

# Property Council New Zealand

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

## The Organisation

### 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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"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 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."

