

ChamberMaster/MemberZone On-site training

Training is essential to your success in implementing the ChamberMaster/MemberZone solution. Our goal is to provide you and your staff with the skills needed to maximize the potential of the software to acquire members, retain and engage members and do more with less time.

On-site Training Agenda

You may choose a combination of any of the training sessions below to customize your on-site training experience. These are recommended sessions, however additional sessions/content may be developed as needed.

Overview of the ChamberMaster/MemberZone Software

New to ChamberMaster/MemberZone? Need a refresher on how to use your database? Are you a Chamber Exec or Association President with a desire to understand the resources available in your software? Hear highlights of the various modules. Learn the tools available for getting assistance with your software. Receive step-by-step instructions to ensure your browser software has proper selections for optimal operation.

Course Length: 1 1/2 Hour Pre-requisites: None

ChamberMaster/MemberZone Administrator Training

This session provides an understanding of the initial setup of your ChamberMaster/MemberZone software. In this session, participants will learn how to configure/customize the software for your Chamber or Association use. Attendees will be shown how to update association information, add or change staff logins and passwords. A "must-attend" for administrators of ChamberMaster/MemberZone.

Course Length: 2 Hours Pre-requisites: Overview of the ChamberMaster/MemberZone Software

Learning Objectives

- Initial Association Information Setup
- Setting Up Your Staff
 - Logins
 - Permissions
 - Notifications
- Setting Up Your Directories
 - Directory Settings
 - Directory Quick Links & Categories



- Setting Up Your Membership Types

ChamberMaster/MemberZone Successful Membership Management

The ChamberMaster/MemberZone Membership Management module makes it easy for you to acquire and retain members. In this session, participants will learn how to create membership packages and the on-line application form, create new members, drop members and manage existing members. Included are tips & tricks on managing prospects, retaining members and using member management reports. A "must-attend" for all office staff.

Course Length: 4 hours Pre-requisites: Overview of the ChamberMaster/MemberZone Software;
ChamberMaster/MemberZone Administrator Training

Learning Objectives

- Setting up your Membership Application
- Adding Members
- Setting up Member Fee Schedules
- Upgrading/Downgrading Members
- Working with Member Representatives
 - Adding/De-activating Reps
 - Setting Up Rep Login Credentials & Permissions
 - Overview of MIC
- Member Web Participation Options
- Dropping Members
- Merging Members

ChamberMaster/MemberZone Managing Communications

Your organization can save time and work more efficiently by using the Groups & Communication functions in the ChamberMaster/MemberZone software. In this session, participants will learn how to send emails and letters, search communication history, use the correspondence editor, create email templates, use mail merge features, send attachments.

Course Length: 2 hours Pre-requisites: Overview of the ChamberMaster/MemberZone Software

Learning Objectives:

- Working with Email Templates
- Sending Emails (Individual & Mass Emails)
- Logging Notes & Reminders
- Reviewing Communication Reports





ChamberMaster/MemberZone Managing Groups

Sending communication via email and letters may be simplified by creating self-defined groups in the **Groups** module. In this session participants will learn how to create groups (both via the groups module and via reports), manage group participation and fees, manage group opt-ins/opt outs, and how to use the groups in the MIC on your web-site.

Course Length: 2 hours Pre-requisites: Overview of the ChamberMaster/MemberZone Software, ChamberMaster/MemberZone Managing Groups

Learning Objectives

- Creating Groups
- Creating Groups From Custom Reports
- Group Display Options
- Group Join Options
- Managing the Group Roster
- Managing Group Fees

ChamberMaster/MemberZone Communications... beyond Email

ChamberMaster/MemberZone provides multiple options for touch-points with your members. Reminders, Push Notifications, Smart Text, News Releases and Blogs. In this session, participants will learn how to take advantage of these alternate communication methods.

Course Length: 2 hour Pre-requisites: Overview of the ChamberMaster/MemberZone Software, ChamberMaster/MemberZone Managing Communications & Groups.

Learning Objectives:

- Setup Reminders
- Sending Push Notifications
- Working with Smart Text
 - Smart Text Setup
 - Creating Smart Text Groups
 - Sending Smart Texts
- Working with News Releases
 - Create a News Release
 - Publish a News Release
- Working with Blogs
 - Creating a Blog
 - Add Posts to Blog
 - Share Blog
 - Review and Approve Blog Comments





ChamberMaster/MemberZone Successful Event Management

Successful events allow you to engage and retain your members, and even acquire new members. In this session, participants will learn the steps to setup events, manage registrations, invite attendees, and promote on the Chamber webpage.

Course Length: 3 ½ hours Pre-requisites: Overview of ChamberMaster/MemberZone Software; Managing Groups & Communications

Learning Objectives:

- Create an Event
- Customizing Events
- Working with Event Registration Fees
- Managing Event Invitations
- Working with the Guest List
- Working with Sponsors
- Event Billing

ChamberMaster/MemberZone Member Benefits.. Beyond the Business Directory

Benefits you can offer your membership, beyond a listing in your active directory, are opportunities to share job postings, hot deals, member to member deals (Plus Edition), market space ads (Pro Edition), and banner ads (Premier Edition). In this session participants will learn how to initially setup these opportunities, promote these opportunities to members, and manage the opportunities.

Course Length: 2 hours Pre-requisites: Overview of the ChamberMaster/MemberZone Software, ChamberMaster/MemberZone Member Management

Learning Objectives:

- Working with Job Postings
 - Setting up Job Postings
 - Adding Job Posting from the Back Office
 - Adding Job Postings from the MIC
- Working with Hot Deals/Member to Member Deals
 - Setting up Deals
 - Adding Deals from the Back Office
 - Adding Deals from the MIC
- Working with Market Space
 - Setting Up Market Space
 - Adding Market Space items from Back Office
 - Adding Market Space items from the MIC





- Working with Banner Ads
 - Setting Up Banner Ads
 - Adding Banner Ads from the Back Office

ChamberMaster/MemberZone Working with the Staff App

The Staff App is the mobile companion for ChamberMaster /MemberZone users that provides real-time membership information no matter where you are. The Staff App helps make your member visits more substantive and meaningful – you can see at a glance if they're signed up for your upcoming event or when you last sent leads their way. In this session participants will learn how to use the staff app to manage their members, representatives, groups & events.

Course Length: 1 ½ hour Pre-requisites: Overview of the ChamberMaster/MemberZone Software

Learning Objectives

- Overview of the Staff App
- Using the Staff App for:
 - Event Check-in
 - Accepting Payments at events (GZ Pay Only)
 - Using the POS (GZ Pay Only)

ChamberMaster/MemberZone Member Information Center

The Member Information Center (MIC) is an internal website just for your members. It gives them the ability to manage a variety of member activities. In this session, participants will learn how to setup and customize the MIC, manage representative access, and understand how members may benefit from the MIC.

Course Length: 1 ½ hour Pre-requisites: Overview of the ChamberMaster/MemberZone Software

Learning Objectives:

- MIC Initial Setup
- Member Login & Permissions to the MIC
- Overview of MIC



ChamberMaster/MemberZone Working with Forms & Surveys

ChamberMaster/MemberZone allows you to quickly create and publish custom web forms and surveys. Features include an intuitive interface which allows you to select from a variety of form fields. Watch the short video below and check out the resources on how to get started. Available with Pro Edition of the software and those with v3 or higher public modules. In this session, participants will learn how to create forms, share forms and analyze results.

Course Length: 1 hour Pre-requisites: Overview of the ChamberMaster/MemberZone Software

Learning Objectives:

- Setting up & Customizing Forms
- Sharing Forms
- Reviewing Forms Results

ChamberMaster/MemberZone Working with Projects/Tasks

Project/Task Manager can help you manage and track projects by allowing you to assign tasks to staff members, monitor the project's progress and keep an eye on deadlines. In this session, participants will learn how to create and use project templates and manage tasks. NOTE: Currently, this tool is in the beta stage and is available with Pro version.

Course Length: 2 hour Pre-requisites: Overview of the ChamberMaster/MemberZone Software, ChamberMaster/MemberZone Member Management, ChamberMaster/MemberZone Event Management

Learning Objectives:

- Setting up Project Templates
- Assigning Projects to Members/Events
- Monitoring Projects/Tasks

ChamberMaster Managing your Billing (Not intended for CQI Users)

ChamberMaster/MemberZone provides an integrated billing solution to allow you to manage accounts receivable for your memberships and events. In this session, participants will learn the basics of settings up billing, as well as the day to day activities to manage billing including invoicing, managing credits/refund/write-offs and journal entries.

Course Length: 3 hours Pre-requisites: Overview of the ChamberMaster/MemberZone Software; ChamberMaster/MemberZone Administrator Training

Learning Objectives

- Overview of Setup:
 - Chart of Accounts





- Fee Items
- Invoice Templates
- Billing Defaults
- Managing Batch Billing
 - Best Practices
 - Creating Monthly Membership Dues Batches
- Billing Transactions
 - Create Invoices
 - Create Credits
 - Create Refunds
 - Create Write-offs
- Billing Reports
 - Overdue Invoices
 - AR Reports
 - Sales Reports
- Journal Entry Export

On-site Training Fees*

1 Day \$3800, each additional day is \$1200.00 (for up to 20 people, additional attendees are charged at \$299/day).

*Fees include all trainer travel expenses

**Each day of training consists of 7 hours of instructions – generally 9am – 4:30pm (1/2 hour lunch)

Training Facility Requirements

The following training facility requirements are necessary to ensure a successful training

- Facility conducive to classroom training
- Laptop/PC for all participants
- Power source for participant laptops
- WIFI Access for all participants
- Overhead projector/screen
- Whiteboard/Flipchart

