

BETA EXCLUSIVE WEBINAR

Benefit Tracking

ChamberMaster/MemberZone

February 2020



Introductions



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Agenda

Introductions

Meet the Team on Today's Webinar

Benefit Tracking

Introduction to Benefit Tracking

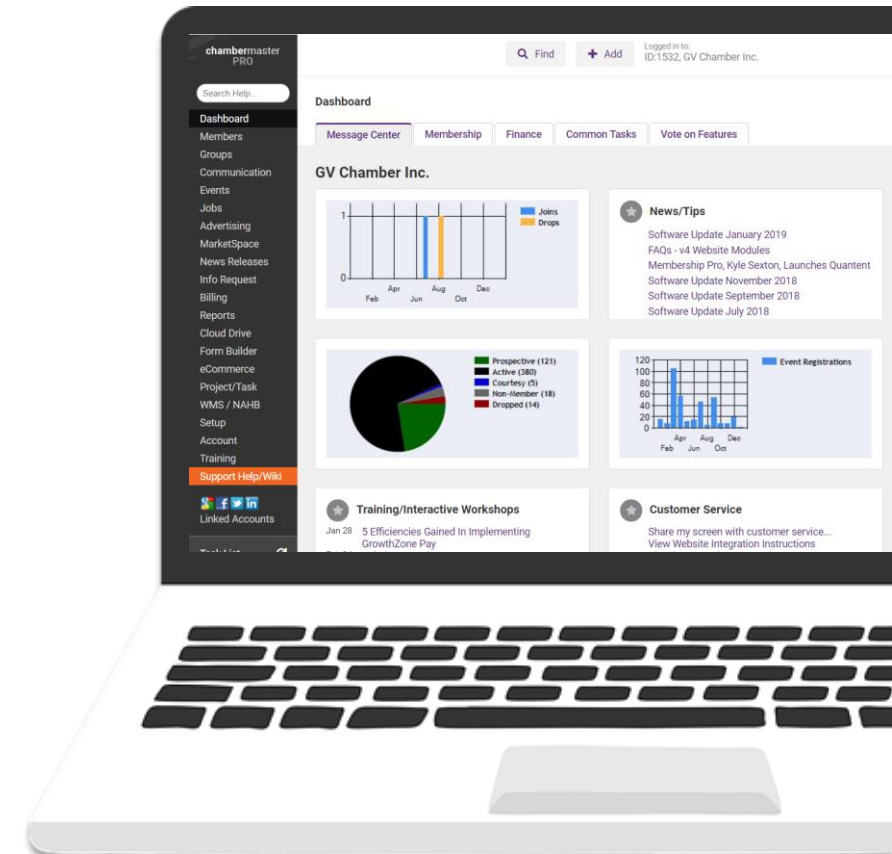
How to Setup/Manage Benefit Tracking

Beta Group Support Plan

Beta Group Goals/Timeline

Closing

Beta Group Feedback Request/Closing Thoughts



INTRODUCTION TO BENEFIT TRACKING



Brenda Lundeen
Product Manager

Introduction to Benefit Tracking

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



Introduction to Benefit Tracking

Benefit 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

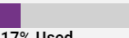
Member Management

General Reps Web Communication Account Stats **Benefit Tracking** Advanced Marketing Files

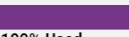
Manage Member Benefits for Ukeleles R Us:

Current Benefits Summary

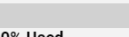
| Platinum Benefit Package | | | |
|---|-----------|------|-----------|
| Advertising Benefits | Available | Used | Remaining |
| Set of Mailing Labels Annually | 1 | 0 | 1 |
| 1/2 Page Ad in Annual Directory | 1 | 0 | 1 |
| 1/4 page add in the Monthly Newsletter (1x) | 1 | 0 | 1 |

Total Package Usage  17% Used

| Facility Use Benefits | Available | Used | Remaining |
|-----------------------------|-----------|------|-----------|
| Free Use of Conference Room | 1 | 1 | 0 |

Facility Use Benefits  100% Used

| Event Discounts | Available | Used | Remaining |
|------------------------|-----------|------|-----------|
| Tickets to Annual Gala | 2 | 0 | 2 |

Event Discounts  0% Used

Benefit Packages

Assigned Benefit Packages

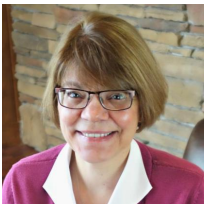
| check all uncheck all | Benefit Package | Status | Starts | Expires |
|--------------------------|--------------------------|--------|--------|---------|
| <input type="checkbox"/> | Platinum Benefit Package | Active | | |

►Disable Selected Packages ►Remove Selected Packages

Assign Benefit Package

chambermaster.com/directory/index.jsp?tabset=10

SETUP/MANAGE BENEFIT TRACKING



Cheri Petterson

Training & Documentation Manager

Setup/Manage Benefit Tracking

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](#)

Benefit Package Details

Package Name:

? Description:

Status:

Active

Show inactive benefit items

Benefit Items List

| Quantity | Item Name | Description | Category | Type |
|--------------------------|---|------------------------------|-----------------------------|----------|
| <input type="checkbox"/> | 1/2 Page Ad in Annual Directory | | Advertising Benefits | Standard |
| <input type="checkbox"/> | 1/4 page add in the Monthly Newslett... | | Advertising Benefits | Event |
| <input type="checkbox"/> | Conference Room Rental | | Other Money-Saving Benefits | Standard |
| <input type="checkbox"/> | Free Use of Conference Room | | Facility Use Benefits | Standard |
| <input type="checkbox"/> | Set of Mailing Labels Annually | | Advertising Benefits | Standard |
| <input type="checkbox"/> | Tickets to Annual Gala | 2 Tickets to the Annual Gala | Event Discounts | Event |

Save & Exit

New Benefit Item

Cancel

Define Benefit Items

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](#)

The image shows two overlapping web forms. The top form, titled 'Benefit Package Details', contains fields for 'Package Name', 'Description', and 'Status' (set to 'Active'). Below these is a table titled 'Benefit Items List' with columns for 'Quantity', 'Item Name', 'Description', 'Category', and 'Type'. The table lists several items, including '1/2 Page Ad in Annual Directory', '1/4 page add in the Monthly Newslett...', 'Conference Room Rental', 'Free Use of Conference Room', 'Set of Mailing Labels Annually', and 'Tickets to Annual Gala'. At the bottom of this form are buttons for 'Save & Exit', 'New Benefit Item', and 'Cancel'. A red arrow points from the 'New Benefit Item' button to a second form titled 'Benefit Item Details'. This second form has fields for 'Item Name', 'Category' (set to 'Advertising Benefits'), 'Type' (set to 'Event'), and 'Status' (set to 'Active'). It also includes a 'Manage Categories' link and 'Save & Exit' and 'Cancel' buttons.

| Quantity | Item Name | Description | Category | Type |
|--------------------------|---|------------------------------|-----------------------------|----------|
| <input type="checkbox"/> | 1/2 Page Ad in Annual Directory | | Advertising Benefits | Standard |
| <input type="checkbox"/> | 1/4 page add in the Monthly Newslett... | | Advertising Benefits | Event |
| <input type="checkbox"/> | Conference Room Rental | | Other Money-Saving Benefits | Standard |
| <input type="checkbox"/> | Free Use of Conference Room | | Facility Use Benefits | Standard |
| <input type="checkbox"/> | Set of Mailing Labels Annually | | Advertising Benefits | Standard |
| <input type="checkbox"/> | Tickets to Annual Gala | 2 Tickets to the Annual Gala | Event | Standard |

Benefit Packages

WIKI: [Copy a Benefit Package](#)

| Benefit Packages List | | |
|-------------------------------------|-----------------------------|----------------------|
| Package Name | Description | |
| Bronze Package | Bronze Package | Copy |
| Gold Package | Benefits for Gold Members | Copy |
| Silver Package | Benefits for Silver Members | Copy |
| New Benefit Package | | |

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)

Benefit Package Details

Package Name:

Gold Membership Package

?

Description:

Status:

Active

▼

☐

Show inactive benefit items

☐

Show only items selected for this package

Benefit Items List

| Quantity | Item Name | Category | Type |
|---------------------------------------|---|-----------------------------|----------|
| <input checked="" type="checkbox"/> 1 | 1/2 Page Ad in Annual Directory | Advertising Benefits | Standard |
| <input checked="" type="checkbox"/> 1 | 1/4 page add in the Monthly Newsletter (1x) | Advertising Benefits | Event |
| <input type="checkbox"/> | Conference Room Rental | Other Money-Saving Benefits | Standard |
| <input checked="" type="checkbox"/> 1 | Free Use of Conference Room | Facility Use Benefits | Standard |
| <input checked="" type="checkbox"/> 1 | Set of Mailing Labels Annually | Advertising Benefits | Standard |
| <input checked="" type="checkbox"/> 1 | Tickets to Annual Gala | Event Discounts | Event |

Save & Exit

New Benefit Item

Cancel

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](#)

Benefit Packages

Setup BenefitsAssign Benefit Packages

Assign Benefit Packages to multiple members at once.
1. Select the members you wish to assign packages to
2. Review the resulting list and select the desired package and other details i.e. package name, start and end date
3. When all member assignments are set as desired in the list, then click Assign Packages

1. Select Members

Membership Type: Diamond Membership ▼
Membership Status: Active ▼
Renewal Month: - Any - ▼
Join Date Start:
Join Date End:
Only those with no current active package ☒
Load/Refresh

3. Assign Packages

Members Selected: 5
Packages to be Assigned: 0
Assign Packages Now

2. Select Package Assignments

| Member Name | Membership Type | Renewal Month | Current Active Package(s) | Join Date | Set All Packages to Assign | Set All Package Names | Set All Start Dates | Set All End Dates | |
|---------------------|--------------------|---------------|---------------------------|------------|----------------------------|-----------------------|----------------------|----------------------|-------------------------------------|
| | | | | | - Select a Package - ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| FirstPage Marketing | Diamond Membership | February | | 3/12/2018 | - None - ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input checked="" type="checkbox"/> |
| The Lobster Shack | Diamond Membership | February | | 4/25/2018 | - None - ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input checked="" type="checkbox"/> |
| DJ Entrprises | Diamond Membership | August | | | - None - ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input checked="" type="checkbox"/> |
| Pasta's Restaurant | Diamond Membership | September | | 9/18/2018 | - None - ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input checked="" type="checkbox"/> |
| Dahlia's | Diamond Membership | July | | 11/26/2018 | - None - ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input checked="" type="checkbox"/> |

Assign Benefit Package to Members

Individually: From the Member's Benefit Tracking tab

WIKI: [Assign Benefit Packages to Members Individually](#)

Benefit Packages

Assigned Benefit Packages

check all
uncheck all

Benefit Package

Status

Starts

Expires

There are no packages assigned to this member. Click "Assign Benefit Package" to add one now

Disable Selected Packages

Remove Selected Packages

Assign Benefit Package

Assign a Package

Package: Gold Membership Package

Name: Gold Membership Package

Start Date (Optional):

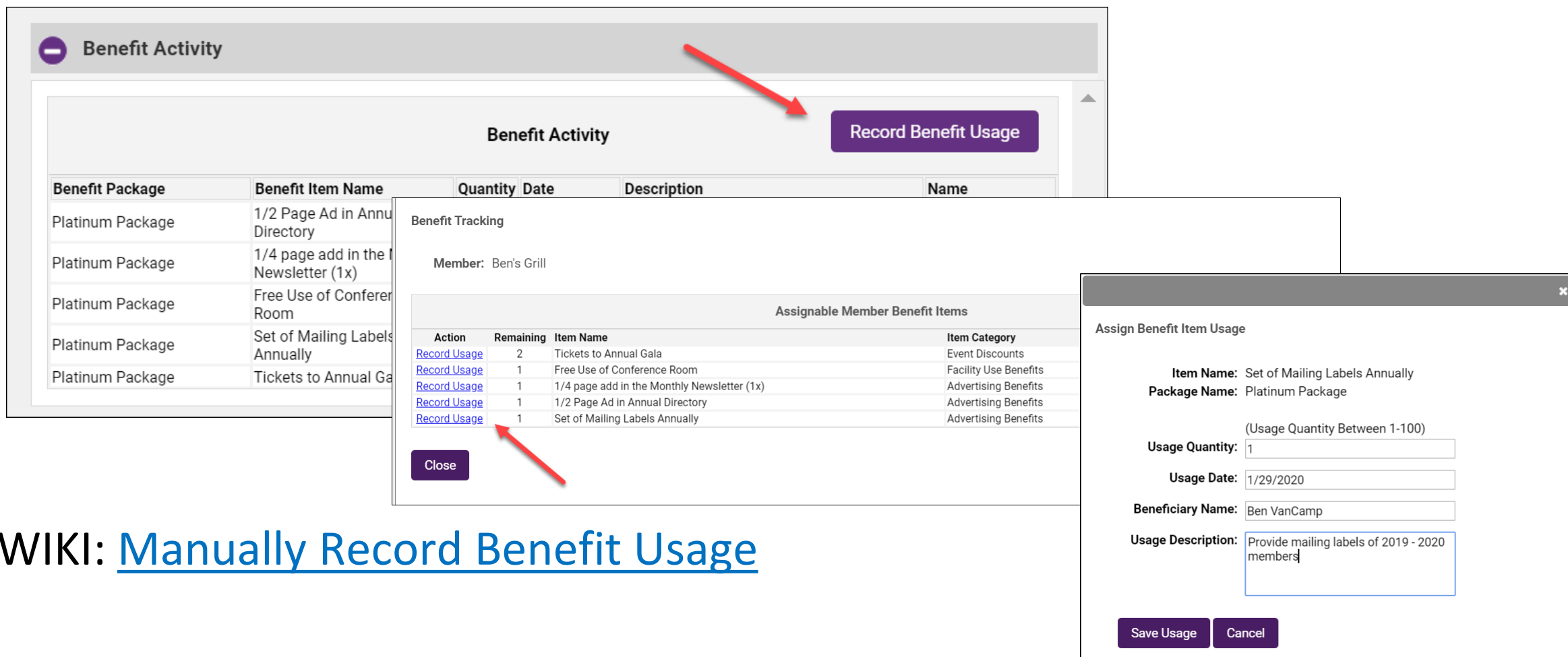
Expiration Date (Optional):

Cancel

Assign

Track Standard Benefits

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



The screenshot displays the 'Benefit Activity' interface. At the top, there is a 'Benefit Activity' header with a minus icon. Below it, a table lists benefit packages and their items. A red arrow points to the 'Record Benefit Usage' button. Another red arrow points to the 'Record Usage' link in the 'Assign Member Benefit Items' table. A modal window titled 'Assign Benefit Item Usage' is open, showing details for the 'Set of Mailing Labels Annually' package.

Benefit Activity

| Benefit Package | Benefit Item Name | Quantity | Date | Description | Name |
|------------------|-------------------------------------|----------|------|-------------|------|
| Platinum Package | 1/2 Page Ad in Annual Directory | | | | |
| Platinum Package | 1/4 page add in the Newsletter (1x) | | | | |
| Platinum Package | Free Use of Conference Room | | | | |
| Platinum Package | Set of Mailing Labels Annually | | | | |
| Platinum Package | Tickets to Annual Gala | | | | |

Record Benefit Usage

Benefit Tracking

Member: Ben's Grill

| Action | Remaining | Item Name | Item Category |
|------------------------------|-----------|---|-----------------------|
| Record Usage | 2 | Tickets to Annual Gala | Event Discounts |
| Record Usage | 1 | Free Use of Conference Room | Facility Use Benefits |
| Record Usage | 1 | 1/4 page add in the Monthly Newsletter (1x) | Advertising Benefits |
| Record Usage | 1 | 1/2 Page Ad in Annual Directory | Advertising Benefits |
| Record Usage | 1 | Set of Mailing Labels Annually | Advertising Benefits |

Assign Benefit Item Usage

Item Name: Set of Mailing Labels Annually
Package Name: Platinum Package

(Usage Quantity Between 1-100)
Usage Quantity: 1
Usage Date: 1/29/2020
Beneficiary Name: Ben VanCamp
Usage Description: Provide mailing labels of 2019 - 2020 members

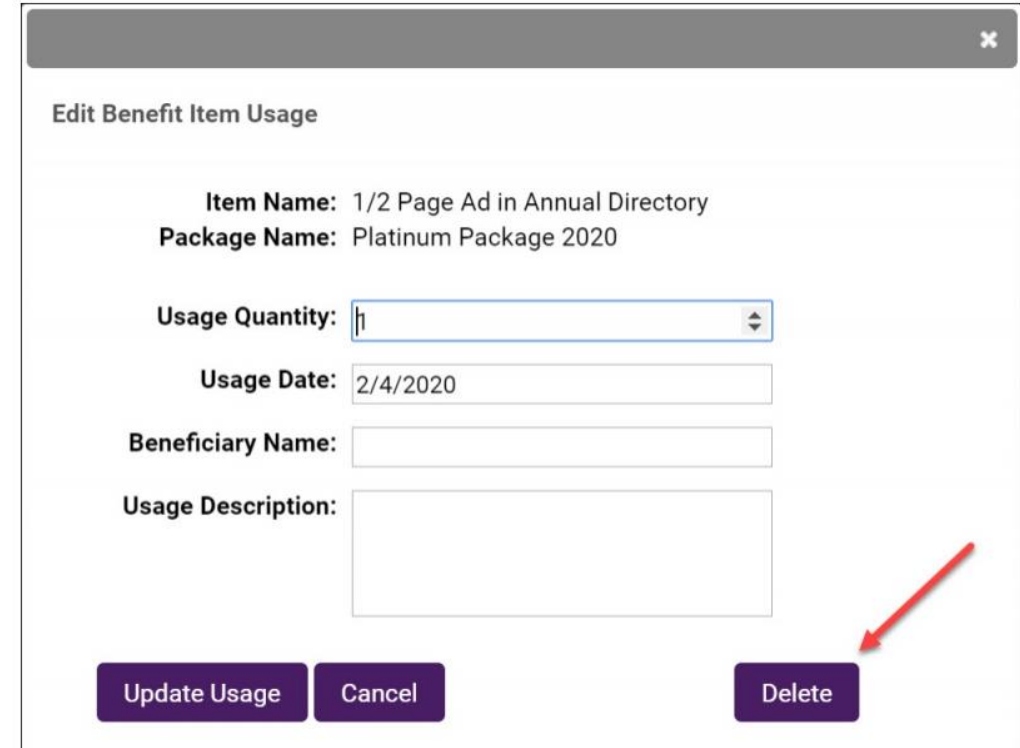
Save Usage **Cancel**

WIKI: [Manually Record Benefit Usage](#)

Manage 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](#)



The screenshot shows a web form titled "Edit Benefit Item Usage" with a close button (X) in the top right corner. The form contains the following fields:

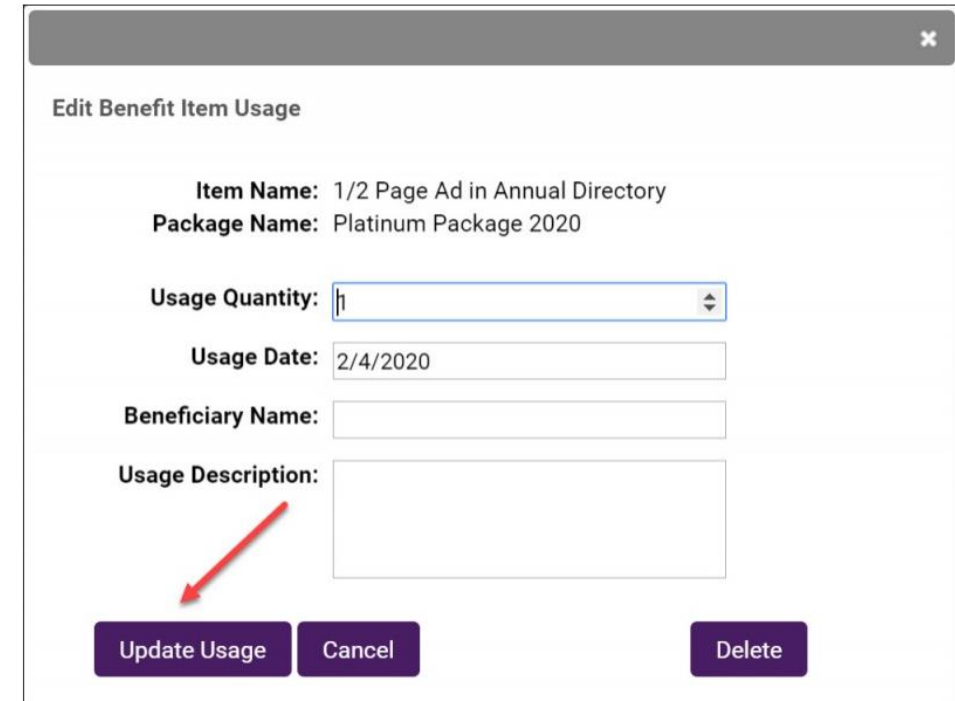
- Item Name:** 1/2 Page Ad in Annual Directory
- Package Name:** Platinum Package 2020
- Usage Quantity:** A dropdown menu currently showing "1".
- Usage Date:** 2/4/2020
- Beneficiary Name:** An empty text input field.
- Usage Description:** A larger empty text input area.

At the bottom of the form are three buttons: "Update Usage", "Cancel", and "Delete". A red arrow points to the "Delete" button.

Manage 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](#)



Edit Benefit Item Usage

Item Name: 1/2 Page Ad in Annual Directory
Package Name: Platinum Package 2020

Usage Quantity:

Usage Date:

Beneficiary Name:

Usage Description:

Update Usage **Cancel** **Delete**

Track Event Benefits

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.

| Benefit Item Discount ? | | | | | |
|--|--|--------------|--------------------------|----------------------------------|-------------|
| check all clear all | | Benefit Item | Description | Applies To | Amount |
| <input type="checkbox"/> | Tickets to Annual Gala | | Platinum Package Benefit | Gala Registration - Members | \$75.00 off |
| Remove Selected Items | | | | Add Benefit Item | |

Edit Event Discount

Benefit Item:

Tickets to Annual Gala

Apply To:

Gala Registration - Members (\$75.00)

Value/Amount:

☐ Use a Flat fee amount of \$ 0.00.

☐ Reduce fee amount by \$ 0.00.

☒ Reduce fee amount by 100.0%.

Description:

Platinum Package Benefit

Save

Close

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 | Last Name | Company | Email | Choose one | Pricing Details | Total |
|------------------------------------|-----------------------------------|--|--|--|---------------------------------|---|
| <input type="text" value="Tracy"/> | <input type="text" value="Hall"/> | <input type="text" value="Ben's Brewery"/> | <input type="text" value="tracyt@mailinator.com"/> | <input type="text" value="Gala Registration - Members"/> | | 75.00   |
| <input type="text" value="Mary"/> | <input type="text" value="Hall"/> | <input type="text" value="Ben's Brewery"/> | <input type="text" value="ben@mailinator.com"/> | <input type="text" value="Gala Registration - Members"/> | | 75.00   |

Add AttendeeAdd Multiple Attendees 

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

*All discounts will be

 Benefit Activity

Benefit Activity

Record Benefit Usage

| Benefit Package | Benefit Item Name | Quantity | Date | Description | Name |
|------------------|---|----------|-----------|------------------------------|------------|
| Platinum Package | Tickets to Annual Gala | 1 | 1/29/2020 | Annual Gala 2020 RegID: 1330 | Tracy Hall |
| Platinum Package | Tickets to Annual Gala | 1 | 1/29/2020 | Annual Gala 2020 RegID: 1330 | Mary Hall |
| Platinum Package | 1/2 Page Ad in Annual Directory | 1 | 1/29/2020 | Benefit Item(s) Added | |
| Platinum Package | 1/4 page add in the Monthly Newsletter (1x) | 1 | 1/29/2020 | Benefit Item(s) Added | |
| Platinum Package | Free Use of Conference Room | 1 | 1/29/2020 | Benefit Item(s) Added | |
| Platinum Package | Set of Mailing Labels Annually | 1 | 1/29/2020 | Benefit Item(s) Added | |
| Platinum Package | Tickets to Annual Gala | 2 | 1/29/2020 | Benefit Item(s) Added | |

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](#)

| Benefit Packages | |
|--|-------------------|
| Package | Package Status |
| Platinum Package 2020 (Platinum Package) | Set as Disabled ▼ |

Benefit Tracking Report

The **Member Benefits Report** can be used to review your members' current benefit packages and usage

WIKI: [Reporting Benefit Usage](#)

| Member Benefits Report | | | | |
|---|-------------------------------|-------------------|---------------|--------------------|
|  | | | | |
| Package / Members | Benefit Item | Quantity Assigned | Quantity Used | Quantity Remaining |
| Bronze Package | | | | |
| Lake Home Hunter Realty | Printout of Membership Labels | 1 | 0 | 1 |
| | Membership Badge | 1 | 0 | 1 |
| | Free Banquet Ticket | 1 | 0 | 1 |
| | | 3 | 0 | 3 |
| Gold Package | | | | |
| Juniper Jellybeans | Conference Room Usage | 2 | 0 | 2 |
| | Printout of Membership Labels | 4 | 0 | 4 |
| | Membership Badge | 1 | 0 | 1 |
| | | 7 | 0 | 7 |

BETA GROUP SUPPORT PLAN



Clara Navin
Product Manager

Support Options During Beta Time Period

To make it easy, links included on the commonly used benefit tracking pages.

Benefit Packages **Beta Users of Benefit Tracking:** [Request help](#) [Give suggestions](#) [View FAQs](#)

[Setup Benefits](#) [Assign Benefit Packages](#)

List Options

☐ Show inactive benefit packages

[New Benefit Package](#)

Benefit Packages List

| Package Name | Description |
|--|---|
| Advocate | |
| Believer | Suggested Starting Level for 2-10 Employees |
| Bronze | Bronze |
| Chairman Package | |
| Executive | Executive |
| Executive 2 | |
| Generation | |
| Influence Level | |
| Investor | Investor |
| Package with Luncheons | test |

[New Benefit Package](#)

chambermaster PRO

Members 49 of 571 [filter options](#) [Find](#) [Add](#) Logged in to: ID:1532, GV Chamber Inc.

Member Management

[General](#) [Reps](#) [Web](#) [Communication](#) [Account](#) [Stats](#) [Benefit Tracking](#) [Advanced](#) [Marketing](#) [Files](#) [Tasks](#)

Beta Users of Benefit Tracking: [Request help](#) [Give suggestions](#) [View FAQs](#)

Manage Member Benefits for Barry University:

Current Benefits Summary

There are no currently active packages for this member. Add a package in the Benefit Packages section below.

Benefit Packages

Assigned Benefit Packages

| Benefit Package | Status | Starts | Expires |
|--|--------|--------|---------|
| There are no packages assigned to this member. Click 'Assign Benefit Package' to add one now | | | |

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

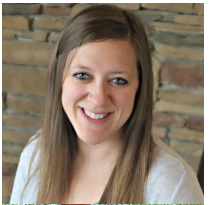


Clara Navin
Product Manager

Beta Group Time Line

- 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

BETA GROUP FEEDBACK



Clara Navin
Product Manager

Feedback Link

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/LxRKVfxp>

Thank You!

