

You're Responsible for Memberships... Now What?

As you view the Membership Director video, here is a worksheet to help you make notes, and begin to define those functions available to you in your GrowthZone tool kit that will benefit you the most in managing your memberships. If you are currently going through onboarding, your notes are conversation topics you should plan to have with your project manager to guide your setup.

Acquisition

What are your goals for your membership structure, and how can GrowthZone help?

What are your goals for your membership structure? How can GrowthZone help?

- Do you wish to (or should) you have your dues be prorated?
- Do your membership dues have levels? (e.g. 1-10 employees, 11-20...)
- Do you calculate membership dues based on a variable, e.g. annual revenue?
- Do you wish to include event registration benefits in your memberships?
- Do you wish to automatically drop your members, or drop them manually?
- Do you wish to allow the system to recalculate dues automatically when changes are made?
- If you have not been doing the above in your current membership structure, review your memberships and evaluate how you can take advantage of these options.



Membership Application Form

- Do you wish to use the On-line Application Form?
- What are the bare minimum pieces of information you need to vet the applicant? You can get the rest of the information via Info Hub afterwards – what are you going to do with data?
- Do you wish to customize the email you send confirming a member’s application?
- Do you wish to customize the email sent when a membership is approved? This might be where you invite them to access the info hub and update their information further

On Boarding

What are the steps that you are currently performing manually to successfully onboard a member...

- What email templates will benefit you in streamlining on-boarding communications?
- How do you wish to communicate with your new members? What **Lists/Committees** do you need, and which do you want to add new members to?
- **Marketing Automation**, do you wish to setup an automated workflow to on-board new members? View our use case in the [wiki](#) and/or ask your onboarding manager to enable the sample workflow
- Do you wish to use the **Projects/Tasks** module to track all of the tasks that are needed to successfully onboard a new member?
- How will you promote the Info Hub to your members? Do you wish to customize the email sent introducing new members to the Info Hub and inviting members to create their logins? Or customize the message presented to your members when they access the Info Hub? The message in the Info Hub is a great way to keep your members updated



- What type of **Directory Displays** do you wish to offer to your members? Varying levels of displays are a way that you can add value to each of your memberships.

Engagement

As the person responsible for members, engaging your members and measuring that engagement is one of the most important things that you can do.

- What have you done previously to measure engagement?
- What **email templates** will be valuable to you in connecting with your members throughout the year?
- **Marketing Automation**, do you wish a workflow for staying connected, engaged with your members? See our use case in the [online wiki](#).
- If subscribed to the **Forms/Surveys** module, do you wish to design a member satisfaction survey? View a sample survey by asking for the Sample Annual Member Survey to be turned in your software.
- Do you wish to encourage your members to download the **MemberPlus App**
- Are you updating the **InfoHub** message on a regular basis?

Renewal

Your GrowthZone toolkit provides ways to efficiently process your membership renewals

- Do you wish the system to **automatically** generate and email invoices for your renewals?
- Do you wish to customize the **invoice template** and **email template** for your renewals?
- Do you wish to encourage your members to **store credit cards** and auto charge to those stored credit cards?



Reporting

Your GrowthZone toolkit provides a wealth of reports to help you analyze your membership from acquisition, renewal, retention, and more...

What **reports** are you currently running for analysis of your membership?



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