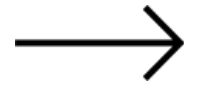CAUSEIS PRESENTS

Digital Academy for Associations
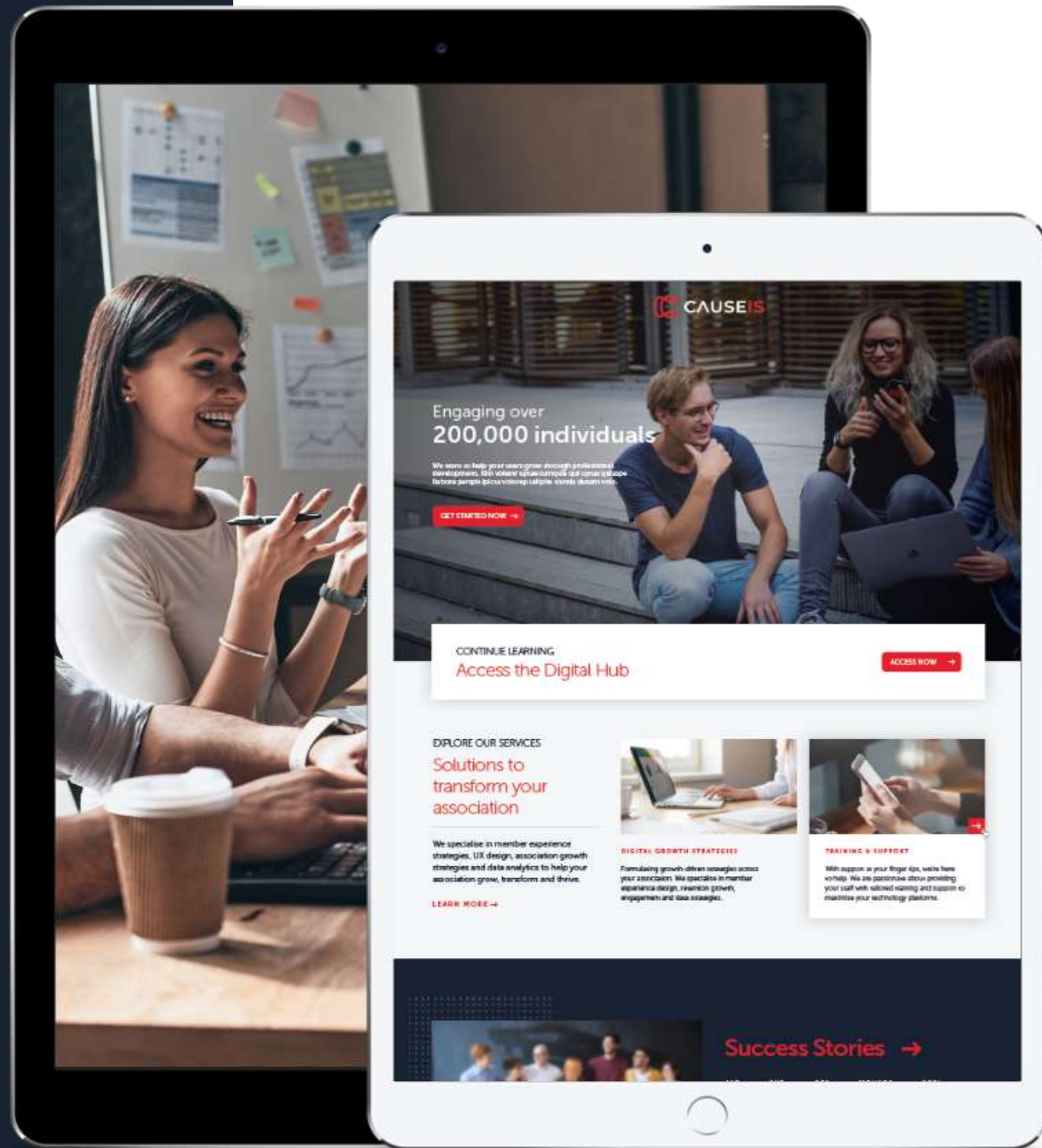
Course: Enabling Process Automation Tasks

Welcome to the Digital Academy

- Time to focus on your Association Strategy

- Learn from other associations and your peers

- Use Member Experience techniques to shift your strategies

- Dedicated Engage iMIS courses to maximise your knowledge of iMIS.

- Consider new culture, innovation and ideas

- Tools and frameworks to help you

About Causeis

Causeis exists to support associations.

Causeis is the complete Digital Partner for your association, and we bring a shared vision for your success.

With unmatched experience in association strategy and technology to draw on, every aspect of our service is centered around the member experience.

Partnered with global best-in-class technology, we ensure you have all bases covered with Causeis.

Recently named by ASI as the Global iMIS Partner of the Year.

Supported by AuSAE

The home for association professionals.
A place where you belong, connect with others, advance your career and be inspired.

www.ausae.org.au

CAUSEIS

AuSAE
The Australasian Society of Association Executives

Presenters & Facilitators

Ashley Hunt, CiA, CiP

Senior Solutions Consultant

Causeis

Yolande smith

Digital Marketing Specialist

Causeis

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Maximise your Workshop Experience

Mute as required

To allow for clear audio please mute yourself when presentation sessions are in session. At times we may mute your line if you may have forgotten.

Session recording

Today's presentations are being recorded however to maximise you're sharing and networking the breakout rooms will not.

Presentation Slides

Presentation slides and recording will be distributed on course completion.

Chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat. Share ideas, successes and learnings.

Use your camera

Especially in the breakout rooms, please don't be shy and turn on your camera to increase your engagement.

Update your Name

So that we know who you are, and to let everyone know where you are from – lets rename ourselves to show our full name & acronym

Tuesday, 21ᵗʰ June

Course Agenda
10am – 12pm AEDT

- Design and implement an end-to-end process automation task.

- Planning & components that make up automation

- Advanced IQA to drive automation

- Testing techniques

- Hands On Building some tasks

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Causeis Automation Best Practices

✓ Don't jump straight into Process Automation and build. You need to design your solution first.

✓ Consider the Member Journey and Touchpoints that will add value, improve efficiency

✓ The four W's

Who

What

Why

When

4
W's
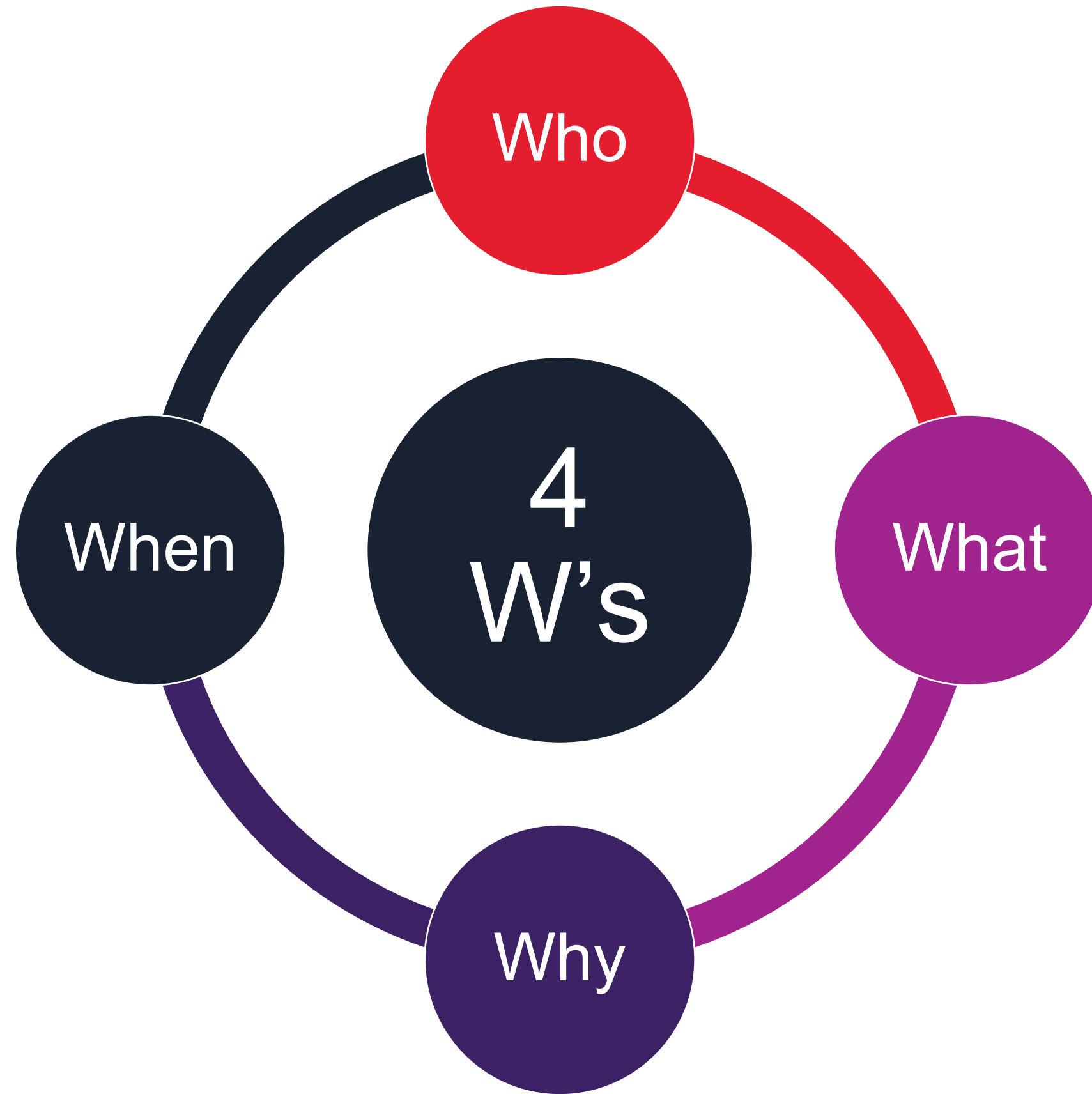
Personas

If MX teaches us to focus on the Member's satisfaction, efficiency and effectiveness then a persona will help your association identify that each member is different.

Not all members are created equal.

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Personas

User Persona Type

"A quotation that captures user's pain-point / what value he seeks"

Age: 28
Work: Job Title
Family: Married, kids, etc
Location: City, State

Personality

Introvert ——— Extrovert
Thinking ——— Feeling
Sensing ——— Intuition
Judging ——— Perceiving

Bio

Bio should be a short paragraph to describe user journey as well as his background

Goals

- A task that needs to be completed
- A life goal to be teacher
- Or an experience to be felt

Tasks/Process

- Current process to reach goal
- Process might be some manual hack or using a solution

Frustrations

- The challenges this user would like to avoid
- An obstacle that prevents the user from achieving their goal
- Problem with the available solution

Motivation

List of Motivations in decreasing order -
- Incentive
- Growth
- Social
- Fear

Touch-Points

Traditional Ads
Facebook
Instagram
Pinterest
LinkedIn
E-Mail
Referral
PR Efforts

https://zapupp.com/

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Personas:

Jane

Image source: Pexel

Sarah

Image source: Pexel

Frank

Image source: Shutterstock

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Persona: Student to Full Member

Jane

Image source: Pexel

Profile:
Age: 23
Occupation: Graduate Nursing
Location: Melbourne

Bio:
Recently graduated from Bachelor of Nursing. Seeking placement in a hospital. Experience in customer service from working while studying.

Goals:
- Start career in nursing
- Focused on advancing their knowledge in nursing
- To make a salary

Frustrations or Concerns:
- Impact of COVID
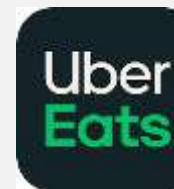- New to profession
- Lack of career discipline or focus

Technology Skills:

Internet	High
Desktop/Office	Low
Social Networks	High
Mobile Apps	High
Trust in Technology	Medium

Daily Brands:

THE ICONIC
YouTube
Uber Eats
TikTok
asos discover fashion online
afterpay

Personality:

Social Change	High
Trust	Medium
Innovative Thinking	Low
Adventurous	High

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Persona: New Member

Sarah

Image source: Pexel

Profile:
Age: 35
Occupation: Hospital RN
Location: Sydney

Bio:
RN in a major Sydney public hospital. 7 plus years experience. Switched hospitals to be closer to home 3 years ago.

Goals:
• Focused on career maintenance.
• Advancing the industry and public health
• Improving patient care

Frustrations or Concerns:
• Frontline COVID worker.
• Time poor and works non-traditional hours
• Mobile work, so not at

Technology Skills:
Internet	Medium
Desktop/Office	Medium
Social Networks	High
Mobile Apps	Low
Trust in Technology	Medium

Personality:
Social Change	Medium
Trust	Medium
Innovative Thinking	Medium
Adventurous	Low

Persona: Existing / Long Standing Member

Frank

Image source: Shutterstock

Profile:
Age: 55
Occupation: Hospital RN
Location: Sydney

Bio:
RN in a Sydney private hospital. Post-operative nurse. 20 plus years experience. Switched hospitals to be dedicated to discipline.

Goals:
- Retirement consideration
- In career discipline and position
- Longer term goal to mentor and teach graduates

Frustrations or Concerns:
- Time poor due to family and work commitments.
- Works traditional hours

Technology Skills:

Internet	Low
Desktop/Office	Medium
Social Networks	Low
Mobile Apps	
	Low
Trust in Technology	Low

Daily Brands:

ABC NEWS   Google

facebook   Woolworths The fresh food people

CHOICE

Personality:

Social Change	Medium
Trust	Low
Innovative Thinking	Low
Adventurous	Medium

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The Build Process

1. Plan
What is the Purpose? Where will it be displayed? Who will see it? What data will be displayed? How do you want it to look?

2. Create IQA
For contact specific alerts ensure you use NetContact and "@SelectedUser" as a filter with any other data sources you need
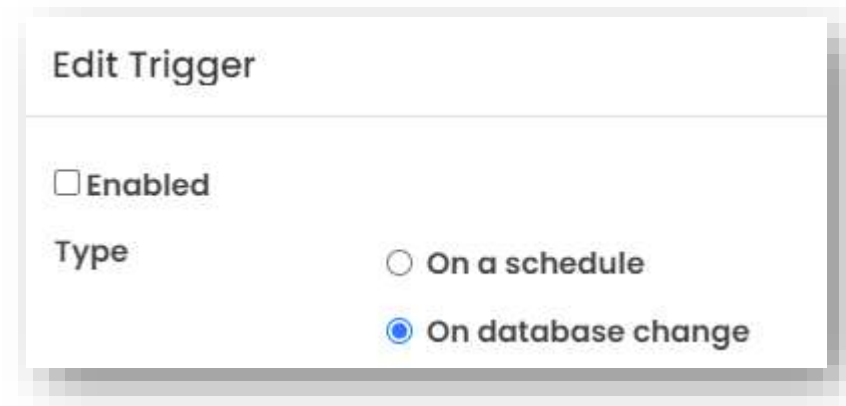
3. Implement & Test
Create the Process Automation and test the results

4. Enable

To trigger or not to trigger

We recommend not to trigger on database change for the following tables:

- ☒ Name

- ☒ Trans

- ☒ Activity

IQA – Within Operator

Date   21/06/2022

Within 2 Days

3	2	1	0	1	2	3
18-Jun-22	19-Jun-22	20-Jun-22	21-Jun-22	22-Jun-22	23-Jun-22	24-Jun-22

Within 1 Months

3	2	1	0	1	2	3
March	April	May	June	July	August	September

Within 3 Years

3	2	1	0	1	2	3
2019	2020	2021	2022	2023	2024	2025

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Let's take a 5-minute break

Grab a refreshment

Please feel free to mute and turn off your camera

Don't close the Zoom session

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Real Automations

- Free membership offer for individuals who belong to a member company

- New Account creation follow-up email

- Renewal Notices (Anniversary Billing)

- Event Certificates

- Admin Notifications: New Joins, Notifications around account activity or workflows to key stakeholders

Questions and Ideas

Next Course: Digital Academy

iMIS Reporting – Focusing on Membership

19th July: 10 am – 12 pm AEST

Ashley Hunt
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Causeis

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Connect with us and experience the difference!

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in linkedin.com/company/causeis

🐦 twitter.com/causeis