

# Back to Basics.....With a Twist

*“Membership Management trends, best practices, and Membee features that you can put to work today as employed by Membee’s most innovative and effective users worldwide.”*

Membee Users Group Conference - June 1 - 2, 2017

**Thursday, June 1<sup>st</sup>**

10:00 – 10:30	Welcome & Introductions
10:45 - 11:15	<p><b>Automations – Using Them Effectively</b> Eliminate work! Take a look at the how Membee’s automations can help with retention while reducing your workload. We will review the best practices our most successful organizations use and show you how other features, such as the new member sign-up, all work together to save you time</p> <ul style="list-style-type: none"><li>● Start at the beginning - when members sign -up<ul style="list-style-type: none"><li>○ Automate this</li><li>○ Make a pending status if they have to be approved and let Membee accept it for you.</li><li>○ Charge for it/post an invoice - you should be configuring Membee for what usually happens, not the exceptions</li><li>○ Take advantage of the notification email - add additional fields</li></ul></li><li>● Use Card Vault<ul style="list-style-type: none"><li>○ Encourage automated renewals</li></ul></li><li>● Renewal</li><li>● Recommended reminders</li><li>● Suspension</li><li>● Cancellation</li></ul>
11:15 - 12:30	<p><b>Directory Listings – A Powerful Tool</b> Join us as we review the directories powerful features including</p> <ul style="list-style-type: none"><li>• Using descriptions<ul style="list-style-type: none"><li>○ Burger Buzz</li></ul></li><li>• Using customizable fields<ul style="list-style-type: none"><li>○ Parameter</li><li>○ Listing parameter, custom and link</li><li>○ Burger Buzz</li></ul></li><li>• Sponsored keywords<ul style="list-style-type: none"><li>○ Keyword is business</li></ul></li></ul>

	<ul style="list-style-type: none"> <li>▪ Bee Innovations</li> <li>▪ Jean Autrey</li> <li>○ Keyword is Bee <ul style="list-style-type: none"> <li>▪ Bee Keepers of America has the listing</li> </ul> </li> <li>○ Featured listings <ul style="list-style-type: none"> <li>▪ Sandy Brown</li> <li>▪ Beez R Us</li> <li>▪ Red Rose Florist</li> </ul> </li> <li>○ Show how you can do this on new member &amp; profile update</li> <li>○ Highlight how you can change the icon <ul style="list-style-type: none"> <li>▪ Go to <ul style="list-style-type: none"> <li><a href="http://www.guelphchamber.com/find#action=Alpha&amp;value=All&amp;listingType=O&amp;cid=119&amp;id=201">http://www.guelphchamber.com/find#action=Alpha&amp;value=All&amp;listingType=O&amp;cid=119&amp;id=201</a></li> </ul> </li> </ul> </li> <li>• Turn on Status <ul style="list-style-type: none"> <li>○ Show in advanced search</li> <li>○ Show in a listing</li> </ul> </li> <li>• Feeds <ul style="list-style-type: none"> <li>○ Sponsored</li> <li>○ Featured</li> <li>○ New members</li> </ul> </li> </ul>
12:30 - 1:30	LUNCH
1:30 – 2:00	<p><b>Take advantage of the New Features for the Profile and New Member Sign-ups</b></p> <p>Take a look at all the new features for the member profile update as well as the new member sign-up forms – all designed to provide more information to your members, make it easy for them to update their information and make it easy for new members to join</p> <ul style="list-style-type: none"> <li>● Profile <ul style="list-style-type: none"> <li>○ <a href="http://nope.membeesites.net/member-update/">http://nope.membeesites.net/member-update/</a></li> <li>○ Betty Summers - <a href="mailto:betty@bizhive.com">betty@bizhive.com</a></li> <li>○ Features <ul style="list-style-type: none"> <li>■ Responsive</li> <li>■ Flat</li> <li>■ Financial History</li> <li>■ Participation History</li> <li>■ Change status</li> <li>■ Switch Employers</li> <li>■ Granting access to new contacts</li> <li>■ Adding listings</li> <li>■ Grouping of category, parameter and custom fields</li> </ul> </li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>● New Member <ul style="list-style-type: none"> <li>○ <a href="http://nope.membeesites.net/stripe-org-sign-up/">http://nope.membeesites.net/stripe-org-sign-up/</a></li> <li>○ Features <ul style="list-style-type: none"> <li>■ Options for granting access</li> <li>■ Allow members to select from existing orgs</li> <li>■ Grouping of category, parameter and custom fields</li> <li>■ Assign parameter fields</li> <li>■ New billing options <ul style="list-style-type: none"> <li>● Free Period</li> <li>● Lifetime</li> <li>● New Pro-rated billing options</li> </ul> </li> </ul> </li> </ul> </li> </ul>
2:00 - 3:15	<p><b>Break Out to Basics</b></p> <p>Membee's team and other seasoned users will show you the basics by breaking out into small groups.</p> <ul style="list-style-type: none"> <li>• Manually setting up a new member, reinstating a member</li> <li>• Processing payments in different ways</li> <li>• Integrating Membee with a third party software, ie MailChimp</li> <li>• Setting up an event</li> <li>• Using emails effectively</li> </ul>
3:15 - 3:30	BREAK
3:30 - 5:00	<p><b>User Feedback Workshop</b></p> <p>This has always been a great tool to get ideas flowing. It is a highly interactive workshop where you will have the opportunity to share your feedback on future possible enhancements.</p> <ul style="list-style-type: none"> <li>- Event Cancellation/Change registration <ul style="list-style-type: none"> <li>- Cancellation policy</li> </ul> </li> <li>- Directory Update - update the look - no new features</li> <li>- User Interface Update - no new features</li> </ul>
6:00 - ???	<p><b>Dinner!</b></p> <p>There will be an open option to go as a group for dinner, choice of restaurant will be decided before the afternoon session. The hotel is right downtown where there are plenty of stores if you want to shop after dinner. It is beside Spencer Smith Park and at the shore of Lake Ontario. There is also a work out room and an indoor swimming pool.</p>

**Friday, June 2<sup>nd</sup>**

? – 9:00	Breakfast is at the B&B (Beaver and Bulldog) restaurant on site.
9:00 – 9:30	<p><b>Reports – How Are They Working For You?</b></p> <p>Membee’s Team will review some best practices for reporting including</p> <ul style="list-style-type: none"> <li>• Eliminating duplication between Membee and your accounting system</li> <li>• Events / Participation Reporting</li> <li>• Generating Itineraries</li> <li>• Membership reports</li> <li>• Identifying potential data issues</li> </ul>
9:30 – 10:00	<p><b>Best Practices Session</b></p> <p>A round table session where every attendee will have the opportunity to present a neat Membee trick or best practice and/or present an organizational business challenge seeking the assistance of the group and Membee</p>
10:00 – 10:15	BREAK
10:15 – 11:00	<p><b>What’s Going on at the Hive</b></p> <p>Make sure your organization isn’t missing out on anything! We’ll take a look at what has been launched in the past year and provide an exclusive preview of what’s coming up next in Membee so your organization can hit the ground running and take advantage of the new features the instant they are released.</p> <ul style="list-style-type: none"> <li>- Include what we did that they asked for - just highlight</li> </ul>
11:00 – 12:00	<p><b>Q&amp;A</b></p> <p>Bring your questions! Membee staff and your fellow Membee users will be available to answer your questions.</p>
12:00 – 12:15	<p><b>Planning Next Conference</b></p> <p>As innovative and groundbreaking features are released in Membee more frequently and the daily challenges faced by our organizations are unrelenting, we need to decide how best to utilize our user meeting.</p>
12:15 – 2:00	Adjourn & Stick Around Time for extra help.