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SUMMIT 2023

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The Palm Jumeirah
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Managing User Provisioning When Churn is Part of Your Business Model

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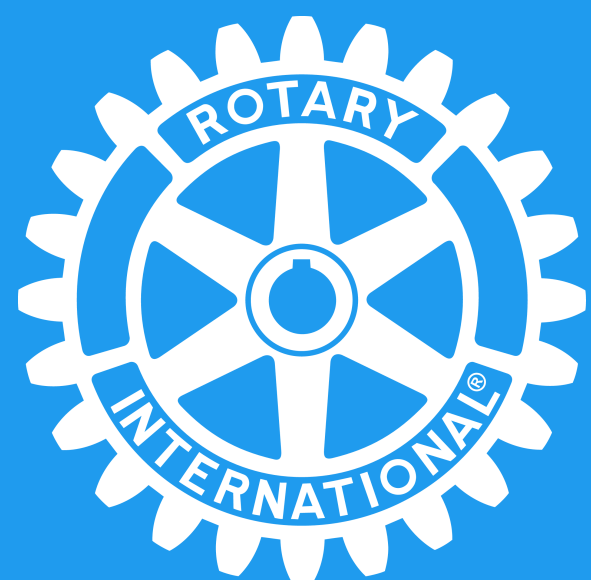
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Paul Haisman

Rotary International /
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A passionate technologist with a
business leadership mindset.



Summary

- The CHURN:
 - Over 440,000 user roles/permissions must be added
 - Over 440,000 user roles/permissions must be removed
- User role changes must take effect on 1st of July annually
- User roles inform security permissions across all global applications

The background of the slide is a photograph of the Burj Khalifa in Dubai, with a green vertical bar on the right side. The text 'Table of Contents' is overlaid on the left side of the image.

Table of Contents

What is Rotary?

Problem Definition

Current Solution Approach

Future Innovation Explored

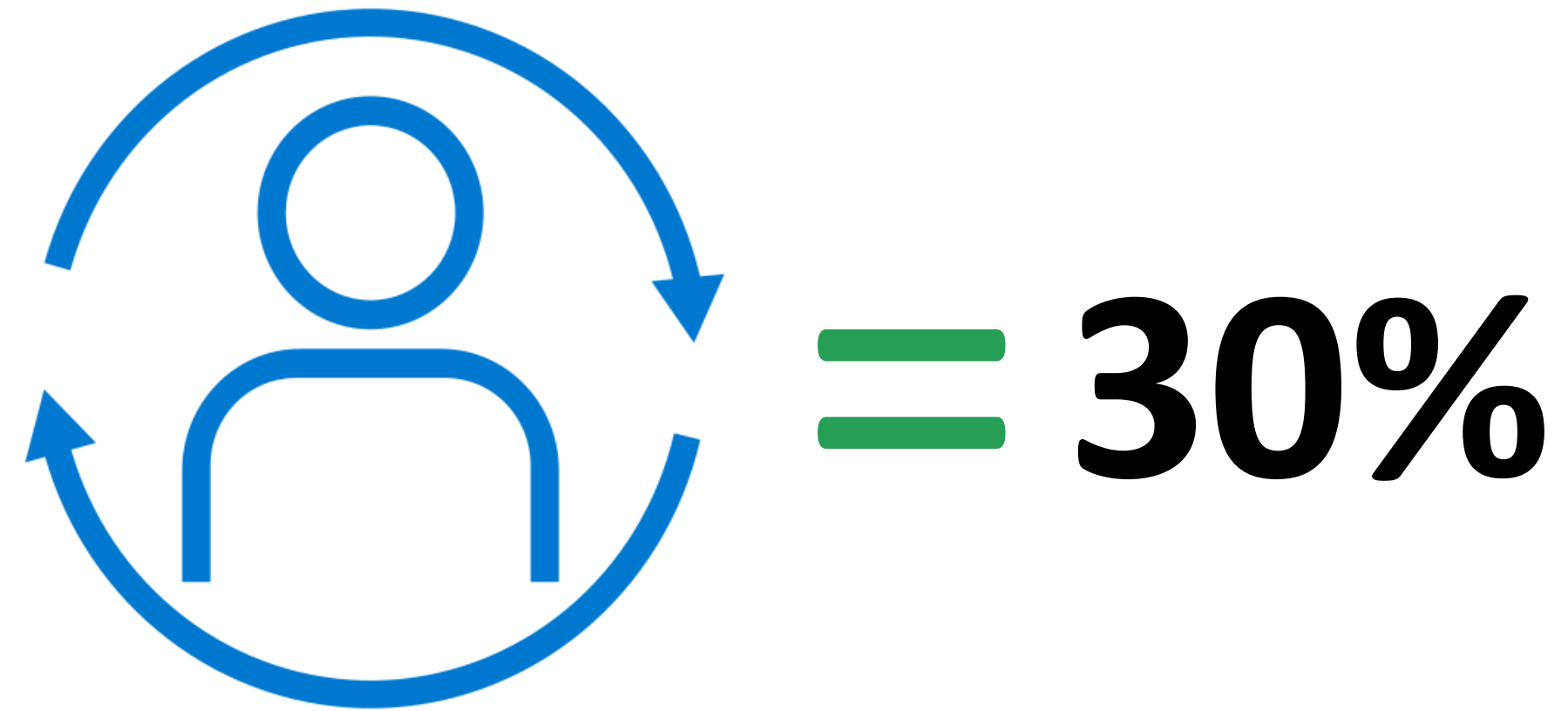


User churn, also known as customer churn, refers to the rate at which customers or users stop doing business with a company or stop using its products or services. It is a metric that measures the number or percentage of customers who discontinue their relationship with a business over a certain period of time.

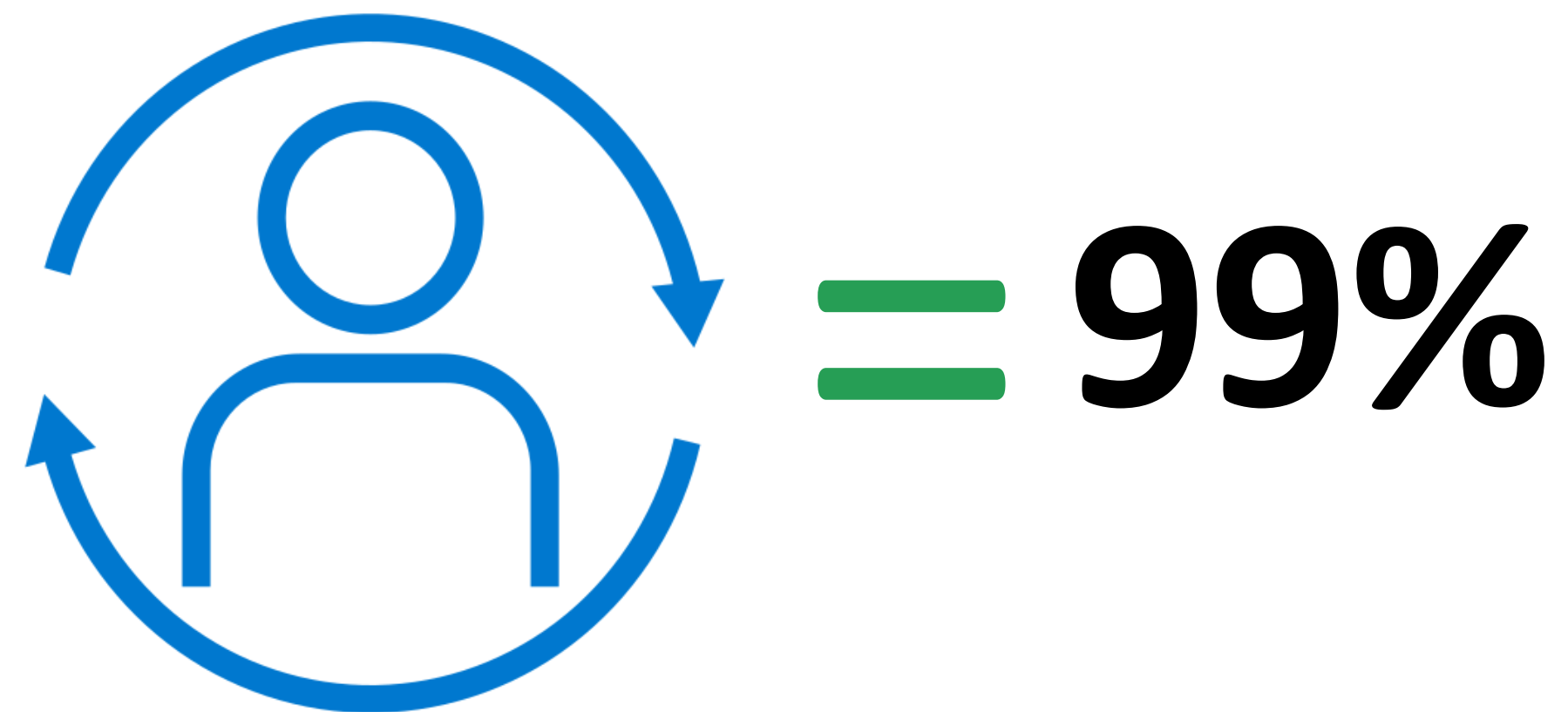
For Rotary

User churn refers to the rate at which customers take on entirely new roles and security permissions in effect discontinuing business in current capacity and repurposing in a new or different capacity.

Globally



For Rotary



Rotary: People Of Action

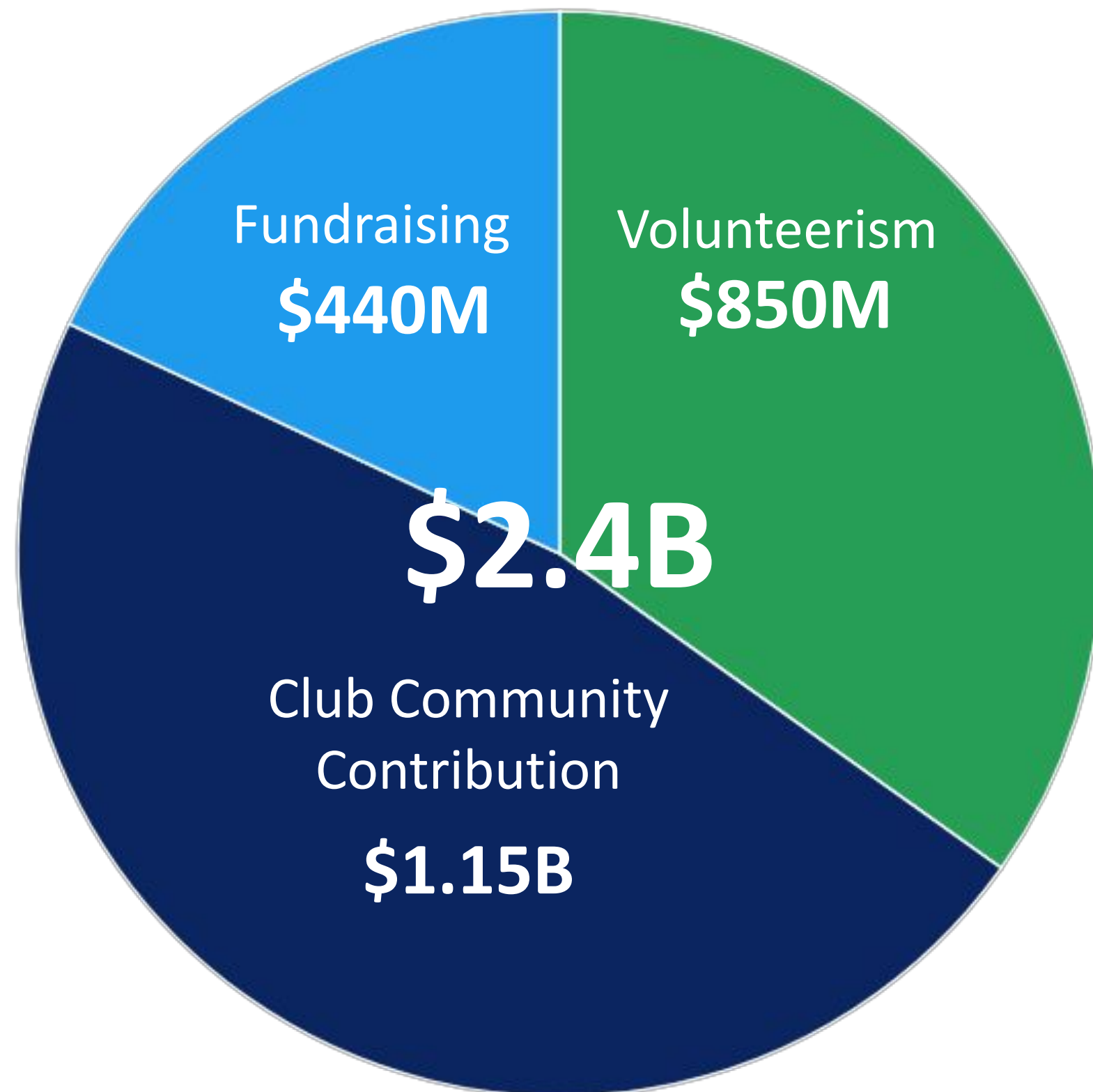
117 Year Old Organization

Global Organizational Structure:

- Rotary International & Rotary International Foundation
- 240 Countries & Territories
- 34 Zones
- 535 Districts
- 40,000+ Clubs
- 1.4 Million Members
- 9 International Languages

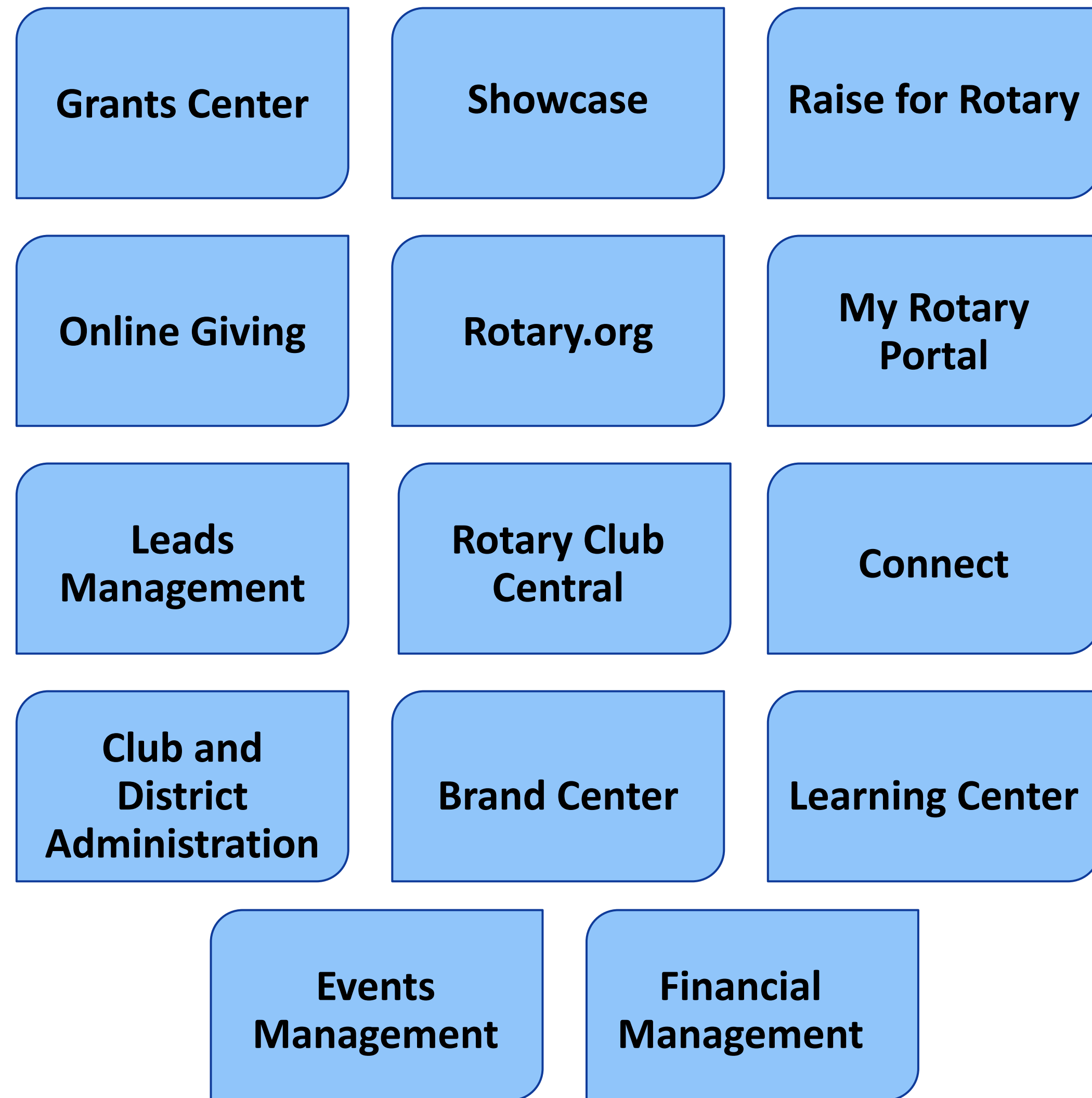


Annual Impact USD



Digital Product Portfolio Landscape

- 14 Digital Products
- Online Fundraising \$50M (US)
- Grants Management \$330M (US)
- Club & District Management
- Events Registration
- Online Learning/Training
- Club Billing/Invoicing (2x per year)
- Invoice Payment Processing (32 Currencies)

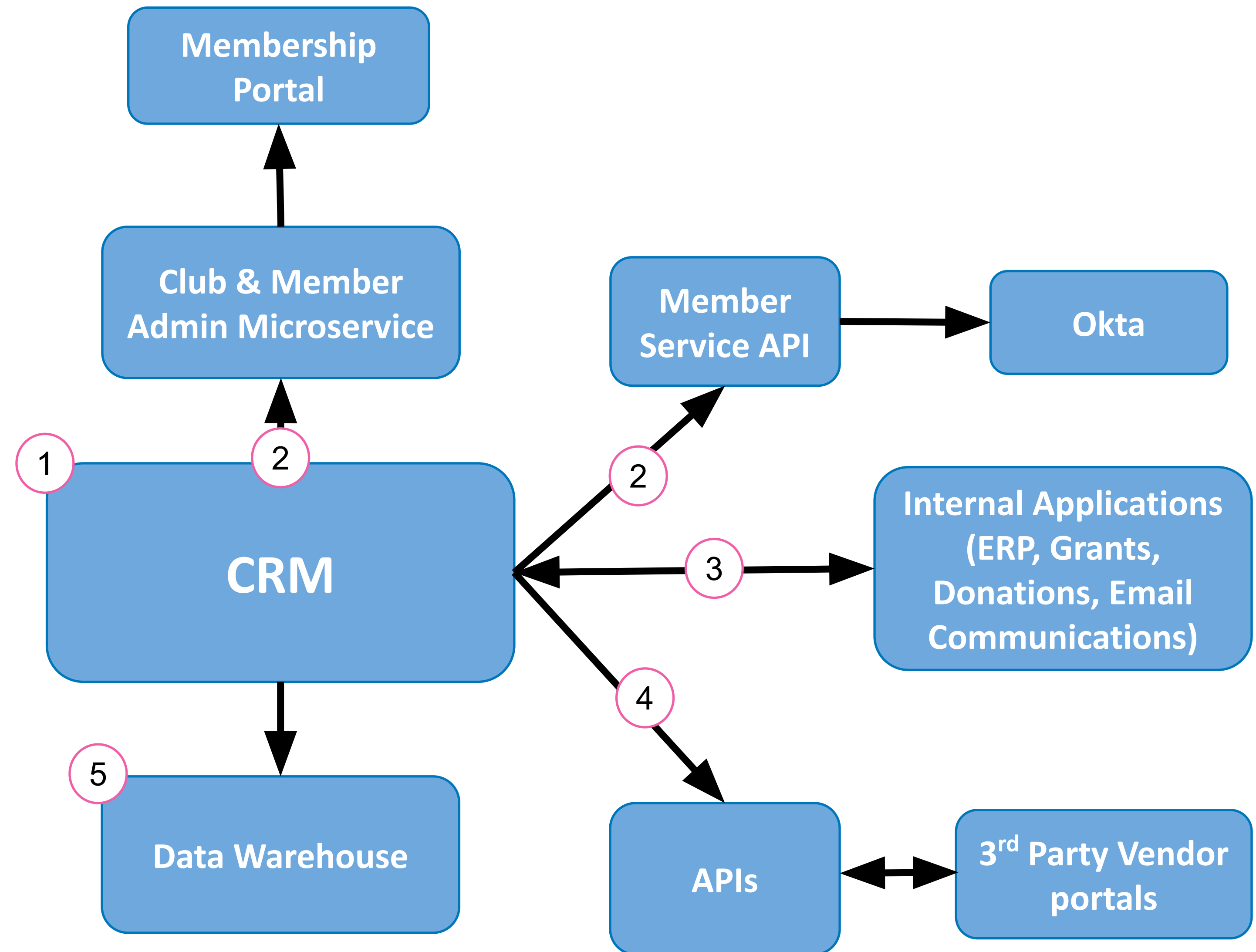


Role Groups	Category	Security Groups
Leadership Roles	RI President Directors Trustees Nominating Committee for President Directors (incoming) RI President (incoming) Trustees (incoming) Assistants Rotary Coordinator Rotary Public Image Coordinator Regional Rotary Foundation Coordinator Endowment/Major Gifts Adviser End Polio Now Coordinators Assistant Rotary Coordinator Assistant Rotary Public Image Coordinator Assistant Regional Rotary Foundation Coordinator District Conference Presidents Representatives RI Representatives to the United Nations Training Leaders Committees - Joint Committees - RI Committees - TRF Committees - Other District Governor District Leaders Rotary Club President Rotaract President Other Club Leaders	CSO Club Leadership District Rotary Foundation Chair Interact Club Member District Grant Authorizer Zone/Region TRF Appointee Rotaract Club Member Rotary Club President Rotary Club Member Rotary Club Leadership Events Administration General Public RDG/DRS Staff District Governor Expense Reporter Program Participant Online Test User Alumni Rotary Club Executive Secretary CSO District Appointee District Executive Secretary Recommender Zone/Region Appointee Council on Legislation Representative District Appointee Senior Leadership
Regional Leaders		
Presidential Appointments		
Committees		
Club and District Roles		

880,000 Roles Churn

Current State Process

- 1 Role changes are manually entered into the CRM and Membership portal as officer appointments made, with future effective dates (usually July 1 through June 30)
- 2 Changes sync with Member Club Management Microservice in near real. Roles sync to Okta via a Member Service API the first time the new officer logs in. (July 1st potential 40,000+ users logging in with new roles)
- 3 Downstream applications get updates about role changes via scheduled jobs
- 4 3rd party vendor portals get the role changes via custom APIs directly with the CRM
- 5 Role changes exported to data warehouse for reporting in complete database bulk loads



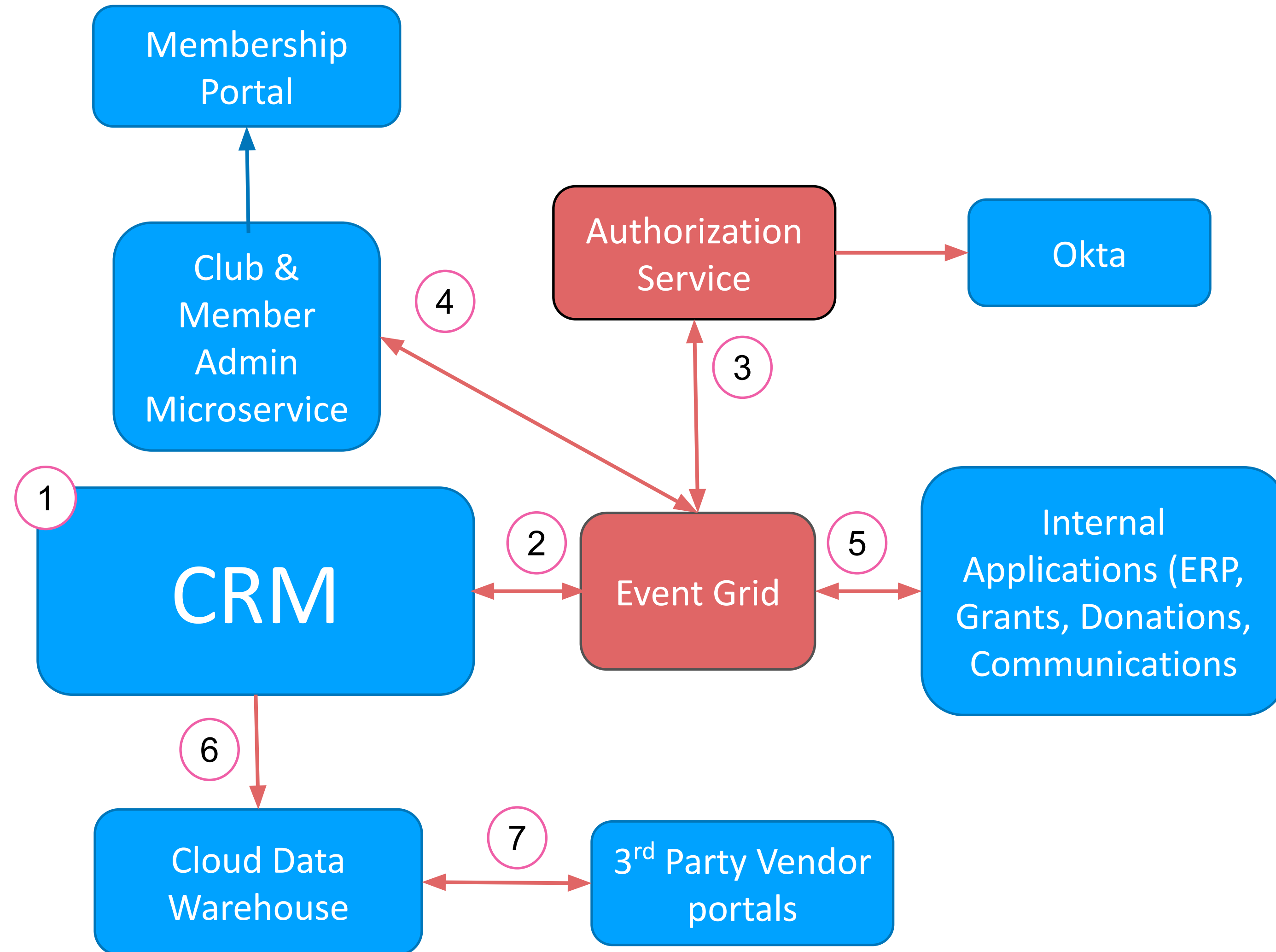
A Perfect Storm

- Role assignments are **synchronous** between CRM and Okta identity provider with changes applied on first login post July 1
- **Performance risk** of potential 40,000+ logins on same day
- Unnecessary **legacy code** being executed slowing performance that is no longer needed
- Burden on **legacy CRM** due to direct access to its database and interfaces impacting performance
- During this churn we see a **250% - 350% increased traffic** across all digital products



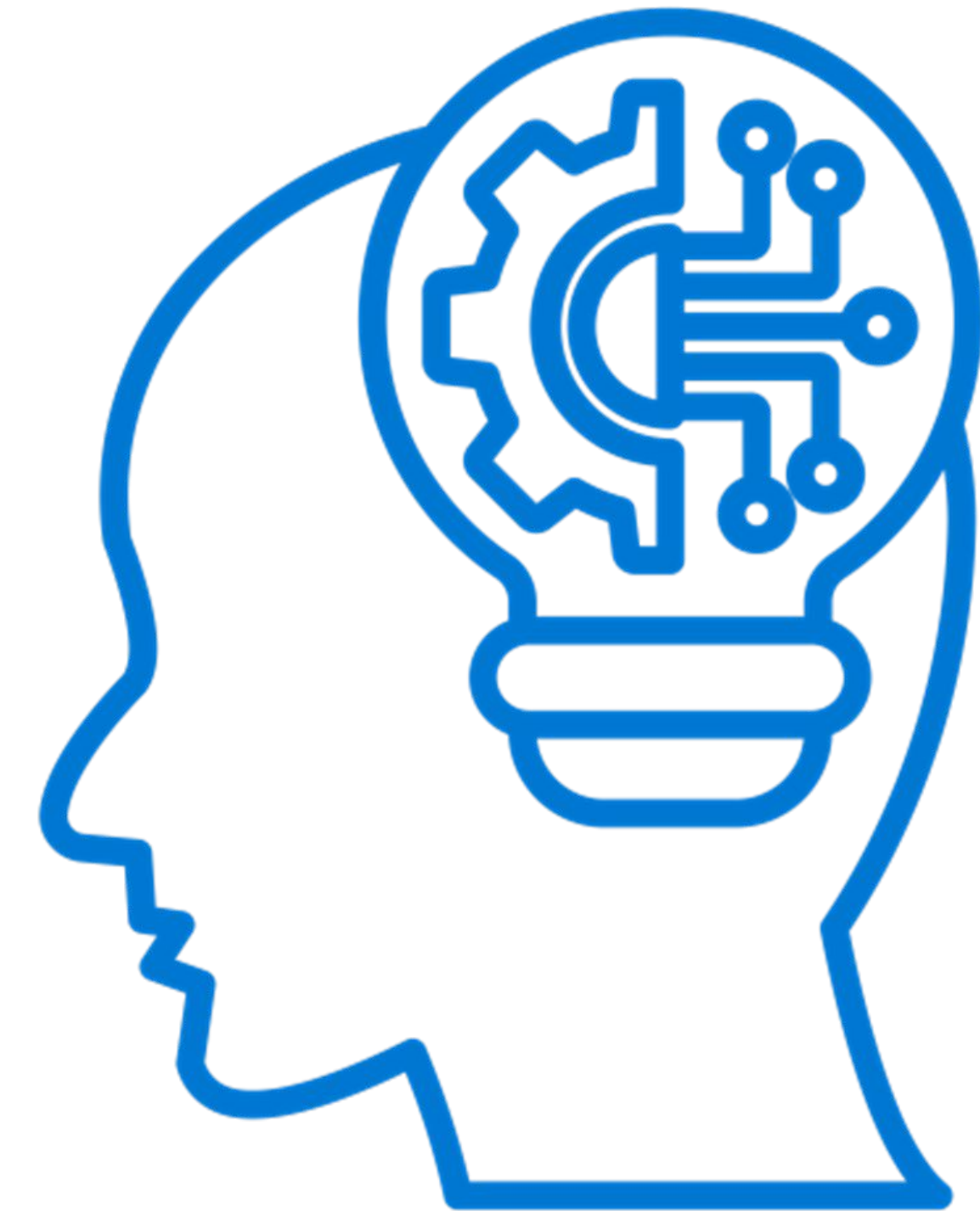
Innovation Approach

- 1 Role changes are manually entered into the CRM and Membership portal as officer appointments made, with future effective dates
- 2 Changes in CRM are published to Event Grid
- 3 New Authorization Service subscribes and picks up changes and updates Okta
- 4 Member Club Management Microservice subscribes to Event Grid picks up changes in real time (no more 400,000 user sync problem!)
- 5 Downstream applications subscribe to event grid get updates
- 6 Role changes sent to cloud data warehouse for reporting via a new Change Data Capture (CDC) process
- 7 3rd party vendor portals get role changes via Data Sharing feature native to cloud data warehouse



Innovation Approach – In Progress

- Democratize data by directing access via a pub-sub model (event grid). Eliminates direct access to the CRM and cross-network traffic
- Simplify login process moving role authorizations from CRM to an authorization microservice syncing role assignments with Okta as an asynchronous process
- Leverage modern data sharing techniques to quickly exchange data between Rotary and 3rd party vendor systems resulting (ie. Snowflake)
- Revisit legacy code. Optimize custom code and stored procedures removing unnecessary or inefficient code



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Thank you!

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