CASE STUDY
A Healthy AMS for a Growing Association

Healthcare Businesswomen's Association uses cloud solution to improve data management, increase staff productivity and streamline event registrations.

The Healthcare Businesswomen's Association (HBA) was established by five professional women who recognized the need for women in the healthcare industry to come together to exchange industry and career information and resources. Over the past four decades, the association has grown from informal meetings in Metro New York City to an active association dedicated to the further advancement and impact of women in the business of healthcare. Today, the association has more than 7,500 individual members and 120 corporate partners across the United States and in Europe.

Challenges

HBA's previous association management software (AMS) was neither configurable nor customizable. So, as the association's business needs changed, it became clear that HBA would not be able to make corresponding changes to the system to support the necessary business improvements. Also, staff members used manual processes for many tasks – including reporting and event registration – which slowed down productivity and frustrated members.

Solution

After discussing with each HBA staff member the needs, pain points and changes required in the new system, the director of IT, Leena Gademsky, sought out a new software partner with an innovative solution. HBA selected Protech Associates' cloud association management software for its Microsoft Dynamics CRM platform, easy integration with other systems and extensive reporting abilities. In addition, the ability for HBA staff to configure member facing forms and processes was paramount.

> " Because Protech Cloud Business Solutions is built on the Microsoft Dynamics CRM platform, HBA will benefit as Microsoft continues to add new features and functionality to the platform."
>
> **Leena Gademsky**
> Director of IT, Healthcare Businesswomen's Association

HBA
Healthcare Businesswomen's Association
Connect Share Grow

WOW! Award Winner

At a Glance

Background

Non-profit association dedicated to the further advancement and impact of women in the business of healthcare

Chapters throughout the United States and Europe.

More than 7,500 members and 120 corporate partners.

Challenges

Could not configure previous system to meet business needs

Staff members spent significant time manually generating reports

Processes to purchase memberships frustrated members

Benefits & Results

Because Protech's cloud AMS easily integrates with the systems HBA already uses, as well as any new systems they might add, data now flows seamlessly between the AMS and the accounting, email marketing and community platforms.

Staff productivity has greatly improved for the association. Previously, individuals had to manually download revenue data from the AMS and upload it to Intacct, HBA's accounting system. Since implementing Protech's association management software, information flows effortlessly between the two systems, eliminating the need to spend hours manually syncing data. The same is true with HBA's email marketing solution from Informz. Today, the AMS automatically syncs with Informz each evening so recipient lists are kept current. This means staff members can send targeted emails to the attendees at HBA's over 300 events each year.

The Protech association management solution greatly benefits HBA members. With the software, members' assistants can easily register executives for events. In addition, Protech's AMS has a table seat assignment functionality, which saves hours of staff time when planning for the 2,500-person annual Woman of the Year event.

Because HBA staff can easily configure the association management system, process improvements are effortless to implement. For example, HBA has notably improved the membership purchase process. Previously, purchasing a membership involved a cumbersome form that required so much information that prospective members often left without completing their purchase. With the new system, HBA has significantly simplified this process. These improvements to HBA's processes led to a second WOW! Award win in 2016 for Excellence in Member Service.

Since switching to Protech's association management software, HBA has been able to focus on long-term, strategic goals instead of worrying about tactical day-to-day tasks. Looking forward, the association plans to continue automating manual processes – including volunteer registration – to increase staff efficiency and further improve the member experience. This will undoubtedly help HBA on its quest to achieve significant growth over the next five years.

At a Glance

Solution

Protech Cloud Business Solutions, association management software powered by Microsoft Dynamics CRM.

Seamless integration with third-party systems, including email marketing, social networking and collaboration, website content management, and a volunteer management system.

Results

Increased overall staff efficiency and realized cost savings at large annual event.

Seamless data flow between systems enables staff to create real-time, on-demand reports.

Streamlined volunteer and event registration process improved the member experience.

PROTECH
AUTOMATING GOODNESS

www.ProtechAssociates.com

📞 800-310-8813 ext. 2   📍 5457 Twin Knolls Rd, Suite 400, Columbia, MD 21045