

## NASBA Transformed Business Operations with Fonteva

### At A Glance



#### Organization

- Professional Association
- Over 200 Staff



#### Challenges

- Outdated, Bulky Software
- Limited Reporting Capabilities
- Software Did Not Scale With Organization
- Limited Features for Members



#### Solution

- Self-Service Member Portal
- Seamless Integrations
- Mobile-Ready
- Robust Online Community
- Scalable Cloud Platform



#### Benefits

- Staff could standardize and automate workflows
- Increased member engagement online
- Enhanced member experience
- 360° view of membership activities

### Legacy Software Can't Keep Up

During her decade-long tenure at NASBA, Maria Caldwell has seen the organization's operations expand to meet the needs of local boards of accountancy. She has also observed the challenges staff faced when the capabilities of NASBA's previous association management software (AMS) didn't expand along with the organization. By implementing Fonteva's Fonteva—a public cloud-based AMS built 100% native on Salesforce—NASBA was able to organize and manage their membership and events all in one place and access it via desktop or mobile.

“Fonteva was the perfect solution. We were able to implement this project in less than three months.”

- Maria Caldwell, Chief Legal Officer & Director of Compliance Services, NASBA

## **NASBA Needed More Flexible and Robust Functionality**

NASBA staff knew they needed a more flexible and robust technology system than the one that was in place. During fiscal year 2013, the association's member services activities included five conferences and support to twenty-two committees, which meet throughout the fiscal year.

Prior to implementing Fonteva, it was difficult to see the full picture of the association's different components. For staff, reporting capabilities were extremely limited. And for members, applying for services wasn't easy nor was making donations and payments.

## **Scalable Association Software Built on Salesforce**

Implementing Fonteva transformed the association's business operations. Staff members were able to standardize and automate workflows, email templates, and internal email alerts.

In addition, NASBA wanted to provide a more robust online community for its members, while making it more convenient to accomplish certain tasks online, such as registering for events, renewing their memberships, tracking donations, or viewing committee activities.

Further, NASBA enhanced the member experience of its portal by creating a simple video explaining how to use it. Doing so reduced the total number of calls from members asking for assistance and increased their ability to do what they really needed to do rather than sitting on the phone waiting for support.

Fonteva's member portal and other key features make it that much easier for the NASBA to fulfill its commitment to being mission driven and member focused. With right technology solution in place, the association, which was named Nashville's best nonprofit business for 2014, is well-positioned to carry out its vision of "performing all services with excellence."

Fonteva is an association management software solution with the features member-based organizations require to develop and nurture relationships, manage events, measure engagement, drive collaboration, and achieve their mission. To learn more about how Fonteva can help your organization meet changing member expectations,

**Contact Us at [marketing@fonteva.com](mailto:marketing@fonteva.com)**