

Hot Topics in The Tropics

iMIS User Group Learning Summit

21 - 23 October 2013 | Cairns, QLD

Proudly sponsored by Advanced Solutions International



22/10/2013

8:00 am - 5:00 pm

Registration & Welcome

9:00 am - 9:30 am

Conference Welcome

9:30 am - 10:30 am

iMIS 20 - What's New and What's Coming

Colin Bryant, Country Manager – Asia Pacific, Advanced Solutions International (Asia Pacific)

iMIS 20 is an Engagement Management System (EMS) that enables organisations to engage members, donors, and other constituents – as well as staff – anytime, anywhere, and from any device! Come to this session as we explore new features you can look forward to when your organisation upgrades to iMIS20 built on RiSE!

10:30 am - 11:00 am

Networking and Exhibitor Showcase

11:00 am - 12:30 Pm

Concurrent Sessions

11:00 am - 11:45 am

Activities Gone Wild

Tricia Fastje, Director of Business Solutions, (C) Systems Global

In this session you will not only learn about creating new

Informz to Retain Regular Givers

Amanda Kirk, Proprietor, Kiss Consulting
Kevin Mayocchi, IT Manager, The Surf Life Foundation

**Special Interest Group Discussion
Fundraising**

With iMIS Fundraising you can manage, process and report on your donations, gifts, gifts-in-kind and other fundraising campaigns. iMIS Fundraising integrates to other modules

activities and how to manage existing activities, but also how to implement them online using iParts.

And wait there is more... we will review how other clients use custom activities to meet their unique business needs.

11:45 am - 12:30 pm

Developing an iMIS Management Framework

Michelle Lelempis, Solutions Consultant, CauseIS Data is regarded as an organisations most valuable asset (well ... other than you of course!). iMIS contains vital business knowledge, member and donor information and it drives your business activities. iMIS needs to have a sound management structure behind it; from issuing user logins, training users, implementing new projects, to responsibility lines. This is a practical and open discussion session where you are invited to learn about best practice methods for managing iMIS. You will be given your own iMIS Management Framework template for developing during this session.

Taking Renewals Online

Jay McCormack, Director, 3 Degrees North A run-through of how a major political party went from paper based renewals to online renewals; the challenges faced, the lessons learned, the process and the results.

including iMIS Customers, Marketing Suite, AR/Cash and Events to give you a complete fundraising suite.

Special Interest Group Discussion Training/Certification and RTO

With iMIS Certification you can use iMIS to manage students, courses and a certification program. Organisations use iMIS Customers, Certification and online modules to deliver short course to lengthy certificate programs.

12:30 pm - 1:30 pm

Networking Sit Down Lunch followed by Exhibitor Showcase

1:30 am - 3:00 pm

Concurrent Sessions

1:30 pm - 2:15 pm

Business Improvement Opportunities with an iMIS 20 Upgrade

Bruce Drury, Co-Founder and Director Business Improvement, iServices
Nathan Price, Senior Business Improvement Consultant, iServices

Are you thinking about upgrading to iMIS 20? You should attend this session where we will review a few of the iMIS upgrades we have recently done and highlight the organisational benefits to be gained from an iMIS 20 upgrade, including real examples of new RiSE websites and business improvement opportunities.

Robert Lane, Ph.D., CEO, Lane Services, LLC

This session will help you get started with iMIS fundraising & learn the difference between funds, campaigns, appeals and distributions. We will also cover pledges, instalments, requests, matching gifts & memorial tributes.

WebFormZ Showcase & Q&A

Now that WebFormZ has been used by several Australian iMIS users to build form and form based workflow, we have invited some of our end users and local consultants to showcase what they have achieved with this great module and to inspire the rest of us to automate our forms processes. Russell Franks, CEO of Ifinity will be at this session also to answer questions about WebFormZ uses, features and functions.

2:15 pm - 3:00 pm

Move from eMailer to eMarketer

Alicia Deering, eMarketing Strategist, Informz
Christy Egan, Client Training Manager, Informz
You have been sending your members regular correspondences but does the conversation continue? Are they reading your emails, are they engaged. Join Alicia Deering, eMarketing Strategist with Informz and Christy Egan, Training Manager and see how you can move from just emailing your members to becoming a true relationship builder with your members. See how Informz created a memorable experience for their users with a monthly enewsletter that focused on testing, and incorporated social, video and mobile.

iMIS RiSE / WCM. How you can implement this into your organisation.

Mark Johnstone, CEO, Johnstone Enterprises
This session will provide a case study on what can be achieved using iMIS RiSE / WCM and how it was implemented at AIPP. You will see how to get a great look and feel, tricks learnt along the way, how some standard iMIS functionality was integrated into the website, as well as implementing custom iParts from a previous website. This session is a must see for anyone thinking about using RiSE / WCM in their organisation.

Special Interest Group Discussion Membership

This discussion will look at how iMIS can assist associations to enhance their membership through better engagement and member experiences.

3:00 pm - 3:30 pm

Networking and Exhibitor Showcase

3:30 pm - 4:15 pm	Managing Knowledge in Your Organisation Jay McCormack, Director, 3 Degrees North This session provides a broad review of the mechanisms and methods of managing knowledge in your organisation. We will look at the steps you can take to ensure corporate knowledge is retained when staff leave your organisation.
4:15 pm - 5:00 pm	On The Couch with Paul, Great Things Interviews with iMIS. Paul Ramsbottom, Managing Director, Asia Pacific, Advanced Solutions International (Asia Pacific) Join Paul Ramsbottom for this annual showcase of not for profit organisations achieving great things using iMIS.
5:00 pm - 7:00 pm	Free Time
7:00 pm	Summit Dinner - 7pm to Late - Pullman Cairns International Pool Deck

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9:00 am - 9:45 am	Social Media - Campaigning or Complaining Liz Drury, Co-Founder and CEO, iServices Bruce Drury, Co-Founder and Director Business Improvement, iServices Social media is now a part of every day life and fast becoming a large part of our marketing strategies to engage with our members and customers. This session will look at both sides of social media. Firstly the key requirements to implementing an effective social media strategy and secondly how to manage criticism or negative comments made via social media channels.		
9:45 am - 10:30 am	Maintaining Data Integrity Doug Morris, President, Computer System Innovations, Inc. USA Keeping iMIS data “clean” is something that all of us struggle with. This session will explore the various things you need to consider for maintaining data integrity within your organisation.		
10:30 am - 11:00 am	Networking and Exhibitor Showcase		
11:00 am - 12:30 PM	Concurrent Sessions		
11:00 am - 11:45 am	A Product Update for iMIS 20 EMS and WebFormZ Russell Franks, Chief Executive, iFINITY plc Russell will be talking about the new versions of WebFormZ for iMIS 20 showing new features and future features that will raise the level of member engagement to new highs. Russell will also show us some example forms in iMIS 20 and talk about how clients throughout the world have used iMIS to build forms and form processes saving cash and speeding the building of business systems within iMIS.	Getting Mobile with iMIS Newlin Jolme, Director, Integr8tiv This session will showcase mobile apps and website options for iMIS users by looking at some existing not-for-profit company examples.	Special Interest Group Discussion Financials With iMIS Financials you can manage cash receipts and track invoices; provide a single point of entry for staff to process payments for dues, subscriptions, orders, donations, and event registrations; and transfer financial transactions to the general ledger solution of your choice.
11:45 am - 12:30 pm	Using TaskCentre to Send out Subscription Invoices Ashley Hunt, Database Systems Coordinator, PGA of Australia This session is a step through demonstration on how the PGA	How you can help your organisation adopt a performance improvement culture with iMIS 20 Paul Ramsbottom, Managing Director, Asia Pacific, Advanced Solutions International (Asia	iXtend : etouches – Event Management Solution Tricia Fastje, Director of Business Solutions, (C) Systems Global etouches is a start to finish event management solution from

used iMIS and TaskCentre to send out subscription invoices via email. You will also see a demonstration of self printable invoices via RiSE / WCM utilising SSRS reporting.

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budgeting and planning to custom websites and surveying with everything else in-between. Come and learn how using etouches and iMIS together gives you the “best of the best” with their seamless integration, (C)onnect. Your event manager, membership staff and IT can all be happy using the unparalleled combination of etouches and iMIS. And the best part is you will experience how awesome etouches is to manage your events with out-of-the-box flexibility that you can use to engage your members.

12:30 pm - 1:30 pm

Networking and Exhibitor Showcase

1:30 pm - 3:00 pm

Concurrent Sessions

1:30 pm - 2:15 pm

Achieving Real Member and Donor Growth

Michelle Lelempis, Solutions Consultant, CauseIS

Even with the best engagement and retention strategies you may be losing members or donors simply through poorly designed business processes. This session will highlight methods to identify where your holes are, how to fix them and why carefully engineered processes matters to your retention. This session will showcase the Australian Medical Association and how it has achieved real membership growth over the last two years through adopting new engagement strategies and aligning its business processes.

Creating a Mentoring Program - Guidelines from A to Z

Jamie Williams, Director Client Services, issociate

Curious to know if implementing a mentoring programme is right for your organisation? Join us as we provide two case studies on associations who have moved from traditional mentoring to more automated online mentoring and hear the challenges they have had to tackle.

Exploring the RiSE Content Gallery

Jason Rowe, Engagement Management

Specialist, Advanced Solutions International (Asia Pacific)

Come and learn how you can use some of the iMIS Dynamic Content Items (formerly known as iParts) in the RiSE Content Gallery to quickly and easily add dynamic, real-time content to your RiSE site without the requirement for programmers. Some of the iMIS Dynamic Content Items we will cover include social sharing of pages from your site, ‘Join Now’ utilising the Data Showcase iMIS Dynamic Content Item, emailing directly from the iMIS Staff View utilising the new Communication Suite, and more!

2:15 pm - 3:00 pm

iMIS From Different Views

Robert Lane, Ph.D., CEO, Lane Services, LLC

iMIS 20 provides you with the opportunity to do many of the tasks on a web browser that were traditionally reserved for desktop users. This session will provide you with the basics of how your off-site & casual users may access member information, register people for events, enter orders, record fundraising transactions, run IQA queries and reports; and perform analyses using the new continuum.

Successfully Negotiating a Budget with Management

Liz Drury, Co-Founder and CEO, iServices

Bruce Drury, Co-Founder and Director Business Improvement, iServices

Join us in exploring how to negotiate a budget with Management successfully.

Special Interest Group Discussion Events

Understand the power of iMIS Events (online and back office) and tools available to extend that power even further.

3:00 pm - 3:30 pm

Just One Last Question....

Join us for the last session of the summit where we will invite all of our Solution Providers back to the stage to answer that question you didn't get to ask in any of the sessions during the conference. This session is not to be missed as our experts are pushed to the limit for knowledge.

- Understanding your Business Drivers and who to pitch your plan to
- Preparing you iMIS Plan
- Ensure your plan is well considered and has Return on Investment (ROI).

3:30 pm - 4:00 pm

Conference Close