

Application: 11363

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Page: Entry Information
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Chapter Greater Los Angeles
Chapter Size Very Large (761-1200)
Category Chapter Operations and Sustainability
Program Name Implementing a new Association Management System: GrowthZone
Each question is worth 20 points and will be scored using the following rubric: (1-5) Poor Didn't effectively answer the question (6-1) Fair Answered the question (11-15) Good Answered the question with more detail (16-20) Excellent Went above and beyond with proven results and visible data
Describe the program and why it fits the category. (20pts) <p>I almost titled this submission, "How GrowthZone Saved Our Lives." To say that implementing the GrowthZone Association Management System (AMS) transformed our operations is an understatement.</p> <p>History</p> <p>When I joined this chapter as the Executive Director at the end of 2022, the Board had already engaged a third party company to build a custom website, content management system (CMS), customer relationship management (CRM) system, and mobile app, and had already committed over \$50,000 to the effort. I was excited for the opportunity to work on this project because of my background in web technology.</p> <p>The new website launched on January 1, 2024. The customer service issues were immediate. Members couldn't figure out how to use the site. Additionally, the new CRM was still being built and wasn't connected to the website yet so no one could login, manage their accounts, or make online purchases. Everything had to be handled manually by chapter staff.</p> <p>It was then that I realized that "the plan" that was in place was more of a theory than anything practical. Chapter staff did our best to work with the third party to develop the platform to serve our operational needs and the members' needs. Through (figurative) blood, sweat, and (literal) tears, we did our best to work with what we were given. We struggled against a sluggish, inaccurate database with an ever-changing interface. We managed an increasing call load with members unable to use the website. We had to keep everything in spreadsheets because we couldn't rely on the new systems to be accurate or to give us what we needed, but we still had to duplicate all the spreadsheet information into the web systems to try to make them work. This system severely increased our workload.</p> <p>After many hopeless months, I presented the board with some alternatives and laid out the real costs of current systems in terms of labor hours and ongoing maintenance. The board agreed that we should stop work on the current systems and implement an alternative.</p> <p>Enter GrowthZone</p> <p>I presented two options to the board: Star Chapter, which was inexpensive and required very little configuration to get us up and running; and GrowthZone, which was more robust, much more customizable, and also more expensive. Star Chapter would give us immediate relief but we would outgrow it within a couple years. The board decided on GrowthZone so that we would, ideally, only have to make this change once.</p> <p>We spent the last part of 2023 onboarding with GrowthZone so that it would be ready for full implementation in 2024.</p> <p>The year that we had in 2024 was a complete turnaround from 2023 largely due to the implementation of GrowthZone. GrowthZone is an all-in-one AMS, so we only have to go to one system to handle nearly everything related to chapter operations.</p>

How did this program meet the mission and vision of the chapter and CAI as a whole including fostering an inclusive environment that reflects and serves our diverse community? (20pts)

SERVICE is one of the pillars of our mission and implementing GrowthZone allowed the chapter to not only better serve our members but also our community. The public website is more accessible and more informative than our former website. The member portal and mobile app are also more accessible to members and easier for them to use, allowing them greater access to the tools that are included in their membership.

What was the impact on the chapter and its members after completing the program? (Growth of membership, financially, public awareness, membership value, better chapter/member relationship, chapter operations, etc.) (20 pts)

The week we launched the new site, we cleared our calendars, ready to deal with the calls from members and any number of technological issues. Then...nothing went wrong. The first day, we didn't receive a single customer service call related to GrowthZone. The only technological issues we had were learning new things. Nothing went wrong. It was the easiest work week we had in over a year.

Members praised the new look of the site. They bought tickets and sponsorship online with no issues. They were able to easily access and update their own information.

Now that the chapter staff was spending so much less time on trying to make a terrible system work, we had more time for strategy, member engagement, and personal lives. Morale in the office improved dramatically.

A testimonial from our Events and Membership Manager:

"One of the biggest game-changers using GrowthZone has been the marketing automation module. It helped me rethink how we engage with members throughout their year and made it easy to schedule emails, set reminders, and manage interactions, especially when handling over 1100 members. I've even been able to assign myself tasks after each interaction, such as sending a copy of the printed directory, or scheduling a phone call after a particular response. With this, I expect to see our retention improve because our database is more manageable and efficient.

Updating member info is also very easy! When there's board member role changes, renewal updates or overall data that needs to be entered, I can update it in one spot. This has become an incredible tool especially during our directory updating process. Not to mention, the event registration has been great because I can email attendees directly without downloading spreadsheets and send reminders only to those who haven't opened the email.

I would also like to highlight committee member management. When managers apply for CEUs or for their PCAMs, I can easily search how many years a person has been with a particular committee, when they started or left.

What I love about GrowthZone is that it's user friendly, dynamic, and reports are customizable for each user. I also appreciate that the developers use the feedback from their users and make improvements. They are very responsive when I call or submit a ticket with a question or need help. I am very satisfied and happy to be working with a tool that has made my life far better as the Events and Membership Manager for our chapter!"

Provide quantifiable data supporting the rationale for success. Include why this data is significant. (20pts)

100% employee retention
-If the board had not approved the transition to a different AMS, both employees would have quit.

1248 labor hours saved (equivalent to \$56,160 at a blended hourly rate)
-Chapter staff were spending an additional 24 hours per week due to the previous AMS. That was split between working on the system, doing extra work because of the system, and the increase in customer service requests caused by the system.

\$14,677 annual savings
-The previous system would have cost \$27,000 per year to maintain. Although GrowthZone is expensive compared to similar platforms, we are getting what we pay for and still saving money over our previous system.

\$6600 additional revenue
-The new system provided additional digital sponsorship opportunities that we were able to sell.

What are your plans to maintain the momentum of this program moving forward? (20 pts)

Over the past year, we have continued to optimize our use of GrowthZone, learning how to use more of the included features and encouraging members to use the portal and the mobile app. We changed some of the add-on modules we purchased as we learned how to make more effective use of their capabilities. We have also increased our sale of the new digital sponsorships and expect that GrowthZone will pay for itself going forward. Our next big step is to add a Learning Management System so that we can expand the life of our virtual education offerings.

Supporting documents including flyers, postcards, pictures, videos etc. can be uploaded below. While they aren't required for your submission we certainly encourage it.

Would you like to upload additional documents?

fileUpload1

Download File (<https://caiawards.secure-platform.com/file/20632/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkJoyMDYzMiwiYWxsY3dOb3RTaWduZWRVcmwiOiJGYWxzZSIsImInbm9yZGEAMS%20Feature%20Comparison%20%284%29.xlsx>)

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Would you like to share a link?

www.cai-glac.org (<http://www.cai-glac.org>)

Thank you for your submission! We encourage you to submit another program in a different category.