



WEBINAR SERIES

Re-Evaluating Communication Tools

Enhancing Your Member Journey

Presented by:

Association Technology Solutions



Association Technology Solutions



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with over 150 integrations
- Over 100 RiSE website implementations
- iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients





Presented by



Presenter:

Randy Richter

Director of Technology, Partner
Association Technology Solutions, LLC

Email: rrichter@atsol.org



Moderator:

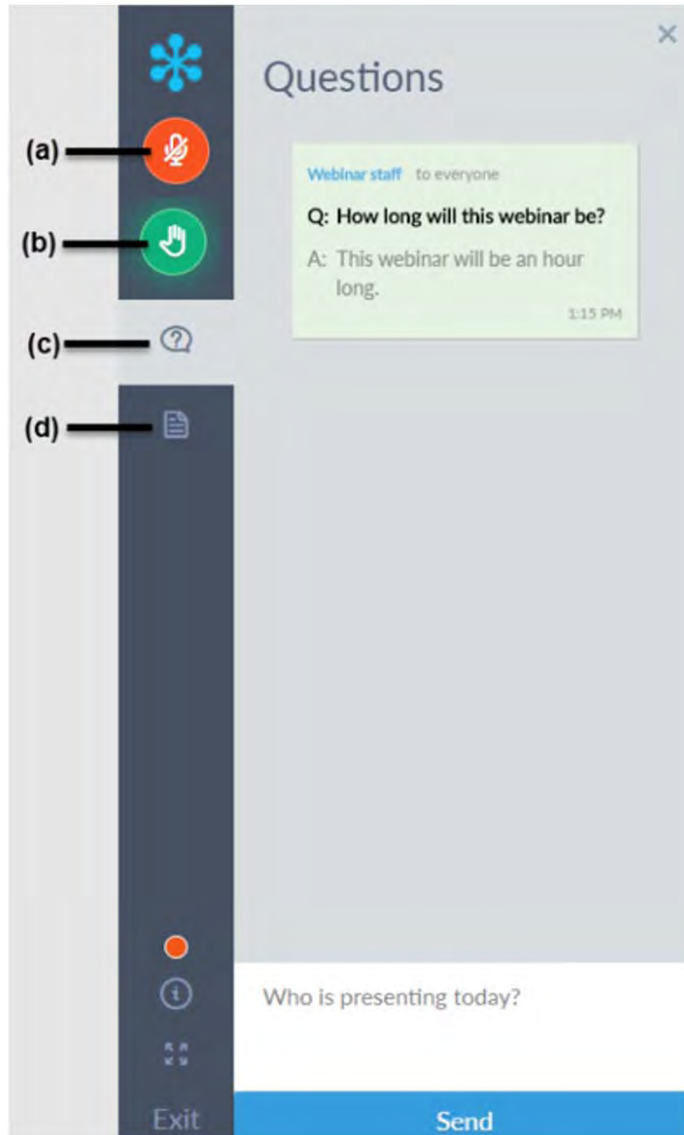
Richard Banks

Sales Manager

Association Technology Solutions, LLC

Email: rbanks@atsol.org





- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete



Why are effective communications important?

- ✓ Associations continue to explore multiple communication methods to communicate and engage their members.
- ✓ Associations need to understand their members and stakeholders to determine what means of communications are most effective.
 - ✓ Bar Association
 - ✓ Medical Assistant
 - ✓ Landscaper





What are some avenues for communications?

- ✓ Social Media
- ✓ Email and Newsletters
- ✓ SMS and Text Messaging
- ✓ Mobile Apps
- ✓ Online Communities
- ✓ Podcasts
- ✓ Digital Ads
- ✓ Chatbots and AI-driven Support





How do you adapt these tools?

- ✓ Ask yourself, what can iMIS do?
- ✓ If there is a showstopper with something iMIS can't do. Then look to additional solutions
- ✓ Don't get mesmerized by capabilities of third-party systems that exceed what your organization process
- ✓ Haver you ever heard the following? "Our retention rate would be much higher if we only had better communication tools." Or, "We would have better attendance at our events if we had better communication tools."





Example

- ✓ We send out too many emails to prospective event attendees. I wish we could remove people who have already registered for the event and target communications.
- ✓ What you need to know to effectively communicate
 - ✓ Who is registered already?
 - ✓ Who has opted out of receiving emails?
 - ✓ Who lives within a 50-mile radius of the event so we can offer a special “local price” and ask for volunteers?





Example

- ✓ We have a new webinar; I want to communicate that to all people who are Certified at Level 1 as this is a good webinar for people who are aspiring to Certified Level 2.
- ✓ What you need to know to effectively communicate
 - ✓ Who is Certified Level 1?
 - ✓ Who has not already registered for the webinar?
 - ✓ Who has opted out of communications?





Components of Effective Communications

- ✓ Establish clear objectives – (Example: We want to promote attendance from local members)
- ✓ Create a communication plan – (Example: We will use a combination of email, text, and digital ads)
- ✓ Maintain consistent branding – (Example, be consistent with fonts, colors, banners, graphics)
- ✓ Segment your audience – (Example, know who your members are, who your at-risk members are)
- ✓ Integrate Digital and Offline Channels – (Example use websites, social media, mail with traditional print and events)
- ✓ Use Data and Analytics (Example, query iMIS to know who had registered or not)
- ✓ Feedback Mechanisms – (Example, use forms surveys, polls to gather information from members.)
- ✓ Collaborate Internally – (Ensure different departments in the association are aligned with their communication strategies and efforts)





What are some solutions

- Out of the box iMIS

Event registrants

Select a query
Active registrations

First name starts with Last name starts with

Registrant	Organization	Title	Date registered	Guest of	Order Number	View registration
Mr. Harry R. Brandnam			7/19/2023		10607.00	View registration
Mr. Joel Brown	Forests NSW		7/19/2023		10605.00	View registration
Mr. Steve Carlson	iMIS International	Intern	5/24/2023		10601.00	View registration
Mr. Douglas A. Hunt, Jr.	Prodigy Makers International	President	7/19/2023		10603.00	View registration
Simon Jones	Versaton Scotland	Senior Accountant	5/23/2023		10600.00	View registration
Mrs. Florence I. Lambert	Southside Repairs		7/19/2023		10606.00	View registration
Mrs. Julie Smith	Opus, Inc.	Vice President, Finance	7/19/2023		10604.00	View registration





iMIS Bridge

- ✓ Some modules in iMIS Bridge
 - ✓ MailChimp
 - ✓ Constant Contact
 - ✓ Twilio SendGrid
 - ✓ RealMagnet
 - ✓ Hubspot





Create

Heads up! Your calendar view will soon be moved to Campaign Manager. [Explore Campaign Manager](#)

Campaigns ^

All campaigns

Campaign Manager New

SMS New

Automations v

Audience ^

Audience dashboard

All contacts

Signup forms

Tags

Segments

Surveys

Subscriber preferences

Inbox

Upgrade

View and manage your emails, ads, social posts, and landing pages.

[View analytics](#)

[Create new](#)

ATS-CloudTesting

Your audience has **81** contacts. **79** of these are subscribers.

[List View](#) [Calendar View](#)

View by Status

- All
- Ongoing
- Draft
- Completed

Sort by [Last updated](#) v

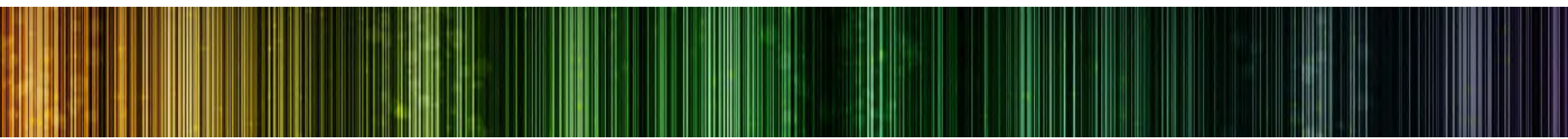
You can also search by [all audiences](#).

December, 2022 (2)

<input type="checkbox"/>		June Email Marketing Test (copy 02)	Sent	0.0%	0.0%	View Report v
		Regular · ATS-CloudTesting	Classic Builder	Opens	Clicks	
		Segment: Aaron				
		Sent Thu, December 1st, 2022 5:40 PM to 0 recipients by you				

View by Type

Emails



Contacts ▾
775 records

[Data Quality](#)
[Actions](#) ▾
 [Import](#)
[Create contact](#)

[All contacts](#)
✕
[My contacts](#)
Unassigned contacts

[+ Add view \(3/5\)](#)
[All views](#)

[Contact owner](#) ▾
 [Create date](#) ▾
 [Last activity date](#) ▾
 [Lead status](#) ▾
 [Advanced filters \(0\)](#)
[Save view](#)

[Export](#)
[Edit columns](#)

<input type="checkbox"/>	NAME	ID	EMAIL	PHONE NUMBER	CONTACT OWNER	PRIMARY COI
<input type="checkbox"/>	William Jones	209	jones@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Audrey Hepburn	1275	ahepburn@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Freestone Test2	1271	freestonetest2@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Freestone Test	1270	freestonetest@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Alison Trail	995	kil.123847@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Alison Patel	868	cha.123921@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Deborah Burge	459	agb.123598@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Jim Kay	1062	jkay@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Marcie Farmhaven	152	mfarmhaven@atsol.org	--	Unassigned	--
<input type="checkbox"/>	Christopher Johnson	1259	cjohnson@atsol.org	--	Unassigned	--





Considerations when using a third-party communications platform

- ✓ iMIS Is the source of truth
- ✓ What do you really need to know in iMIS in 3 months?
- ✓ How much engagement do you want to write back to iMIS?





Summary

- ✓ iMIS is the source of truth
- ✓ All roads lead to iMIS
- ✓ Data flows are automatic and can be real time between iMIS and third-party platforms
- ✓ The iMIS Bridge provides connectors to third party platforms
- ✓ Combining multiple solutions and leverage best of breed solutions can result in a seamless integration
- ✓ “Own” your communication strategy for email, text, community, mobile, etc.

www.atsol.org -> products -> iMIS Bridge





Additional Information about iMIS Bridge

- ✓ Modules have pages that discuss how they work
- ✓ Some have videos and webinars describing the use
- ✓ Supported use cases are listed on the website
- ✓ Contact us for additional use cases or questions

- ✓ <https://www.atsol.org/imisbridge>
- ✓ sales@atsol.org

www.atsol.org -> products -> iMIS Bridge





Questions & Answers



Presenter:

Randy Richter

Director of Technology, Partner
Association Technology Solutions, LLC
Email: rrichter@atsol.org



Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC
Email: rbanks@atsol.org

