

Property Council New Zealand

Property Council New Zealand increase member satisfaction with Upbeat Membership from Professional Advantage, built within the Microsoft technology platform.

Organisation

Property Council New Zealand

Industry

Property

PA Product

Upbeat

KEY POINTS

- Property Council New Zealand (PCNZ) is a member-based organisation and is the leading advocate for New Zealand's property industry.
- PCNZ needed a system to support an upgrade to their membership structure, as well as an improvement in their data storage and reliability.
- They chose Upbeat Membership by Professional Advantage (PA) thanks to its integration with Agend, and their trust in a partnership with PA.
- Member satisfaction has been significantly improved thanks to simplifying member processes and improving the quality of the data.
- The integration between the teams at PCNZ and PA has been instrumental to the success of the project.

"Upbeat Membership is far superior to anything we had before. It is so easy to use, and the flexibility of creating and modifying views has meant that our information is stored and accessed in a way users want."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

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The Organisation

Property Council New Zealand (PCNZ) is a not-for-profit organisation that collectively champions the New Zealand property industry, bringing together members from all corners of the property ecosystem. They connect over 10,000 property professionals and advocate for the interest of 550 member companies, including some of the largest commercial and residential property owners and developers in New Zealand. The organisation's core purpose is advocacy, working with local and central government to reduce red tape and enable development. With four main offices across the country, PCNZ organises and runs up to 80 events per annum, including five awards programmes, five annual conferences, and approximately 20 webinars.

The Need:

PCNZ made the decision to undergo a major change in their membership structure, moving from multiple regional memberships to a nationwide membership structure that encompasses all regions. The thematic of this project led to the realisation that implementing these changes with the current system would be challenging, and that this system was limited in its use and was not providing quality data.

"We had manual processes for event registrations, we lacked an in depth understanding of the specifics of our members, and we were working with poor quality data."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

As part of the process to update their systems and implement the new membership structure, PCNZ identified six key challenges that needed to be addressed:

- Provide effective communications with members.
- Enable a higher level of engagement with and between members.
- Enable member companies to manage their own people within the membership system.
- Allow participants to book and pay for their attendance at events.
- Implement the ability to charge for webinars.
- Enable process led management of member facing activities.

The Solution:

The team at PCNZ completed extensive research on the best system to support their organisational and membership changes. From this research, they were able to fast track a handful of options and hone their selection process by comparing these solutions against their key requirements.

"We ended up with a short list of solutions, and it was clear that Microsoft and Dynamics 365 stood out."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

With their shortlist of solutions came a shortlist of partners. Therefore, the team focussed upon the organisational skills of each potential partner.

"When we spoke with Professional Advantage (PA), we appreciated their depth of knowledge as well as their experience with not-for-profits and member organisations. They also had a long-standing relationship with Property Council Australia which showed us they were a reliable business, so we knew we could move quickly with trust that our partnership and project would work."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

The solution that PA presented was Upbeat, a purpose-built membership system that harnesses the technology of Microsoft Dynamics 365 to streamline the performance of all major functions of a membership organisation.

"A critical decider for us was that Upbeat integrated with the Agend member portal; we didn't have to worry about a new integration or add-on, or a relationship that needed to be built."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

Upon selection of their new solution and partner organisation, PCNZ compiled their list of project objectives:

- Design and implement an integrated solution for the membership acquisition and renewal process.
- Design and implement an integrated solution for event management, ticketing, and reporting processes.
- Design and implement an integrated solution for the process behind the selling of publications.
- Integrate the solution with PCNZ's financial applications, streamlining their data.
- Test and deploy the integrated solution to PCNZ users and member administrators.

The Result:

PCNZ were very clear about what they wanted from their solution, and when they wanted it by, something which PA was able to support them with.

"PA were bold enough to accept our aggressive project timeframe and were prepared to work with our no-customisations approach."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

They specified they did not want any customisations, *"and we stuck to that, which was a significant contributor to completing the project on time"*, says Roger. This no-customisations approach means that they are never changing the core functionality of their solution or affecting the integrity of the system. The flexibility of Upbeat ensures that even without customisations, they can add fields, workflows, and views as needed.

Within PCNZ, Upbeat is being utilised for events, membership, finance systems (with which Upbeat integrates), and Higher Logic marketing communications.

"Events have experienced a significant improvement in the tracking of registrations. They also have new levels of traceability and accuracy of event revenue: this data can be completely relied upon and reconciled with expectations."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.



They are also using Upbeat to consolidate their invoice process: previously their invoices came from multiple systems, but now every invoice is generated from Upbeat.

"Within Member Management, the most significant change is in the Renewal Invoicing process. A process that used to take days is now complete within half a day, and we are working towards further reducing that time by 50%."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

The tracking of the status of prospective members has also been simplified, with the ability to quickly access contact details including interactions, ticket purchases, and event registrations.

User adoption was initially fuelled by an organisation-wide desire to upgrade their systems. However, it has been supported by the flexibility and ease of use of Upbeat.

"It is easy to use, and so it is used. On a regular basis we are changing or adding new views allowing our team to be presented with the exact data they want."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

The intuitive system presented the team with an ease of use that meant training required for new users was minimal.

"We understood the system very quickly. It supports our processes, so as long as someone understands the process, they can understand the system that supports it."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

Upbeat bi-directionally integrates with the PCNZ website / Agend member portal which allows members to now update contact and company details, as well as being able to purchase their own tickets for events, eliminating what was previously a manual process completed by regional managers.

"Our members now enjoy the simplicity of making purchases and paying direct by card. This has not only improved cashflow but also minimised the need to chase payments."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

The culmination of meeting their project objectives and experiencing improvements across the organisation have brought substantial benefits to PCNZ's members.

"Member satisfaction has improved. We have better quality and accurate membership data which has given us a much greater understanding of member interests."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand.

There has been a strong collaboration between the PCNZ and PA teams, which has been important to the success of the project.

"The best thing has been the integration between our teams. We were introduced early on to our whole team at PA, and they have been present throughout. From our sales representative to consultants to our client management team, we know we are genuinely being looked after. This adds another dimension to the partnership."

Roger Grove, Finance & Technology Consultant, Property Council New Zealand

At Professional Advantage, we want to support our clients throughout their journey with us, something that spans from initial consultations to implementation to further development and progression. We pride ourselves in the tenure of both our staff and our clients. This puts our clients in a unique position to be able to build long and lasting relationships with PA as both an organisation and as the people behind it.

