ats WEBINAR SERIES

Transforming Your Advocacy Efforts with VoterVoice

Presented by: Randy Richter Association Technology Solutions



About ATS

ats

Serving iMIS community since 1995

About ATS

- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with integrations to over 150 vendor platforms
- Over 100 RiSE website designs and implementations
- iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients wither starting out in EMS or migrating to EMS.



ats Presented by



Presenter: Randy Richter Director of Technology, Partner Association Technology Solutions, LLC Email: rrichter@atsol.org



Moderator: Richard Banks Sales Manager Association Technology Solutions, LLC Email: rbanks@atsol.org



ats Using GoToWebinar



- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts (not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete



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Advocacy Platform Features

- Targeted Email Campaigns
- SMS Text Messaging
- Social Media Integration
- Action Centers
- Personalized Advocacy
- Petitions and Surveys
- Event Promotion
- Analytics and reporting
- Multi-Channel Integration
- Accessibility and Automation





Advocacy Platforms in iMIS Bridge

- CQ Roll Call
- SoftEdge
- Votility







VoterVoice – Key Features

- Advocacy Campaign Tools Email, Phone, Social Media
- Legislative Tracking Bill tracking, custom alerts
- Personalized and Targeting Customized messages, Geotargeting
- Engagement Insights Analytics, Engagement metrics
- Event and Petition Management Petition tools, Event Coordination
- Compliance and Security Legal compliance







Integration with iMIS

- 2024 and earlier enSYNC (great company) has an integration called VoterSYNC
 - Being discontinued in 2025 and clients are migrating to iMIS Bridge
- ✓ Late 2024 ATS has integrated VoterVoice into the iMIS Bridge Platform
- ATS is working closely with VoterVoice to maximize all integration components
- Goal is to maintain key features and add additional features



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Components – Move contacts from iMIS to VoterVoice

- Transfer contacts from iMIS to VoterVoice using an IQA
- Standard fields (e.g., ID, Email, First Name, Last Name, Email, address, etc.)
- Home and work addresses, Custom Fields
- Deduplication of contacts for clients with existing VoterVoice installations
- Sync runs on a scheduled basis (e.g., daily) and can be run on demand

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	• 1 2 3 4 5 6 7 8 9									
ID	EMAIL	FIRST_NAME	LAST_NAME	FAX	MOBILE_PHONE	PREFIX	TITLE	COMPANY	PHONE	
and and a second se										
ID 105	EMAIL carolhamilton@mailinator.com	FIRST_NAME	LAST_NAME Hamilton	FAX (201) 543-6785	MOBILE_PHONE (748)764-8930	PREFIX Ms.	TITLE Administrative Assistant	COMPANY Foundation Support Systems	PHONE (201) 245-6754	





Voter Voice - Contacts

Displays contacts on a map (\aleph)

Reports on activities

ATS Sandbox		දියි Configu	re W
Dashboard Launchpad		to comgo	
Contacts Map (All Contacts)	:	Upcoming Events and Reminders	
		Today	
	1	Send a reminder on your broadcast, Call t Action : HR 1040 12/8/2024 (12/8/2024) boost your response rate.	
	North Atlantic Ocean	Dec 12th	
and the second s	Tanja Basa Marco Ayar	OR - 2024 1st Special Session begins.	
C0A.			

10 Name Points Tech Einet Tech Lack 0





Voter Voice - Contacts

Contact Data

PEOPLE ~ ADVOCACY ~ N	IESSAGING \checkmark LEGISLATION \checkmark REPORTS \checkmark	CREATE ~	
Contacts Contacts Search Contacts	List Uploads Custom Fields Relationships		
Randy Richter 🤣			
Info Officials Activiti	es Subscriptions Relationships Notes	Meetings Map	
Prefix	Mr., Mrs., Ms., etc 🔛	Company	
First Name	Randy	Title	
Last Name	Richter	Email	rrichter@arsol.org
Suffix		Phone	
		Fax	
Home	clear address	Business	clear address
Street	14634 Emporia Ct	Street	
City	Brighton	City	x
State	C0 ~	State	
ZIP Code	80602 5728	ZIP Code	



Association Technology Solutions



Voter Voice – Custom Fields

Contact Data

Custom Fields

Contacts	Search Contacts	List Uploads	Custom Fields	Relationships					
Custom Field	ds > Options								
Enter the	Enter the name of the custom field								
MEMBER	_TYPE]				
Choose to Short Text	ype of data ent	tered v							
O Hide from	 Choose whether or not to display on the user profile Hide from user profile Display on user profile 								
User Inform	nere to display mation Section ired field	on the user	r profile						



Association Technology Solutions



Components – Track Activities

- When an advocate performs an action, that action is recorded as an activity in iMIS
 - Sign petition
 - Contact Congressman
 - Attend an event
- Activity records can then be used for engagement tracking in IMIS





Voter Voice - Activities

PEOPLE ~	ADVOCACY 🗸	MESSAGING 🗸	LEGISLATION ~	REPORTS ~	CREATE ~	l		
Contacts Contacts Search Contacts List Uploads Custom Fields Relationships								
Mr. Tes	St First Test	: Last 🤣 Activities Subscrip	otions Relations	hips Notes	Meetings	Мар		
Туре			Description				Date	
Advoca	Advocacy HR 1040 12/8/2024						12/9/2024	





Voter Voice – Activities in iMIS

Activity Record in iMIS

- Date of Activity
- Campaign ID
- ☑ Type of message (e.g., Email)
- Subject Line
- Recipient name
- Recipient office





VoterVoice – New Contacts

- Optionally create new contact records in iMIS for people who have taken action in VoterVoice but are not in iMIS
 - Deduplicate based on email address
 - Add activity (actions) to the new record in iMIS
 - New contacts will have source code of VoterVoice





VoterVoice – SSO

Optionally turn on SSO which has two options

- Convenience VoterVoice will remain open to the public. But if the user accesses VoterVoice via a link from an iMIS site, VoterVoice will know who the person is. Advocates who do not go through the link can still interact with VoterVoice modules.
- Security This setting means that the person MUST be authenticated in iMIS first and cannot simply navigate to a VoterVoice campaign. This will limit advocates who access VoterVoice to only those who have be authenticated in iMIS.



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VoterVoice – Updating iMIS US and State Districts

- Optionally allow the integration to update US and State districts
- Addresses are sent to VoterVoice via an IQA.
- Districts are updated in iMIS.
- iMIS EMS will update US Districts when address is created or changed but not State Districts
- Data can be used in iMIS to segment and communicate with contacts

Legislative Details							
State House	51						
State Senate	14						
US Congress	37						





VoterVoice – Future Integration

- Write back of office holders (e.g., representative names)
- Validation of addresses in iMIS





Summary

- It is expected that advocacy efforts will increase with the new administration in 2025
- Connecting your members to the right individuals in Congress will continue to be important as new legislation is introduced
- The VoterVoice module of iMIS bridge will enable new levels of involvement of your members on key issues
- Actions taken by members can be an important component of iMIS Engagement Scoring helping you identify the most engaged members and finding champions within your community





Additional Information about iMIS Bridge

- Modules have pages that discuss how they work
- Some have videos and webinars describing the use
- Supported use cases are listed on the website
- Contact us for additional use cases or questions
- <u>https://www.atsol.org/imisbridge</u>
- sales@atsol.org



www.atsol.org -> products -> iMIS Bridge



ats Questions & Answers



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