



CASE STUDY

A Modern Member Management System for the National Association of REALTORS®



Just the Headlines

Short on time? Here are the key facts.

- NAR wanted to modernize their member management system to be more user-friendly, valuable for users, and scalable as they continue to grow.
- 2nd Watch worked closely with their team to understand issues with the current system, current needs, and future goals.
- We designed and implemented a new custom modern member membership system with a user-friendly design and functionality that provided users quick and convenient access to the data they needed when they needed it.



Overview

As part of an ongoing commitment to provide easily accessible resources, education, and insights to their membership base, NAR partnered with 2nd Watch to replace their more than 20-year-old member engagement system. This new modern member engagement platform is one of many initiatives NAR has undertaken to modernize systems, provide their members with better access to information, and help members to be more successful.

NAR's goal was to have an updated system with a modern and intuitive design that provided:

- A modern membership ecosystem for NAR and for NAR associations, affiliates, and partners that resolved challenges identified in the previous system
- A modern, intuitive, and responsive design users can access from a mobile device, tablet, or desktop browser
- A scalable enterprise architecture solution to enable flexibility and extensibility into the future, allowing NAR to respond to quickly changing business needs

- One single source of truth across NAR's associations that includes clean and accurate data with consistent formats and definitions
- Customized access levels and permissions so administrators can provide users access to all the relevant data they need while keeping secure or confidential data limited to select users
- Easy-to-use reporting features that allow the ability to analyze and uncover insights from NAR national data as well as data from local NAR associations, affiliates, partners, and third-party data sources

To ensure this new member management system provided the access, quality, and speed their users required, NAR chose their long-time application solution partner, 2nd Watch, to design and develop a modern solution. In this case study, we'll explore the approach 2nd Watch took to confirm this tool would meet NAR's goals and the needs of their members while being technically sound and scalable.

The Challenge

Despite a strong belief in the power of data, the client was struggling to maximize the value of its data assets. Systems and information were poorly integrated, leading to blind spots in the evaluation of customer, carrier, and representative performance.

After a thorough audit of the company's technology, the 2nd Watch team identified critical data in five systems. The silos created by the disparate source systems were slowing effective data analysis, contributing to several chronic problems at the firm, including poor decision-making capabilities and a lack of clear strategic focus.

Select Challenges of the Previous System

- Outdated and hard-to-navigate user interface
- Limited ability to be agile and respond quickly to changing business needs
- Data inconsistencies

The Solution

Part 1: Strategy, Goals, and User Needs

2nd Watch's strategy-first approach meant that development did not begin until we had a detailed understanding of:

- Who would use the system and how it would be used
- The current state, including current challenges
- Goals for the future state
- Constraints and limitations for the future state

Armed with this information, 2nd Watch and NAR built out a multi-phased strategy that included a detailed future state vision, project goals, and a roadmap for the future state implementation. This approach ensures the final product is built with the users and project goals in mind. It also uncovers potential issues or roadblocks that could slow down or even stop the implementation.

During the current state analysis, the 2nd Watch and NAR team uncovered the following issues that would need to be addressed to make this project successful:

- An outdated design and hard-to-use application made the system unfriendly to users and prevented usage.
- Data organization did not meet current business needs.
- Data inconsistencies meant that available data was unreliable.

Part 2: Building the New Member Management System

The 2nd Watch/NAR team took a stepwise approach to the solution to ensure all issues with the previous member management system were addressed and that the new system would be stable and scalable.

The first step was to address the most critical application; this included a full replacement of the previous online member management system. 2nd Watch's solution was to migrate the core online member management system from legacy, on-site systems into Azure's Platform as a Service. We also improved the data synchronization process and architecture to support backwards compatibility and provide a more accurate and uniform representation of NAR's members.

Additionally, 2nd Watch and NAR jointly built a new modern user interface using Vue.js, .Net Core, and Bootstrap. This addressed NAR's legacy system pain points to provide associations with a better design and more intuitive user experience. The application also allowed NAR to have real-time analytics via Power BI Embedded, a knowledge center with SharePoint content control that included PDFs, newsletters, and podcasts all together in one custom solution. In addition, 2nd Watch enabled NAR to improve their incoming data quality via M1 by integrating real-time USPS address and real estate license validations during form entry with existing business rules.

The Outcome

2nd Watch helped NAR accomplish their objective of rolling out a completely new member management system along with a flexible enterprise architecture that will allow NAR to adapt and scale seamlessly into the future.

The member management system was an instant hit for NAR's association affiliates. The new design and functionality greatly improved the user experience by enabling the associations to find and manage information more easily and quickly than ever before.

Along with a modern and intuitive design, users were immediately able to:

- Easily create new members or offices
- Search for members or offices by criteria such as location, status, type, and more
- Gain quick access to training materials
- Retrieve accurate and detailed member information, including demographics, interests, statuses, and activities
- Run reports and view analytics to find insights on members, industry trends, location data, and more

What's Next

As next steps, 2nd Watch will continue to add new data sources to the solution while helping the company's leadership identify possible ways to expand the system. 2nd Watch also plans to develop a customer portal, which will be central to their new managed services branch. This portal will provide reliable, data-driven business reports based on our client's services.