How Association Services Partners with Vantaca to Build Great Communities

Early in her career, Evelyn Dufford (CPA, CMCA, PCAM) was a bookkeeper for a real estate developer in the Tacoma area of Washington state. That developer became her first client after she earned her CPA and founded Association Services in 2000. Fittingly, Association Services' early work was with developers of homeowner associations around the east Pierce County region. "As east Pierce County grew, so did we," Evelyn said.

Under Evelyn's leadership, the company became a member of the Washington Chapter of Community Association Institute in 2003. Then in 2009, they officially became an Accredited Association Management Company, putting them in the elite ranks of only a few hundred management companies in the country who have earned the highest level of industry designation. Association Services has always strived to achieve excellence and to set themselves apart.

Association Services has three core values – **integrity, education, and collaboration**.

They wanted every process, communication, and task to be done with integrity. They wanted to educate themselves, their boards members, and homeowners in order to achieve excellence. And lastly, they valued collaboration that would help them work closely with their boards - as a team - to build great communities together. Together, these core values contribute to Association Service's mantra: "We believe there is a better way."

> "Vantaca is innovation with a sincere interest in making the industry and my company better."

Evelyn Dufford - Owner Association Services

From Identifying Challenges to the Search for Top Technology and a True Partner

Association Management had a phenomenal team with expertise spanning accounting, investments, property management, real estate, and customer service. As they grew, however, they found that they were struggling to solve customer problems in a timely manner and making data-driven decisions about the business was becoming cumbersome and frustrating. In a team planning session, they discovered everyone felt their current software was too restrictive in the services they could provide, not supportive of their management needs, and limiting their potential for growth.

After they identified the limitations, they knew they needed to make a software change.

Their top priorities were to find

1 a top-notch, innovative technology

2 a real partner who was invested in their success.

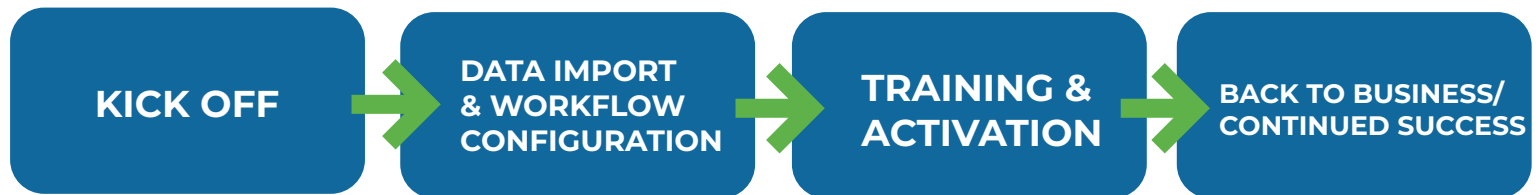# Vantaca: The Software Partner Committed to Association Service's Success

Evelyn heard about Vantaca from another management company; luckily, the software provider fit both of Association Services' search criteria. Still, the team was worried about the time and burden on the staff to implement a new software platform. Compared to other options, Vantaca's implementation process was clear, robust, and promised a complete white glove experience - fully managed by an entire implementation team. That team was made up of an implementation leader, a training specialist, an accounting consultant, a customer success team, and a customer support team. Together, the implementation team would help Association Services deliver their financials in time, migrate data from their old system, and be there to answer any questions they had along the way. Association Services decided to begin their partnership with Vantaca.

Vantaca's process starts with a kick-off call, followed by an onboarding phase where Vantaca partners with management companies to prepare them to go live. For Association Services, Vantaca delivered a software configuration to Association Services' unique workflows, communication templates, resources to learn the software, and above all - consistent support. After the "go-live" date, Vantaca offers post-activation support and regular touchpoints with Customer Success.

Vantaca's Implementation Process

| KICK OFF | → | DATA IMPORT & WORKFLOW CONFIGURATION | → | TRAINING & ACTIVATION | → | BACK TO BUSINESS/ CONTINUED SUCCESS |

Through the implementation process, Evelyn's staff knew that Vantaca was going to help them gain what they had previously lacked: **flexibility, better customer service, visibility into their business, and fuel for growth**. Vantaca's workflow and action item process would help them refine their own roles and responsibilities. Automation in both accounting and community management tasks made everyone's lives easier. Lastly, the communication and portal capabilities of Vantaca would ultimately help them serve their clients better.

IMPLEMENTATION MANAGER

ACCOUNTING CONSULTANT
- Reviews and imports data from prior software
- Empowers your accounting producing first set of financials

TRAINING SPECIALIST
- Provides live training sessions for super users
- Creates and maintains VantacaU courses

We appreciate Vantaca's point of view and ability to see what's working and what's not working for us. It's so refreshing to see this with a product company and work with people who know the system so we can leverage it to our advantage.

Evelyn Dufford - Owner Association Services

Association Services' Performance with Vantaca

After Association Services completed their software transition to Vantaca, they have been able to streamline their processes and eliminate technology limitations.

Happier Boards and Homeowners

Association Services is beyond fantastic! Very proactive, professional and just a pleasure to work with!
-Erik, Association Services Customer, President

Scaling Staff for Growth

Association Services has had the opportunity to take on more clients – including larger clients - while still maintaining a smaller staff.

Increased Transparency and Visibility

With Vantaca, Association Services has built more transparency and visibility into their business with their own staff and with their customers. As a result, they've been able to iterate and refine their model and process for creating better communities

Vantaca not only provided Association Services with initial performance improvements, but as a partner, aims to continue doing so over the course of the partnership. Years after initial implementation, a few managers from Vantaca's Customer Success team visited Association Services in Washington for a 3-day onsite to run a 'Database Optimization' exercise. During the exercise, Vantaca and Association Services revisited their current processes to make sure they were fully using all of the features and functionality available. The Vantaca team also shared best practices and recommendations for continued efficiencies. From regular video call touchpoints to company onsite visits, Vantaca strives to provide continual success and improvements to all customers.