

## TAUG Breakout Session Descriptions

Monday, April 23

11:00am - 12:30pm

### Building Leadership Capabilities for Technology



In this session, you'll learn about the critical leadership competencies important to your organization's success and effectiveness in the technology arena – and discover how you can implement them to benchmark and improve your current performance.

*Personas:* [Senior Executive](#)

*Versions:* All

### Topics in Security



Back by popular demand, this session presents practical ideas for protecting your organization's most valuable asset – your customer data. From creating a secure mindset for staff, to protecting credit card information, this session will cover a variety of ideas that you will be able to bring home with you – after passing through airport security, of course.

*Personas:* [Systems Administrator](#)

*Versions:* All

### Using Data Strategically: Building and Managing Your Marketing Database



You spend countless hours creating the perfect marketing messages and developing the most creative direct mail packages, so it's imperative that the communications get to the correct people. In this session, TIMSS users will share examples of building powerful marketing databases and how to segment data for the best ROI.

*Personas:* [Exhibition Manager](#), [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#), [Subscriptions Manager](#), [Advertising Manager](#)

*Versions:* All

### Volunteer Management: Lessons from Community Based Organizations



Many community based organizations rely on volunteers on a daily basis. Listen as they share the best practices for recruiting, engaging, and most importantly keeping volunteers.

*Personas:* Everybody

*Versions:* All

### Large Organization Roundtable



TIMSS and Personify are in operation at some of the world's largest membership organizations, where unique challenges often present themselves because of the size and mission of these large organizations. Meet with colleagues representing organizations

with 50,000 or more customers and members to learn how they have been able to use TMA Resources' software to meet these challenges.

Personas: [System Administrator](#)

Versions: All

**Monday, April 23**

**1:30pm - 3:00pm**

### **How Successful Associations Use Technology in Support of the “Seven Measures of Success: What Remarkable Associations Do That Others Don’t”**



What other applications can work with TIMSS and Personify? Hear examples of how successful associations work with their technology partners to empower their organizations and align their products and services with the organization’s mission (one of the seven measures).

Personas: [Senior Executive](#), *Everybody*

Versions: All

### **Integrating with Third-Party Software Using Web Services and APIs**



What other applications can work with TIMSS and Personify? Just about any application that can write to APIs or consume and generate Web services. Learn from you peers how they have been able to integrate third-party applications, such as job banks, online voting and other applications through the use of Web services and APIs. Discuss the dos and don’ts of third-party integration work. See practical examples of these integrated systems at work.

Personas: [Systems Administrator](#)

Versions: *TIMSS 6, Personify*

### **Membership Recruitment, Retention, and Recognition with TIMSS**



Associations are using innovative techniques for recruiting new members and retaining existing ones. Membership directors will share some of their most successful ideas, including how to set up and manage an electronic membership program. Learn how your peers are using TIMSS to run these and other programs most efficiently.

Personas: [Marketing Manager](#), [Meetings Manager](#)

Versions: All

### **Topics in Customer Service Roundtable**



Customer service professionals, this is your chance to talk to your colleagues about best practices in the field and how to use TIMSS to improve customer service practices, policies, and procedures. Topics may include how to improve call response times, training techniques, and how to incorporate order entry into your call center. Find

out what works, what doesn't, and how you can take your customer service department to the next level.

*Personas:* [Call Center Manager](#), [Call Center Representative](#)

*Versions:* All

### **Ad Hoc Querying — The Basics and Beyond**



In this 90-minute training session, learn how to use one of the most powerful tools in TIMSS – Ad Hoc Query. If you're not using this module, learn how it can empower end-users and reduce the reliance on other report writing. If you're already using the module, learn new tips and tricks from a power user. The training session will be presented using TIMSS 6, but will be applicable to TIMSS 5 users as well. The session is designed for end users, and will not focus on any of the technical aspects of ad-hoc query.

Participants will learn how Query Metadata can be setup to be most useful to those running reports, and how to develop a query to retrieve the desired records. They will also learn what can be done with queries once they are developed, and how security can be applied within the Ad Hoc Query module.

Participants should include TIMSS users who want to improve how they are using the module, as well as users who want to increase their end users' use of this module.

*Personas:* [Certification Manager](#), [Exhibition Manager](#), [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#), [Subscriptions Manager](#), [Advertising Manager](#), [Transcript Manager](#)

*Versions:* TIMSS 6, Personify

**Monday, April 23**

**3:30 pm – 5:00 pm**

### **The Data-Driven Organization**



Tapping into one of the Seven Measure of Successful Associations (data-driven strategies) from the best-selling book of the same name, this session not only defines “balanced scorecard”, but also gives you a roadmap of how to bring this concept to life within your organization. The session leaders will provide you with guidance on how to develop and implement a balanced scorecard for your organization – and talk about what data you need to collect and why.

*Personas:* [Senior Executive](#), [Marketing Manager](#), *Everybody*

*Versions:* All

### **Migrating From TIMSS 5 to 6 to Personify**



Thinking of moving on up? This session will show you how. Learn from staff and your own peers who have gone through the process how best to orchestrate your

migration from TIMSS 5 to either TIMSS 6 or Personify. Practical advice and resources will be on hand to help you make a smooth, efficient transition.

*Personas:* [Accounting Manager](#), [Systems Administrator](#)

*Versions:* TIMSS 6, Personify

### **Small Organization Roundtable**



Small is beautiful! Join your colleagues from smaller organizations (50 staff or fewer) to learn about the special challenges faced by smaller – yet no less mighty – organizations in their use of TIMSS.

*Personas:* [Systems Administrator](#)

*Versions:* TIMSS 5 & 6

### **Making the Most of Reporting Functionality: For Non-Technical Users**



Come learn how to make the most out of TIMSS reporting. In this session, you will get helpful hints on how to run some of the base online reports that you might not know about, and how to make sure the reports contain the data that you are expecting. Also, learn how to communicate to your IT department what your requirements are for a custom report so that you get what you are asking for. Many end users struggle when it comes to asking for custom reports to be developed. Learn how to communicate your requirements so that you get the report that you require.

*Personas:* [Call Center Manager](#), [Call Center Representative](#), [Certification Manager](#), [Certification Registrar](#), [Exhibition Manager](#), [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#), [Subscriptions Manager](#), [Advertising Manager](#), [Transcript Manager](#)

*Version:* TIMSS 6, Personify

### **Practical e-Business Deployments**



Some of the most dynamic membership organizations in the world are using TMA Resources' e-Business tool as the muscle behind their Web presence. Review examples of practical deployments for such e-business applications as online directories, hotel blocking and more. Understand the challenges presented by these deployments and the benefits organizations have reaped by beefing up their e-business capabilities.

*Personas:* [Call Center Manager](#), [Certification Manager](#), [Exhibition Manager](#), [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#), [Subscriptions Manager](#), [Transcript Manager](#)

*Versions:* All

**Tuesday, April 24**  
**9:00 am – 10:30 am**

### **Successful Project and Resource Management**



Back by popular demand! One of the most highly rated sessions at TAUG 2006, project management experts from world-class associations will show you how to prioritize and manage your IT project portfolio, within the context of organizational priorities. Allocate resources, and work with vendors like TMA Resources, so projects are completed on time, within budget and in a quality fashion. Retain, retrain, and develop your IT staff, and build solid relationships with internal customers to satisfy their expectations. Several proven take-a-ways, templates, and examples will be distributed.

*Personas:* [Senior Executive](#), [Systems Administrator](#), *Everybody*  
*Versions:* *All*

### **Topics in Accounting 1 Roundtable**



This is the first of a two-part series for accountants. This informal discussion will provide you with the opportunity to learn how other organizations are handling credit card processing and lockbox processing. Come prepared with you list of challenges and solutions.

*Personas:* [Accounting Manager](#)  
*Versions:* *All*

### **Data Quality Audits and Other Measures for Achieving Superior Data Integrity**



Whether we like it or not, our best business decisions are more and more frequently based on data. Fact-based decision making is rapidly replacing "gut-feel-seat-of-the-pants" decision making. That means that the quality of your data is central to the accuracy of your strategic planning. Learn about software profiling tools that others are using to identify data anomalies and other problems with their data. See how these tools are being used to dramatically improve data quality.

*Personas:* [Call Center Manager](#), [Certification Manager](#), [Exhibition Manager](#), [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#), [Subscriptions Manager](#), [Advertising Manager](#)  
*Versions:* *All*

### **Crystal Reports Swap Meet**




Got a great Crystal report that everyone back at the office just loves? Here's your chance to get the recognition you deserve, from the people who really appreciate a well-crafted report. Or, maybe you've got the perfect report in mind, but just haven't been able to figure out how to make it a reality. Join the Crystal Reports Swap Meet, where the experts gather to show off their best reports and pick up new ideas and pointers from friends. (Be sure to bring examples of the reports you've created, and be prepared to share.)

*Personas:* [Call Center Manager](#), [Call Center Representative Certification Manager](#), [Exhibition Manager](#), [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#), [Subscriptions Manager](#), [Transcript Manager](#)

*Versions:* TIMSS 6, Personify

### **Meeting Training: Beyond the Basics**

 Not all meetings are created equal. TMA Resources staff will lead this training session on the advantages of setting up different meetings different ways. Sharpen your understanding of using TIMSS to manage your meetings.


*Personas:* [Meetings Manager](#)

*Versions:* TIMSS 6

**Tuesday, April 24**

**11:00am - 12:30pm**


### **Working with TMA Resources**

 Another winner repeated from TAUG 2006! This time there will be more TMA Resources participants, more customer examples offered, and even more specific take-aways and tips about how to maximize your organization's relationship with your technology partner – and obtain the results you desire.

*Personas:* [Senior Executive](#), [System Administrator](#)

*Versions:* All


### **Topics in Accounting 2 Roundtable**

 Bring your ideas and experiences to the second of two sessions targeted toward accounting experts. Topics that will be discussed include secrets of month end closing, financial reporting and preparing for your audit.

*Personas:* [Accounting Manager](#)

*Versions:* All

### **Managing Meetings and Expositions Online Roundtable**

 Exposition managers of both large and small meetings will gain valuable advice in this informal discussion about how other customers are using TIMSS to manage online meetings. Topics such as registration processes and the customized meeting applications will be discussed. Come with questions for other meeting planners and be ready to share your experiences.

*Personas:* [Meetings Manager](#), [Systems Administrator](#), [Certification Registrar](#)

*Versions:* All



## DBA Best Practices



Learn from the brightest in the business how best to tune your TIMSS or Personify application, and their underlying databases, to operate effectively and efficiently. It's all about performance, and our DBA experts will show you how to get the very most from your technology investment.

*Personas:* [System Administrator](#)

*Versions:* All

## Marketing Challenges with Changing Demographics



As associations grow and develop new products and benefits, they must be able to do business with more diverse audiences, who often do not fit the profile of the average member. As your target audiences change, your marketing messages must also change. In this session, TIMSS customers will share their dilemmas and solutions for over-coming the challenges of marketing to people who are different ages, live in different regions, and have different needs and wants.

*Personas:* [Exhibition Manager](#), [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#), [Subscriptions Manager](#), [Advertising Manager](#), *Everybody*

*Versions:* All

## Professional Development Roundtable



This informal discussion gives those in professional development an opportunity to see how other TMA Resources customers are handling certification and accreditation and the chance to discuss what's hot in educational programming.

*Personas:* [Certification Manager](#), [Certification Registrar](#), [Transcript Manager](#)

*Versions:* All

**Wednesday, April 25**

**1:30pm - 5:30pm**

## Membership Business Intelligence Training



TMA Resources staff will lead this training session for Membership Advantage, TMA Resources membership BI solution. Non-technical users learn how to answer your most pressing membership questions through the practical application of Membership Advantage and its supporting tools. You will also have the opportunity to preview Meeting Advantage.

*Personas:* [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#)

*Versions:* TIMSS 6, Personify

## Personify Studio Training



Personify Studio is the tool that allows you to complete the modification or creation of personas through the creation and modification of persona screens, fields, workflows and more. In this four-hour training session, you'll learn how to create, modify and deploy persona screens, add and remove fields, and modify workflows to create the most productive and efficient user experience possible. Become an architect of user efficiency, with Personify Studio.

*Personas:* [System Administrator](#)

*Versions:* Personify, and anyone considering upgrading to Personify.

## Marketing Module Training



Receive detailed training from a TMA Resources staff member on the TIMSS Marketing and List Management Module. Learn how to create, store, and manage your lists of members, prospects, and customers.

*Personas:* [Call Center Manager](#), [Call Center Representative](#), [Certification Manager](#), [Exhibition Manager](#), [Marketing Manager](#), [Meetings Manager](#), [Membership Manager](#), [Subscriptions Manager](#), [Advertising Manager](#)

*Versions:* TIMSS 6

## Subscriptions, BPA, and Advertising Module Training



No two TIMSS modules are more connected to each other than the Subscription and Advertising modules. Come learn how they can both be used to their fullest, including new Advertising enhancements being released in the second quarter of 2007. These days, the Subscription module means more than just printed journals, and the Advertising module means more than print insertions. Learn all the ways that these two modules can be used to setup new types of revenue streams for your organization. Also, learn how TIMSS supports Publication Audit, including both ABC and BPA reporting, which can have a huge impact on your Advertising revenue.

*Personas:* [Subscription Manager](#), [Advertising Manager](#)

*Versions:* TIMSS 6

## Open Training on TIMSS 5 and TIMSS 6



Don't miss your chance to stump our training staff with questions regarding just about anything having to do with TIMSS 5 or 6. Back for a command performance, our trainers will show you how to do just about anything that TIMSS 5 or 6 can do for you. Specific or general questions are welcome. If you can do it in TIMSS 5 or 6, our trainers will show you how.

*Personas:* All

*Versions:* TIMSS 5 & 6