Protech Associates Creates “Tier 1 Support on Steroids”

Higher Logic-powered online community provides the information users need, when they need it.

Based in Columbia, Maryland, Protech Associates, Inc. provides cloud association management software powered by Microsoft Dynamics CRM and run on the Microsoft Azure cloud. The organization has dedicated more than 30 years to exclusively serving the association community and is continuously looking for ways to improve the products and services it delivers. In early 2015, Protech realized that it needed an online community to enhance its customer support experience. Protech Director of Customer Care Matt Bruffey spearheaded the project, which has become one of Protech’s most valuable benefits for its customers.

“Prior to using the Higher Logic community, our support services used traditional account management phone calls, emails and support tickets,” said Bruffey. “While this was effective for weekly or monthly outreach and individual support cases, we wanted something more personal that would allow our customers to get answers quickly and work together to promote innovative uses of our software.”

Bruffey added, “Our system enables non-profit organizations to customize their management processes to fit their particular needs, and we wanted an online community platform where users could ask their peers and our experts for advice and easily download documentation and training materials. An online community would also allow us to extend the reach of our support staff and enable users to get the information they need when they need it.”
Implementing Higher Logic

Bruffey began looking for a solution and found that Higher Logic had all the capabilities he wanted: an open forum for networking, a resource center for downloading materials, a digest capability for distributing discussions to a user’s email inbox, and detailed reporting on user activity.

To implement the online community software, Protech Associates relied heavily on Higher Logic and took advantage of Higher Logic's included integration services to connect the new online community to Protech's extensive database and its own MX Online member portal. “Higher Logic played a huge role in the implementation, and everyone who helped us was first-rate,” said Bruffey. “They also shared best practices for how to market a new community to drive user adoption and participation, including sample welcome letters we could send to new members and how-to documentation that users could download.

I also joined the Higher Logic online user community (known as HUG) and was able to access their entire library of resources and ask other Higher Logic users for advice — which is exactly the capabilities I wanted to provide for our community. The whole process could not have been smoother.”

Launching the Community

Protech launched its Protech Users Group (PUG) online community in July of 2015. To inform users and encourage adoption, Bruffey took several steps. He announced the PUG online community in the Protech customer newsletter, issued promotional emails with a link to an online video discussing the PUG online community, distributed a PDF quick-start guide, and invited all users to attend what turned out to be a very popular webinar on the benefits of the PUG online community and how to get engaged. Bruffey also talked individually with each customer project lead to answer questions and make sure users would be able to take advantage of the site.

On the morning of the launch, Bruffey sent another email to all users, and during the first week, worked closely with key customers to post questions and answers to generate activity and help other members feel comfortable engaging on the platform.

“Our customers truly embraced this online community and it really took off organically,” said Bruffey. “After just two weeks, there were 50 members and by the PUG online community's first anniversary we had nearly 575 members.”

Another important step Bruffey took was to open the PUG online community to Protech Associates' expert staff, enabling them to answer questions directly and post valuable materials. Users love the ability to interact with these experts and get additional insight into using the system. “We also recently added Higher Logic's gamification capabilities to the site and found that users really like it. It’s now an important way to encourage participation and increase engagement with the community,” said Bruffey.
Exceeding Expectations

Higher Logic has turned out to be an extremely valuable resource for new and established customers and users. “It’s like Tier 1 support on steroids,” said Bruffey. “Every answer to every question is automatically saved and available to all members. The discussion between users and our staff is like a friendly chat about solving their problems, which has enabled us to further develop very positive relationships with users. I had high expectations for our online community when we started on this journey, and Higher Logic has far exceeded them.”

Key Benefits of the Platform Include:

A Phenomenal User Experience

Users love the ability to quickly get answers to their most pressing questions from Protech Associates’ staff and veteran users. For example, if they have a question about how to configure the membership module to support a change in how their organizations collect dues, they can post the question to the forum instead of asking the customer project lead to create a support ticket. On the forum, they quickly get an answer, if not multiple, often within minutes.

“I talk to customers every day, and they constantly express how happy they are with the approach we took to creating the PUG online community,” said Bruffey. “It’s not just some clunky portal that’s difficult to navigate. It’s a modern enterprise system that’s a pleasure to use.”

A Vital Resource Center

The online resource center lets users download training materials, user guides, and release notes. They can also watch a series of how-to videos that Bruffey created. Higher Logic’s search capability makes it easy for users to quickly find vital information.

“Our users gobble up the materials in the resource center,” said Bruffey. “For example, when I post release notes online, I’ll check an hour later and there are already more than one hundred downloads. And directing new Protech users to the library for helpful information as they get going with our solution automatically brings them into the online community, encourages greater participation, and reduces the number of support tickets they need to submit.”

Easy Access to Answers

The email digests, an advanced Higher Logic capability that collects and disseminates forum posts, are an important way that Protech Associates communicates with users on a regular basis and encourages greater participation. Users can set up the system to receive a single summary digest each day, or they can increase the frequency or even receive an email each time there’s a post to the forum. They can also respond back to the community right from their email inbox.
But the digest isn't just for users. In addition to providing answers on the forum, Protech Associates experts and other Protech staff use the digest to review the conversations users are having.

“Participating in the forum and reviewing the digest has brought tremendous dividends,” said Bruffey. “For example, we recently saw that the advice a user was receiving on how to solve a workflow problem really wasn't the most efficient approach. We were able to quickly step in and offer a better idea. Even veteran users were impressed with the new solution, and now it's preserved on the site, easily accessible to anyone who searches on that topic.”

**Accelerated Business Processes**

For Protech Associates, the PUG online community is now an important tool for streamlining operations. When a new Protech Associates customer is ready to go live, all the new users receive an email welcoming them to the online customer care portal, which is plugged into the PUG online community. The users automatically get sent their credentials and a link to the PUG community. They just have to login to access the resources and begin posting questions.

Before the PUG online community, distributing release notes was complicated. They were sent to the customer project leads, but they did not always make their way to end users. As a result, Protech Associates would actually receive support tickets asking for release notes. Now the release notes are added to the PUG resource center in real time, where they are immediately accessible to everyone.

**Planning for the Future**

Bruffey plans to continue innovating with the PUG online community. For example, he will be launching a live online solution roundtable, and will use the PUG community to post topics, organize the event, sign up attendees, and share the results. He is also going to create an ongoing Ideation Lab, a discussion group that will generate feedback on how to improve the company’s products and services.

**Client Profile | Protech Associates, Inc.**

Founded in 1984 and headquartered in Columbia, Maryland, Protech Associates, Inc. is the world's first and leading provider of cloud association management software. Powered by Microsoft Dynamics CRM and run on Microsoft Azure, the company's suite of mature, feature-rich applications offers a unique combination of world-class CRM technology and association-centric business applications to help organizations more effectively manage their associations and provide superior member services. Learn more about Protech Associates, Inc. online at www.protechassociates.com.