# PERSONIFY360 PRODUCT OVERVIEW

Improve engagement, loyalty and revenue with Personify360 for mission driven and member-focused organizations.

*Your constituents are different. Why treat them all the same?*

Personify360 helps you achieve sustainable success with advanced tools that are easy to use, a powerful open-architecture technology and the industry's largest network of third-party service and solution providers.

Personify

What other type of organization has the ability to know so much about their members, who are all at once speak, sponsor, customer, advocate and so much more? This is a mission driven and member-focused organization's competitive advantage.

Designed for associations and continuously improved through collaboration with leading associations, Personify360 delivers the reliability, flexibility and scalability your IT department requires along with the specialized business applications and functionality that department managers need to improve performance.

Personify360 CRM provides each of your departments with a unified view of constituent information, behavior and transactions across all of your channels of engagement. The streamlined interface enables a panoramic, 360-degree view of relevant information, with easy-to use tools to help each department optimize relationships and value creation. Access transactional intelligence to create more targeted offers for cross-sell and up-sell, manage contacts and activities through Outlook 2010/13 integration, and improve the efficiency and effectiveness of all of your interactions with social and mobile constituent relationship management.

Personify360 Operations delivers a complete suite of operations management applications that focus on capturing member information, managing transactions and satisfying member needs. Integrated business modules (listed on the back cover) include Customer Management, Financial Management, Product Order and Invoice Management, Marketing, Meetings and Exhibition Management, Subscription Management, Fund-Raising and Donor Management and System Management.

*Give each department insight into personal preferences, behaviors and transactions.*

Personify360 e-Business delivers a comprehensive e-business solution that provides the application software, knowledge and implementation expertise you need to provide your constituents with the highest level of service online. Extending your AMS to the web with a custom solution can be time-consuming and expensive. Our e-business controls and ODATA standard web services allow you to add transactional and social functionality to your website

quickly and easily, including embedding our controls in virtually any .NET-based content management system. Our team of experienced professionals makes certain you have the right solution for your organization without overwhelming you with development costs.

Personify360 Analytics provides a powerful business intelligence solution that simplifies and standardizes how you view, share and act on strategic information. Personify360 Analytics includes web- and mobile-based intuitive drag-and-drop visualization and self-guided business discovery tools, dashboards and data marts that help you answer key operational and strategic business questions and reduce the distance between data and action.

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> With Personify360 **we have one-stop shopping** for all of our accounting needs, our membership needs, our sales needs, our marketing needs.
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> *Rusty Duckworth, American Trucking Association*

Personify360 Studio is a set of visual tools designed to enable IT departments to customize the Personify360 interface and the underlying workflow/ screen flow to fit your organization. Personify360 Studio includes tools for creating specialized web services, personas, screens, workflow and context-sensitive tasks, extending the database, managing security and creating custom notifications. These tools elevate IT professionals to architects of user efficiency.

Personify360 Mobile offers a year-round, persistent branding capability with features that deliver value to your members and staff long after your annual meeting has ended. Using a hybrid approach, Personify360 Mobile provides your constituents with the very best functionality that native apps and HTML 5 can offer (in tablet and smart phone formats), all pre-integrated with Personify360. Finally, it offers the only true mobile platform built specifically for associations giving you the power to build, modify and deploy your own mobile applications to meet changing needs quickly and cost-effectively.

# Personify360 Operations Modules

## Customer Management
- Contact Management
- Membership Management
- Committee Management
- Awards Management
- Sales Force Automation
- Volunteer Management
- Outlook 2010/2013 Plugin
- Integrated Telephony

## Financial Management
- Accounts Receivable
- Multi-Company Processing
- EFT and SCH Processing
- Lock Box Processing

## Product Order and Invoice Management
- Order Processing
- Order Entry and Inventory Management
- Miscellaneous Invoice Management
- Digital Content Delivery

## Marketing
- Marketing and List Management

## Analytics
- Data Analyzer
- Dashboard Designer
- Explorer
- Data Warehouse

## Meetings and Exhibition Management
- Meetings Management
- Exhibition Management
- Housing Management
- Speaker Management
- Facilities Management
- Abstracts and Submissions Management

## Education Management
- Continuing Education and Transcripts Management
- Certification Management

## Subscription Management
- Subscription Management
- Subscription Audit Management

## Fund-Raising and Donor Management
- Fund-Raising and Donor Management

## System Management
- System Administration
- Security Management
- Reports Management
- Email Notification Service

## Studio
- Studio Toolkit
- Web Services Designer
- Single Sign-On
- Identity Management

Personify, is rated by Lehman Reports as number one in product satisfaction among the three leading providers to the large association market, and has the highest average satisfaction ratings for 18 of the 29 areas covered.

Personify provides the leading enterprise software and service solutions that empower the best mission driven and member-focused organizations to succeed. Personify360 delivers enterprise software and service solutions that enable them to drive member value through best-of-breed technology and best practices. As an organization's technology foundation, Personify360 captures and provides insight across all member interactions, allowing them to maximize engagement and drive revenue. This is supported by a partnership-based service philosophy committed to helping organizations make smart decisions about their technology in order to maximize adoption and return on investment.