



AAM TRANSFORMS HOA COMMUNICATIONS

CCM technology puts digital adoption on fast track

“Nordis gave us the ability to seamlessly toggle between digital and print on one platform, letting us create documents that look the same in both channels. It’s the perfect hybrid to boost efficiency, accuracy and compliance.”

Eric Parsons

CIO of AAM

- + Customer Since 2018
- + Espresso CCM, Print/Mail, Email
- + 1.6 million+ digital and mailed documents distributed each year

The Challenge

Associated Asset Management Company (AAM) is a leading professional management company for homeowner and community associations. Founded in 1990, AAM manages 840 associations consisting of 230,000 homeowners in 11 states. These associations represent master-planned, single-family, condominium, active adult, urban high-rise and mid-rise communities.

Managing all these organizations involves developing and distributing a tremendous number of documents each year — up to 1.6 million and growing. These documents range from financial maintenance fee statements, annual meeting notices and association budgets to compliance and collection letters.

AAM wanted to use technology to provide a better homeowner experience, including omnichannel communications. It sought control and flexibility to increase owner choice and convenience, from offering multiple digital and print channels for communications to easy self-service options for online account management. Using cutting-edge customer communications management (CCM) technology, AAM would improve accuracy, reduce errors, save time and enhance owner satisfaction. Meantime, AAM could turn its focus to relationship-building with clients and growing the association management business.

The Solution

AAM chose Nordis Technologies’ Espresso® cloud-based CCM platform and integrated print and mail services for a complete omnichannel communications solution. They also use Espresso’s digital presentment and archiving capabilities to improve online self-service and customer service. Using a mobile app called AAM All Access or the online AAM Customer Portal, owners can access their billing records and make payments without having to contact the AAM call center. When owners do choose to call for help, customer service representatives quickly access the communications sent to that owner — from any of the 840 associations — better equipping the agent to handle those questions with ease. Documents are archived within Espresso and presented via API into AAM’s customer portal and mobile application.

With Espresso, AAM:

- + **Streamlined** and automated the development of maintenance fee statements and other customer correspondence for print and digital distribution.
- + **Customized** communications by association, brand or other segments using a combination of centralized content, data, and custom business rules.
- + **Allowed** AAM community managers to easily review homeowner documents, make disclosure changes, track distribution, generate reports and archive correspondence.



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“Everybody wins with digital. The HOAs save money, and we save money while also improving the customer experience.”

Eric Parsons

CIO of AAM

Nordis Technologies is an innovator and leader in technology solutions that solve complex communications and payment challenges. Our Expresso® CCM application and integrated Print/Mail Services, including ExpressoCertified®, provide a complete omnichannel communications solution, from planning and development to print and digital production and distribution. Nordis offers print/mail, email, SMS/text and digital wallet capabilities, seamlessly connected for fast and easy document development and management among channels. To further cater to customer preferences and enhanced customer experience, Nordis offers our ExpressoPay® electronic bill presentment and payment system for a fully integrated communications and payments solution.



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Results

AAM can now take advantage of Expresso's "one to many" configuration. AAM leverages common templates across HOAs while presenting customized HOA-specific content using a simple-to-manage custom table and Expresso's omnichannel delivery channels. Proven results include:

- **Soaring digital adoption** — By leveraging the Expresso technology and pushing digital adoption, AAM achieved its goal to move more customers to digital communications. Within two years, the number of owner opt-ins to digital invoices went from very few to 32%, and the adoption rate is set to go only higher. AAM has plans to add more documents to the digital side of the platform. Within seconds of an owner scanning a QR code for an opt-in to digital, AAM can make the switch. AAM eventually will have 12 different types of documents ready for digital distribution including budgets that can run 40+ pages, architectural documents and more. The print and postage cost savings are considerable.
- **Simplified compliance** — Many compliance documents must still be sent by mail. Expresso's PDF Print Ready module allowed AAM to move from zero print-ready documents to 205,000 within two years. These print-ready communications are developed by AAM's core systems, but once delivered into Expresso, they still benefit from the omnichannel delivery, archive and digital presentment capabilities of the platform. AAM saves money and eases customer confusion by presenting only the disclosures and disclaimers that meet individual state requirements and rules.
- **Improved workflow and efficiencies** — Using one data file for both digital and print communication increases efficiencies. Plus, with Expresso reporting features, AAM tracks file processing results, return mail, email delivery opens and bounces and other key metrics that keep AAM operations and customer data up-to-date and effective.
- **Easy dashboard management** — It's simple and fast to handle the entire lifecycle of communications from a single dashboard. AAM employees access custom tables, files, document templates and a content library with HOA logos, text blocks, and images to tailor messaging and layouts to each association and homeowner. When dealing with hundreds of associations simultaneously, it's important to have the capability to offer dynamic customization. Staff also can review signoffs, disclosure changes, tracking and reporting and send digital e-blasts with urgent information to owners who have opted in for electronic communications.
- **Fast onboarding** — Expresso allows AAM to maintain flexibility without losing quality control as it scales up. As AAM adds new association customers, it can easily onboard them within hours and without external IT help. Simply update the association content table with the new HOA-specific information, and you're up and running.
- **Enhanced customer experience** — With omnichannel communications options that include print/mail and digital delivery, AAM caters to owner delivery preferences while also creating content that's personalized and dynamic.

Aided by Expresso's CCM, digital adoption for invoices went from nearly zero to 32% within two years