

# CASE STUDY

CLIENT:	Australian Association of Massage Therapists
INDUSTRY:	Health
LOCATION:	Australia
PRODUCT SUITE:	EXO Business
MYOB ENTERPRISE PARTNER:	Oxygen Express

Using EXO to get an accurate picture of a unique, subscription-based revenue stream.

## Overview

With over 6,500 members, the Australian Association of Massage Therapists (AAMT) is the leading representative body for massage therapists in Australia.

Formed in 2003 following the amalgamation of five massage associations, the not-for-profit organisation maintains a register of qualified member practitioners for referral, and to respond to enquiries and complaints from the public.

AAMT has gone from strength to strength in the past six years, but managing, accounting for and reporting on membership renewals has presented the organisation with a number of unique challenges.

## Recognising limitations

The AAMT had been running Premier for a number of years. And considering all it could do, says Roy John, Finance Manager at AAMT, it was great value for money.

However, Premier wasn't really designed with multiple users in mind, which, for a growing organisation, wasn't ideal.

Its search functionality was a little limited too, says John, "which made finding anything a bit of a lengthy process".

"We were also restricted by the number of reports we could pull out of Premier," he adds, "and that was

something we were looking to do more of".

So AAMT started looking for a replacement system.

## Keeping it in the family

AAMT's first port of call was the MYOB website.

"Being Premier customers, we already had an inkling of some of MYOB's other products including the SQL-based EXO. And as we were keen to generate a lot of bespoke reports, EXO seemed like a viable contender," says John.

But AAMT were keen to look at other systems too, including SAP Business 1.

"They both use the same SQL database. And both offer fully integrated functionality. But the cost of customising reports in SAP Business 1 seemed prohibitively expensive compared with EXO."

So AAMT chose EXO.

## The challenges of integration

On MYOB's recommendation, AAMT began working with local EXO implementation specialist Oxygen Express.

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According to John, the first thing Oxygen Express did was set up a demo version of EXO to allow the association to trial the system using their own data.

“Because of our unconventional revenue stream,” he says, “we had a number of specific requirements around invoicing and payments, and we were keen to see whether EXO could handle those in practice”.

Chief amongst these was the ability to process subscriptions.

## Invoicing subscription payments

“Our primary focus isn’t to generate huge profits,” says John – “our revenue stream comes from members’ renewal fees.

“Obviously we want our members to renew their memberships, but because there’s no obligation for them to do so, we don’t want non-renewals showing up in EXO as debts.”

To work around this, AAMT issues invoices from a separate system and only records them in EXO once a membership renewal slip has been received, or a payment is made over the phone.

“It’s still possible to end up with small debts showing in EXO if a credit card payment or cheque bounces, but these are relatively isolated amounts that can normally be recovered quickly,” says John.

## Dealing with credit card batches

AAMT also had specific payment processing requirements.

Instead of dealing with credit card payments themselves individually as and when subscriptions are renewed, AAMT processes all credit card transactions in twice-weekly batches, and imports them into St George in one go.

“This was an existing process from Premier days and we wanted to be sure it could continue,” says John.

So Oxygen Express worked the credit report into a specific format that would be acceptable by St George.

## The early days

In all, it took barely two days to complete the installation. Within a week staff had a basic

understanding of the system. Confidence grew over the next few weeks.

“There’s no doubt we wouldn’t have been up to speed anywhere near as quickly without the assistance and patience of Oxygen Express,” says John.

“Their understanding both of our needs and the capabilities of EXO meant they really knew how to coach us through those first steps,” he adds.

A few months down the line, the relationship is still “excellent”, according to John.

“Minor adjustments we deal with in a reasonably casual fashion, under the terms of our support agreement. For anything more specific we ask for a quote.”

## EXO day-to-day

At first glance, John says that a handful of elements in EXO aren’t markedly different from those in Premier.

“There are certainly aspects of payroll that are familiar,” he says.

The difference with EXO however, is that payroll is integrated with other business processes. That means you only need to post a single entry and it is propagated throughout the system.

“It also means more than one person can use the system simultaneously without having to worry about overwriting anything,” adds John, “and that’s a welcome change”.

When pressed on whether he feels EXO has saved AAMT money, John says he thinks of EXO more in terms of freeing up information.

“EXO is definitely a lot faster,” he says, “and there’s an overall ease of process with everything. We can now run searches based on almost any criteria, which makes zoning in on a particular customer – or part of the organisation – virtually instantaneous.”

## Better vision on costs and performance

Where EXO really comes into its own, according to John, is through its specific reporting capabilities.

“Accurate reporting gives us a much better view of

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the business. A better view of the business means a clearer view of costs and a more accurate picture of performance,” says John.

AAMT relies on two reports in particular. The first allows them to gauge the profitability of their continuous professions education (CPE) workshops and their yearly conference. The other allows a year-by-year comparison of figures, not just for the preceding year, but as far back as data will allow.

“Having that information really is invaluable when you’re trying to demonstrate growth trends to the Finance and Audit Committee or the board,” remarks John.

## Summing up

John says he’d recommend EXO to anybody on a similar budget.

“EXO promises increased productivity and virtually unlimited customisability, all at a reasonable cost. And that’s exactly what you get.”

## Client and Enterprise partner details

[www.aamt.com.au](http://www.aamt.com.au)

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