AAR Business Services & Technology
2017 Business Plan

From: **Business Services and Technology**
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REALTOR® - The best prepared real estate professional with the highest standards.

The following are programs, products, services and activities (PPSA's) with Business Services and Technology oversight.

BUSINESS SERVICES

AAR provides technology tools other than forms delivery as a member benefit only if AAR is in a unique position to provide the tool, or the tool create value statewide, or if the tool advances the real estate industry and the AAR vision.

Brief description of how the PPSA contributes to achieving AAR's vision: AAR's Business Services provide tangible products members use every day in increasing their professionalism and providing a higher quality of service to consumers.

Importance of PPSA to the critical-to-serve customer: Business Services enhances member's professionalism and prepares them to better serve tomorrow's consumers.

Strategic Focus Points:

	1. AAR is a professional REALTOR® association that functions within a fluid operational structure and responsive governance model to accomplish its purpose and vision
	2. AAR communicates the right message to the right people at the right time in methods that listen, reach out, inform, connect, and engage the membership and local associations.
	3. AAR is the most powerful and influential political force in Arizona.
	4. AAR provides members with unsurpassed risk management tools.
	5. To be the most trusted source and delivery partner of education and information resources for REALTOR® members and local REALTOR® associations.
X	6. AAR supports the success of REALTOR® members with business services.

Measurable Objectives	Status
Ensures that training materials for eSign and zipForm Plus are always accurate and current.	All materials are current and available.
Conduct a user survey of AAR members on their use of Business Services applications by November 30, 2017.	Pending
Investigate and provide information on products and services that increase efficiency and profitability of member business operations.	Working with zipForm® and GoPaperless on enhancements to benefit member usage. zipForm® has implemented a method we believe will greatly reduce the number of out-of-date forms that get used.
Negotiate discounts for products and services that benefit members.	AAR eSign contract has been implemented as of May 1st.
Maintain form security with forms licensees.	Ongoing

Recommendation: Continue basically as-is

Tech Helpline®

AAR negotiates discounts for products and services that benefit members.

Brief description of how the PPSA contributes to achieving AAR's vision: Provides members with a source to minimize computer and device issues with a trusted REALTOR® friendly resource.
Importance of PPSA to the critical-to-serve customer: Provides members with an inexpensive resource for computer and device technical assistance as a benefit.

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Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	Ongoing - statistics are compiled and shared monthly with the BS&T committee
Market for member awareness and increased use	Continued marketing through the website and The Voice weekly email
Maintain positive member responses	Ongoing - all feedback from members has been positive

Recommendation: Continue basically as-is

zipForm®

AAR negotiates discounts for products and services that benefit members.

Brief description of how the PPSA contributes to achieving AAR's vision: zipForm® controls the delivery of AAR's forms and provides the delivery of AAR's forms to the members as a member benefit. zipForm® Plus is provided to members as a benefit from NAR while zipForm® Standard and Mobile are provided as benefits from AAR.
Importance of PPSA to the critical-to-serve customer: zipForm® controls risk and enhances member's professionalism, preparing them to better serve tomorrow's consumers.

Strategic Focus Points:

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Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	Ongoing
Conduct trainings on a monthly/bi-weekly basis	Ongoing
Maintain positive member responses	Ongoing - member responses on zipForm® is generally positive

Recommendation: Continue basically as-is

AAR eSign

AAR negotiates discounts for products and services that benefit members.

Brief description of how the PPSA contributes to achieving AAR's vision: AAR eSign provides members with a technology tool through AAR's unique position to provide the tool. AAR eSign creates value statewide and advances the real estate industry.
Importance of PPSA to the critical-to-serve customer: zipForm® controls risk and enhances member's professionalism, preparing them to better serve tomorrow's consumers.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.

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Measurable Objectives	Status
Usage statistics are compiled and shared monthly.	Ongoing - usage statistics are compiled and shared with BS&T committee monthly.
Conduct trainings on a monthly/bi-weekly basis	Ongoing
Maintain positive member responses	Member responses on zipForm® is generally positive

Recommendation: Continue basically as-is

SOFTWARE DEVELOPMENT

AAR will develop and monitor software that will help members' access to AAR's forms as a member benefit (SP: 5.A) and maintain data to better understand member needs, communicate more effectively with members and maximize adoption of AAR programs and services.

Brief description of how the PPSA contributes to achieving AAR's vision: AAR's Business Services provide tangible products members use every day in increasing their professionalism and providing a higher quality of service to consumers.
Importance of PPSA to the critical-to-serve customer: Applications provided by AAR allow members to work effectively and efficiently.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.

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Measurable Objectives	Status
Develop Forms Server for licensee and member use by March 2017	Project has been cancelled.

Recommendation: Continue with modifications detailed below.

Enhanced Member Profile

AAR develops and maintains data, beginning with an enhanced member profile, to better understand member needs, communicate more effectively with members and maximize adoption of AAR programs and services (SP: 5.E).

Brief description of how the PPSA contributes to achieving AAR's vision: The Enhanced Member Profile provides the tools to communicate the right message to the right people in methods that reach out, inform and engage the membership.
Importance of PPSA to the critical-to-serve customer: The Enhanced Member Profile is a necessary tool to provide information on members to effectively communicate and coordinate information.

Measurable Objectives	Status
Provide data analytics of AAROnline.com members logged-in.	REALTOR® Party Plus data is being added to RAMCO which has been used to allow profile modeling.
Develop "Enhanced Member Profile" through RAMCO conversion	RAMCO will be the primary bulk email service with data on open rate and click through being collected at the user level. Additional levels of data on members is being pursued through REALTOR® Party Plus (RPR).

Build the system that will make RAMCO the data warehouse for the Enhanced Member Profile	RAMCO is now effectively the data repository for the Enhanced Member Profile system.

Recommendation: Continue with proposed initiative

IT RESOURCES AND SECURITY MANAGEMENT

AAR will develop and monitor software that will help members' access to AAR's forms as a member benefit (SP: 5.A) and maintain data to better understand member needs, communicate more effectively with members and maximize adoption of AAR programs and services (SP: 5.E).

Brief description of how the PPSA contributes to achieving AAR's vision: This program contains basic support items for the network and communications infrastructure of the association.
Importance of PPSA to the critical-to-serve customer: This is an "enabling" program that provides for development and delivery of essential customer benefits.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.

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Measurable Objectives	Status
Data and voice systems uptime is better than 99%, excluding planned maintenance periods	Ongoing
Security exploits conducted against AAR receive urgent attention and appropriate measure taken to prevent reoccurrence	Ongoing – new firewall equipment and software installation in Dec of 2016
Build an effective disaster recovery infrastructure to allow immediate phone and email recovery	Email is in transition, moving from physical servers located at AAR to Office 365 to permit email access under any disaster scenario. Abacus will move to a similar cloud environment in December.

Recommendation: Continue with modifications detailed below.

Phone

AAR's Information Technology resources will ensure that phone communications are secure and reliable, allowing AAR to communicate more effectively with members (SP: 5.E).

Brief description of how the PPSA contributes to achieving AAR's vision: The phone system is an integral part necessary to communicate with members. The system is essential to each area of AAR, providing a direct link to/from members, ensuring AAR's ability to fulfilling its vision.
Importance of PPSA to the critical-to-serve customer: The phone system is a necessary tool to provide members with a channel to effectively communicate and coordinate information.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.

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Measurable Objectives	Status
Enhance disaster recovery infrastructure to maintain phone system in event of local physical failure	Phone system resides offsite and can be rerouted to any necessary locations in the event of local physical failure
Maintain a secure and reliable phone system	Ongoing
Troubleshoot problems in a quick and efficient manner.	Ongoing

Recommendation: Continue basically as-is

Network

AAR's Information Technology resources will ensure that the network infrastructure is secure and reliable, allowing AAR to communicate more effectively with members and each other (SP: 5.E).

Brief description of how the PPSA contributes to achieving AAR's vision: Provide resources which support the entire network and infrastructure of the association. A major part of this is securing AAR's networks against unauthorized access, physical damage/failure and providing for restoring the infrastructure in the event of a major disaster. Components of this program include AAR's Internet connections, data backup and restoration, maintenance of Internet firewalls and switches, support for our membership system, and consulting fees for technology and security issues.
Importance of PPSA to the critical-to-serve customer: This program provides resources that enable nearly all programs within AAR.

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Measurable Objectives	Status
Establish disaster recovery infrastructure to maintain phone system in event of local physical failure	Established relationship with Network Admin provider to ensure business continuity and unbiased needs assessment. Initial cloud transitions for Office 365 and Abacus are planned or in progress.

Maintain the network to ensure it remains secure and reliable	Ongoing
Conduct vulnerability study and remediation by June 2017	Completed by network administration provider.

Recommendation: Continue basically as-is

BUSINESS SERVICES AND TECHNOLOGY SUPPORT

AAR's Business Services and Technology area will provide top notch technical and customer support to its members.

Brief description of how the PPSA contributes to achieving AAR's vision: This program contains basic support items for other programs within this committee, as well as programs in other areas. Included are things such as copying, postage, subscriptions and supplies. It supports the vision indirectly by providing resources critical to accomplishing the goals of other programs, products, services, and activities. Specialized training/continuing education of staff and travel of staff to meetings and conferences are included in this budget.
Importance of PPSA to the critical-to-serve customer: This is an "enabling" program that provides for development and delivery of essential customer benefits.

Strategic Focus Points: Indicate which focus point is addressed by the PPSA.

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Measurable Objectives	Status
Staff and committee leadership review use of resources via monthly financials	Ongoing
At year-end, income and expense for this committee's overall budget are within 10%	Ongoing

Recommendation: Continue basically as-is.

MEMBER COMMUNICATIONS

AAR creates and maintains a consistent, coordinated system of communication management for all areas of the association. Efforts in this area include investigating and implementing communication methods to increase the effectiveness of AAR's efforts to inform, engage and reach out to the membership.

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Measurable Objectives	Status
Disseminate pertinent, relevant and timely industry and association information, (i.e.; social networks, website, video, newsletters, etc.).	Ongoing through various channels; email (The Voice), YouTube, Facebook, Twitter, LinkedIn
Create and update Communications and Public Relations plans for the organization based on members' interests and the coordinated efforts with area managers, local associations, and the Executive Committee by January 2017.	A public relations plan using social media has been established with Big Yam which included routine monitoring and posting to Facebook, LinkedIn and Twitter.
Customize website content for individual users based on user-selected topics and actual use of the site.	Subscription choices at the member profile allows members to receive emails based on content.
Print and digital collateral adheres to the AAR brand and is member centric and speaks to AAR's value proposition.	Ongoing
Communication statistics are compiled and shared monthly.	Bulk email from all departments now originates from RAMCO's ClickDimensions. This allows the collection of open/click data down to the member level. Data on emails can now be reported on each email and reports generated on a variety of levels.
Organize information on the website for easy search and access by members.	Content search and Find-a-REALTOR® have been enhanced
Implement a system to determine the preferred communications methods of our members and communicate with our members via segmented content by May 2017.	Completed – developed Subscription List to allow members to customize content delivery. List is found in the member profile.
Provide a consistent voice at AAR which will speak to advocacy efforts with a focus on consumer outreach and education to the public and members by making at least two posts to HomeOwnershipMatters.com/Arizona in 2017.	Pending – the first post is scheduled by the end of 1Q17
Solicit community outreach efforts conducted by REALTOR® members and recognize them through an annual award.	Ongoing
Promote the value and the "why" of the REALTOR® brand to our members by conducting a statewide consumer-directed event in 2017.	Ongoing – a tentative date has not yet been determined
Social media channels are managed and monitored to ensure a steady rise in engagement and alternate sources for members to receive information.	Social media channels are managed internally and externally (Big Yam) on a daily basis.

Develop a system to foster discussions with member association for the purpose of delivering timely and relevant content by April 2017.	Coordination with AEs through AAR liaison to maintain timely and relevant discussion
Engage in regular outreach to members to elicit discussions by posing monthly questions on social media.	Per contract with Big Yam, weekly engagement with members.
Meet or exceed real estate industry email open and click-through rates with The Voice.	Click through rates for The Voice (20%) have exceeded real estate industry standards (17%). Approximately ½ of all members see one Voice edition each month.
Conduct member and consumer research as needed to provide information to decision makers by fielding at least two email surveys in 2017.	Partial – A survey was released in April asking opinions on what the members like and what isn't liked.
Communicate the value and success of REALTOR® associations throughout the state by placing at least ten mentions in print or broadcast media in 2017.	Ongoing through Big Yam.

Recommendation: Continue basically as-is.