



# AACSB

**AACSB  
Future-Proofs  
Association  
Management  
with Protech and  
Microsoft  
Dynamics 365**

“Now, we have less worry about updates, security, and disaster recovery with the platform handling it all. And there’s so many resources to learn, explore, and improve. Industry best practices are always in your back pocket with Microsoft.”

**- Ginger Ausloos: PMP, VP Information Technology, AACSB**

Synonymous with the highest standards of excellence since 1916, AACSB International provides quality assurance, business education intelligence, and learning and development services to over 1,900 member organizations and more than 1,000 accredited business schools worldwide, serving more than five million students.

## Evolving technology tools and internal teams

For more than a decade, AACSB managed its member data, accreditation details, events, and renewals on a customized web-based association management system (AMS.) Various independent systems supported other areas of the business. Despite the lack of integration, AACSB's dedicated team managed operations seamlessly through their resourcefulness. They often leveraged Excel spreadsheets to bridge any gaps and ensure a smooth flow of work across various systems.

As membership and offerings grew over time, however, these disparate, aging applications and processes proved to be cumbersome, error-prone, and inefficient, distracting busy employees from providing superior customer experiences. The intricate nature of customizations in the systems posed challenges when it came to scalability, maintenance, and incorporating new features.

To address these issues, AACSB turned to Protech AMS, a Microsoft Business Applications Partner. Protech provides trade and professional organizations with cloud-based solutions and technical services built on the Dynamics 365 and Power Apps Platform. Beginning in 2018, AACSB started managing memberships, events, e-commerce, and business school accreditation processes on Protech's AMS, an on-premises version of Microsoft Dynamics 365 (formerly known as Dynamics CRM) hosted in Azure.

While AACSB had been satisfied with Protech's solution and services, they and the association's internal team members had been making remarkable strides in learning about the potential of Dynamics 365 and the broader Microsoft ecosystem. They became well-versed in the latest Dynamics 365 enhancements and cloud technologies, driving a desire to further elevate their technology platform. This ambition led to a pivotal decision—to transition from an IaaS infrastructure in Azure to Microsoft's SaaS Power Platform version of Dynamics in the commercial cloud. This strategic shift not only showcased AACSB's commitment to embracing technological advancements, but also positioned them for greater agility and innovation in the future.



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“Having experience with the CRM tools and Protech was a huge benefit for us. It gave us knowledge that we could take forward in further refining how we used the system.”

- **Ginger Ausloos: PMP, VP Information Technology, AACSB**

After carefully assessing alternative options, the team determined the benefits of moving to the cloud version of Dynamics 365 with Protech's AMS, would outnumber possible uncertainties. The expected benefits of the migration included:

- Regular updates and maintenance releases
- Autonomy over users, licenses, access, apps, and automation
- No need to hire a costly integration consultant
- Integrated third-party software solutions for easy reporting
- Encouragement of continued skill building, best practices, and features usage

Understanding and supporting AACSB's goal, Protech began working with the Microsoft FastTrack program in 2019. By the time AACSB began their project in early 2021, Protech had already established a successful track record of similar migrations.

## Preparing for change and the modern cloud

Protech's AMS was identified as an ideal solution for AACSB's current requirements and promised to provide the flexibility needed to support their future technology roadmap. Once the project teams were identified and the initial discovery was completed, the teams came together for an official kickoff meeting to discuss the overall process and timeline. Protech, AACSB and Microsoft were each assigned key roles for different phases of the project as outlined in the FastTrack best practices documentation. Approaching challenges with a growth mindset is an AACSB value, so the team enthusiastically agreed.





AACSB assigned “Champions” for each department to support the implementation. They would oversee the preparations, planning, and training for their specific business functions. This coordinated approach proved to be more efficient and less overwhelming than managing all activities with a single team.

After three fruitful test runs with various users testing along the way, millions of pieces of data were migrated to the new cloud instance of Dynamics 365. Due to the efficient collaboration between AACSB, Protech, and Microsoft, the project was completed within seven months. Once the go-live turnover process was finished, AACSB’s team began using their fully modernized system, with the confidence of knowing that Protech will continue as their trusted partner into the future to help support their constantly evolving business requirements.

## Empowered to do more with the right tools

The AACSB team has been thrilled with the results of moving to the cloud with Dynamics 365. Return on investment is positive overall due to savings in licensing, management fees, and IT support—and the increased productivity of the staff. Just as important, the key benefits promised at the beginning have been delivered in the two years since the migration to Dynamics 365:

- **Latest features and functionality:** Microsoft continually releases automated updates and enhancements to Dynamics 365, introducing new capabilities, improved user experiences, and enhanced performance.
- **Scalability and performance:** Dynamics 365 offers robust performance, allowing the organization to handle more data, users, and transactional demands.
- **Enhanced integration:** As a unified platform, the system offers better integration capabilities with other Microsoft products such as Microsoft 365, Power Platform, and Azure services. This allows for smoother data flows, streamlined workflows, and improved collaboration across business functions.
- **Simplified management:** The cloud-based solution offloads the infrastructure management responsibilities, including updates, backups, and security, to Microsoft. For example, system updates and edits to headcount or settings are now completed in hours rather than days.



Other upsides have become apparent over time. For example, leadership has been impressed by the system's ease of use and the initiative of employees who are leveraging the online learning opportunities and new tools to build their own low-code/no-code automations that improve productivity.

Power Automate flows streamline many processes that were previously performed manually (or not at all), such as:

- Financial batch creations for both regular and adjusted transactions which run just after midnight every day.
- Removing promotional packages after the deferral end date helps prevent members from inadvertently purchasing items that are no longer available and declutters the events web page.
- The distribution of 5 million emails per year is now automated for event registrations, thought leadership, and ecommerce campaigns. Given the global audience, the team appreciates the regulatory and compliance requirements for each country are built directly into the platform.

Due to the inherent restrictions of the previous data center model, AACSB had more restricted access to the Dynamics 365 environment and the Protech AMS system. When most issues were identified, a ticket was created and sent to Protech to address, which added unnecessary delays. Now, employees often figure out a solution themselves and share learnings with co-workers so everyone can benefit.

More subtle benefits involve minimizing customizations with third-party integrations. The switch to the cloud gave the team at AACSB an opportunity to assess processes and be thoughtful about which ones to keep. They learned that adjusting to work with the out-of-the-box features and functionalities within Dynamics365 since they were built to meet most common workflows.



“[Microsoft has] thought through all the best practices for each type of workflow, so it makes sense to shift to the ones in Dynamics 365 whenever possible.”

- **Ginger Ausloos: PMP, VP Information Technology, AACSB**

## **A bright future for business education**

To assist with expanding its reach and revenue, the AACSB team is beginning to work with the lead management capabilities of Dynamics 365 to guide users through the membership onboarding journey. This is helping to turn more inquiries and leads into members, who in turn attend events, share knowledge, build networks, and seek accreditation. With easy integration in Dynamics 365, they're using a variety of third-party applications to create rosters, track attendance, and support virtual events.

IT leadership and departmental Champions are hard at work to make sure that everyone in the organization continues collaborating, growing, and looking forward to continued growth and improvement.

## **Learn More About Protech**

Built specifically for Microsoft Dynamics 365 and the Power Platform, Protech's integrated suite of member-focused database, financial, e-commerce and analytics tools work seamlessly together to help you deliver exceptional member experiences. The company's robust, easy-to-use association software platform is certified in Microsoft AppSource and helps association professionals streamline operations, empower employees, engage members and make better decisions.



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