



SUCCESS STORY

American School Food Service Association



Taking Ownership of the Aptify™ Solution

OVERVIEW

When upgrading to a new software release, most organizations need substantial assistance from their software vendor. In addition to the installation, a manual and difficult evaluation usually must be done to determine the compatibility of configurations. With many vendors, alterations to the software results in changes to source code which must either be retrofitted or discarded with an upgrade. This requires detailed knowledge of all such changes combined with a fundamental understanding of the software's architecture. Due to these factors, most software users make upgrade decisions with a great deal of trepidation, knowing it will require a substantial investment of staff and resources. These calamities are inherent in the design of most business software applications with proprietary designs. One of the core design principles of the Aptify™ Technology Platform is to eliminate this challenge through an advanced technology approach that has been refined for nearly a decade. This paper will discuss how the Aptify™ Technology Platform allowed the American School Food Service Association (ASFSFA) to seamlessly upgrade to the most recent release of Aptify™ on their own.

"After a successful implementation and complete understanding of the Aptify™ platform, the ASFSFA staff took ownership of the system. We took advantage of Aptify™'s flexibility and configured it to fit our unique needs with little assistance from Aptify™. We were able to really make it our own on our own!"

-MARCELO ESQUIVEL, INFORMATION TECHNOLOGY MANAGER, ASFSFA

Client Profile:

American School Food Service Association (ASFSFA)

INDUSTRY
Education

MISSION
To advance good nutrition for all children

GEOGRAPHIES
HQ- Alexandria, VA
Nationwide Association

MEMBERSHIP
52 State Affiliates
55,000 Members
Hundreds of local chapters

WEB SITE
[Http://www.asfsa.org/](http://www.asfsa.org/)

APTIFY BUSINESS APPLICATIONS
Membership Management
Fundraising

CONFIGURED MODULES
Education
Certification
Advertising

ASFSA BACKGROUND

The American School Food Service Association (ASFSA), headquartered in Alexandria, Virginia, has been advancing the availability, quality and acceptance of school nutrition programs as an integral part of education since 1946. The association strives to ensure that all children have access to healthful school meals and nutritional education. The primary activities of the association are to provide education and training, set standards through certification and credentialing, gather and transmit regulatory, legislative, industry, nutritional and other types of information related to school nutrition and to represent the nutritional interests of all children.

Helping to fulfill the mission of ASFSA, Marcelo Esquivel, Information Technology Manager, sought an association management system that would adapt to ASFSA's changing needs. ASFSA

was searching for a system that was flexible and easy to tailor to their way of doing business; one that would allow them to take ownership of the system without the need to have an extensive IT staff for custom programming and maintenance.

THE NEED FOR APTIFY™

Early in the search process, ASFSA's IT staff recognized the need for a system that was totally integrated, with the flexibility to handle their unique, diverse and fluid needs. It was important for them to find a user friendly system that would provide 'real time' reporting and analytics that would allow staff to access information and create queries without assistance. These requirements called for the Aptify™ Membership solution. Aptify™'s advanced platform development capability and comprehensive application functionality proved to have the

flexibility, breadth of out-of-the-box functionality, and scalability to meet ASFSA's long-term needs.

IMPLEMENTATION AND APPLICATION

ASFSA completed their implementation using in-house staff and expertise. Using the Aptify™ Technology Platform, ASFSA's internal IT staff was able to implement the Aptify™ Membership software to convert all of the data from their old system. In addition, ASFSA created a number of custom modules using the Aptify™ platform. The customizations include a 'from-scratch' Education and Certification module and several configurations to the Aptify™ Advertising module which was modified to utilize a rate card wizard for handling thousands of different pricing options.

One of the key features used extensively throughout the organization is Aptify™'s personalization technology. ASFSA is large and complex and has many sources of information; therefore every department has its own unique requirements for each data entry form and has a different focus or set of interests in the data that is used on a daily basis. In addition, each department has unique needs for input fields, data sets and reports laid out in a manner that enables staff to more effectively perform their jobs. This same information was previously tracked in several stand-alone databases that required additional input and reporting and did not allow for an integrated database with multi-dimensional reporting and inquiries. ASFSA has developed over 60% of the forms that are in current use, with approximately 40 forms in daily use throughout the organization. All of this development was done using Aptify™'s Technology Platform tools. Reporting has also become a much

When asked specifically about improvements in processing time and required staff involvement, ASFSA said that they immediately noticed how the Aptify™ system enhanced the performance of many tasks. They found a 97% decrease in the time required to complete a monthly task such as fulfilling magazine subscriptions, freeing staff to process orders and complete other key membership activities. In another example of efficiencies achieved, the time required to merge duplicate records went from 2 minutes to 15-20 seconds.

Taking Ownership of the Aptify Solution

more intuitive process with Aptify™. Flexible reporting options as well as the interactive Aptify™ Viewing system enable ASFSA staff to query the database and to easily run reports reflecting the output from those queries. ASFSA's IT staff has set up reports and exports to run with the click of a button. Using the Aptify™ Digital Dashboard, each individual staff member has their own personalized desktop so they can view the information they need to do their job on a daily basis. Each Digital Dashboard can be different and may include any reports and exports that need to be run, as well as those input forms that are so much a part of the staff's daily routine. Staff members can have their email, daily tasks, calendars, their most often used views, and popular reports at their fingertips with a simple click on their Aptify™ desktop.

ASFSA's familiarity and expertise with Aptify™ technology led them to an early adoption of Aptify™ 3.0. ASFSA

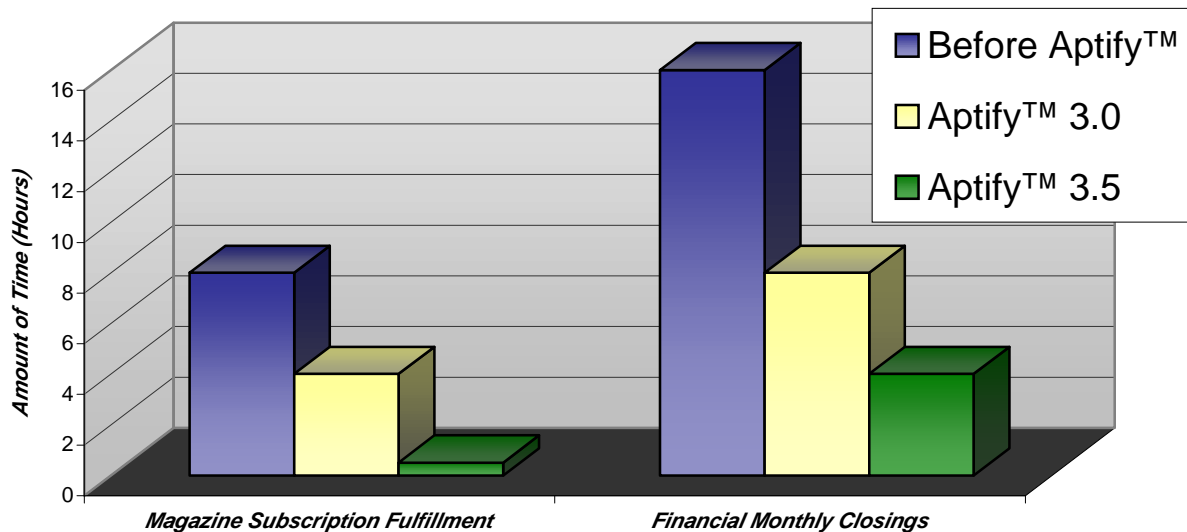
was confident in their knowledge of the Aptify™ architecture and their thorough involvement in their initial implementation made them the perfect early upgrade candidate. ASFSA was eager to take advantage of the new features and enhancements of 3.0 that promised to increase the power of their Aptify™ business applications, while further reducing development timelines and costs along with providing an overall improved user experience.

An immediate benefit that ASFSA soon realized with version 3.0 was the responsiveness of their staff to membership processing requests. With the ability to speed the processing of new member applications and establishing communication sooner in the membership processing cycle, ASFSA staff took a more proactive approach in improving service to its members in the early stages of membership. Aptify release 3.0 includes Aptify™ Process Pipeline, which enables an organi-

“We were not expecting the slew of emails from our new members—over 60 in one day – *thanking* our staff for their quick turnaround time.”

zation to embed and link business processes within the Aptify™ environment and to link multiple processes together for greater efficiencies. This has permitted ASFSA to automatically initiate a specific activity when an event takes place, for example, ASFSA configured its member processing to include an email acknowledgement to be sent to new and renewing members notifying them that their membership application had been processed. ASFSA also provided new members with a 'new member information kit.' This has allowed ASFSA to grant new members with immediate benefits instead

ASFSA TIME SAVINGS USING APTIFY



ASFSA SUCCESS STORY

of waiting three or four weeks until they received their membership acknowledgement and identification via mail. "We were not expecting the slew of emails – over 60 in one day – *thanking* our staff for their quick turnaround time," said Esquivel. Members now have instant access to ASFSA services. ASFSA, in turn, gained additional credibility by creating a bond with their new members early in the relationship and establishing an effective two-way communication channel.

CURRENT USE

ASFSA recently completed a successful upgrade to Aptify version 3.5 and has already seen increased performance in addition to its success in using version 3.0. ASFSA employs most of the Aptify™ applications, including Membership Management, Advertising, Fundraising, Meeting Management and Education. Now that ASFSA is on the latest version of Aptify™, they have access to the Aptify™ Process Pipeline capability to build workflows that easily define business logic and provide job-scheduling options, allowing ASFSA another opportunity to optimize staff resources.

In addition, ASFSA's entire meeting management process is now captured via Aptify™ software, including the ability to track speakers and sessions according to specific tracks, attendees and evaluations; handouts and re-

sources requirements; lodging and travel arrangements; complete logistics of venues; and all financial tracking, including speaker payments and recognizing meeting payment by membership type. Integrated with Aptify™ Education and Membership Management, member records are updated with attendance information and CEU's are tracked for certification processing. The Aptify™ system easily handles ASFSA's annual conference (6,500 attendees) as well as eight to ten smaller meetings throughout the year.

FUTURE PLANS

ASFSA is currently implementing the Aptify™ e-Business Suite for Microsoft .NET. ASFSA's integrated Web applications will directly integrate with the Aptify™ Membership database to allow members and customers to control their own profile and provide 24/7 customer service for all members. New capabilities in this area will include: on-line meeting registration, publication/subscription access, membership renewals and dues payments, and up-to-the-minute information on their profile while providing round the clock internet access. When asked what contributed to the success of the Aptify™ implementation, Esquivel does not hesitate to state that one significant reason for success was that he and the entire ASFSA staff took ownership of the implementation and were able to do so due to the power and flexibility of the Aptify™ technology.

It is a point of pride that ASFSA uses the Aptify™ system to its fullest extent, taking advantage of the flexibility to configure it to meet their particular needs. Esquivel made a presentation to fellow Aptify™ clients at a User's Group meeting in which he drove home the point that the Aptify™ system does not require a large IT staff. He explained that it does help to think outside the box when imagining the possibilities for deploying the Aptify™ technology to effectively improve member satisfaction, and streamlining internal processes simultaneously. Many software users have learned to accept their software system as "that's just the way it is" and look for a work-around or maintain a separate database - this ideology defeats the purpose of an integrated system. But with Aptify™, the applications, the screens, forms and reports are just the tip of the iceberg. The flexibility of the Aptify™ system allows limitless flexibility for users at every level of the organization. ASFSA grasped this concept and has been very successful in taking ownership of the Aptify™ solution. As a result, ASFSA is seeing very positive results that could not have been achieved with a traditional software application.

ABOUT APTIFY™

As a leader in business enterprise software, Aptify™ is set apart from all other competitors in the association market. Aptify™ has well over a decade of history leading the industry in technology innovation and has since grown to become an industry leader in component technology. Aptify™ combines robust functionality with unparalleled configurability in an extensible and scalable environment to create software solutions designed to meet the needs of associations and non-profit organizations of all sizes. Aptify™'s software enables organizations to easily manage their membership database while maximizing the quality of the service an

organization provides to its members. Aptify™'s functionality includes a number of business applications such as e-Business, Meetings and Event Management, Fundraising, Accounting, Order Entry and Fulfillment, Campaign Management, Education and Certification, Subscriptions and Publication, and Housing. Aptify™ is truly unique in that its powerful component framework is designed to embrace change. Since all organizations are unique and have different needs that will likely change over time, Aptify™'s flexible framework is designed to ensure that an organization's respective business needs are satisfied now and in the future.

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