
</tbody>
</table>

**Total Selected Amount: $0.00**

Please note that staff will be unselected and removed from cart, if you return to this page.
Dues - Education

• General Meeting Presentation
• Broker/Manager Presentation
• Private Social Media
• Emails
• Articles

2017 Annual RAE Membership Dues Payment

Deadline is Friday, March 31, 2017, 5pm

You are receiving this email because our files indicate you have not yet paid your dues. If you have paid your dues, please disregard this message.

Your membership dues invoice was e-mailed to you on March 1, 2017 at the e-mail address that RAE has on file for you. The e-mail gives you complete instructions on how you can pay your membership dues.

Dues payment options:
Pay online with VISA, MasterCard or American Express by following the link on member.rah.com
Dues - Benefits

• Receive the invoice faster
• More reminders
  • Including Targeted Reminders
• Broker Functionality
  • Who still Owes
  • Pay for Members Online
• Pay from anywhere
Dues - Next Steps

• Smooth out membership processes
  • 190 billing possibilities
    • Members
    • Affiliates
    • Third Parties

• Automate the emails

• Auto pay solutions
Newsletters
Newsletters - Overview

• Historically
  • Manual Process
  • Weekly Review
    • 4+ pages
    • Full color
    • Weekly
    • ~3,200 copies
  • Costs
    • $3,000 in printing
    • 2 people a full day
    • Mailing fees

• New Initiative
  • RAE News
    • Articles Online
    • Emails for Critical News
    • PDF Creator
  • Costs
    • $0 in printing
    • Staffing cost is negligible
Newsletters - Risks/Speed bumps

• Missing Information
  • Advertised in Multiple Locations
  • Emails for Critical Notices
Newsletters - Risks/Speed bumps

- Spacing Members
  - Members can sign up for specific email types
Newsletters - Education

• Emails
• Private Social Media
• Articles

Help your clients learn more about home energy efficiency

The City of Edmonton has arranged to conduct a Lunch & Learn for Edmonton REALTORS® on July 11 to learn more about Edmonton’s EnerGuide for Homes: Spot the Difference Program, which combines the power of the EnerGuide label with a publicly accessible, online sharing platform located at ace.edmonton.ca/energuide.

Register for the Lunch & Learn Session
Newsletters - Benefits

• Information is received in a timely manner
• Receive only the information you want
• Custom PDF Creator
Rosters
Roster - Overview

• Historically
  • Membership
    • ~32 pages
    • ~250 copies
    • Monthly
  • Office
    • ~14 pages
    • ~250 copies
    • Monthly
  • Costs
    • $115 for printing
    • 1 person a full day
    • Mailing fees

• New Initiative
  • Membership
    • Online PDF
    • Searchable
  • Office
    • Online PDF
    • Searchable
  • Costs
    • $0 for printing
    • Staff cost is negligible
Roster - Risks/Speed bumps

• Members Spamming Members
  • PDF Version

Rosters
Please note, the Membership and Office rosters are updated weekly and the Roster is available when needed.

- Membership Roster
- Office Roster
- Rural Roster - Please note, all rural Members are listed in the Office and Membership Rosters...
Roster - Other Information

- Education
  - Private Social Media
  - Emails
- Benefits
  - More up-to-date information
- Next Steps
  - SSRS report
Registration
Registration - Overview

• Historically
  • Paper Copy
    • Each course had an individual registration form

• New Initiative
  • Online for Members
  • Paper for Non-Members
    • Generic registration form
Registration - Risks/Speed bumps

- Decrease in Attendance
  - Emails Specifically for Education
  - We Advertise Other Sessions in Classes
  - Electronic Signs Advertising Sessions
  - Online Calendar and Offerings
- Numbers
  - In 2016 (January to July) 3835 registrations
  - In 2017 (January to July) 2712 registrations
  - Decrease could be explained by less course offerings and a change in our market
    - In November 2015 we released a new MLS® System
Registration - Other Information

• Education
  • Private Social Media
  • Articles
  • Emails

• Benefits
  • Members Can Manage Their Own Registrations

• Next Steps
  • Re-writing our Courses
  • Online Education Offerings
Receipts
Receipts - Overview

• Historically
  • Paper
  • Costs
    • $300 in printing
    • Mailing fees

• New Initiative
  • Online
  • Costs
    • $0 in printing
Receipts - Education

- Educated One-on-one
- Private Social Media
- Emails
Receipts - Benefits

• Receipts No Longer Lost
Receipts - Next Steps

- Filter by Date
- Change IQA Fields
  - Similar to Online Invoicing
- Print Multiples
- Enforce the Rule
Annual Report
Overview

• Historically
  • Printed
    • ~44 pages
    • Full Color
    • ~3,200 copies
  • Costs
    • $15,200 in printing
    • 2 people a full day
    • Mail fees

• New Initiative
  • Emailing
  • Websites
  • 200 Printed Copies for Meeting
  • Costs
    • $950 in printing
Invoicing
Invoicing - Overview

• Historically
  • Invoices
    • 1 page/property
    • ~4,500 properties
    • Monthly
  • Statement of Accounts
    • 16 invoices/page
    • Monthly
  • Costs
    • $60,000 in printing
    • 2 people a full day each month
    • Mailing fees

• New Initiative
  • Invoices
    • Online
    • PDF option
  • Statement of Accounts
    • Online
    • PDF option
  • Costs
    • $0 in printing
Invoicing

Change Request
Change Request

• Background
  • Request
  • Office Visits
  • Data Gaps
  • Survey
• iMIS Configuration
  • Log In Credentials
  • IQA for Download
  • SSRS Reports
• Roll Out Preparation
  • Training
  • Communication
  • Testing
• Roll Out
• Timelines/Resources
Complaints about the amount of paper
  - Up to 300+ pieces of paper

Visited 3 offices to record the staff processes
  - Recorded gaps, positive and negative aspects

Data Gaps/Risks
  - Outlined each data gap/risk
  - Created mitigation strategies

October 2016 Survey
  - 55% response rate
  - Findings
    - 58% use Lone Wolf for Accounting
      - 42% pencil and paper to other accounting software
    - 74% have an Assistant or Similar position entering invoices manually
      - Typically not a member of the Association
    - Mixed results on the needs for online versus paper solutions
Change Request - iMIS Configuration

- Log In Credentials
  - Brokerage Level Sign On
- IQA for Download
  - Fields
  - Display
  - Order
- SSRS Reports
  - Statement of Account
  - Invoices
Change Request - Roll Out Preparation

- Training
  - Emails
  - Broker/Manager Presentation
  - PDF instructions
  - One-on-one office visits
  - Association Staff Training

- Communication
  - Emails
  - Private Social Media

- Testing
  - Staff Testing
  - Broker Testing
Change Request - Roll Out

- Ran the both print and electronic for 4 months
- Collected Feedback
- One-on-one training
  - At office
  - On phone
Change Request - Timelines/Resources

- Listed each task
  - Estimated time
  - Who would do the work

<table>
<thead>
<tr>
<th>Timelines/Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tom Shearer Office Visit</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>- 2 hours</td>
</tr>
<tr>
<td>- Elizabeth/Leisa/Manal</td>
</tr>
<tr>
<td>Data Gaps</td>
</tr>
<tr>
<td>- 1 hour</td>
</tr>
<tr>
<td>- Management Team</td>
</tr>
<tr>
<td>Broker/ Manager Survey</td>
</tr>
<tr>
<td>- 2 hours</td>
</tr>
<tr>
<td>- 1 week to collect data</td>
</tr>
<tr>
<td>- Elizabeth/Kathryn/Manal/Susan</td>
</tr>
<tr>
<td>Brokerage Log In Credentials</td>
</tr>
<tr>
<td>- 5 hours</td>
</tr>
<tr>
<td>- HUB</td>
</tr>
<tr>
<td>Create a view</td>
</tr>
<tr>
<td>- 8 hours</td>
</tr>
<tr>
<td>- Charles/Elizabeth/Bursting Silver</td>
</tr>
<tr>
<td>IQA for Download</td>
</tr>
<tr>
<td>- 3 hour</td>
</tr>
<tr>
<td>- Elizabeth/Bursting Silver</td>
</tr>
</tbody>
</table>
Invoicing

Finished Product
Finished Product - Suggested Monthly Process

1. Email stating Invoices are ready
   • Sent out after month end is completed
2. Review Invoices and Statement of Accounts
3. Export invoices from iMIS
4. Enter invoices in Accounting Software
   • First run in test database or a single line only
5. Confirm data
6. Pay invoices
Finished Product - Accessing the Site

- Brokerage level credentials
  - Accommodate all business options
Finished Product - Brokerage Profile

- Online Invoices
- Alternative email
- Other fields for REALTOR.ca
Finished Product - Open Office Invoices

• Here Brokerages can
  • Review
  • Print
  • Save
  • Export
Finished Product - Statement of Accounts

- Open invoices
  - Up to the last day of the previous month
Finished Product - Individual Invoices

- Open invoices up to the moment

![Invoice Image]
Finished Product - Information to Members

• Data Changes
  • Export is robust
    • 28 fields
  • Alter column order
  • Delete columns to suit your software
  • Split fees between Members
  • Some columns are blank
    • They are place holders for Lone Wolf software

• Lone Wolf Notes
Finished Product - Pay Invoices

- After data is entered into your accounting system
- Only 100 Invoices at a time
Invoicing
Invoicing - Benefits

• Receive Invoices Faster
• Ability to Pay Online
• Additional Profile Information
• Less Manual Data Entry
Invoicing - Next Steps

• Print Multiple Invoices
• Statement of Accounts History
• IQA of Invoices Paid Online
• Expand to Other Invoicing
Wrap Up Points

• Change is a constant
• Mitigating the risks is paramount
• Make change for the masses but support the individuals
• Detailed communication plans are necessary
• Documented testing is important
Questions
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