## V9 Regional Training – Day One

*Please bring your laptop to each training session to participate in hands on exercises.*

**9:00 – 11:30**

System Navigation

Initial ChamberMaster/MemberZone setup

- Configuring General Organization Information
- Setting up Staff User Permissions & Profiles
- Setting up Communications
    - Templates
    - Correspondence Categories
- Setting up Directories
- Initial Billing Setup
    - Chart of Accounts
    - Setting up Fee Items

**11:30 – 12:30 – Lunch on Own**

**12:30 – 4:30**

Acquiring & Retaining Members (The Membership Life Cycle)

- Setting up Membership Packages & Types
- Membership Application Form
- Managing Members
    - On-boarding
    - Groups
    - Billing
- Introduction to MIC
    - Visibility
    - Job Postings
    - Hot Deals
- Analyzing Membership Reports
    - Why do people join
    - Why do people drop
- Removing Renewal Roadblocks