BETA EXCLUSIVE WEBINAR
Benefit Tracking
ChamberMaster/MemberZone

February 2020
Introductions

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Customer Support Representative
Agenda

Introductions  Meet the Team on Today’s Webinar

Benefit Tracking  Introduction to Benefit Tracking
  How to Setup/Manage Benefit Tracking
  Beta Group Support Plan
  Beta Group Goals/Timeline

Closing  Beta Group Feedback Request/Closing Thoughts
INTRODUCTION TO BENEFIT TRACKING

Brenda Lundeen
Product Manager
Tiered dues provide a "your way" approach to membership. -- Frank Kenny

Providing value to your members in unique offerings that meet their needs.

Requires detailed recordkeeping!

Benefit tracking provides an easy and efficient way for you to track member benefits, their availability, and use.
Benefits tracking includes ability to:

• Setup the benefit items and packages for membership types
• Assign the member benefit packages individually or in mass
• Show those items as available, used, or remaining on their account
• Automatically track the use of free and/or discounted event benefits
• Manually record use of other benefit items used including the date, who used it, and other important notes
• Ability to view and report on how many items a member has remaining
SETUP/MANAGE BENEFIT TRACKING

Cheri Petterson
Training & Documentation Manager
Define Benefit Packages
Setup Benefit Items
Setup Benefit Categories
Assign Benefit Package to Members
Track Benefits
  • Manually
  • Event Registrations
Reporting
Define Benefit Packages

Setup > Setup Benefit Packages > New Benefit Package

WIKI: Define Benefit Packages
Within a Benefit Package, click **New Benefit Item**

- Categories are a way to organize your benefits
- Type will drive whether the benefit item is used for an event or standard use

WIKI: [Add New Benefit Items](#)
Best Practice: The copy function will also be useful in creating different packages each year. We do not recommend that you simply adjust an existing package if you wish to introduce changes from year to year. We recommend that you create a new package vs. editing an existing package.
Add/Remove a Benefit Item to an Existing Benefit Package (and cascade to members who have already been assigned the benefit package)

WIKI: Add/Remove Benefit from Existing Package
Assign Benefit Package to Members

In Bulk: Setup > Setup Benefit Tracking > Assign Benefit Packages

WIKI: Assign Benefit Package to Members – In Bulk
Assign Benefit Package to Members

Individually: From the Member’s Benefit Tracking tab

WIKI: Assign Benefit Packages to Members Individually
Track Standard Benefits

Standard Benefits are manually tracked on the member’s Benefit Tracking tab

WIKI: Manually Record Benefit Usage
Delete a benefit usage: your staff has incorrectly recorded a benefit usage, you have the ability to delete the benefit usage item

WIKI: [Delete a Benefit Usage](#)
Edit a Benefit Usage: your staff has incorrectly recorded a benefit usage, you have the ability to update/edit the usage

WIKI: Edit a Benefit Usage
If benefits that you provide your member include free or discounted event registrations, you can automate the tracking process by creating a **Benefit Item Discount** for your event.

WIKI: [Automate Event Benefit Usage Tracking](#)
How it Works...

When a member has the event benefit item included, during registration a Benefit Item drop-down will be displayed.

When the benefit is used, the benefit tracking will automatically be updated on the members record.
Track Event Benefits

- Attendees
  - First Name: Tracy
  - Last Name: Hall
  - Company: Ben's Brewery
  - Email: tracy@email.com
  - Choose one: Gala Registration - Members
  - Total: $75.00

- Attendees
  - First Name: Mary
  - Last Name: Hall
  - Company: Ben's Brewery
  - Email: mhall@email.com
  - Choose one: Gala Registration - Members
  - Total: $75.00

Sub-Total Amount: $150.00
Discounts:
- Tickets to Annual Gala: $150.00
Total Discount: $150.00
*Total Discount Applied: $150.00
Total Amount: $0.00

Benefit Activity

<table>
<thead>
<tr>
<th>Benefit Package</th>
<th>Benefit Item Name</th>
<th>Quantity</th>
<th>Date</th>
<th>Description</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platinum Package</td>
<td>Tickets to Annual Gala</td>
<td>1</td>
<td>1/29/2020</td>
<td>Annual Gala 2020 RegID: 1330</td>
<td>Tracy Hall</td>
</tr>
<tr>
<td>Platinum Package</td>
<td>Tickets to Annual Gala</td>
<td>1</td>
<td>1/29/2020</td>
<td>Annual Gala 2020 RegID: 1330</td>
<td>Mary Hall</td>
</tr>
<tr>
<td>Platinum Package</td>
<td>1/2 Page Ad in Annual Directory</td>
<td>1</td>
<td>1/29/2020</td>
<td>Benefit Item(s) Added</td>
<td></td>
</tr>
<tr>
<td>Platinum Package</td>
<td>1/4 page add in the Monthly Newsletter (1x)</td>
<td>1</td>
<td>1/29/2020</td>
<td>Benefit Item(s) Added</td>
<td></td>
</tr>
<tr>
<td>Platinum Package</td>
<td>Free Use of Conference Room</td>
<td>1</td>
<td>1/29/2020</td>
<td>Benefit Item(s) Added</td>
<td></td>
</tr>
<tr>
<td>Platinum Package</td>
<td>Set of Mailing Labels Annually</td>
<td>1</td>
<td>1/29/2020</td>
<td>Benefit Item(s) Added</td>
<td></td>
</tr>
<tr>
<td>Platinum Package</td>
<td>Tickets to Annual Gala</td>
<td>2</td>
<td>1/29/2020</td>
<td>Benefit Item(s) Added</td>
<td></td>
</tr>
</tbody>
</table>
Manage Packages when Dropping Members

When a member is dropped you will have the option to disable the Benefit Package

WIKI: Disable a Benefit Package on Member Drop
The **Member Benefits Report** can be used to review your members' current benefit packages and usage.

WIKI: [Reporting Benefit Usage](#)
Support Options During Beta Time Period

To make it easy, links included on the commonly used benefit tracking pages.
Support Options During Beta Time Period

• Webinar Recording (made available after this training)
• Support Wiki
• Email support via support@growthzone.com
  • Subject line: Benefit tracking beta group
• Response time may be 1-2 days
  • If urgent, please indicate that immediately in the title of the ticket – thanks!
• Email support is limited to the 2 individuals that were on the questionnaire
BETA GROUP GOALS/TIMELINE

Clara Navin
Product Manager
• Benefit Tracking selection **will be available in your database by tomorrow**
• Begin creating and assigning benefit packages immediately
• Beta Testing is expected to run thru end of March
• Feedback will be requested periodically during beta period
We’ll be periodically asking you for your feedback, but you don’t need to wait until then. Provide feedback at any time, by clicking the link below:

https://growthzone.growthzoneapp.com/ap/Form/Fill/LxRKVfzp
Thank You!