**CASE STUDY**

# A Digital Transformation in Phases

*Consumer Healthcare Products Association optimizes systems and processes to elevate member experience, improve user adoption and prepare for a database upgrade*

For more than 120 years, the Washington, D.C.–based Consumer Healthcare Products Association (CHPA) has been committed to empowering consumer self-care by preserving and expanding the choice and availability of consumer healthcare products. The national trade association's 185 members include leading manufacturers and marketers of over-the-counter (OTC) medicines, dietary supplements and consumer medical devices.

## Getting to Know Protech AMS… again

Numerous staff changes at CHPA, including the departure of the Director of Information Technology, led the organization's leadership to evaluate all technology solutions, including its association management software (AMS).

CHPA needed to ensure that the systems were easy to maintain and met its business needs. However, with recent turnover, the new staff had a hard time determining what was custom versus out-of-the-box functionality.

The Protech team explained what the AMS offered out of the box and noted how the system could be optimized using this functionality. Further, Protech shared additional out-of-the-box capabilities that would be available in newer versions of the software and encouraged CHPA to consider an optimization project.

## A Systematic Approach

CHPA was committed to making sure its technology met the needs of its staff and achieved the critical goals of leadership, so they brought in an industry consultant to assist from iTAG, a strategic technology consulting firm that helps clients provide value and streamline operations. Protech and iTAG conducted extensive interviews with CHPA staff to identify system gaps, develop use cases for each department and set priorities.

Instead of simultaneously making sweeping changes throughout the organization, the joint project team took a phased approach to the organization's digital transformation: optimize the current system and processes to address the highest priorities, then complete the upgrades. This enabled the teams to score early wins and maintain a familiar system, minimizing the learning curve for new functionality.

**CHPA** ® | CONSUMER HEALTHCARE PRODUCTS ASSOCIATION

Taking healthcare personally.

## At a Glance

### Background

National trade association providing invaluable industry insights and business development opportunities to its members

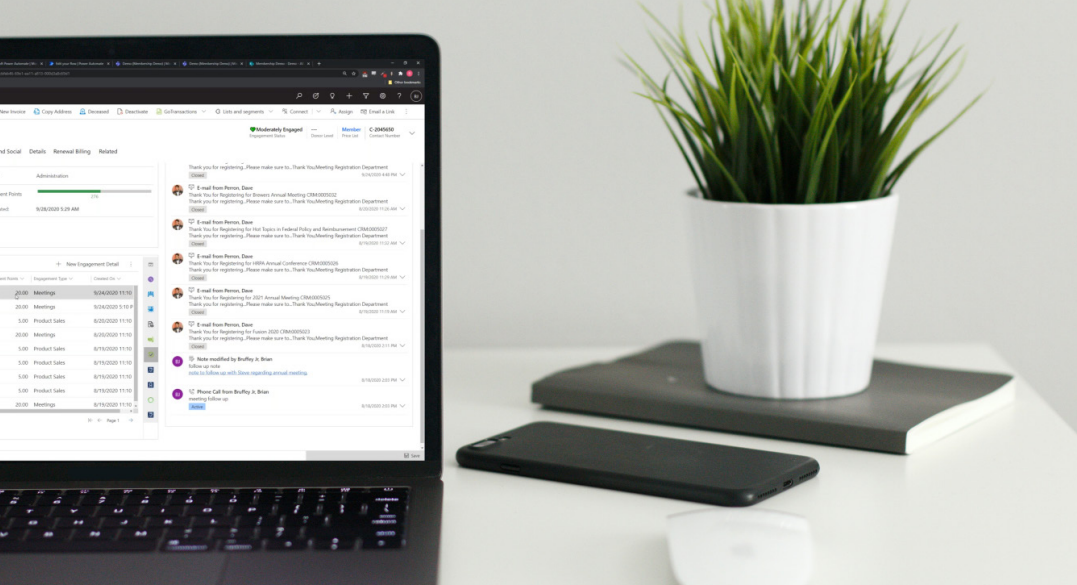Founded in 1881, CHPA is located in Washington, D.C.

185 members: manufacturers and marketers of over-the-counter (OTC) medicines, dietary supplements and consumer medical devices

### Challenges

Staff turnover led to a loss of institutional knowledge of the AMS

Distinguishing custom versus out-of-the-box functionality was difficult

Unaware of extensive features that come with the system

In the initial phase of the project, Protech and CHPA determined which items should be optimized within the current system and which should wait until the system upgrade. Anything that was custom in their current version, but standard in the next version would wait for the upgrade to save time and duplication of effort.

In addition, CHPA launched Protech's MX e-commerce solution to replace its Web Portal. Branded to match the organization's main website, MX's easy-to-use editing capabilities enable CHPA staff to make changes without complex HTML coding. New, out-of-the-box functionality allows the association's members to purchase group registrations or transfer registrations online, which wasn't possible before.

Protech conducted two days of training with CHPA. During the training, each department learned how the system works with current processes and what changed during the optimization process. Additionally, the executive team was trained on new reporting capabilities to ensure quick, easy access to the precise data they need to make strategic decisions for the organization.

## Results

Protech's user-friendly, centralized database offers easy-to-run queries and reports that deliver the insights needed to better serve members, including unique reporting on member company products and product ingredients for the executive team.

Improved user adoption, a greater understanding of the organization's systems and optimized business processes led to an increased sense of ownership among the CHPA staff and a renewed dedication to keeping data clean. In addition, the improved functionality of the easy-to-maintain member website elevated the association's web presence and continues to enhance member engagement online.

## Looking Forward

CHPA plans to upgrade to the latest version of the Protech AMS next. This suite of SaaS business applications is built specifically for Microsoft Dynamics 365 and designed to meet the unique needs of associations with member-specific functionality. The MX e-commerce solution will integrate with the BlueSky eLearn LMS to streamline online learning processes, while the member database will offer even more out-of-the-box functionality backed by the security and reliability of the Microsoft cloud. With Protech AMS, CHPA can plan for the future knowing that their technology will grow and evolve with them to further optimize operations and enhance the member experience.

## At a Glance

### Solution

Protech AMS built for Microsoft Dynamics

Centralized UX member database and MX e-commerce solution

System and process optimization

### Results

Increased efficiencies throughout the association

Improved member engagement online

Enhanced reporting and actionable insights