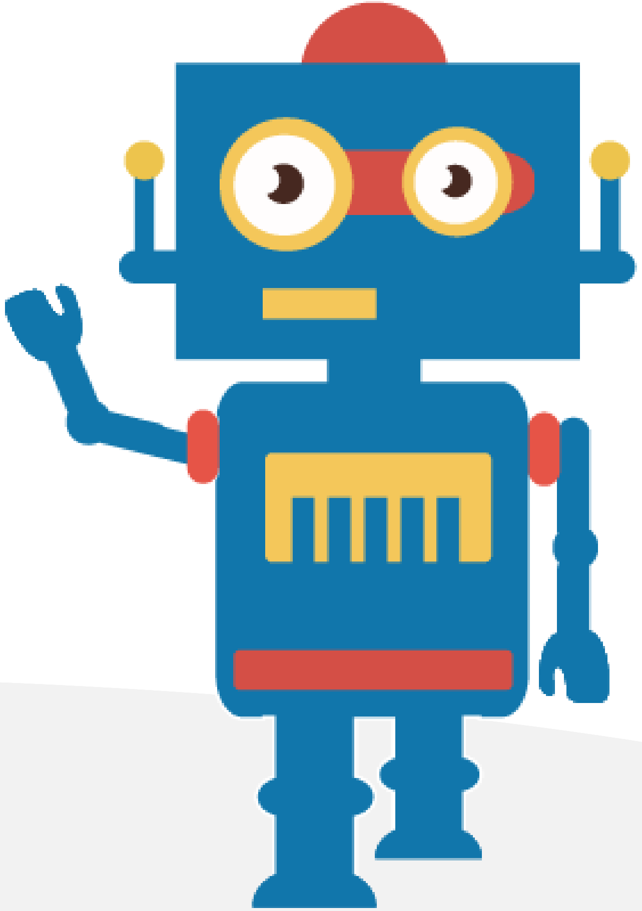
Year-End Best Practices

10 Best Practices for Ending the Year in WebLink Connect



WebLink
Grow Faster

Benefits of a Year-End Review

- Databases don’t clean themselves
- Data leads to decisions
- Your WebLink system should grow with you

Year-End Suggested Processes

1. Start with the 30,000-ft View
2. Congratulate the Winners
3. Analyze the Drops
4. Protect the Adds
5. Fill the Gaps
6. Clean up the Codes
7. Eliminate Duplicate Profiles
8. Analyze the Revenue
9. Prep for Next year
10. Learn more at the Help Center and User Community

Start with the 30,000-ft View

- Run the **Database Utilization Report** to get a overall sense of your WebLink Progress
  - Go back to your first year as a client
  - Look for upward or downward trends

- Run **Summary Reports** to identify trends:
  - Member Retention Report (Member Reports menu)
  - Executive Dashboard Summary (Member Reports menu)
  - Top 5 Sponsors (Event Reports menu)
  - Top 20 Profiles by Payment (Payment Reports menu)
  - Executive Summary (Referral Reports menu)
  - Members Joined and Members Dropped reports (member Reports menu)

Congratulate the Winners

- **Based on who got the most referrals:**
  - Reports > Web Reports > Top 150 Members…
- **Based on payments to you:**
  - Reports > Revenue Reports > Payment Reports > Top 20 Profiles by Payment
  - Reports > Member Reports > Executive Dashboard Summary

- **Methods to congratulate them:**
  - Email them the Referral Report showing how their category performed
  - Publish the list in your newsletters or on your website

  - **Bonus Tip:** Look for prospects in the same Category

Analyze the Drops

1. Use the Profile Selector to look for contributing factors
   Note: Change your Profile Selector settings to show the right data
2. Look for trends you can address:
   - Not attending events
   - Not receiving emails
   - Not being Contacted

- **What could you have done differently?**
  - More frequent contacts
  - Free invitations to events
  - Promote their Directory category

Protect the Adds

1. Use the Profile Selector to look for warning signs
   Note: Change your Profile Selector settings to show the right data
2. Look for trends you can address:
   - Not attending events
   - Not receiving emails
   - Not being Contacted

- **How can you ensure they renew?**
  - More frequent contacts
  - Free invitations to events
  - Promote their Directory category
  - Create Retention Projects

Fill the Gaps

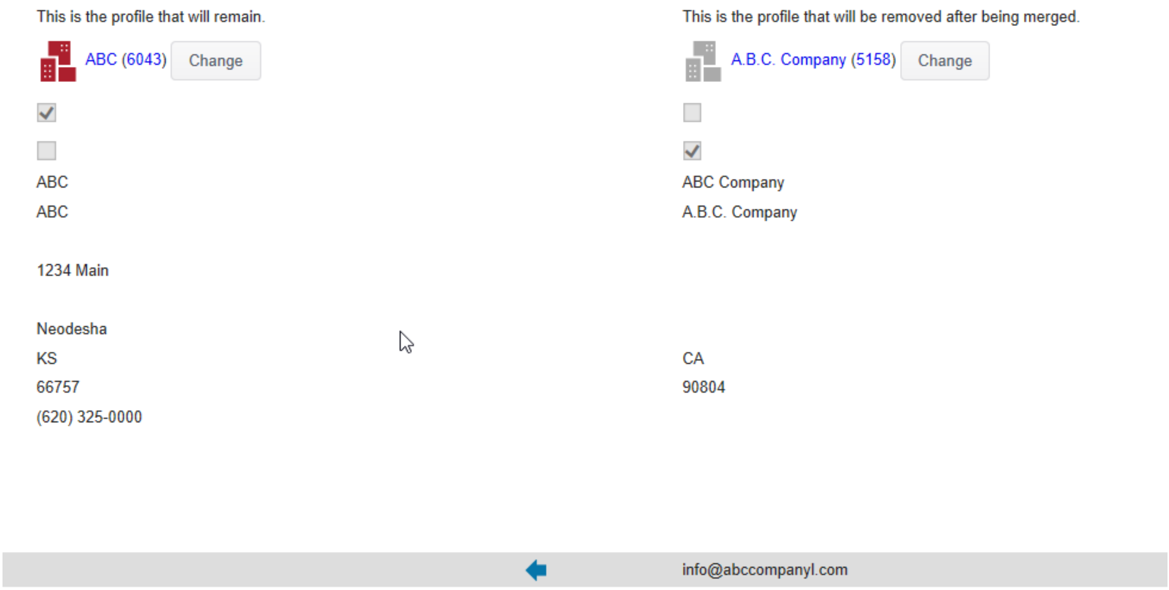
1. Use Exception Reports and Profile Selector to find missing data
   (Reports > Admin > Exception Reports)
2. Look for members with no:
   1. Email
   2. Website
   3. Employees/Relationships
   4. Contacts
   5. Events

Clean up the Codes

- Review and Update your Admin Area so that you record data the right way:
  - Contact Types
  - Event Types
  - Member Activity Types
  - Revenue Items
  - Users
- Update the Settings area so the Modules behave the way you want:
  - Profile Update Form
  - WebLink Local Directory
  - Drop Automation
  - Member Levels
  - Referral Report
  - Profile Selector

Eliminate Duplicate Profiles

1. Use this SQL in the SQL Writer Tool
   - Reports > SQL Writer Tool
2. select max(profileid), count(*) , reportname from profile group by reportname having count (*) >1
3. User the Profile Merge Tool to eliminate duplicates
   - Admin > Profile Merge Tool

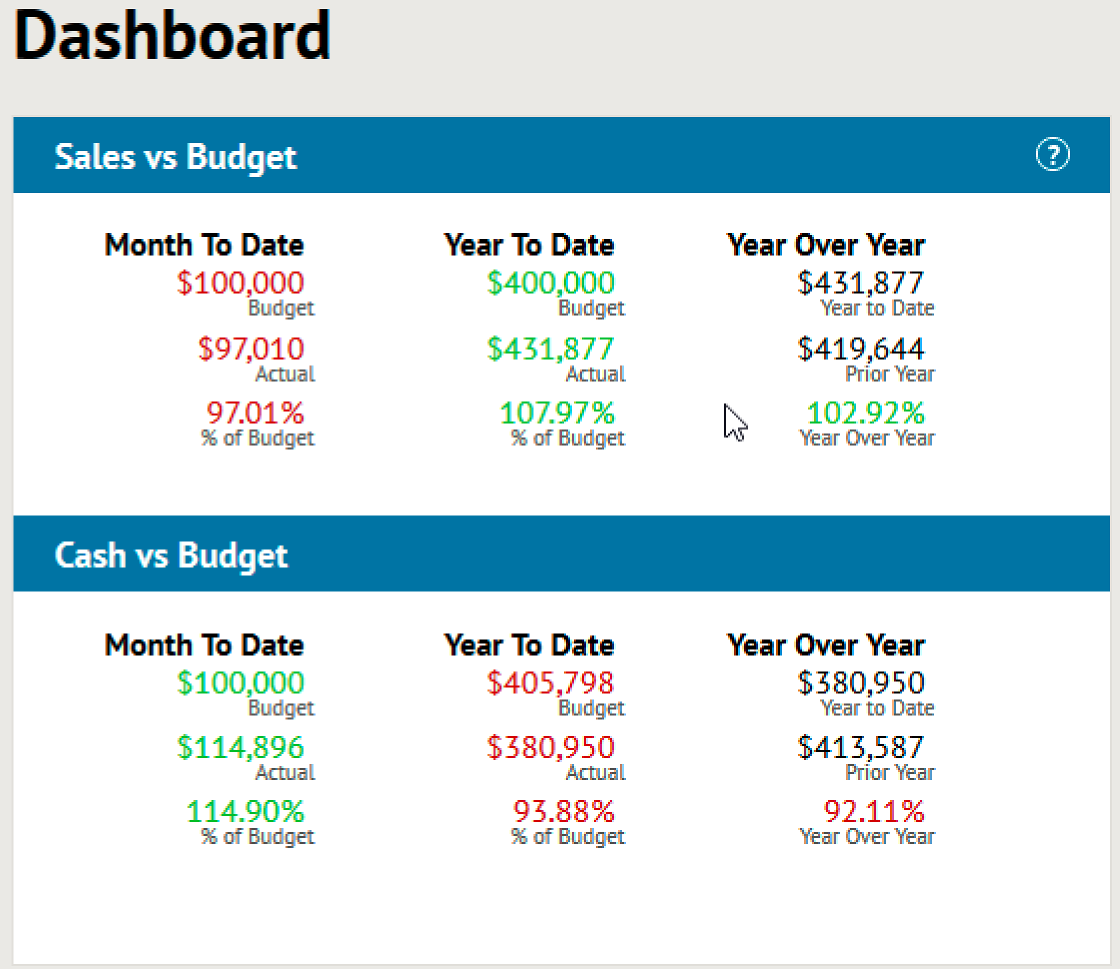


Analyze the Revenue

- Use the Invoice and Payment Selector for raw data
- Use the Financial Transaction Audit Report to help with an Audit
  (Reports > Admin Reports > Financial Transaction Audit)
- Unapplied Payments Outstanding
  (Reports > Revenue Reports > Payment Reports > Unapplied Payments Outstanding)
- Member Segmentation Report
  (Reports > Member Reports > Member Segmentation)
- Compare Year over Year Results
  - **Two Year Revenue Comparison**
    (Reports > Revenue Reports > Two-year Comparison of Revenue Invoiced
  - **Database Utilization**
    (Reports > Admin Reports > Database Utilization)

Prep for Next year

- **Establish Budgets in the Browser App**
  - Helps easily monitor your goals and progress
- **Create new HTML Templates**
  - Helps streamline communications and branding
- **Review old Events for Non-Members**
  - Helps make prospecting easier



Need more Guidance? Visit the **Help Center** and **User Community!**

- Complete sections of How-to Content for every WebLink module:
  - Best Practice Guides
  - On-demand Videos
  - Help with Settings and Configurations
- Connect with your Peers on the **User Community**
  - Networking Groups by Industry Type
  - Feature Requests and Enhancement Ideas

Training Resources for Referenced Functionality

- **Profile Merge Tool:** https://support.weblinkinternational.com/hc/en-us/articles/224870828-Merge-Two-Profiles
- **Profile Selector Configuration:** https://support.weblinkinternational.com/hc/en-us/articles/224870888-Profile-Selector-Configuration-Settings
- **SQL Writer Tool:** https://support.weblinkinternational.com/hc/en-us/articles/227492148-The-SQL-Writer-Tool
- **Drop Automation Configuration:** https://support.weblinkinternational.com/hc/en-us/articles/224865928-About-Member-Drop-Automation
- **Referral Report Configuration:** https://support.weblinkinternational.com/hc/en-us/articles/224868408-Configure-Referral-Report-Settings
- **WebLink Local Configuration:** https://support.weblinkinternational.com/hc/en-us/articles/224870268-Configuration-and-Settings-for-WebLink-Local-Directory-Business-Directory-
- **Cash and Sales Budget Configuration:** https://support.weblinkinternational.com/hc/en-us/articles/224872888-WebLink-Browser-Interface-Dashboard
- **Member Level Configuration:** https://support.weblinkinternational.com/hc/en-us/articles/224865968-About-Membership-Level-Management
- **Add Reports to your Dashboard:** https://support.weblinkinternational.com/hc/en-us/articles/224866428-Add-Dashboard-Reports