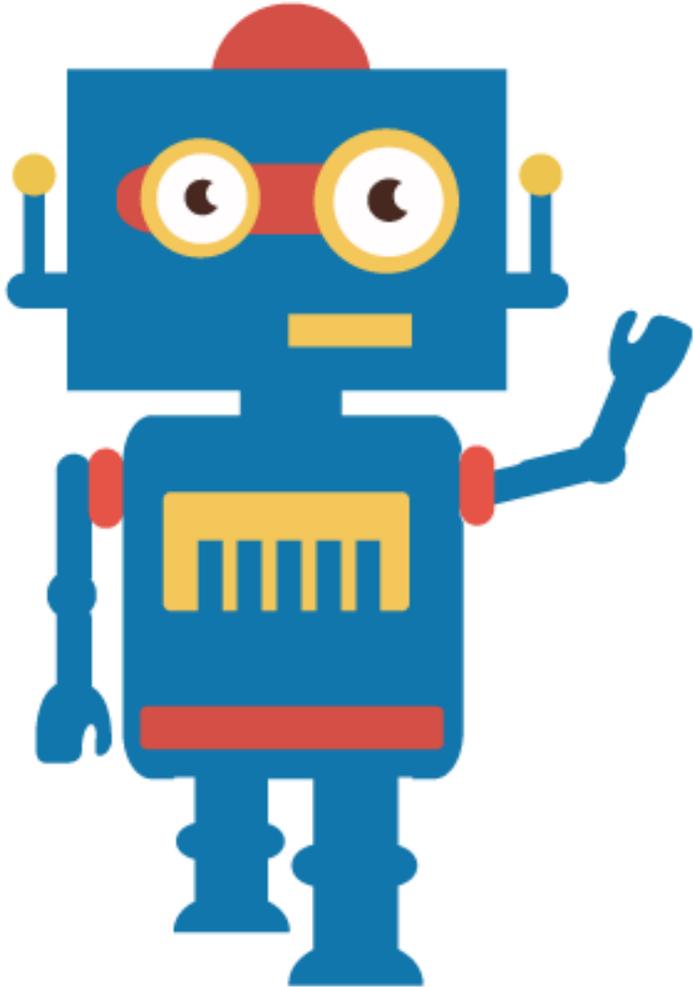




Tracking Member Groups

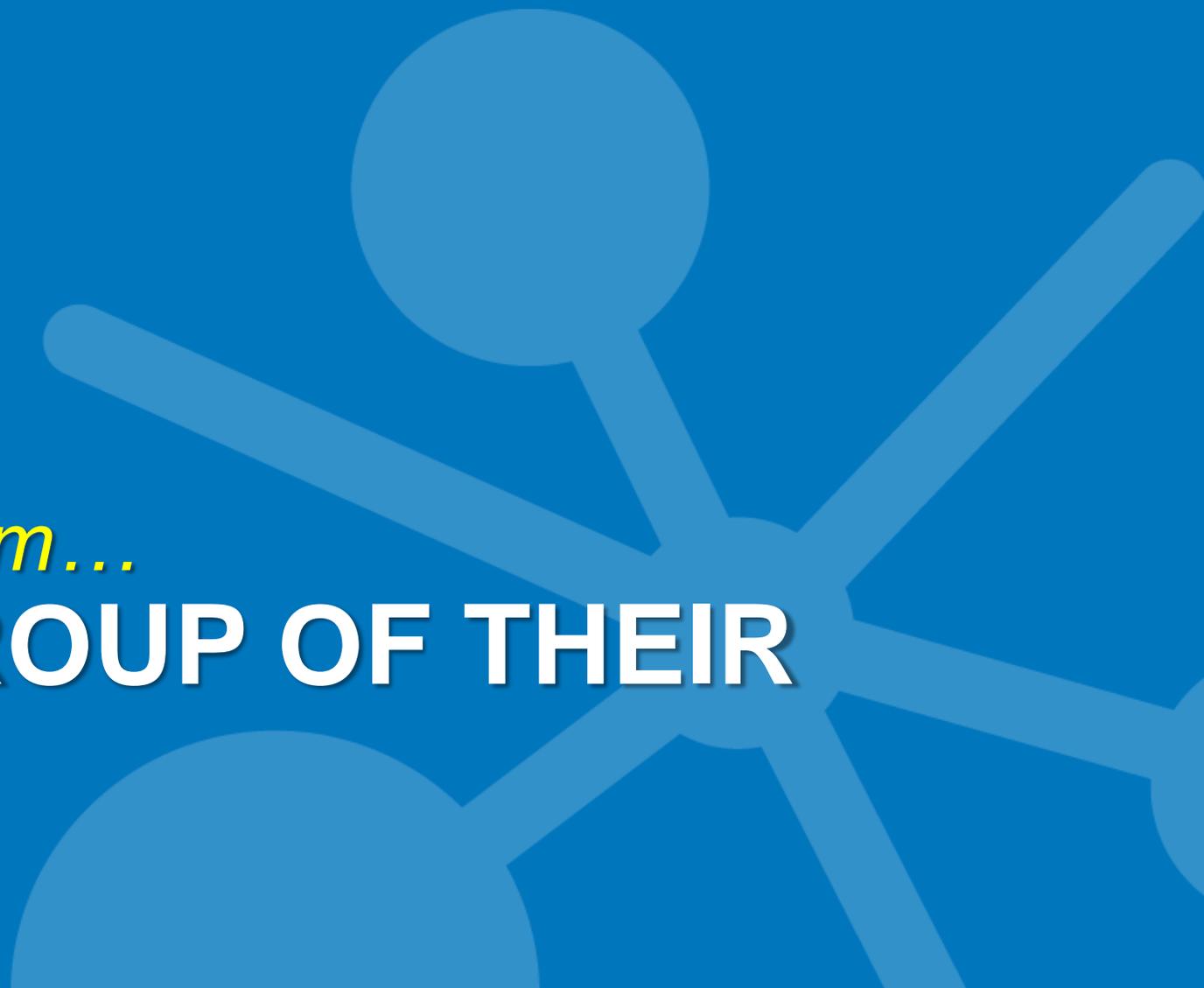
#WLSummit

Meet the Presenters



✦ **Laura Alin**, *Onboarding Specialist*
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✦ **Sabrina Sides**, *Onboarding Specialist*
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Think about the program...

**ARE THEY A GROUP OF THEIR
OWN?**

If you answered YES...

Should they be an Affiliation or a Committee?

- ✂ Do you need to track meeting attendance?
- ✂ Do you just need an easy way to communicate?
- ✂ What are my reporting options for both?

Reporting Options – Affiliations vs. Committees

Affiliations:

- ✱ Mailing Labels
- ✱ Mailing Export
- ✱ Printable Lists

Committees:

- ✱ Mailing Labels
- ✱ Mailing Export
- ✱ Attendance Sheet
- ✱ Roster
- ✱ Committee Summary
- ✱ Meeting Details



Think about the program...

**DO THEY HAVE TO PAY A FEE TO
BELONG?**

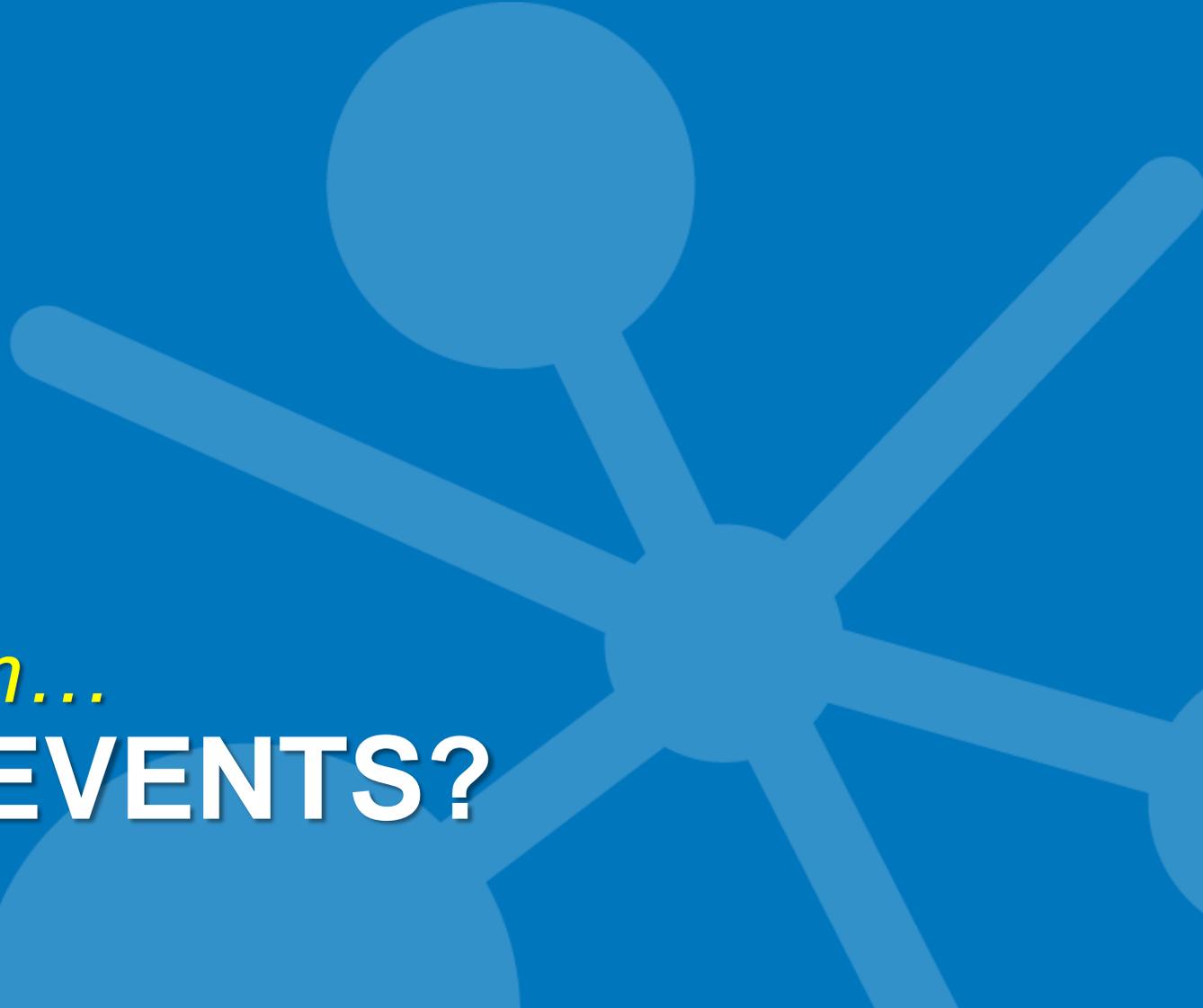
If they pay...

How can you bill and track fees efficiently?

- ✂ Set up Billing Records for recurring fees
- ✂ Use Generate One Time Invoices for Multiple Profiles for special cases
- ✂ Create single invoices from profiles using specific Revenue Item
- ✂ Apply payments in mass to save time

Think about the program...

DO THEY HAVE EVENTS?



How can I manage program specific events?

- ✱ Set up an Event Type admin code
- ✱ Use Affiliation Codes to restrict event items
- ✱ Set up a guest price for potential group members
- ✱ Communicate easily with guests afterwards

Think about the program...

**SET UP EASY ACCESS TO GROUP
RESOURCES**

How can I manage their program specific resources?

- ✱ Give access to reports or documents by restricting Web Content Records to specific groups
- ✱ Track which group members are viewing files
- ✱ Give full membership access to resources, but track who is viewing to follow-up with prospective group members

Think about the program...

**HOW CAN I SHOW THEM THE ROI
FOR BELONGING TO THE
PROGRAM?**

Track all referrals and benefits received!

✱ Create specific Referral Types for each group and benefit within the group

✱ **Referral Report Options:**

- Print/mail Single Referral Report to each Member
- Email Referral Report to entire group
- Profile Full Involvement Report

Questions?

