CASE STUDY

Cheers to Data Accuracy and Reduced Stress with AMS Software

Wine & Spirits Wholesalers of America, Inc. uses Protech Cloud Business Solutions to effectively manage annual convention and improve organization-wide efficiency

The Wine & Spirits Wholesalers of America, Inc. (WSWA) is the national trade association representing the wholesale tier of the wine and spirits industry. It is dedicated to advancing the interests and independence of its 362 member organizations – wholesale distributors and brokers of wine and spirits. Spanning all 50 states and the District of Columbia, WSWA's members distribute more than 80 percent of all wines and spirits sold at wholesale in the United States. Founded in 1943 and headquartered in Washington, D.C., WSWA provides its members with representation before Congress, executive agencies, regulatory bodies, courts and other alcohol beverage industry organizations. In addition, WSWA's nearly 20 staff members offer a wide range of services in the areas of public affairs, education and social responsibility, as well as valuable cost-saving programs.

Challenges

WSWA does not employ an IT expert on staff. This limits the capabilities of the current staff in managing on-site technology solutions and led to their previous association management system (AMS), which was hosted by a third party. However, even though the legacy AMS software provided the benefits of the cloud, the system wasn't user friendly. Challenges in executing basic tasks and a distrust for the accuracy of the data dissuaded the majority of the office from accessing the AMS software regularly. Furthermore, without an on-site IT resource, WSWA needed a technology partner that could offer assistance in utilizing the system, whether for developing reports, improving operations or driving user adoption.

Solution

Senior Director, Membership, Bob Wiggans, has conducted extensive research of association management software over the years. So, when WSWA's President and CEO, Craig Wolf, asked him about Protech Associates, he was already well versed in the company's strengths and the capabilities of its association management software, **Protech Cloud Business Solutions**.

Upon further research and comparison against other AMS software in the market, WSWA determined that Protech's cloud-based association management system was the clear choice. Powered by Microsoft Dynamics CRM®, Protech Cloud Business Solutions displays a Microsoft Office look-and-feel that both Wiggans and Wolf felt would encourage more participation and involvement from the staff. Its flexibility to integrate with a number of back- and front-office systems offered significant opportunities to streamline operations and increase efficiency across the organization, while improving member engagement online. The system also consolidates numerous functions into one system, eliminating the need for coordinating multiple vendors.

Protech's systems engineers and Microsoft Certified Professionals worked with WSWA's staff to configure the cloud-based system for the association's specific needs. Protech Cloud Business Solutions was integrated with Outlook for increased user adoption and ease of use. Equally important, the association management system offers integrated financial management with the organization's accounting system to streamline billing, payment processing and financial system reconciliation for transactions captured both online and in the back office. WSWA uses a unique, two-step invoicing process based on its members' sales from the previous year. Protech helped to configure the system so that when a sales number is entered into UX Online, the system's centralized database, a six-level formula calculates what each member owes for the year, plus a suggested donation for the foundation. That same data is then compiled into an overall report for executives and membership teams.

At a Glance

Background

National trade association representing the wholesale tier of the wine and spirits industry.

Founded in 1943, WSWA is based in Washington, D.C. with 18 employees.

More than 360 member companies throughout all 50 states and Washington, D.C.

Challenges

WSWA does not have an IT resource on staff.

Previous system was not user friendly.

Few employees accessed the old AMS software and most didn't trust the data.

"We have a complex dues structure and Protech knocked it right out of the park from the first billing cycle with automated workflows that calculate specific dues totals based on sales volume that our staff input into the system. It's gone very well and it's really nice to have a history of this and other key data right in the system," said Wiggans.

Departments such as communications, memberships and event management benefit from the seamless integration of the UX Online database with ExactTarget email marketing and communications software and the organization's content management system (CMS). Members can also log in to the website through a single-sign-on (SSO) to update profiles, access members-only content or search a value-added state law database.

Mastering the Annual Convention

Now in its 72nd year, WSWA's Annual Convention & Exposition is the organization's largest non-dues revenue stream and a coveted opportunity for wholesalers and suppliers to come together. To coordinate this prominent event, WSWA uses Protech Cloud Business Solutions' innate functionality to manage registrations and identify what events members are attending in order to track revenue. Integrations with MapYourShow and Passkey enable exhibitors to secure booths and attendees to reserve hotel rooms without creating multiple log ins. Other integrations with ExpoBadge help to facilitate express check-ins.

Liz Armstrong, Manager, Technology and Support, Meetings & Conventions, said, "Protech's association management software has definitely made our event management process more cohesive. It's more convenient to quickly gain information and we can better understand what our members need from us. That has been a huge benefit."

Results

WSWA regularly looks to the history of the organization to identify opportunities for overall improvement and better member experiences. From the CEO, to vice presidents and department heads, the staff uses Protech's AMS software to slice and dice data without the assistance of an IT professional. One report in particular was created to highlight meeting registrations and is delivered directly to the CEO for ease of access. Similarly, more than eight years of history were imported into the association management solution, creating the ability to compare event statistics year-over-year, and identify marketing opportunities for potential registrants based on previous attendance. Improved efficiency of billing and invoicing promotes earlier payment of dues, resulting in an increased cash flow for the organization by more than $1 million in 2014.

Wiggans concluded, "Protech's AMS software removed a lot of headaches and a lot of stress. It gave us a better sense of well-being because we have solid, reliable, accurate data available at all times. That has been invaluable for us."

At a Glance

Solution

Protech Cloud Business Solutions powered by Microsoft Dynamics CRM.

Centralized UX Online database and MX Online e-commerce solution and web interface.

Seamless integration with Outlook, accounting system, CMS, ExactTarget, MapYourShow, Passkey, ExpoBadge and CrowdCompass.

Results

Integrated financial management improved billing and invoicing and increased cash flow by more than $1 million in 2014.

Customizable reporting provides marketing insight, event registration status, revenue trends and more.

Reliable, accurate data enables greater insight to make informed business decisions for overall improvement and better member experiences.

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.

Founded in 1984, Protech combines deep industry expertise and the technical knowledge of numerous on-staff Microsoft Certified Professionals to deliver a robust, easy-to-use, association management software that is Certified for Microsoft Dynamics, with enterprise-level security, a built-in disaster recovery plan, and a 99.9 percent uptime guarantee. Headquartered in Columbia, Md., the company has been repeatedly named to the Microsoft President's Club, received the Microsoft Distinction in Marketing Award twice, is a Microsoft partner with a gold Customer Relationship Management competency, and partners with CenturyLink, Cetrom, Melissa Data, PayPal, ExactTarget, Higher Logic and Engage.

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