

# Membership Database Solution for Rainmaker University



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– Nikki Lewallen, Vice President of Development of Rainmakers

## Objective:

Streamline membership management tool which reduces redundancy, paperwork and data entry time, while improving data across and reporting capabilities.

## Agile Approach:

- Documented and evaluated existing systems
- Interviewed users to understand requirements
- Designed prototype and tested in actual environment
- Recommend hardware to allow remote programming

## Business Outcomes:

- Staff spends less time in admin, more on sales
- 20% increase in sales just months after

## Challenge:

Member-based organization, Rainmakers Marketing Group was founded in 2002 as a business-to-business networking organization.

Growing rapidly from an informal monthly networking event serving the Indianapolis community to an organization with more than 1,500 members and 40+ events a month covering most of the state, Rainmakers required a robust membership database to track member status, activities, renewals and requests.

Like many small businesses, they began managing their membership information with a series of spreadsheets which they quickly outgrew. As they searched for a more complete solution, they found a membership database application which seemed to have many of the features they required.

While it was a significant improvement over the spreadsheets, it was not as flexible, comprehensive or customizable as the Rainmaker team had hoped.

The desktop application required staff members to print member lists in advance, manually record attendance, and then update the database upon their return to the office. With 2 and 3 events occurring on the same day, often 50 or 100 miles from the office, it might be several days before a staff member could return to update the records.

The task of preparing for events and updating the database was becoming extremely time consuming, and left little time to focus on sales, member support or process improvement.

*“A year ago, national expansion was something we talked about, as a someday, maybe. There were so many obstacles, it didn’t seem practical. Now, with this simplified system, we are ready to launch Ohio and the rest of the Midwest in the not too distant future.”*

**-Tony Scelzo, Founder of Rainmakers**

“Using our old system I was in the office late nights and every weekend trying to catch up on work and get things accomplished,” said Nikki Lewallen, Vice President Development. “Because the system wasn’t web-based, if I was managing an event in Columbus, Ft. Wayne or Bloomington, I had to come back to the office to update our database.”

“Our chairmen and their teams were waiting two and three days to get event reports,” said Founder Tony Scelzo. “While that may not seem like a long time to many businesses, in our industry, we have 48 hours to follow up. After that, our ability to close the prospect drops significantly.”

As Rainmakers began to look outside the boundaries of Indiana, it became apparent the existing system would be a major obstacle to supporting remote events and creating a personal connection with members in widely diverse geographic areas.

In addition, the expansion would require support staff to be available to answer questions and make more outbound client calls in support of the new territories. With the existing system, the time consuming double and triple entries were consuming so much time, Rainmakers was considering adding additional staff to handle the support requirements.



## **Solution:**

Rainmakers turned to Agile Reasoning to create custom, web-based software to replace their member database and member center. This product integrated the two former applications and merged them into one, protecting critical information via passwords and codes. This allows information to be updated quickly and sync to ensure data is correct in all venues of the database. The new web-based system, with predictive-type filling allows staff members to access the database remotely from anywhere with a Wi-Fi connection, making member check-in at events a one-step process.

At the end of the event the system generates attendance and status reports automatically and distributes the information to staff and board members. What used to take a day or two is now done in an instant, with reports often arriving in the email inbox of board members before they return home from the event.

As Rainmakers evolved, the members, staff, and chairmen developed their own slang. The application uses Rainmaker terminology, not generic terms to describe fields, functions and files. New staff members are able to come up to speed quickly because they don’t need to learn two sets of terms for every task. Nor do they waste time, skipping over unnecessary data fields.

“Our previous system contained tabs and features we didn’t need or use, they were just taking up space,” said Lewallen. “As we worked with Agile Reasoning, we told them what we wanted and they built it. Everything is unique to us, exactly what we asked for.

*"If there is something we left out or didn't exactly like, Agile Reasoning was on it and had usually had a solution in a day. As a result, every single component it is up to our satisfaction and designed to our needs."*

– Nikki Lewallen, VP. Development, Rainmakers



"There is nothing superfluous. And the simplicity has reduced our use of paper, and time spent filing the paper reports."

In addition to reducing the amount of time spent on administrative tasks, the new system allows us to centralize all their information. It provides more detailed reports and gives us the ability to customize output to look at specific events, groups of events or time periods. As a business management tool, the data allows the management team to make more informed decisions about which events are under-performing, where additional attention is required, and which events are truly the most effective, based on a series of criteria such as attendance, guest count and closing rate.

### **Implementation and Results:**

As with many custom software projects, staff members identified missing elements and functions as they began to use the software. Agile Reasoning anticipated there would be changes and built in time to accommodate additional requests. "If there is something we left out or didn't exactly like Agile Reasoning was on it and had usually had a solution in a day," said Lewallen. "As a result, every single component is up to our satisfaction and designed to our needs."

A month after implementation, Rainmakers could not be happier with their new software. The staff spends more time marketing and following up with members and prospects instead of entering and re-entering data.

This has led to an increase in the quality of member services delivered and program enrollment. There are fewer complaints about lack of follow-up, since special requests can be noted directly into the database.

"This month we have already seen an 20% increase in our membership," said Lewallen. "There is no doubt in my mind that it's due in part to our improved efficiency driven by our new software."

"A year ago, national expansion was something we talked about, as a someday, maybe," said Scelzo. "There were so many obstacles, it didn't seem practical. Now, with this simplified system, we are ready to launch Ohio and the rest of the Midwest in the not-too-distant future.

### **What's Next?**

Rainmakers is already working with Agile Reasoning to extend the functionality of the database to something which will be useful to all members.

"We envision a contact management tool, with expanded profiles, which will provide all our members with the most current contact information for their peers," said Lewallen. "The tool will allow members to find people they want to meet, then request and make introductions."

"This capability will take our organization to the next level allowing us to easily grow from a local organization to a national presence rapidly" said Scelzo.