

Get the Scoop

on the Newest Feature in WebLink Connect™

Track and measure member benefit use with WebLink's
new Member Benefits Management feature

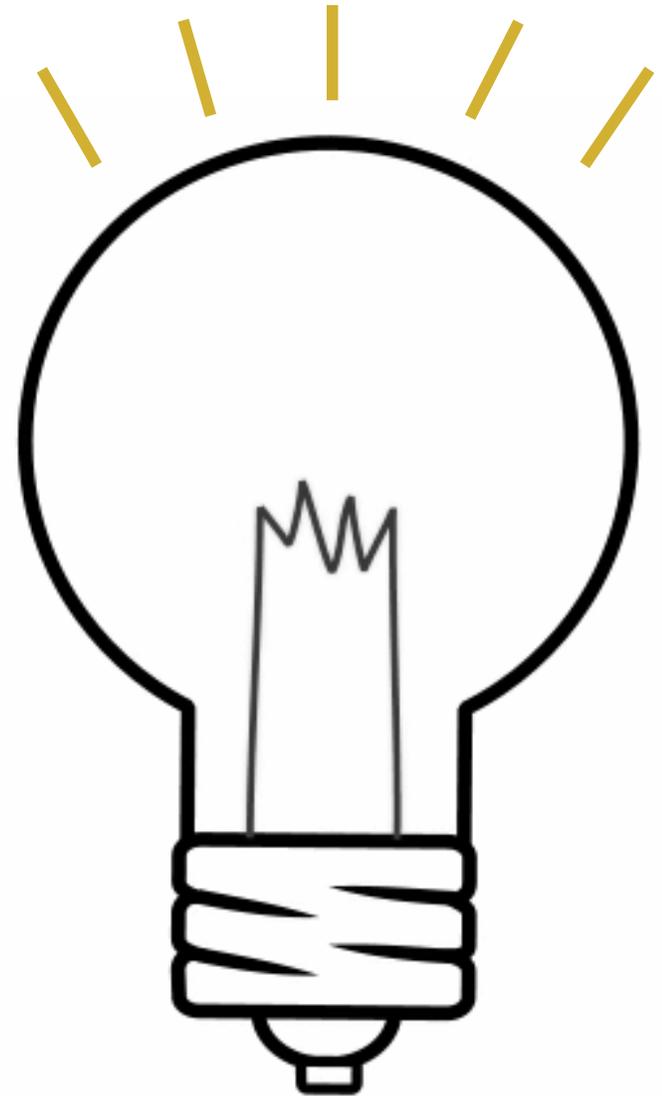
Tao Stadler, Customer Experience Director





Why Establish a Benefits Program?

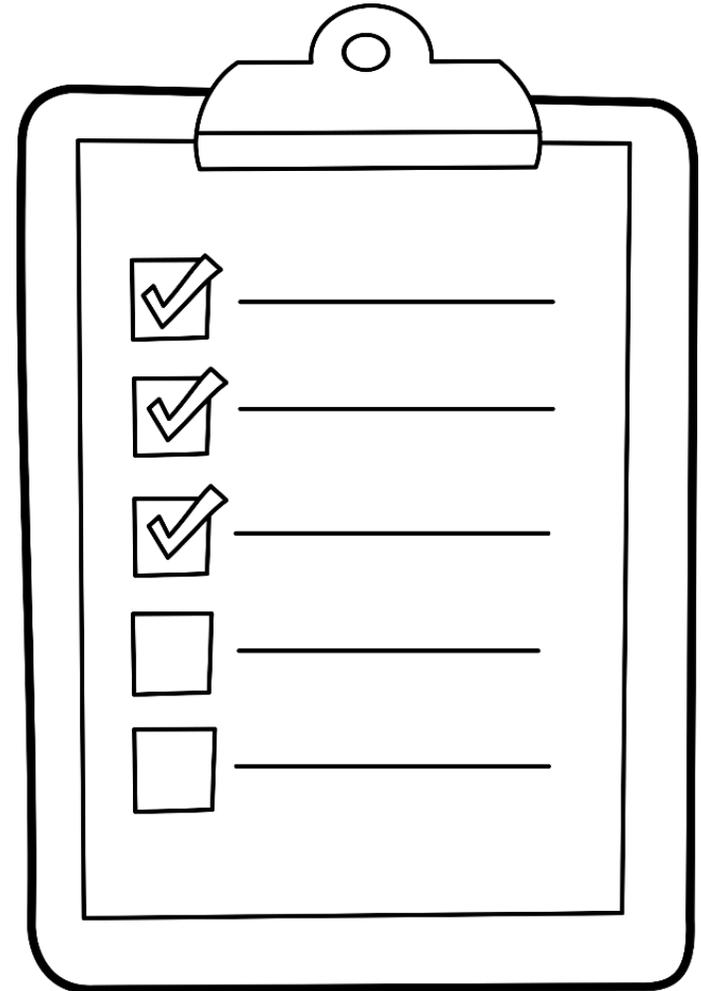
- ✓ 1 sell vs Many
- ✓ Members Choose their Benefits
- ✓ Fair Share encourages lying and punishes growth
- ✓ More Revenue overall
- ✓ Poll: How many of you already use Tiered Dues?





What Benefits do you Offer?

1. **Make a list.** Write down all of the free/included benefits of membership, even ones that seem hard to quantify
2. **Start adding the extras** (i.e. benefits provided to higher levels or offered a la carte).
3. **Add more.** Use this opportunity to brainstorm more benefit options



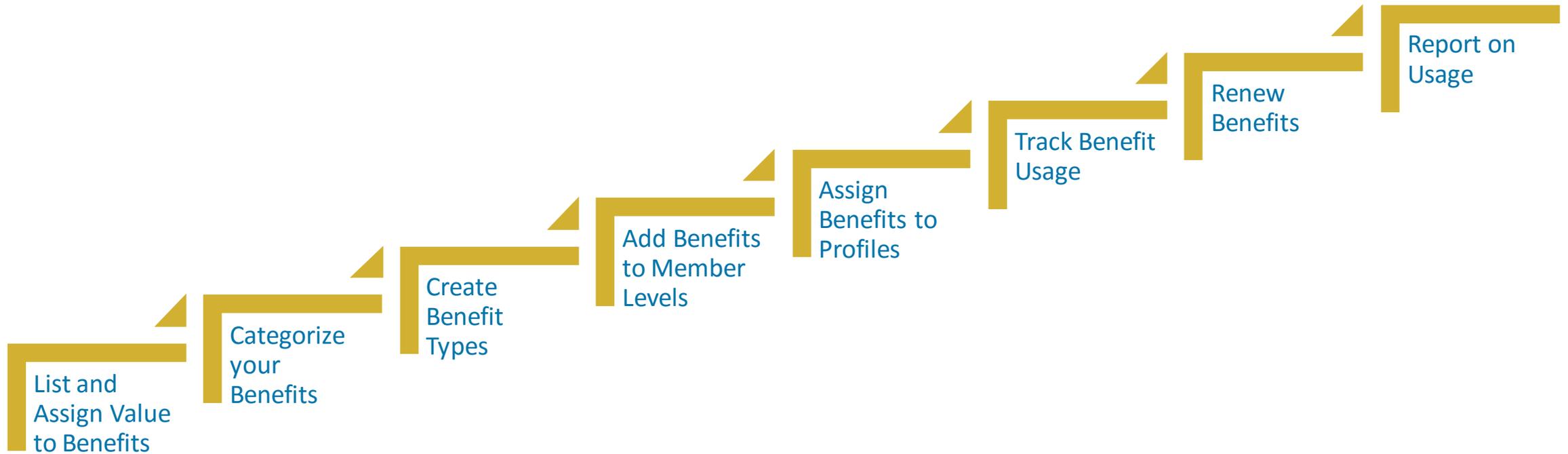


The possibilities are endless...

- Application fee waived
- Discounted mailing list/ mailing labels (discount and/or frequency can vary)
- Use of bulk mail permit
- Deluxe membership plaque
- Free e-mail blast advertising (frequency can vary)
- Free notary public service (quantity of documents can vary)
- Free job postings on chamber web site (frequency can vary)
- Free video included on YouTube channel
- Inclusion of business literature in racks in organization office
- Complimentary membership to national level of organization
- Invitation to welcome lunch during first year of membership
- Subscriptions to publications (number can vary)
- Free tickets to specific events (quantity can vary)
- Preferred seating at events (quantity can vary)
- Discounted booth space (dollar amount can vary)
- Complimentary conference room rental (frequency and/or duration can vary; size of room can vary if more than one available; certain dates or times can be excluded depending on tier)
- VIP parking at select events (events can vary)
- Complimentary drink tickets at select events (events can vary)
- First choice of sponsorship opportunities
- First choice of ad placement
- Ability to host certain events, such as Business After Hours
- Complimentary seats at athletic events in chamber box (number and/or frequency can vary)
- Invitation to advocacy trips
- Private meeting/meal with organization president and/or leadership
- Complimentary consulting services (number of hours can vary)



Step by Step Process



Assign Value to your Benefits

1. **Determine** how much the value would cost to purchase elsewhere

BENEFIT	RETAIL VALUE	MEMBER PRICE
Business Referrals (we only refer members)	\$100	\$0

2. **Assign** an average dollar amount to a “sale” the member could expect to get from the benefit, and **multiply** times the number of benefits the member can expect

BENEFIT	RETAIL VALUE	MEMBER PRICE
Course/Training : Professional Accreditation	\$500	\$200

Hint: Use WebLink's eBook for Developing Tiered Benefits



Categorize your Benefits

- Items costing little time and resources should be available to everyone
- Consider dollar value and market availability for higher level groups
- Create special groups/tiers based on benefit worth
- Group benefits based on areas of interest, for example networking benefits vs. business referral benefits to appeal to a wide range of members
- Determine any customizable or a la carte options



WebLink Benefit Management

Once you have identified your benefits and quantified their value, it's time to start tracking them in WebLink.



Create Benefit Codes

Admin > Manage Codes > Benefit Codes

- Create a code for each separate benefit name
- Assign a dollar value for a single benefit
- Indicate if the benefit is for use in event registration

BENEFIT TYPE CODES:

Selected Code

Name	Value	Id
<input type="text" value="Conference Room Rental"/>	<input type="text" value="250.00"/>	7

Event Benefit

Codes				
	Name	Value	IsEventBenefit	Id
▶	Conference Room Rental	250	<input type="checkbox"/>	7
	Event Networking Ticket	20	<input checked="" type="checkbox"/>	2
	Event Upgrade	10	<input checked="" type="checkbox"/>	5
	Golf Event Hole Sponsorship	200	<input checked="" type="checkbox"/>	3
	Member Resource Library	50	<input type="checkbox"/>	1
	Newsletter Highlight	75	<input type="checkbox"/>	4
	Press Release Posting	15	<input type="checkbox"/>	6





Configure Membership Levels with Benefits

Admin > Manage Codes > Benefit Codes

- Edit each Membership Level to add all benefits
- Select the benefit
- Enter the quantity...
 - [And/or enter a custom dollar amount...](#)
 - [For a total dollar value for one year](#)
- Choose whether the benefit is renewed annually with membership. Some new-member benefits may only be available once

Membership Level

Name: Silver Member

Profile Info
Billing
Affiliation Codes
Listing
Member Activity
Benefits

ADD BENEFIT

* Benefit Name: Member Resource Library

Amount:	Dollar Value	Quantity	Total Value
	50	1	50

Renew Anually

REMOVE

* Benefit Name: Press Release Posting

Amount:	Dollar Value	Quantity	Total Value
	15	2	30

Renew Anually

SAVE **CANCEL**





Configure Membership Levels with Benefits

When you've added all available benefits for members in the level, click **save**.

Determine whether you want to assign all benefits on save. If you do **NOT** choose to automatically update all profiles, you will need to add benefits manually (they can be added to multiple profiles at once).



Assign Benefits to Profiles

Admin > Manage Codes > Benefit Codes

- In any single profile, you can manually add a benefit
- Each benefit tracks the amount and quantity used
- The Renewal Date, along with the Renew Annually checkbox, tells the system when to inactivate the current year's benefit and start over in the next membership year

Add Benefit

Benefit

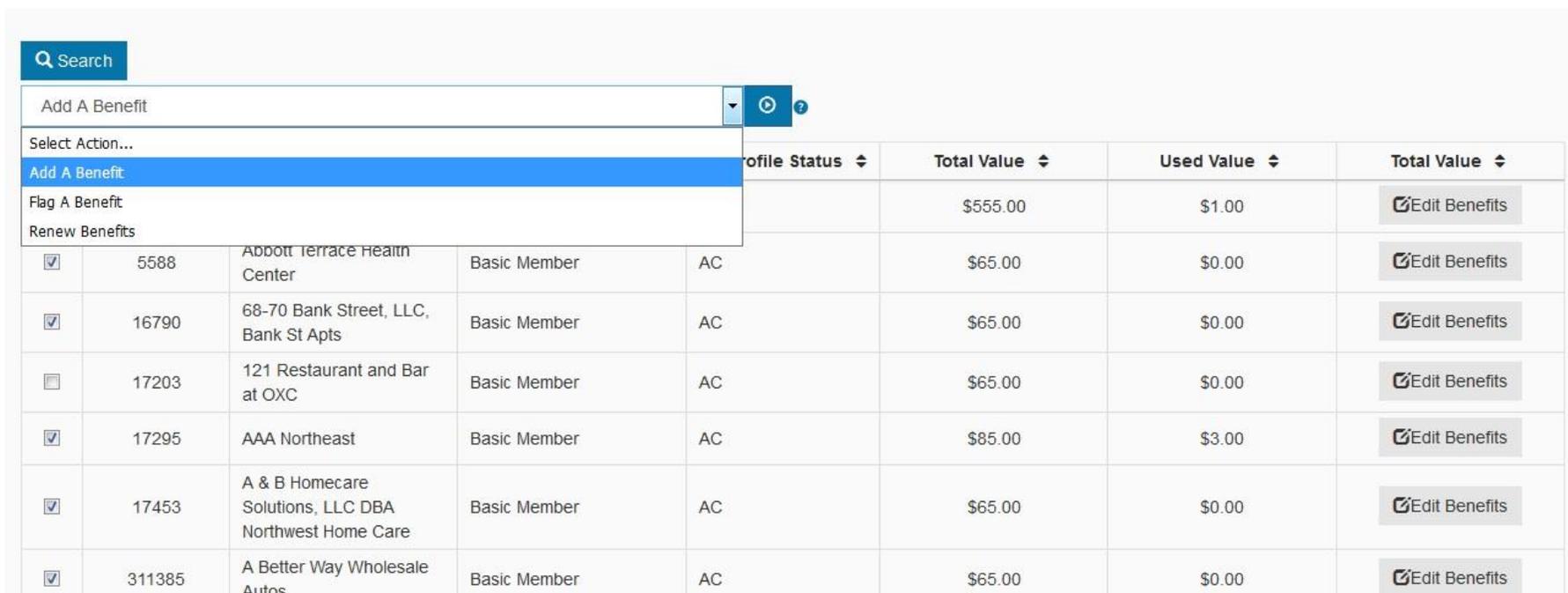
Dollar Value	Quantity	Total Value
\$ <input type="text" value="0"/>	<input type="text" value="0"/>	\$0.00

Expiration Date Use Dues Billing Anchor Month/day
 Use Specific Date
 Renew Annually



Assign Benefits to Multiple Profiles

- **Select** which profiles should receive the benefit
- **Choose** a dollar value and/or quantity – all selected profiles must get the same amount for the benefit for each addition
- **Choose** either a specific date (for all memberships on a standardized year), or choose to use the member's dues billing record to determine when to renew



				Profile Status	Total Value	Used Value	Total Value
					\$555.00	\$1.00	Edit Benefits
<input checked="" type="checkbox"/>	5588	Abbott Terrace Health Center	Basic Member	AC	\$65.00	\$0.00	Edit Benefits
<input checked="" type="checkbox"/>	16790	68-70 Bank Street, LLC, Bank St Apts	Basic Member	AC	\$65.00	\$0.00	Edit Benefits
<input type="checkbox"/>	17203	121 Restaurant and Bar at OXC	Basic Member	AC	\$65.00	\$0.00	Edit Benefits
<input checked="" type="checkbox"/>	17295	AAA Northeast	Basic Member	AC	\$85.00	\$3.00	Edit Benefits
<input checked="" type="checkbox"/>	17453	A & B Homecare Solutions, LLC DBA Northwest Home Care	Basic Member	AC	\$65.00	\$0.00	Edit Benefits
<input checked="" type="checkbox"/>	311385	A Better Way Wholesale Autos	Basic Member	AC	\$65.00	\$0.00	Edit Benefits



Track Benefit Usage

- Manually mark benefits as “used”
 - For a single profile
 - For multiple profiles at once
- Configure events to allow benefit usage as a payment method

May Flowers Networking Event
Monday, May 1, 2017 5:00 PM

Welcome John Smith

Registration Contact
Select Items
Attendees

+ New Attendee
Attendee #1
Payment Info

Payment Info

Promo Code

Use Member Benefits

Amount/Quantity to Use

Single Ticket:	\$10.00
1 x \$10.00	
Amount	\$10.00
Benefits Applied	-\$2.00
Tax Amount	\$0.00
Total Amount	\$8.00

Payment Option





Set Up Event Benefit Payment Method

1. Add one or more benefits to an event
 - Only one type of benefit can be used by each member, but multiple types can be available for the event
2. Set a limit of how many benefits can be used for a single registration
3. Set an adjustment type to be used to offset the event invoice

Add a Benefit ✕

Benefit Name: Network Tickets ▼

Applies to:

Event Item	Applies
Luncheon Ticket	<input checked="" type="checkbox"/>
Sponsorship	<input checked="" type="checkbox"/>
Free Item	<input type="checkbox"/>
Taxable Event Item	<input type="checkbox"/>

Benefit Limit per Member: ▲ ▼ Quantity Dollar Value

Adjustment Type: ▼





Renew Benefits

Benefits will be set to auto-renew daily.

- Criteria:
 - Expiration Date has passed
 - There are no DUES invoices with a balance due
- Any expired benefits that do not auto-renew will remain active until dropped or manually inactivated
- Force renewal at any time (even if dues invoice is unpaid) in Benefit Management interface
- Renewed benefits will update with all available and a new expiration date of the following year



Benefit Reporting

Membership Benefit Summary by Level: high-level overview of what benefits apply to which levels, with total numbers available/used as an average, grouped by Membership Level

Benefit Usage Report by Member: a list of all members with their total benefit value, available and used for each member

Benefit Usage by Type: a summary of all Benefits Types and how often they've been used

Available Benefits by Type: a list of all configured benefits, with a summary of which levels apply and percentage used



Benefit Reporting

Membership Benefit Summary by Level

As of Date: 7/24/2017

This report gives a high-level overview of which benefits apply to each level.

	Quantity	Total Value	Renew Annually
Gold Member			
Member Resource Library	1	\$100.00	Y
Event Networking Ticket	10	\$150.00	Y
Member News Posting	3	\$150.00	Y
Sponsor Table	1	\$1,000.00	Y
Total for Gold Member	15	\$1,400.00	
Silver Member			
Member Resource Library	1	\$100.00	Y
Event Networking Ticket	5	\$75.00	Y
Member News Posting	2	\$100.00	Y
Sponsor Table	1	\$500.00	Y
Total for Silver Member	9	\$775.00	
Basic Member			
Member Resource Library	1	\$100.00	Y
Event Networking Ticket	2	\$30.00	Y
Member News Posting	1	\$50.00	Y
Total for Basic Member	4	\$180.00	

Member Benefit Summary

As of Date: 7/24/2017

Profile ID 129

Chase Collegiate School
 Membership Level: Gold Member
 Annual Dues Amount: \$500.00
 Annual Renewal: April 1

	Quantity	Value	Quantity Used	Value Used	Quantity Available	Value Available
Event Networking Ticket	10	\$15.00	0	\$0.00	10	\$15.00
Member News Posting	3	\$50.00	0	\$0.00	3	\$50.00
Member Resource Library	1	\$100.00	0	\$0.00	1	\$100.00
Sponsor Table	1	\$1,000.00	0	\$0.00	1	\$1,000.00
Total	15	\$1,165.00	0	\$0.00	15	\$1,165.00

Profile Benefit Management

AI Engineers, Inc. (316483)

Active Benefits

Benefit	Quantity	Total Value	Quantity Used	Amount Used	Quantity Remaining	Amount Remaining	Expiration Date
Member Resource Library	1	\$100.00	0	\$0.00	1	\$100.00	10/1/2017
Event Networking Ticket	2	\$30.00	1	\$15.00	1	\$15.00	10/1/2017
Member News Posting	1	\$50.00	0	\$0.00	1	\$50.00	10/1/2017

Inactive Benefits

Benefit	Quantity	Total Value	Quantity Used	Amount Used	Quantity Remaining	Amount Remaining	Event Benefit	Renew Annually	Expiration Date	Inactive	Date Inactivated
No records found											

Benefit Usage by Type

As of Date: 7/24/2017

This report displays all benefits, sorted by total active benefit value assigned to your profile and still available. Double-click the benefit name to see a drill-down of member usage.

Benefit Type	Quantity	Value	Quantity Used	Value Used
Member Resource Library	782	\$78,200.00	0	\$0.00
Member News Posting	786	\$39,100.00	0	\$0.00
Event Networking Ticket	1578	\$11,715.00	781	\$11,715.00
Sponsor Table	2	\$2,000.00	0	\$0.00

Benefit Usage by Member

As of Date: 7/24/2017

This report gives a list of members sorted by total benefit value, with amount used and still available.

ProfileID	ReportName	Quantity	Value	Quantity Used	Value Used	Quantity Available	Value Available
129	Chase Collegiate School	15	\$1,165.00	0	\$0.00	15	\$1,165.00
354012	Basket Co.	15	\$1,165.00	0	\$0.00	15	\$1,165.00
5	Albert Bros, Inc.	4	\$165.00	0	\$0.00	4	\$165.00
22	Budwitz & Meyerjack, PC	4	\$165.00	0	\$0.00	4	\$165.00
24	Burton's Monument Shop, Inc.	4	\$165.00	0	\$0.00	4	\$165.00
25	Bushka Lumber and Millwork Company, LLC	4	\$165.00	0	\$0.00	4	\$165.00
28	Carmody Torrance Sandak & Hennessy LLP	4	\$165.00	0	\$0.00	4	\$165.00
31	Cly-Del Manufacturing Company	4	\$165.00	0	\$0.00	4	\$165.00
39	Holiday Hill	4	\$165.00	0	\$0.00	4	\$165.00
42	M.J. Daly, LLC	4	\$165.00	0	\$0.00	4	\$165.00
50	Easterseals	4	\$165.00	0	\$0.00	4	\$165.00
60	Quassy Amusement Park Inc.	4	\$165.00	0	\$0.00	4	\$165.00
61	Gager, Emerson, Rickart, Bower & Scalzo, LLP	4	\$165.00	0	\$0.00	4	\$165.00
65	Griffin, Griffin & Mayo, P.C.	4	\$165.00	0	\$0.00	4	\$165.00
69	Charles Heaven & Co., Certified Public Accountants	4	\$165.00	0	\$0.00	4	\$165.00
73	Hubbard-Hall Inc.	4	\$165.00	0	\$0.00	4	\$165.00
75	Industrial Riggers, Inc.	4	\$165.00	0	\$0.00	4	\$165.00
95	Martin & Rowland Insurance, Inc.	4	\$165.00	0	\$0.00	4	\$165.00
111	Nelson Heat Treating Company, Inc.	4	\$165.00	0	\$0.00	4	\$165.00
115	Northwestern Mutual Wealth Management-Boxer Wealth Management	4	\$165.00	0	\$0.00	4	\$165.00
132	Schmidt's & Serafine's, Inc.	4	\$165.00	0	\$0.00	4	\$165.00
134	Secor, Cassidy & McPartland, PC	4	\$165.00	0	\$0.00	4	\$165.00
135	H. D. Segur, Inc.	4	\$165.00	0	\$0.00	4	\$165.00
148	H&T Waterbury, Inc.	4	\$165.00	0	\$0.00	4	\$165.00
170	Zackin Zimyeski Sullivan, CPA, LLC	4	\$165.00	0	\$0.00	4	\$165.00
175	Bunker Hill Pharmacy, Inc.	4	\$165.00	0	\$0.00	4	\$165.00



Thank You!

Next Steps:

- Download our eBook on Developing your own Tiered Dues Program:
<http://info.weblinkinternational.com/grow-with-tiered-dues>
- Visit the Help Center for detailed instructions and videos on Benefits Management
- Activate your free 18-month trial of Benefits Management by July 31

