



PLUS Transforms Their Website Using ClearVantage Connect

“We worked closely with the Euclid team to examine our business processes and ultimately implemented solutions that are truly incredible. Our members now have a web experience that speaks to their interests, and we are better equipped to tailor our offerings to our diverse membership.”

- Scott Billey
Director of Operations, PLUS

CV Connect Delivers Personalized Content to PLUS Members

The Professional Liability Underwriting Society (PLUS) is dedicated to the development and advancement of individuals in the field of professional liability. With members in various roles and disciplines across the liability underwriting industry, PLUS wanted to ensure that each of its 7,000 members had a personalized experience when they visited the PLUS website.

“We’re always trying to add value to our member interactions, and we thought the best way to do that was to provide an experience that was entirely their own,” explains Scott Billey, Director of Operations at PLUS. “ClearVantage was the perfect tool to make that vision a reality.”

Customized Home Screens Enhance Member Experience

A Euclid Technology client since 2004, PLUS selected CV Connect, Euclid’s Content Management System (CMS), to provide its members a unique online experience. CV Connect allows PLUS to create dynamic content areas that display personalized information for each of their members.

How was this done? The PLUS homepage was given two states of display: the non-logged in state, and the logged in state. The non-logged in state displays a newsfeed, promotional slider, events, journal articles, and educational resources that are standard content for all visitors. However, once a member logs into the site, all five of those sections display unique content based on the member’s selected preferences, previous purchase history, and event registrations. Logged in member’s also have access to a dashboard with links to their account and chapter information.

PLUS was able to implement these dynamic content areas without any significant changes to the look and feel of their website. “We were excited to provide our members with a personalized web interface, but we didn’t want to overhaul the entire design of our website,” explains Scott Billey. “Website redesigns are costly and generally lead to member confusion. The fact that CV Connect was able to deliver us custom content without redesigning our site was as impressive as the functionality itself.”

CV Connect and ClearVantage... More Powerful Together

Two key capabilities allowed Euclid Technology to develop this powerful website. The first, was CV Connect’s close integration with the ClearVantage AMS solution already in place at PLUS. The result of that integration was that information could be seamlessly passed back and forth between the AMS and CMS in real time. This allows association staff members to update numerous aspects of the website (events, products, articles, customer profiles, etc.) from within the ClearVantage database. In this case, it also allows the staff at PLUS to associate “taxonomy terms” with each of their members and all of their website content.

Customer Profile:



The Professional Liability Underwriting Society was founded in 1986 by industry professionals who recognized a need for a forum open to individuals involved in the field of professional liability. Today, PLUS has roughly 7,000 individual members from over 1,000 different companies as well as 180 corporate members. The society’s mission is to be the global community for the professional liability insurance industry by providing essential knowledge, thought leadership and career development opportunities.

Challenge:

Provide PLUS members with a personalized view of their website

Solution:

Euclid used CV Connect and Taxonomy to show content on PLUS’s website that was relevant to the specific member

Results:

Increased member engagement and satisfaction as resources on the website became more useful

ClearVantage Taxonomy Enables Dynamic Content

Taxonomy is the second key capability that enabled the dynamic content areas on PLUS's website. At its core, this functionality is quite simple. It allows members to be associated with a wide variety of "taxonomy terms" based on their profession, chapter affiliation, interests, purchase history, and other demographic information. Content on the PLUS website such as products, events, educational resources, and articles can then be associated with those same taxonomy terms.

To illustrate how taxonomy works, imagine PLUS posted an article entitled "Growing Global Threat of Economic Crime" on their website. The staff member who wrote the article would associate it with all relevant taxonomy terms in the ClearVantage AMS before posting it online. These would likely include terms such as "economic crime", "international liability", etc. Once the article has been associated with those terms, it would be shown on the homepage of members who have selected those terms as personal interests, attended an event tagged with those terms, purchased a product associated with those terms, etc.

"It's critically important that we serve the individual needs of our members," continues Billy. "The needs of a CEO of an insurance corporation are vastly different than those of a college student interested in a career in liability underwriting. Our members are thrilled that they now see resources that are tailored to their interests, and we're thrilled that Euclid and its suite of tools were able to make that possible."

Personalized PLUS Home Screen

The image shows a screenshot of the PLUS website home screen. At the top, there is a navigation bar with links for About, Member, Journal, Education, Events, Career HQ, Community, and a shopping cart icon. Below the navigation bar, the main content area is divided into several sections. On the left, there are "Cyber Updates" and "D&O Updates". In the center, there is a large announcement for the "Medical PL Symposium" taking place on April 23 & 24, 2014 at the Marriott Marquis in Atlanta, GA. Below this, there are four columns of content: "UPCOMING EVENTS", "EDUCATION", "PLUS JOURNAL", and "CHAPTERS".

A callout box on the right side of the image shows a user profile for "Daniel", Director of Sales. The profile includes a profile picture, a bio, and a "LOGOUT" button. The bio reads: "About: Leader of a highly successful sales team that manages both inside and outside sales for liability managers." The callout box also shows navigation options for "Community" (Profile, Directory) and "Dashboard".

Below the main content area, there are four columns of personalized content, each with a corresponding label below it:

- UPCOMING EVENTS**: 2014 PLUS Cyber Symposium (April 23, 2014, Atlanta, GA), 2014 Professional Risk Symposium (April 23, 2014, Atlanta, GA), PLUS Southern California Chapter Seminar (March 13, 2014, Los Angeles, CA).
- EDUCATION**: PLUS Curriculum (A new, comprehensive curriculum for the professional liability industry), RPLU (The RPLU Program is recommended for all professionals active in the field of professional liability), PLUS University (A new educational opportunity for underwriters and brokers with minimal experience in the professional liability industry).
- PLUS JOURNAL**: Top Ten D&O Stories of 2013, Thank You 2014 D&O Symposium Sponsors!, PLUS April Symposia, 2014 Gilmartin Scholarships.
- CHAPTERS**: PLUS Chapters (PLUS Chapters provide regional events throughout North America and Europe. Chapters offer local educational and networking opportunities, providing a great vehicle to participate in local activities, impact regional professional liability issues and network with other industry professionals in your area), Find a Chapter Near You, Chapter Photos.

Arrows point from the callout box to the profile picture and bio in the main content area. Arrows also point from the four columns of content to their respective labels below them.

Redesigning the Membership Experience at PLUS

As part of the CV Connect integration, PLUS also improved the way its entire membership process is managed. It's a complex membership structure which included multiple membership categories, with members routinely moving from one category to another – all of which created a convoluted process that was difficult to manage. By designing an online membership application that used data fields directly from ClearVantage, PLUS was able to automate the entire application process, saving a considerable amount of work that had been handled manually in the past.

A good example of a process change is the **Future PLUS** membership which is available to members up through the age of 35. In the past, PLUS staff would monitor members ages and transfer members to a full membership once they turned 36 years old, a process that was time consuming and inefficient. The new online membership application allows PLUS to capture birthdates of all applicants in ClearVantage. By capturing the member's birthdates, ClearVantage was able to be configured so that Membership categories were automatically updated (from **Future PLUS** to **Full Member**) once the member turns 36.

"Automating our membership processes with ClearVantage has made a major impact on our organizational efficiency," Scott Billey concludes. "We worked closely with the Euclid team to examine our business processes and ultimately implemented solutions that are truly incredible."

Automated Certification and Continuing Education

PLUS's certifications are broadly recognized as the gold standard within the liability underwriting industry. PLUS also offers Continuing Education Units (CEU's) which are accepted in all 50 states. Members purchase educational "modules" and corresponding electronic exams from the PLUS website. In the past, PLUS would update all test grades and certification statuses manually in ClearVantage. This process could be slow and time consuming.

By further integrating with ClearVantage, PLUS was able to have all test scores and certifications update automatically in the ClearVantage AMS. Additionally, members could track their own test scores and certifications from the PLUS website. "Certifications and education are a key part of our organization," says Scott Billey. "ClearVantage made it easy to automate a previously time consuming task and freed up our staff to focus on more important activities."

Moving Forward with PLUS

"I'm so impressed by what PLUS and Euclid were able to achieve together. PLUS offered an exciting challenge, and we were able to deliver for them using ClearVantage and CV Connect in an innovative way," says Charlie Vinal, President and CEO of Euclid Technology. "The best ideas always start with our clients. We listen to their needs and desired outcomes and then deliver the best products on the market. It is especially gratifying to work with a longtime client like PLUS who has been with us for over ten years now. It speaks to the longstanding partnerships that we have with all of our clients. We recognize that our clients' objectives change over time, and we are not only ready but eager to rise to any challenge to ensure that our software can help them get to that next level, whatever it may be."

About Euclid Technology:

Located in Bethesda, Maryland, Euclid provides premier enterprise software solutions, content management systems, and mobile web solutions to associations and other member-based organizations. Established in 1997, Euclid delivers superior products and services to such clients as: the American Forest Foundation, the South Carolina Bar Association, the National Association of College and University Attorneys, the California Medical Association, the Educational Theatre Association and more.

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