



ASWB adopts new customer relationship software

Integrated system makes engaging with ASWB easier for our members

While the “disruptive technology” of a few startups in Silicon Valley get a lot of attention, day-to-day software isn’t very glamorous. Most software packages are workhorses—the applications we use every day to get work done, send messages, conduct research, etc. But having the right workhorse can make all the difference for an association like ASWB.

This year, ASWB has implemented a new, specialized workhorse software with Abila’s NetForum Pro. NetForum Pro is a system designed especially for associations, with integrated modules to track meeting registrations, dues payments, committee appointments, and contact information. NetForum Pro will also allow staff members to share information with working committees, eventually replacing the login system on members.aswb.org used most often by administrators, the Board of Directors, and the Nominating Committee.

For our members, NetForum Pro means that registering for meetings will be simpler, with the system automatically filling in data in online registration forms. Members will also be able to update their contact information in one place. NetForum Pro also makes it easier

for meeting attendees to select meeting sessions, include guests in their registrations, and make changes to their registrations. “With an integrated system like this,” says Melissa Ryder, volunteer engagement and outreach senior manager, “it’s much easier to capture the involvement of individual members and tie their activity to the regulatory board they belong to.” Capturing that information, Ryder explained, should make it easier to track volunteer engagement.

This new package is replacing existing contacts and meetings databases that ASWB had used for more than 15 years, which couldn’t communicate directly with each other. In the past, meeting registration was done through online forms that provided Excel spreadsheets, which then had to be imported into the meetings database. After the meeting was over, attendees needed to be imported into the contacts database. At each import step, data could be lost or entered incorrectly. And to send meeting notifications or distribute this newsletter, mailing lists had to be exported from both systems.

NetForum Pro combines those functions, enabling ASWB members to register for meetings

directly online and simultaneously updating contact information for ASWB staff if the member makes changes during the registration process. In addition, the software records meeting attendance by individuals and provides a simpler platform for emails and other communication.

Implementing this new system has been a complex process, with a core team of ASWB staff led by Ryder working with an implementation specialist to determine the best ways to customize the software for ASWB's needs. Member Services Specialist Cara Sanner mapped out the previous database and organized the data in preparation for importing into NetForum Pro. Information Technology Project Manager Robert Adach, who worked with NetForum Pro in a previous job, has been customizing queries and training ASWB staff on how to use the system. Member Services Director Jennifer Henkel worked with the team to keep the needs of ASWB's members front and center during the implementation.

“We are implementing NetForum Pro gradually, to minimize confusion,” says Ryder. “The Annual Meeting was a great starting point because it’s one of our biggest meetings and will get most of our active members into the system when they register.” When 2018 New Board Member Trainings are opened for registration, those will also move into the new system, as will 2018 committee appointments and annual membership dues.

“Down the road, we believe that we will be able to use even more functions of NetForum Pro,” Ryder continued, “but the integration we’re getting right now is already an improvement for ASWB and our members.”

Mastering NetForum Pro

Any new software system comes with a learning curve, and ASWB is happy to help members who have questions about this transition. By going to engage.aswb.org, you can create an account very quickly—and register for the Annual Meeting of the Delegate Assembly while you’re there. If you create an account using one of the email addresses ASWB had in the old system, NetForum Pro will automatically link your new online account and password to the data we have, including the regulatory board that you serve(d) on, committee memberships, etc. If your online account doesn’t match a previous record, you’ll get an email asking you to contact our Volunteer Engagement and Outreach (VEO) department at veo@aswb.org.

Once you log in, you’ll see that the navigation menu expands to include special, members-only content, including “my events” and “my information.” Using those links, you can update your contact information, double-check your meeting registrations, and even add ASWB meetings to your online calendar.

