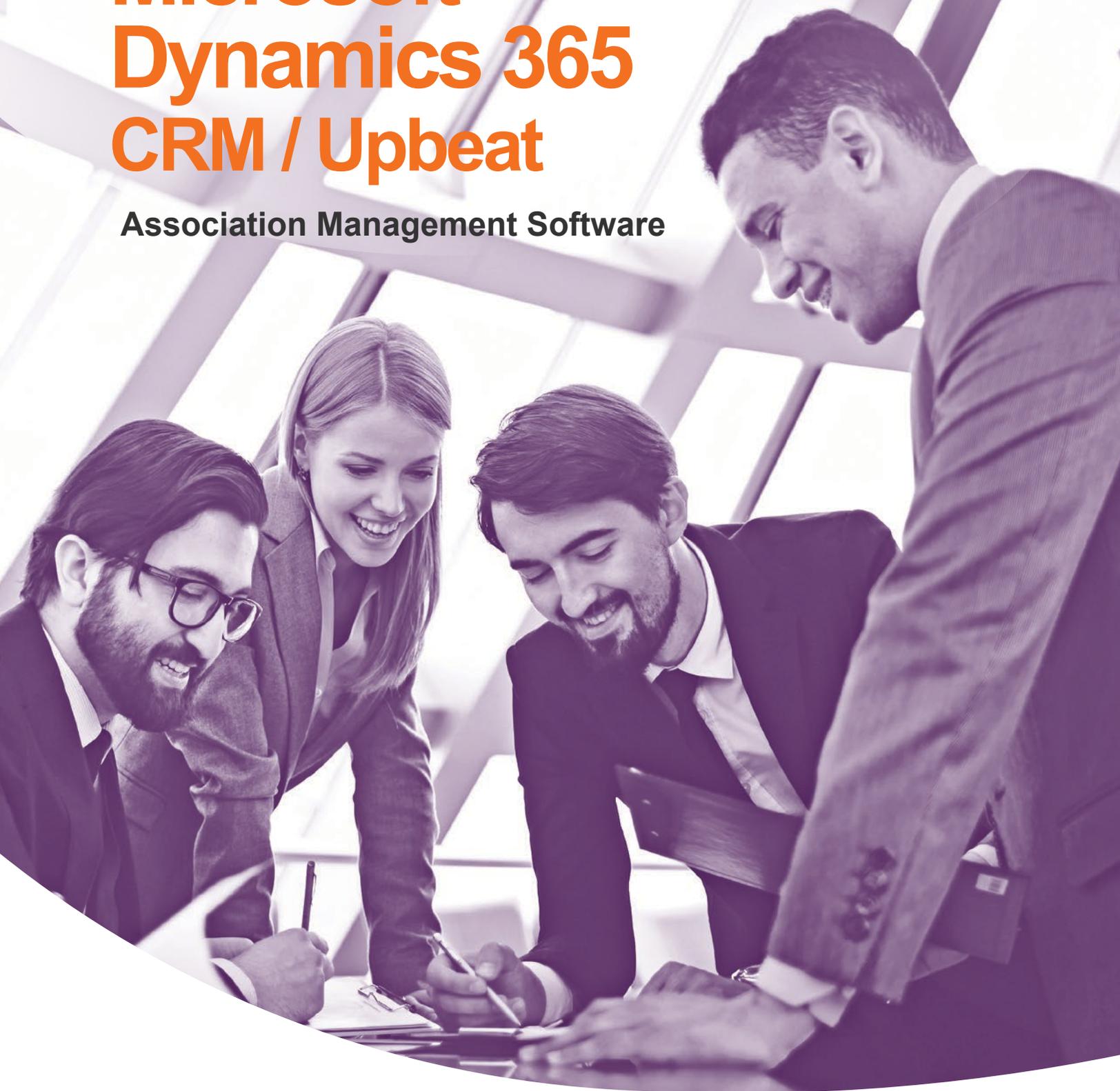


BROCHURE

upbeatmembership.com

Microsoft Dynamics 365 CRM / Upbeat

Association Management Software



What is Microsoft Dynamics 365 – CRM / Upbeat ?

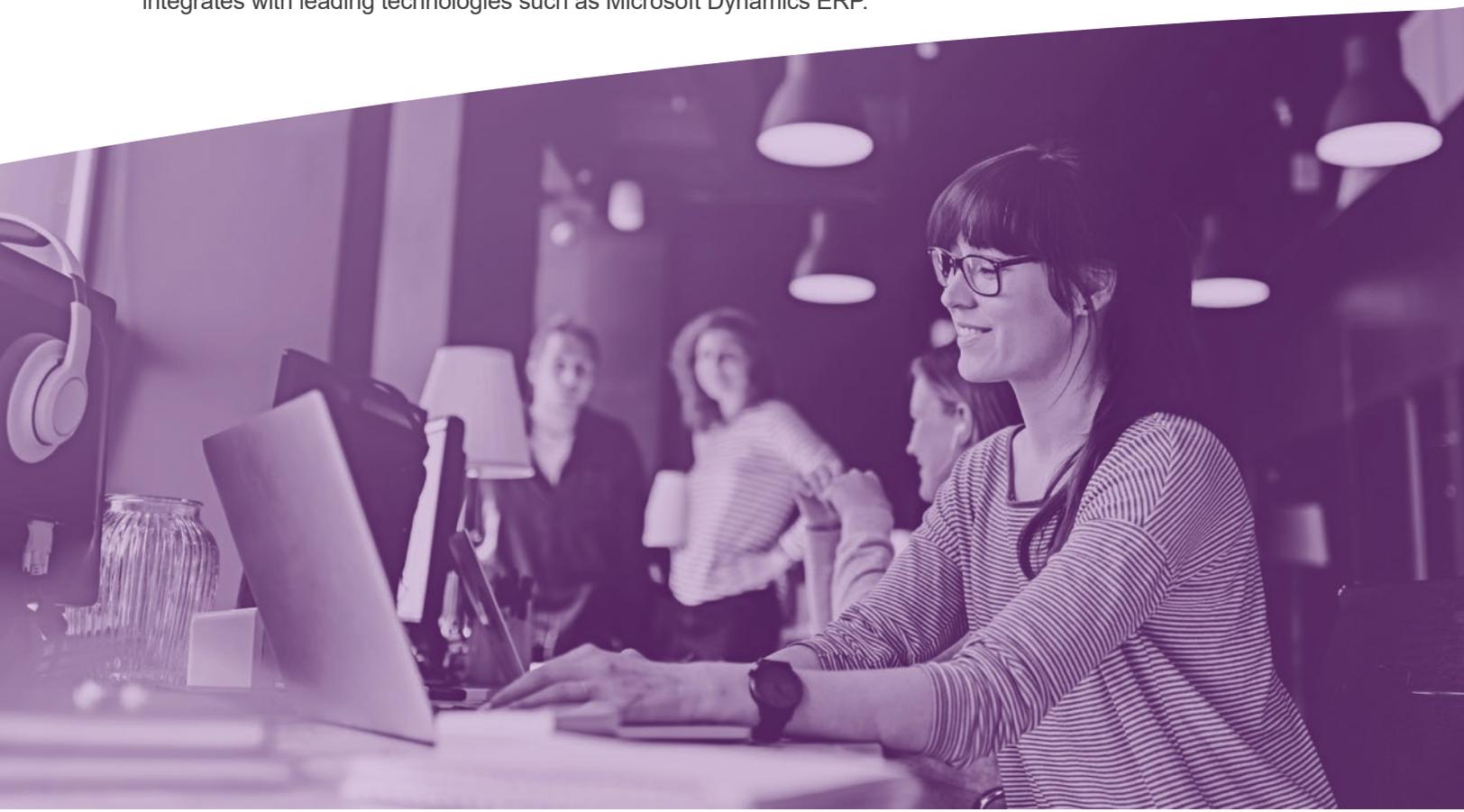
Microsoft Dynamics 365 – CRM / Upbeat is a comprehensive business management solution for professional associations, not for profits, institutes, government bodies, clubs and other membership and event centric organisations. The solution helps you manage and maximise the valuable relationships your organisation has with members, sponsors, supporters and other key stakeholders.

For organisations eager to grow their membership base, retain members for the long term and manage and improve relationships with its other constituents, this is the ideal solution.

The beauty of this platform is its ability to provide you with a 360 degree view of your organisation, while also enabling you to streamline operations, reduce costs, maximise revenue and fulfil your organisation's strategic mission.

Using this platform, you will be able to turn information into insights, and insights into action. Upbeat seamlessly integrates and supports all your membership, financial, marketing and event management systems. Rather than rely on multiple information systems to run your organisation, Microsoft Dynamics 365 – CRM / Upbeat covers it all.

Upbeat is built on the highly regarded Microsoft Dynamics 365 - CRM platform and integrates with leading technologies such as Microsoft Dynamics ERP.





MEMBERSHIP MANAGEMENT

To not only survive but flourish, membership organisations need to engage with members in a way that makes them want to stay. Upbeat enables you to do just that.

With Upbeat you can capture a complete history of every member interaction, including renewals, products purchased and events attended. As well as providing the insights you need to enhance your engagement with members, Upbeat greatly reduces your staff's administrative burden.

Designed to support an unlimited number of membership categories, Upbeat automates correspondence and the allocation of membership entitlements such as discounts, publication subscriptions, prioritised ticketing, special offers and other benefits. It also provides greater flexibility in product offerings and payment options.

MARKET TO MEMBERS

When marketing to members, you want to target the right people with the right message at the right time. Upbeat improves the results of your marketing efforts through sharper targeting of members. The data analytics tools in Upbeat enables you to identify those members most likely to respond as well as give you the information you need to execute prospect campaigns that deliver maximum results.

Additionally, correspondence such as diary alerts, invitations, subscriptions, retail offers and booking information are all easily managed with Upbeat.



UNDERSTAND WHAT WORKS

Using Upbeat, you can see at a glance whether a member has renewed their membership or attended an event, and which members have purchased items from your shop or website. Armed with this data, you can identify trends relating to purchasing or booking behaviours and refine your marketing strategy accordingly.

GROW YOUR EXTENDED FAMILY

Upbeat can be used to strengthen your relationships with, and meet your obligations to, sponsors, subscribers, board members, governing bodies and regulatory authorities.

For these stakeholders, Upbeat provides easy to use reporting and analytics tools such as Microsoft PowerBI that you can use to demonstrate value. Information on event attendance levels, funds raised, media coverage generated and other key metrics can all be easily produced and analysed using Upbeat. With its automated workflow and its ability to provide quick access to data, Upbeat provides a strong foundation for the cultivation of mutually beneficial partnerships, projects and promotions.

FINANCIAL MANAGEMENT

Sound financial management is essential for any organisation, and even more so for an organisation that is the trusted custodian of revenues generated through membership fees, member events and other membership driven transactions and activities.

Upbeat automates many day to day financial activities including membership renewals, invoicing and payments. The system also allows your organisation to stipulate its own business requirements and define its own payment methods and terms such as monthly payment plans for members or phased invoicing for sponsors. With Upbeat, you set the rules.

EVENTS / CONFERENCE MANAGEMENT – ENERGISE YOUR EVENTS

Whether you're planning a charity show, an awards night, a gala dinner or an internal meeting, Upbeat has you covered.

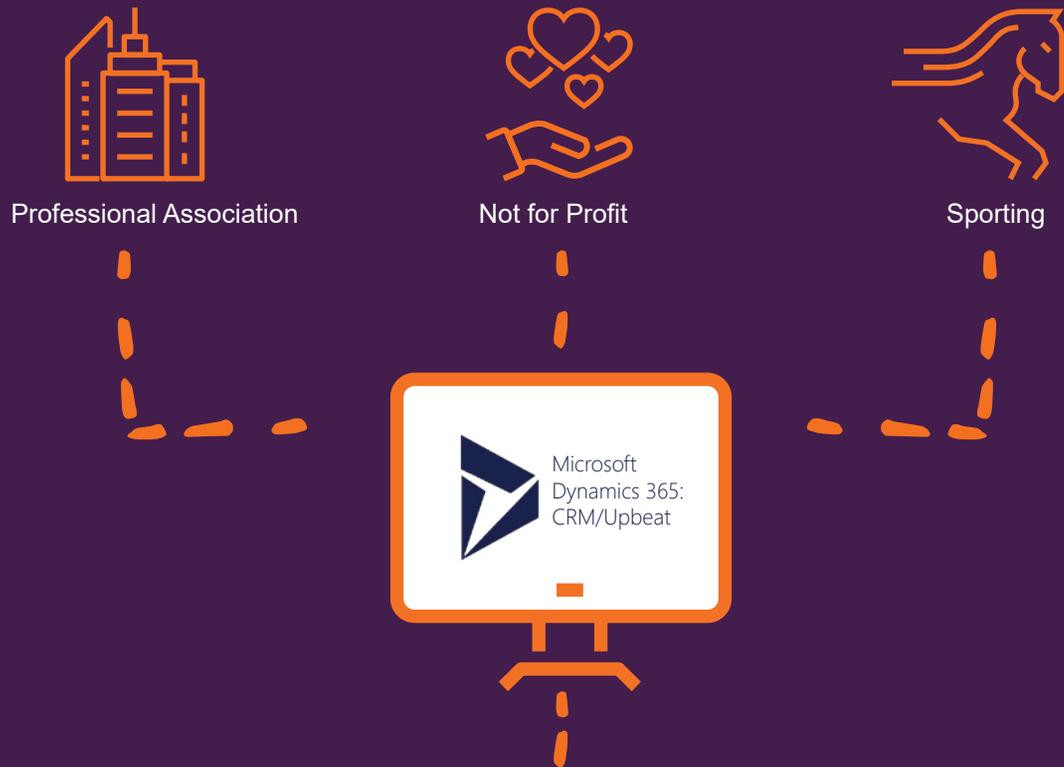
From initial planning through to post-event follow up, Upbeat will support you every step of the way. Starting with budget and approval, Upbeat guides your staff through all the stages required to make your event a huge success.

Upbeat can also be used to manage logistics of training courses. Those signing up for such courses will acquire new skills and expertise and can earn Continuous Professional Development points through their attendance. These points are easily managed and accrued through course attendance.

Upbeat places you in the driver's seat, enabling greater control of your event through immediate, up to date access to registrations, complemented by comprehensive pre- and post event reporting. Upbeat helps you with seemingly minor details such as printing name cards and attendee lists.

By automating your event management processes, you more time to focus on what's important rather than get bogged down in repetitive, labour intensive tasks.





INTEGRATED FOR A COMPLETE PICTURE

To keep revenues flowing and the various moving parts of your organisation operating smoothly and effectively, integration of your business systems is key.

Upbeat provides tight integration with your core business systems to ensure that all financial transactions – including debtors, general ledger postings, bank reconciliations and audit trails – are automatically and transparently recorded.

Transactions such as membership fees, event bookings and sponsorships are also instantly recorded and reflected within your organisation's overall financial picture, enabling you to know your organisation's financial position at any given time. Revenues are matched to costs so that the financial viability and success of an activity can be easily evaluated.

From a financial management perspective, Upbeat delivers greater financial visibility, flexibility and control.



BUILT FROM EXPERIENCE

With any technology deployment, you need to have confidence in the people who will be carrying it out.

For more than 25 years Professional Advantage has been deploying business management solutions for organisations of all shapes and sizes and from a wide range of industries.

During that time we have developed a deep understanding of the day to day challenges faced by membership organisations. Our approach is to work alongside you, our customer, to assess your organisation's requirements and roll out an Microsoft Dynamics 365 – CRM / Upbeat solution that meets both your current and future needs.

As one of Microsoft's most experienced Australian partners, Professional Advantage builds on this base with robust industry and task specific functionality, tuning Upbeat for optimal performance and for integration with other leading Microsoft business management systems.

When you engage Professional Advantage for your Microsoft Dynamics 365 – CRM / Upbeat deployment project, you bring on board a team that understands your industry, your organisation and your business goals.

For more information

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About Professional Advantage

Professional Advantage is an international IT consulting and solutions company, with 30 years of experience in helping organisations achieve more by improving their business systems through industry leading software solutions. Originating in Australia, it is one of the country's most awarded solutions providers. The 250-strong team covers seven offices across three continents, and has successfully worked with over 1000 organisations.