

Velosio[®]

CLIENT SOLUTION CASE STUDY

Intellectual Property Owners Association Moves its iMIS Solution to the Cloud for Streamlined Engagement Management



iMIS ENGAGEMENT
MANAGEMENT SYSTEM

Overview



Software Solutions:

- iMIS Engagement Management System
- Microsoft Azure

Challenges:

- Complicated VPN login
- Costly servers
- Insight Constraints

Benefits:

- User friendly, intuitive, and interactive app
- Streamlined cloud-based experience with easier access
- 360-degree view of members supercharges engagement

Company Overview:

Intellectual Property Owners Association (IPO), established in 1972, is an international trade association representing diverse companies, law firms, service providers and individuals in all industries and fields of technology that own, or are interested in, intellectual property (IP) rights.

Industry: 501(c)(6) Membership Association

Members: 450+ organizations worldwide

Headquarters: Washington, DC

Background

Intellectual Property Owner's Association, (IPO), is the voice of IP owners. As the premier association for IP professionals, IPO advocates on behalf of its members for effective and affordable IP rights. Members receive networking, professional, and business development opportunities along with continuing legal education and other educational resources.

As a worldwide trade association, IPO's members include intellectual property owners in all industries and all fields of technology. Its goal is to serve the needs of corporate IP departments. IPO also advocates for reforms that provide cost-effective and reliable IP protection.

IPO was a long-time user of iMIS for managing its 450+ membership organizations worldwide. However, the team became challenged by its use of the system on-premises, with costly servers and a complicated VPN login process for remote users. "We hit a wall where it was taking a lot

of time and energy to maintain the iMIS server on-premises, and also the process of logging into iMIS just became very tedious, so we made the decision to move completely to the cloud to streamline the process for everybody and lighten our tech load," says Nicholas Evans, operations manager for IPO. "We had been using a version of the iMIS website alongside our old database, so staff were somewhat familiar with the look and feel of the cloud version - we knew we wouldn't have to completely retrain everybody," continues Evans.

The IPO team did not consider other solutions as they were quite happy with the functionality of iMIS. "We've been using iMIS for so long and our staff is so familiar with it - it is pretty robust and does what we need - so we didn't honestly look at other tools," says Evans.



Upgrade and Implementation

The iMIS upgrade project came in under budget and on time – a big win for the IPO team. To stay under budget, the IPO team cut down on customizations and the number of reports they transferred over to the upgraded solution. “We decided to start fresh and only bring in the absolutely essential things and just see how we do out of the box with the solution, and so far, it’s been pretty good,” says Evans. “We’ve added a few reports here or there, but you know, we had hundreds of reports in our old iMIS database, so we started with a few of the most important reports,” continues Evans.

Another upgrade success factor can be attributed to the familiarity between the IPO and Velosio teams, which have been working together for 15 years. “The Velosio team is great,” says Evans. “They understand our systems really well, and even when something goes a little wrong - which it always does in these major upgrades - they’re very flexible and helpful and can usually help iron out whatever the issue is. We’ve had a great relationship with them for many years,” continues Evans.

At IPO, iMIS is integrated with a few additional third-party solutions – Higher Logic for mailings and managing committees; Elevate for webinar management; and WordPress for the website and content protection.

For post implementation training, IPO and Velosio performed a mix of in-person and remote training. “ASI also has a great learning library, so the staff watched a lot of independent videos in their departments, and then we did some group trainings as well and that seemed to get us there,” describes Evans. “Then once we were live and staff were actually using the system, there were a few issues where we had to go back and retrain, but it only amounted to two to three hours of training, and everything is running really smoothly now,” continues Evans. User acceptance is high, according to Evans: “I think that people really love not having to deal with the desktop application anymore. Of course, anytime you change applications, there’s a little bit of guffawing because you know the clicks are a little different and some of the procedures are different. But in general, I think people really like it just because it streamlines their day a little bit, they don’t have to go through this very tedious process just to log into a database, so it’s more what people are used to where you go to a website and all your tools are there that you need,” says Evans.



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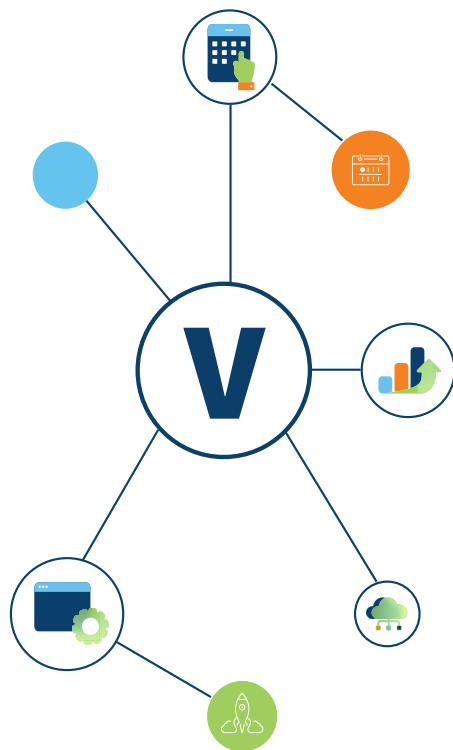
Nicholas Evans, Operations Manager

Benefits

The IPO team is pleased with its move to the cloud and use of additional features and functionality that were not available in its previous solution. “It’s a big benefit to be able to access the cloud-based solution from wherever, whenever because most of our staff is only in the office one or two days a week these days,” says Evans. “Now we just have multi-factor authentication for the website, and it’s super easy – a big improvement,” continues Evans. Additionally, IPO now has a sleeker tech stack, eliminating the need for costly servers.

Benefits Overview

- ✔ Manages all aspects of membership, including CRM, Accounting, Events, Personalized Web Portals, Automation, Dashboards & Reporting
- ✔ Cloud based system ensures stability, accessibility, uptime, and increased security
- ✔ Eliminated costly servers
- ✔ More efficient login process
- ✔ Available uptime anytime, anywhere
- ✔ User friendly, intuitive, and interactive app
- ✔ 360-degree view of members supercharges engagement
- ✔ More predictable monthly cost of ownership
- ✔ Members can now easily donate at the time of renewal
- ✔ Sophisticated online registration for two signature member events per year



Future Plans

IPO continues to discover new functionality within the up-graded system and will soon utilize the members engagement dashboards to score both user engagement and organization engagement. This will determine, for each member organization, how much they are participating on committees, or attending events or webinars. Then the membership team can check in with the dashboards when it’s time for renewals to review participation to encourage organizations to get more involved in networking and learning opportunities.



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