

Monthly Event Topic:

# QUALITY ASSURANCE: MONITORING AND MAINTENANCE

Presenters: Team Treadwell

October 18, 2023

## Team Treadwell

- 126+ Years of Nonprofit or Data Experience
- 200+ Clients in the last Year
- 4 Countries served:
  - US, Canada, UK and Australia















## Treadwell's Core Values

### Impact through Technology:

We simplify and leverage integrated technology to help nonprofits improve the lives of their clients and the community through performance-based measurement systems.

#### Unbiased, Client-focused, Independent:

While we have relationships and partnerships, we are staunchly independent. In the course of consultation, we always place our clients' needs above our own desires and any third parties' interests.

#### Innovation:

We are artists/creators/engineers/innovators. We creatively use the tools that we have at our disposal and develop/identify new tools to better achieve solutions for our clients.

#### Personal Fulfillment:

We are a community who celebrates, appreciates and empowers each other's personal and professional fulfillment and selfactualization.



Unbiased



Client-focused



Independent



**Passionate** 



## Getting to know you

- Your Name
- Organization
  - -Location
  - -Mission and Services
- Your role within your organization
- Intro Questions
  - -One thing you love about Apricot/ETO
  - -One thing that you wish were easier in Apricot/ETO



### Monitoring and maintainance

# TODAY'S TOPIC



## Purpose of Today's Call

- Equip administrators with tools
  - Front End
  - Reporting (Standard and Custom)
- Quick and Easy Wins
- Data Informed Decision to Drive Configuration Changes
- Hear From You



# apricot

- Things your group discusses
  - Front End Features
  - Custom Reports



# eto°

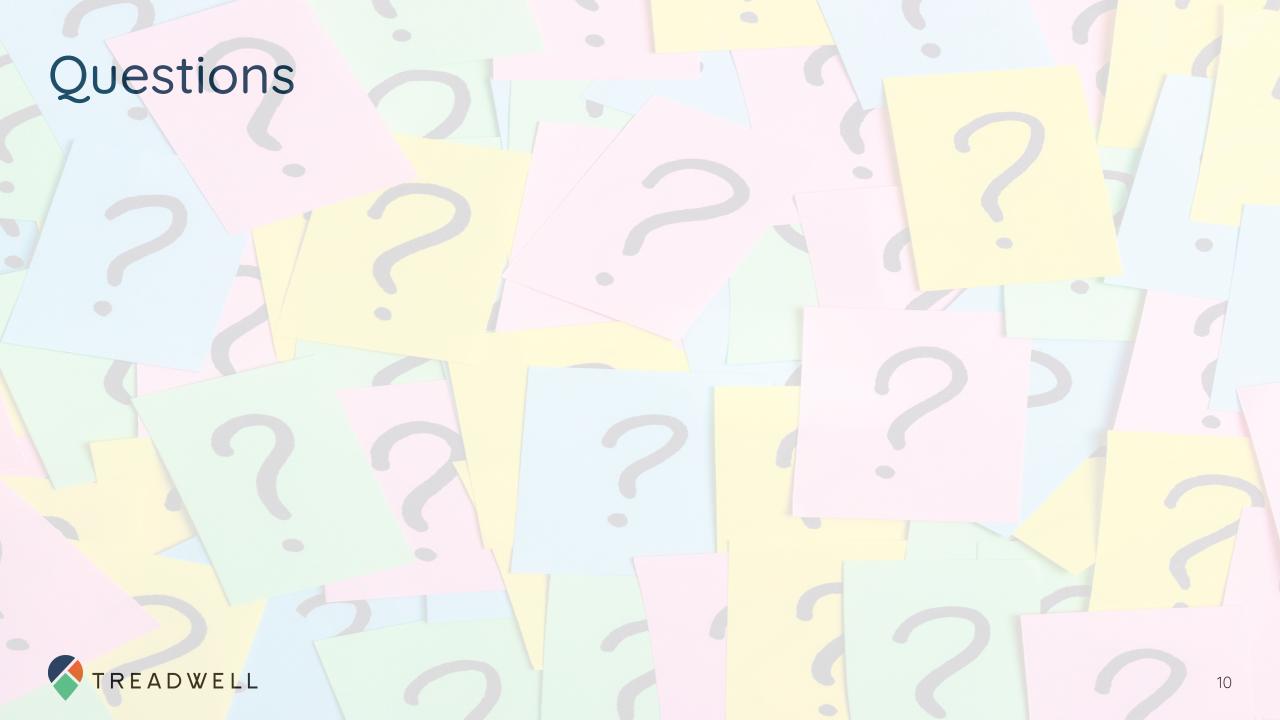
- Things your group discusses
  - Front End Features
  - Custom Reports



## Questions to the group

- What is something you are taking away from today's discussion?
- Are there any challenges that surface from this discussion?
- What, if any, successes have you seen in the early stages of monitoring?





## Managed Services Program Benefits

- Base Managed Services
  - Consultation
  - Support Coordination
  - System Monitoring
  - Access to exclusive monthly Treadwell events
  - Discounts on additional services
- Tiered Services
  - Professional service hours
  - Access to Treadwell's network of experts
  - Credits towards advanced features



## August's Call

Special Guest: Julie Bianchi Grant Writing for Tech Capacity

November 15, 2023 1 PM Pacific | 4 PM Eastern

