



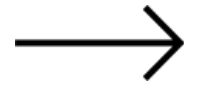
CAUSEIS PRESENTS

# Digital Academy for Associations

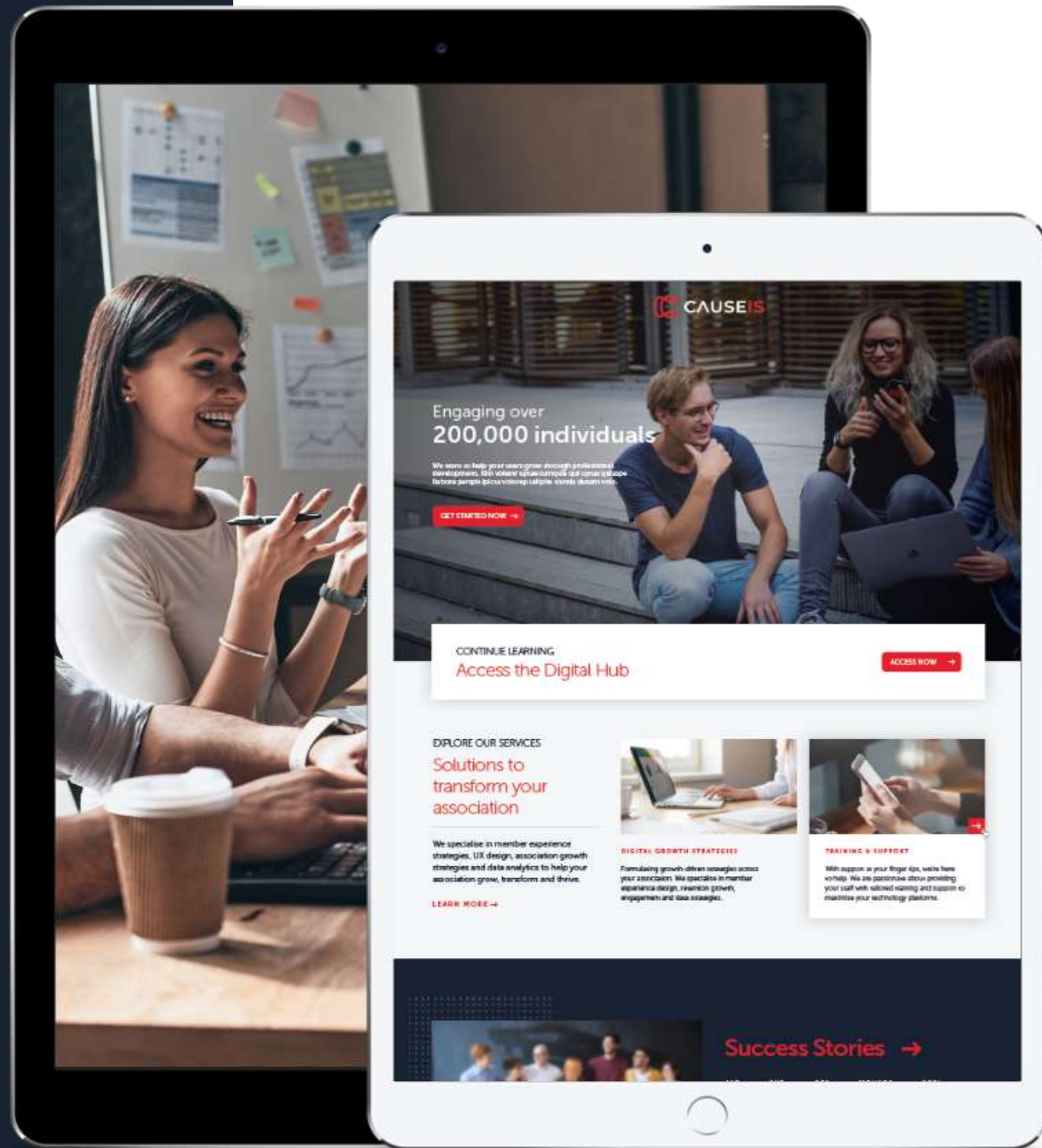
→ Course: iMIS Reporting – Focusing  
on Membership



Digital Academy



# 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.



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career and be inspired.

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# Presenters & Facilitators



Conrad Henley-Calvert, CiP, MACS CT  
Service Delivery Manager  
Causeis



Yolande Smith  
Digital Marketing Specialist  
Causeis

# 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,  
19th July

## Course Agenda

10am – 12pm AEDT

- Basics of IQAs
- Understanding membership business objects and fields
  - Dates in iMIS
  - Dues
  - Demographic data
  - Categories
- Let's build some reports



# Introduction to IQA's



A wooden clock on a wall, a wooden pencil holder with pencils, and a stack of books on a desk.

# Dates, Dates and More Dates



# What dates matter for membership?

01

## Join Date

New members start date  
Drives the pricing rule  
If the Join date falls into  
the current year then will  
use pro-rate

02

## Paid Thru Date

Identifies how far a member  
has paid their membership  
If less than today, then not  
financial

03

## Renewed Thru Date

Identifies how far the  
member has been billed and  
invoiced

# Dues

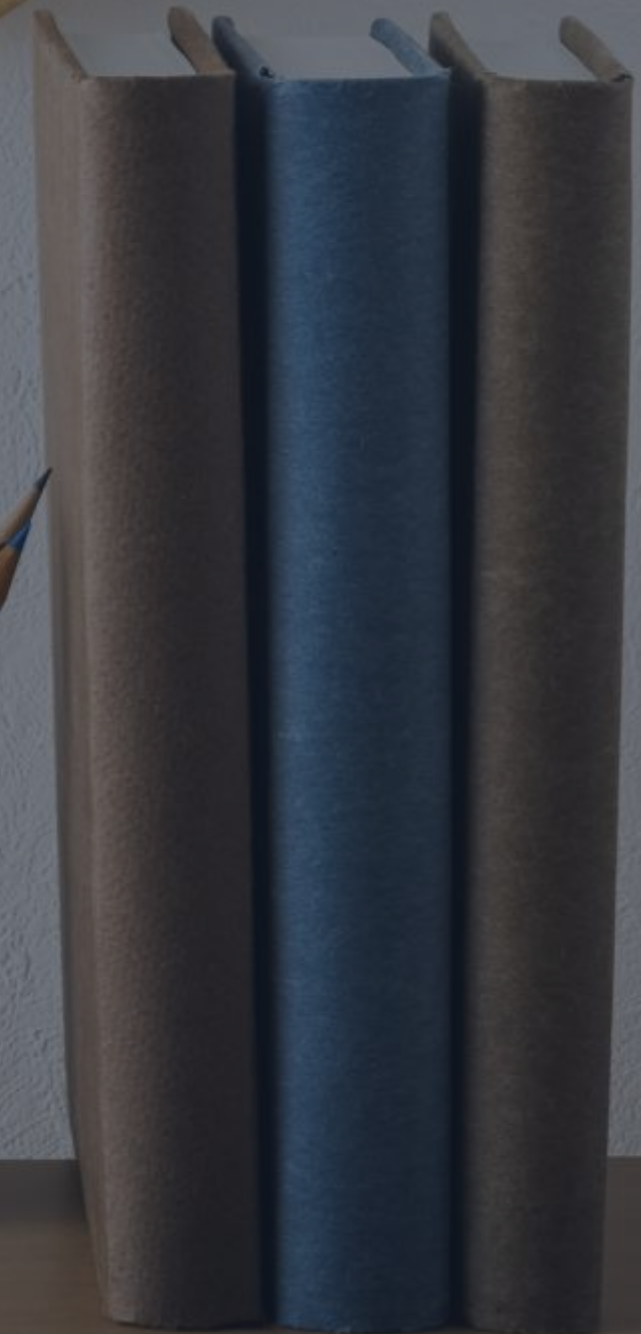


# Demographic data





# Categories



# Membership reporting checklist



## Data Review: Paid Thru Dates

Check all Paid Thru dates are not over the current membership year or empty.

## Data Review: Check your Renew Thru Dates

Check all Renew Thru dates are not over the current membership year

## Status of Members

Check that your Members are all active, or they will not be billed.

## Membership Categories

Validate that all members have a category or valid logic of a category

## Use iQA

Work out what you are trying to report on, then use IQA

## Dues Activity

Remember where this is and how important it is for reporting around your renewals time

# Let's take a 5-minute break

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12 - 13 October 2022

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**EARLY BIRD  
REGISTRATION**

Save \$100

*Hurry closes 31 July*

**Register Now**

Grab a refreshment

Don't close the Zoom session

Please feel free to mute and turn off your camera



A wooden clock on a wall, a wooden pencil holder with pencils, and three books on a desk.

# Reporting: Active Members

# Reporting: Category



# Reporting: Demographic data



A wooden clock on a wall, a wooden pencil holder with pencils, and a stack of books on a desk.

# Reporting: New Members

# Reporting: Non-Member/ Former Member



# Questions and Ideas





# Next Course: Digital Academy

## Digital Marketing for Associations

2<sup>nd</sup> & 4th August: 10 am – 1 pm AEST





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9:41



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