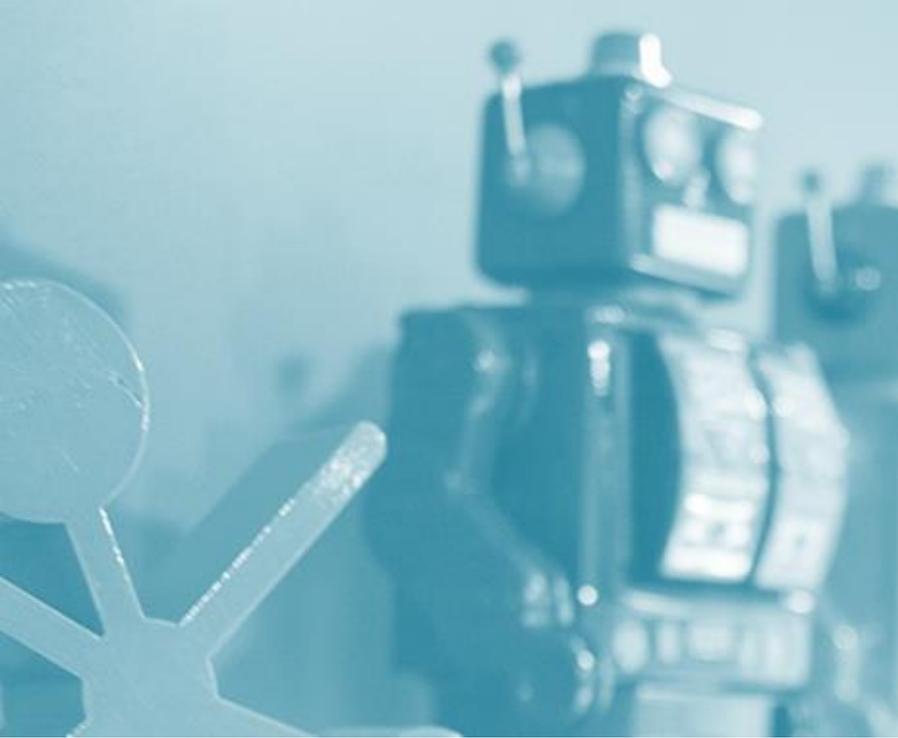




Best Practices for Launching your Members-Only Area

Planning, communicating and unveiling a new way for your
members to interact with you

ABOUT WEBLINK



- Leading SaaS AMS Company
- Over 720 Association Customers; 5,500 Users; Supporting 650K Members
- Established in 1996
- Based in Indianapolis, Indiana
- 60 Employees
- 94% Customer Retention Rate
- 96% Average Daily Satisfaction Rating

About the Members Only Area

- It's part of your WebLink Connect software
- It is always real-time, up-to-date, and completely self-service for your members
- It improves your image as a modern association
- Things your members can do:
 - Update their contact information, preferences, and relationships
 - Pay their bills
 - Access exclusive content
 - Determine their Membership ROI
 - Take surveys
 - And more...!!

4 Steps to Success

- Configure the back-end
- Plan out your phasing
- Communicate your message
- Reinforce the value

Step 1:

CONFIGURE THE BACK-END



Configure the back-end

- Set your Members Only Portal Access options
- Configure your Profile Update Form
- Personalize your Web Portal Welcome Message
- Set your Referral Report date range
- Populate your event and news article lists
- Assign User Names and Passwords
- Add extra content (Restricted Web Content Records, other links, etc)

Step 2:

PLAN OUT YOUR PHASING



Plan out your phasing

Organization-based

- Members and Main Contacts first
- Next move to Primary Relations (other employees besides the main)
- Set your Editors correctly

Individual-based

- Members first (and last?)
- Are there other related profiles to include?

Step 3:

COMMUNICATE YOUR MESSAGE



Communicate your message

- Use HTML templates for each phase and audience
- Use Special Fields so that the messages are personalized
- Test, test, test before you launch
- Send messages before, during and after your launch
- Use our example templates to start

Step 4:

REINFORCE YOUR VALUE



Reinforce your value

- Send members back to your members Only area often
- Use Special Fields often so members rarely have to log in
- Move the most valuable information on your website to your Members Only area
- Place special fields in your email communications consistently
- Review and Approve your members' Profile Changes promptly

Appendix

Links to Help Articles and resources for items referenced in this document

- a. **Set your Members Only Portal Access options:** Admin > Set Preferences > Profile Portal Settings
- b. **Configure your profile Update Form:**
<https://support.weblinkinternational.com/entries/95763807-Configure-your-Online-Profile-Update-Form>
- c. **Personalize your Portal welcome Message:** Admin > Set preferences > Web Preferences
- d. **Set your Referral Report date range:** Admin > Set preferences > Web Preferences > Web Defaults > Default IR Report Days
- e. **Populate your event and news article lists:** Check the “Members Only Event” designation on appropriate events, and add news Articles in the Web
- f. **Assign User Names and Passwords:**
<https://support.weblinkinternational.com/entries/24910921-Create-and-Send-Usernames-and-Passwords-in-Members-Only-Section>
- g. **Add Restricted Web Content records:**
<https://support.weblinkinternational.com/entries/24910471-Restrict-Web-Content-to-Members-or-a-Specific-Group>
- h. **Set your Editors:** Each related profile can be set as an “Editor” of the profile it’s related to. Main Contacts are always set as “Editors”
- i. **Use HTML templates:**
<https://support.weblinkinternational.com/entries/24910291-Setup-or-Create-HTML-Templates-for-Email-Signatures-Newsletters-and-More>

Sample HTML Template - Intro

Dear [[REPORTNAME]],

Thank you so much for being a valued member of ours. As part of our ongoing commitment to providing you with the highest level of member value and engagement, we've recently launched a new members Only Area of our website. This message--and more coming in the near future--will help you get acquainted with the many self-service benefits you can manage from our website.

Our Log-In Area--Our new log in page is located at web.ENTER-YOUR-ASSOCIATION-WEBSITE-ADRESS-HERE.com/portal/portallogin.aspx

If we have a username and password for you, it is available here: [[PORTALLOGINLINK]]

If we don't have a Username or password for you, please visit our Information Update area so you can set one. In this area, you'll also be able to update several other key areas of information that will help us serve you better. Click here to update your profile: [[PROFILEUPDATELINK]]

Once you are familiar with our Members Only area, you'll also be able to manage a variety of other items, including

--Paying your Renewal Invoices

--Selecting what communications you want to receive from us

--Taking Surveys

--Calculating your Membership ROI

We hope you enjoy having more control over your own membership with us. If you have any questions or concerns, please feel free to contact our office at 555-555-1212 or email us at YOUREMAILADDRESS@YOURASSOCIATION.COM

Sincerely,

Your Membership team

Sample HTML Template - Reminder

Dear [[REPORTNAME]],

Have you updated your profile yet in our new Members Only area of our website? If not, this message will help you log in and manage almost every aspect of your membership with us. It's an important part of our ability to successfully serve you—so please log in today to keep us up to date!

Our Log-In Area--Our new log in page is located at web. ENTER-YOUR-ASSOCIATION-WEBSITE-ADRESS-HERE .com/portal/portallogin.aspx

If we have a username and password for you, it is available here: [[PORTALLOGINLINK]]

If we don't have a Username or password for you, please visit our Information Update area so you can set one. In this area, you'll also be able to update several other key areas of information that will help us serve you better. Click here to update your profile: [[PROFILEUPDATE LINK]]

Once you are familiar with our Members Only area, you'll also be able to manage a variety of other items, including

- Paying your Renewal Invoices
- Selecting what communications you want to receive from us
- Taking Surveys
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We hope you enjoy having more control over your own membership with us. If you have any questions or concerns, please feel free to contact our office at 555-555-1212 or email us at YOUREMAILADDRESS@YOURASSOCIATION.COM

Sincerely,

Your Membership team