



## CUSTOMER CASE STUDY > URBAN LAND INSTITUTE

### Summary

The Urban Land Institute (ULI) made the strategic decision in 2016 to funnel all customer interactions, including event registrations, through their customer system of record in order to compile a 360 view of their individual customers. With 75 regional offices hosting hundreds of events a year, the existing manual process of onsite paper registrations that were collected and entered by staff after the event was a cumbersome lift for staff. After exploring multiple options, ULI enlisted fusionSPAN to create an elegant onsite payment solution that is intuitive, supported by existing hardware, and mobilized ULI to move away from the paper registration forms and into the digital age.

### About ULI

The Urban Land Institute was originally incorporated on December 14, 1936, as an independent, nonprofit, research and education organization under the name of the National Real Estate Foundation for Practical Research and Education. Currently, ULI is the oldest and largest network of cross-disciplinary real estate and land use experts in the world. ULI's mission is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide, and is led by both a professional staff and committed member volunteers.

### Challenges ULI Faced

ULI's existing registration process was fully manual, involving a distributed paper form for members to write in the required information. The staff collected the form for manual entry in their data system at a later date, causing delays in data entry and payment processing. Furthermore, the ULI organization did not have the ability to process international and multi-currency payments. Overall, this process inhibited the professional appeal ULI wanted to portray to its attendees.

### How fusionSPAN Helped

It was important to ULI that the new automated process was integrated with their existing systems, customer facing in terms of styling, and created new efficiencies for their staff and event attendees. In order to accomplish these requirements, fusionSPAN recommended an onsite registration process that was designed and built on top of ULI's existing AMS (NetForum).

The goal was to improve customer engagement, data entry and process payment within a timeframe of three months. From the project start, key players included fusionSPAN Staff, ULI's IT staff, the Customer Success team at ULI, and multiple district councils.

Tasks critical to this project's success included:

- **Business Objectives and IT Requirements were documented and measured**
- **A phased implementation to ensure user satisfaction and equipment durability**
- **Addressed "the person problem" - making sure registrants and staff were able to follow the process with ease and gather the required information**
- **fusionSPAN created documentation and SOPs for staff**

fusionSPAN and ULI opted for a phased implementation approach in order to iterate based on user feedback. The new onsite registration process would be rolled out to a small group of users, and then feedback would be collected and implemented as necessary.

### Results

The onsite registration was rolled out successfully and met with approval from both ULI staff and event attendees. ULI stated that the new process has made the registration process more efficient, easier for customers, and given the staff time back with the removal of a manual data entry process.

The registration process is now solely done on computers with a clean, easy to understand interface without a delay in the processing of credit card payments. Additionally, ULI has the new capability to process international and multi-currency payments. Despite the push to postpone or move events to a virtual interface due to COVID-19, ULI has seen hundreds of users access this interface throughout the year with great success.

#### Client Testimonial

*"fusionSPAN has been an invaluable partner to ULI. They brought the technical expertise to address our NetForum Enterprise development and integration needs, while their business knowledge of associations has ensured we are taking a strategic approach to technology. fusionSPAN seamlessly integrated with our team and ultimately enabled us to meet our aggressive timelines. We would highly recommend fusionSPAN and we look forward to continuing partnership with their organization."*

**- Adam Smolyar**

Chief Marketing & Membership Officer  
of ULI on fusionSPAN