MemberJunction

CASE®

Breaking Free from Vendor Lock-in

How CASE Revolutionized Member Insights with MemberJunction and Skip

Council for Advancement and Support of Education (CASE) Case Study

OVERVIEW

The Council for Advancement and Support of Education (CASE), a leading global association serving educational advancement professionals across more than 80 countries, faced a common but critical challenge: data was trapped in siloed systems, making comprehensive member insights difficult to access. CASE needed a unified view of membership trends, event performance, and financial data without being constrained by vendor limitations. MemberJunction created an AI-powered solution that transformed CASE's data management and analytics capabilities.

THE CHALLENGE

CASE struggled with fragmented data across multiple platforms:

- **Siloed Information:** Critical data was separated across their Association Management System, Abstracts and Speaker Management System, and email marketing platforms, among others
- **Manual Reporting:** Staff spent hours manually compiling reports from different systems
- **Limited Analytics:** Standard analytics tools couldn't answer dynamic questions about member behavior and trends
- **Resource Drain:** Technical teams were constantly diverted to address basic data inquiries
- **Vendor Constraints:** Traditional systems limited CASE's ability to innovate and adapt

> Our staff was **spending hours manually compiling reports from different systems**, and even then, **we couldn't answer basic questions about our members** without significant effort.

Catherine Zaic, Senior Director, Information Technology

THE SOLUTION

CASE implemented MemberJunction to break free from vendor lock-in and transform their data management capabilities. MemberJunction established secure connections to all CASE's key systems, including:

- **Personify** (Association Management System) for member data and transactions
- **Hubspot** and other marketing platforms for communication and engagement metrics
- **Cadmium** for speaker and abstract management

SKIP IMPLEMENTION

Skip, an AI-powered data analyst, is being deployed with a sophisticated training process:

Data Collection & Connection	Domain Knowledge Acquisition	Pattern Recognition Training	Iterative Testing & Refinement
Establishing secure connections to all CASE's organizational data sources	Learning CASE-specific terminology, organizational structure, and membership models	Identifying relationships between data points across previously disconnected systems	Continuous improvement through structured testing scenarios and detailed feedback

Intelligent Record Matching

MemberJunction's advanced duplicate detection system ensures data integrity by:

- Using AI-driven vectorization to identify and manage duplicate records
- Employing both exact and similarity-based matching for accurate member data
- Flagging potential duplicates for review or automated merging

KEY FEATURES

CASE will benefit from Skip's ability to provide instant insights through natural language queries across previously disconnected systems:

Conversational Data Analysis

Unlike traditional BI tools that require technical expertise to build and modify dashboards, Skip functions like having a data analyst available 24/7 who already understands CASE's business context. Users simply ask questions in natural language and receive immediate insights.

Cross-System Intelligence

Skip provides comprehensive insights across key operational areas:

- **Event & Program Intelligence:** "How many people are registered for our upcoming summit?" "How many unique institutions are represented among registrants?"
- **Membership Analysis:** "What was our retention rate for schools in this region last year?" "Which members have joined in the current fiscal year?"
- **Volunteer Engagement:** "Who are the members of our Standards Committee?" "Generate a report of Chief Advancement Officers within 150 miles of this location."
- **Sponsorship & Revenue:** "Which educational partners have renewal dates in the next 30 days?" "Which partner has spent the most with us in the last decade?"

Automated Data Pipelines

MemberJunction implemented secure data ingestion flows for key systems:

- **Personify Data Ingestion Flow:** A structured process to extract membership data including incremental backups
- **Hubspot Flow:** Secure authentication and token management for marketing data extraction
- **Cadmium Flow:** API-based data extraction for event and presentation management

RESULTS

The implementation of MemberJunction and Skip will deliver transformative outcomes for CASE:

Enhanced Data Accessibility

Staff can now instantly access critical information without IT support, answering complex questions in seconds instead of days.

Improved Decision-Making

Leadership gained visibility into membership trends, enabling proactive retention strategies and data-driven marketing and event planning.

Resource Optimization

CASE redirected 15+ hours weekly from report creation to strategic initiatives, with marketing alone saving 5+ hours on outreach lists.
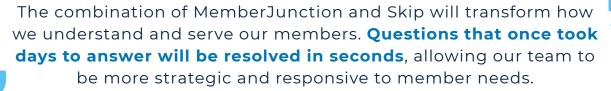
Data Integration and Integrity

MemberJunction's intelligent record matching processed 44,000+ records, eliminating duplicates and ensuring consistency across all systems.

FUTURE ROADMAP

With the initial database implementation complete and Skip's training well underway, CASE is now exploring predictive analytics for membership retention and event attendance forecasting in addition to adding more data sources. The flexibility of MemberJunction allows for continuous innovation without the constraints of vendor-specific limitations.

> The combination of MemberJunction and Skip will transform how we understand and serve our members. **Questions that once took days to answer will be resolved in seconds**, allowing our team to be more strategic and responsive to member needs.

Catherine Zaic, Senior Director, Information Technology