ChamberMaster/MemberZone Regional Training

Greater Mission Chamber of Commerce Day 1

Communications

- Creating Email Templates
- Communication Templates Best Practices
  - Using the Cloud Drive for Document Sharing
  - Email Best Practices
- Viewing/Logging Communications (notes, reminders, e-referrals)
- Communication Reports
  - Invalid Email Addresses Removed
  - Invalid Email Addresses Restored
  - Email Opt-Outs
  - Contact Benchmark Report
- Constant Contact Synchronization

Membership Management

- Working with your Active Directory
  - Setting up Search Functionality
  - Setting up Categories
  - Understanding Attributes
  - Category Reporting
    - Categories and Member Counts
    - Directory Category & Attribute Assignments
- Working with Groups
  - Creating Groups from custom reports
  - Emailing Groups
  - Constant Contact Sync

Managing your Memberships

- Setting up recurring Membership Fees
  - Mass updating Membership Fees
  - Reporting to ensure all members have a schedule/renewal month
- Reviewing Member Statistics
  - Member Benefit Report Batch Print or Email
- Advanced Membership Engagement Options
  - Hot Deals
  - Member to Member Deals
  - Job Postings
- Generating and Analyzing Membership Reports

- o Custom Member Report
- o Custom Representative Report
- o Member Engagement (At Risk)
- o Member Engagement (Most Active)
- o Retention Report
- Using the Mobile App for Membership Management