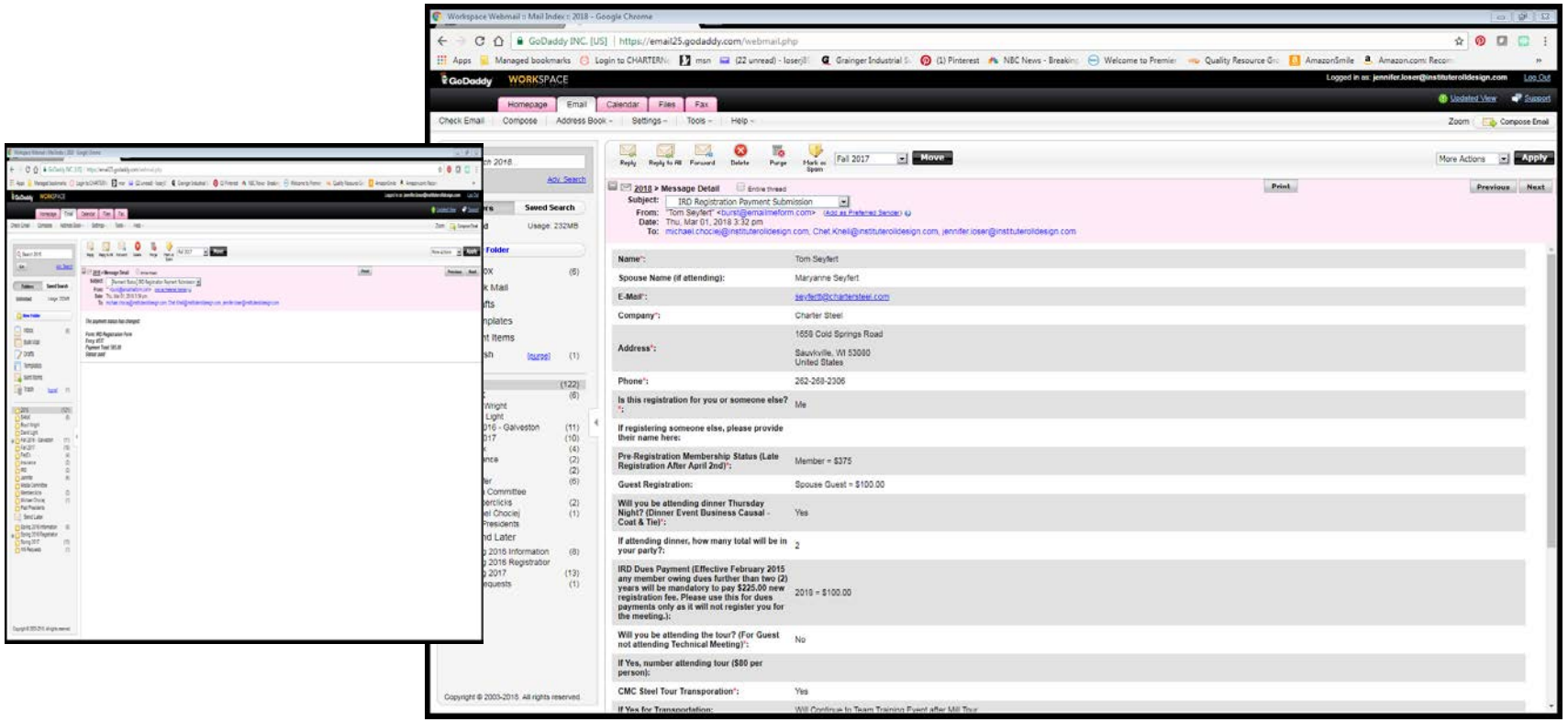
IRD Association Inc.

2018 Update – Membership/Registration Enhancements

Current Process for Members to Register for Meetings

- Secretary sends out meeting announcement
- Attendees go to IRD.net and register for meeting
  - Form is filled out
  - PayPal Payment



The Treasurer and Secretary get an email with the registration and a separate email confirming the PayPal payment processed.

This then triggers two additional manual processes

Secretary

1. Creates a spreadsheet to track the information for reporting
2. Verifies accuracy of registration
3. Works with Treasurer to correct registrations and verify head counts

If at any point information
Is not correct the process
has to stop and additional emails
and/or phone calls have to be made.
These manual processes mean our
“volunteers” are spending more than 20
hours a week **Reprocessing** registrations for
each meeting.

Treasurer

1. Verifies payment has processed in PayPal
2. Opens QuickBooks and Verifies attendee is Member vs Non Member
3. Verifies Member is current on dues
4. Verifies Member information in QuickBooks is correct
5. Enters a sales receipt in QuickBooks
6. Sends receipts to attendees
7. Works with Secretary to verify head counts and registration accuracy

Why do we do that?

Each event is set up and costed based on head counts.
Room Set ups
Meal Counts
Final Costs to the IRD

The more accurate our up front information is the better we can manage our costs.

Can it be done better?

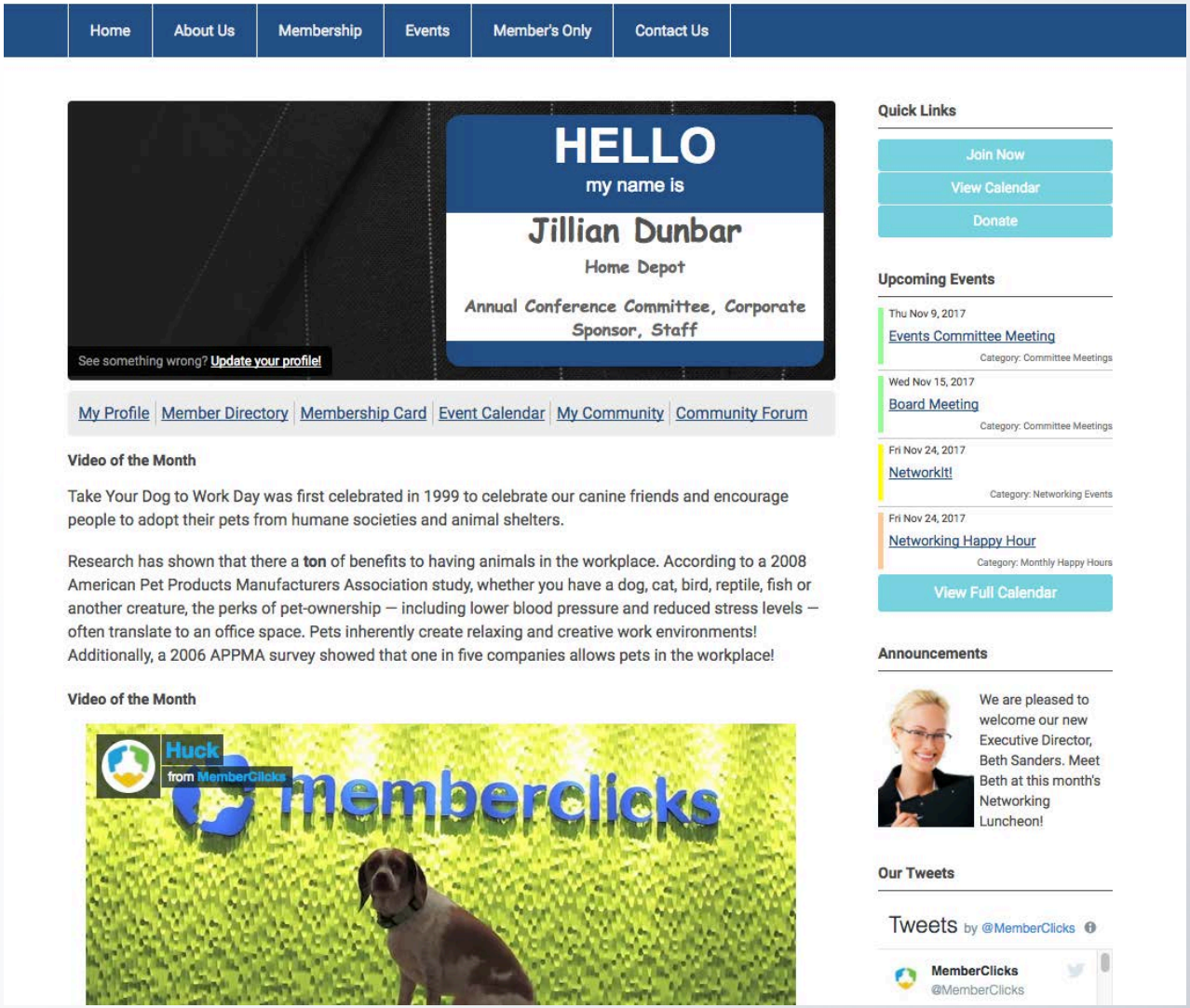
YES!

MemberClicks

WHAT OUR PRODUCT DOES

MemberClicks

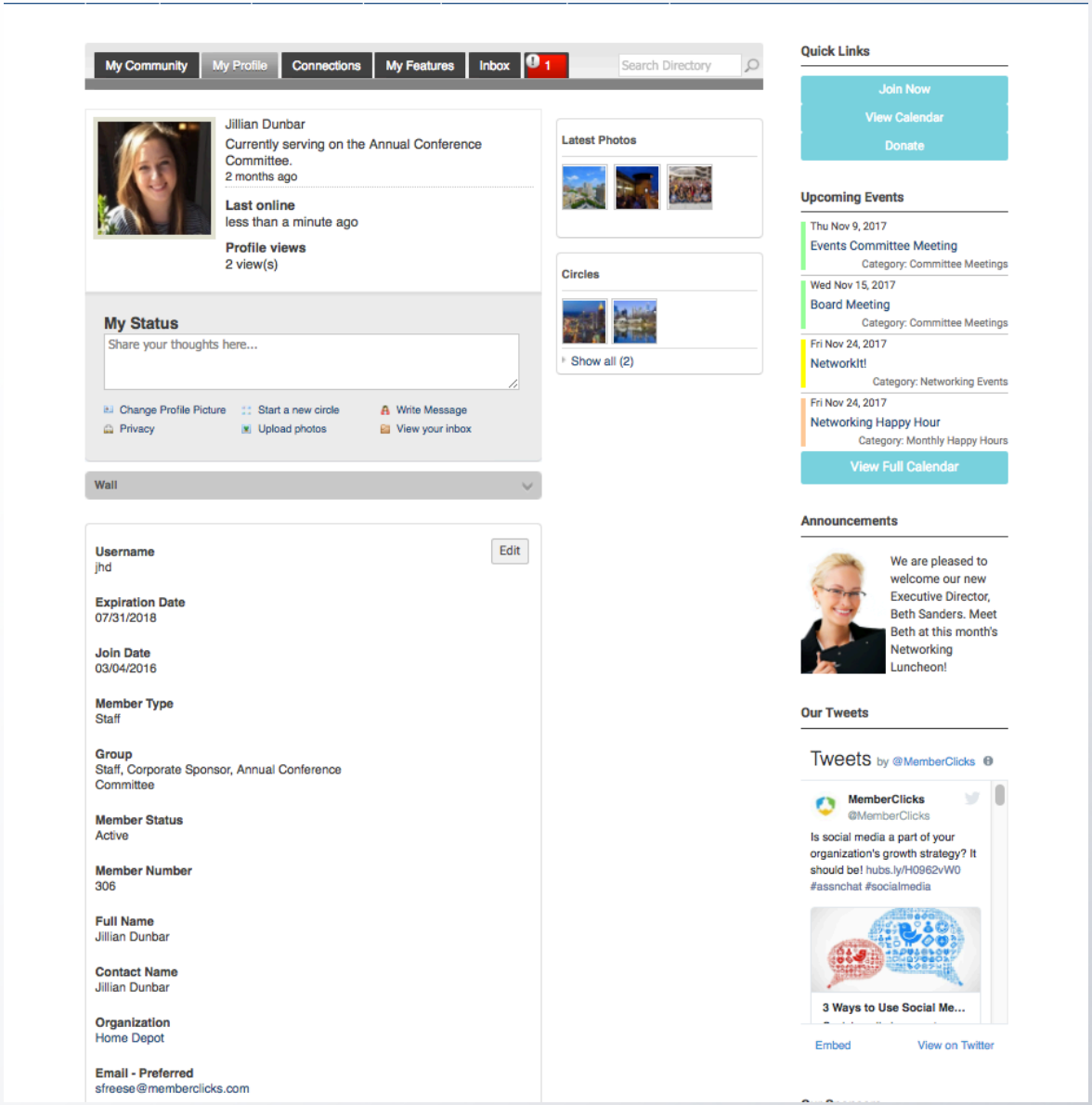
Member Landing Page



Member Landing Page:

- Centralized Hub for members
- Members-Only Content
- Fully customizable page

- https://irda.memberclicks.net/admin



Member Profile

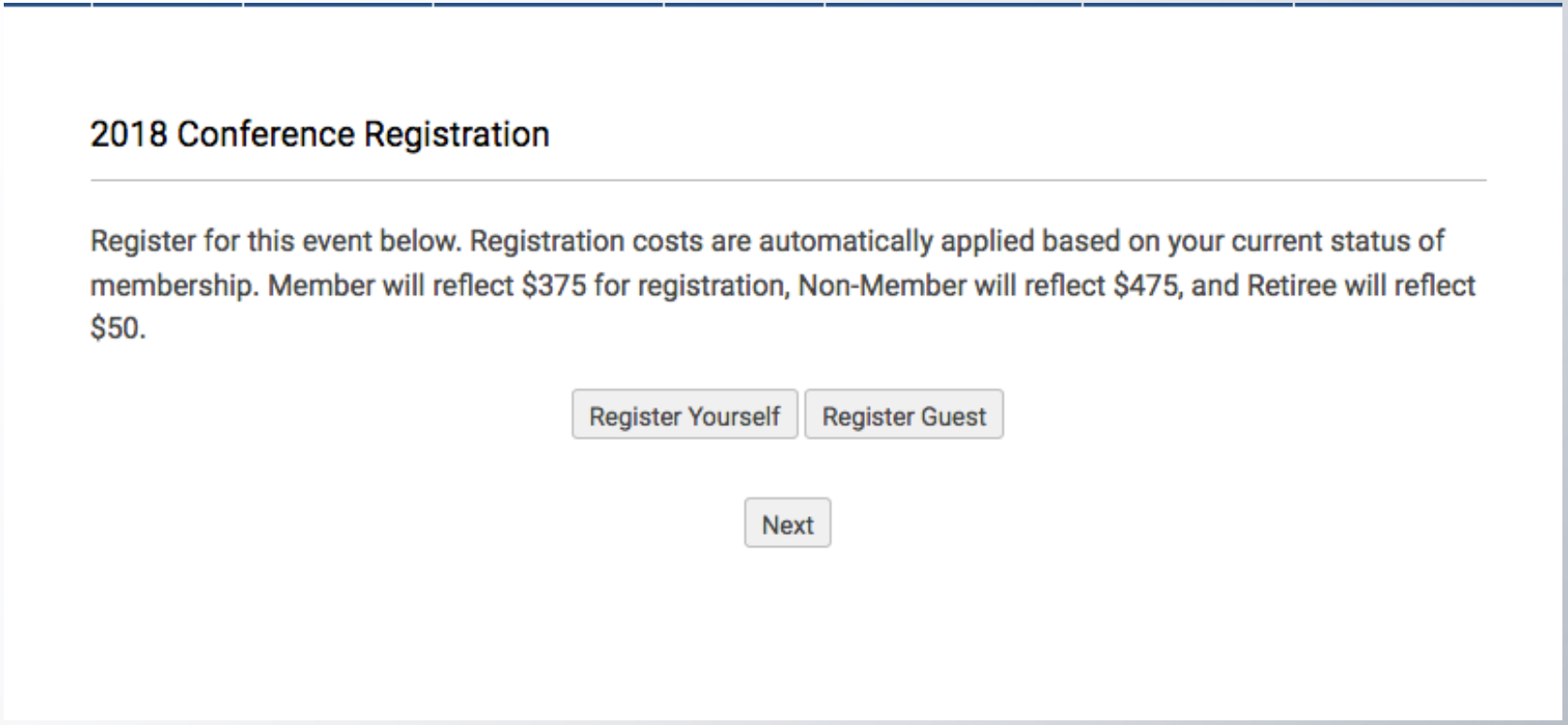
Individual Profile (employee of Member Company):

- Social Community (discussion boards, internal social network)
- Attributes – individual data fields captured on contacts and members.

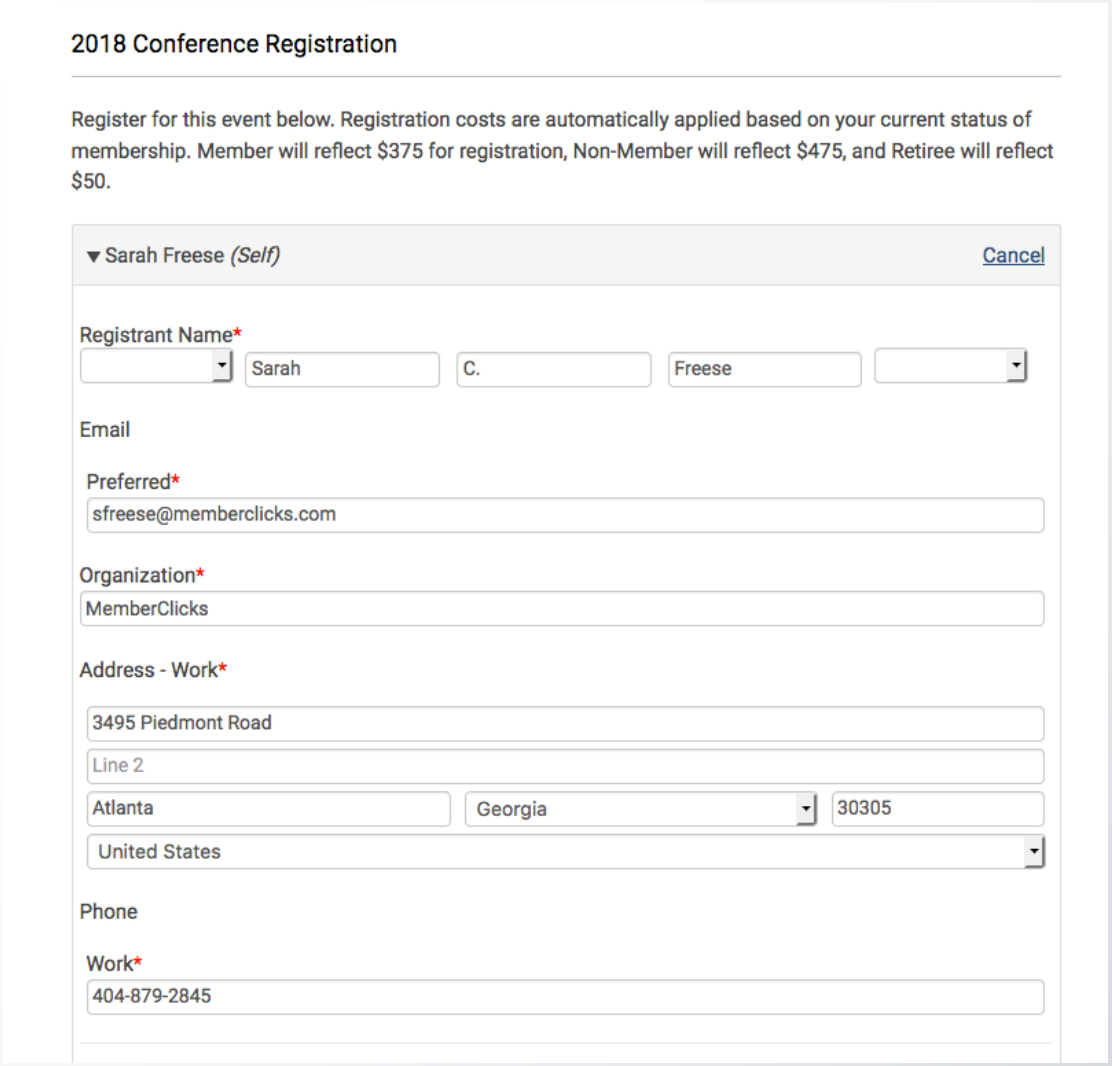
FORM SUBMISSIONS

Event Registration, Membership Application (Online,) Membership Satisfaction Survey, Board Election, etc etc

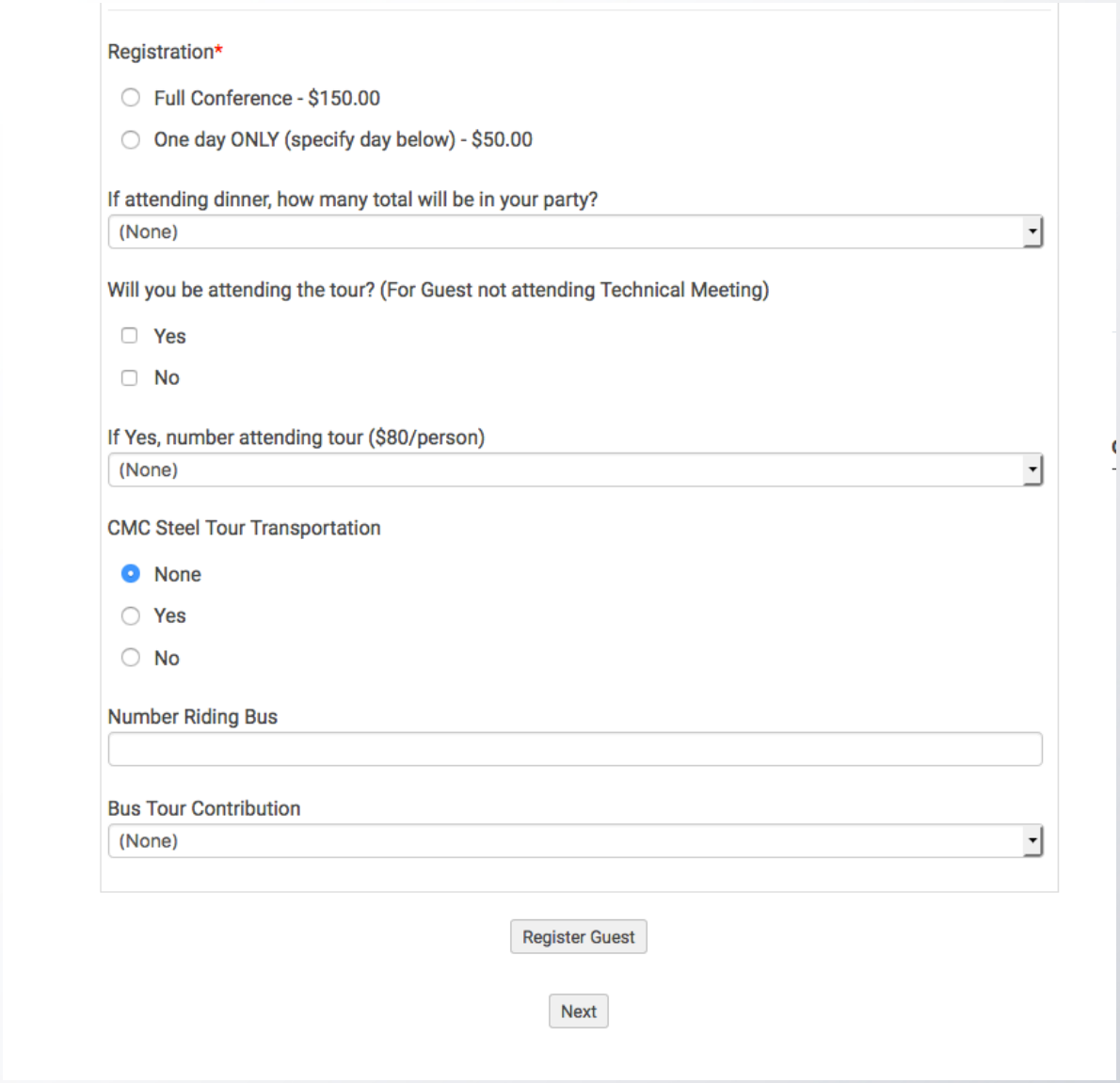
Event Registration



The Registration itself can be customized – I put in the text with the membership + registration values. The system is set up to automatically recognize those values based on whether the person registering is a Member, Nonmember, or Retiree.

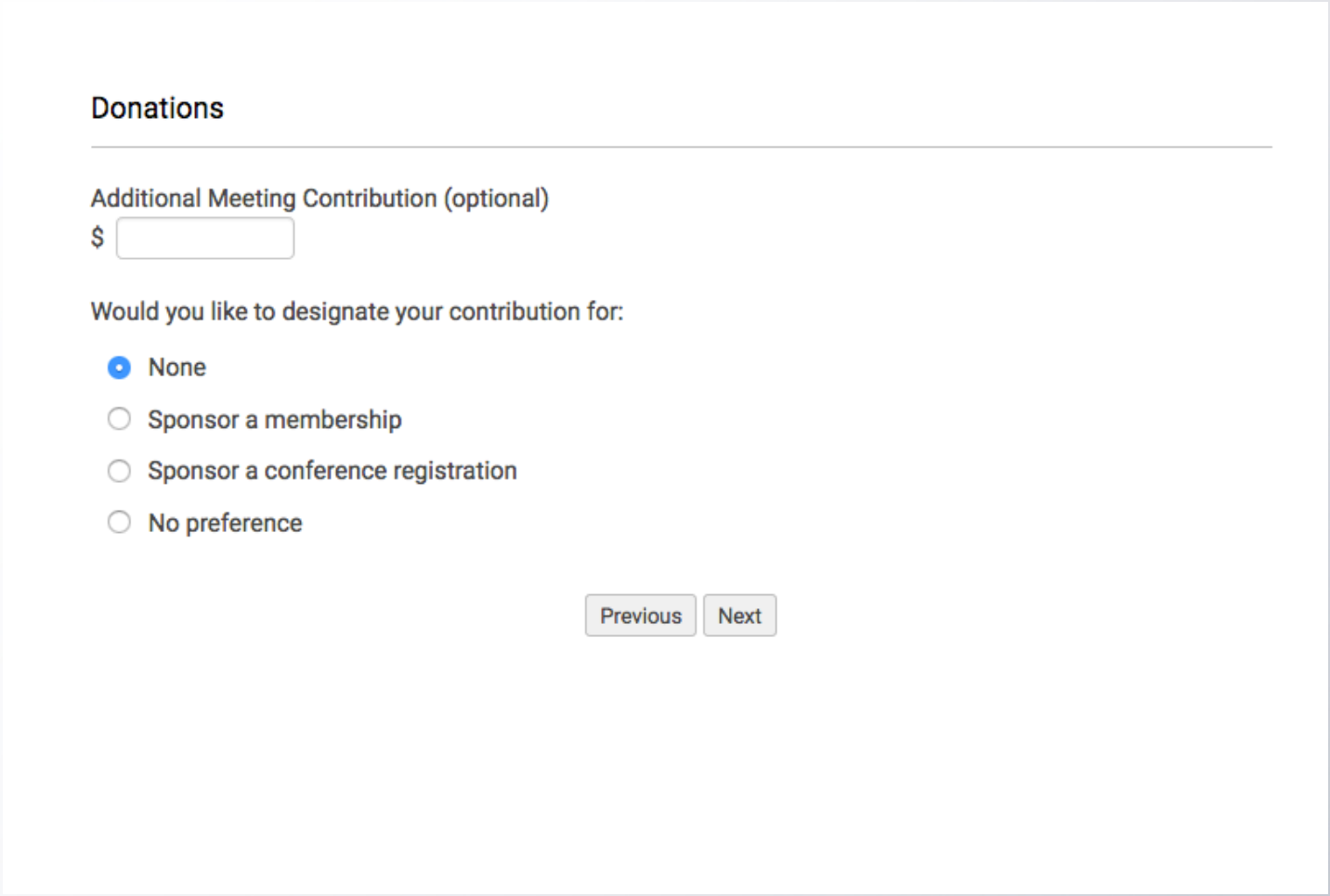


The beginning of the registration form where they can input standard information. Because this person is a member, and logged into the system, it autopopulates their information into the form (saving time and effort.)

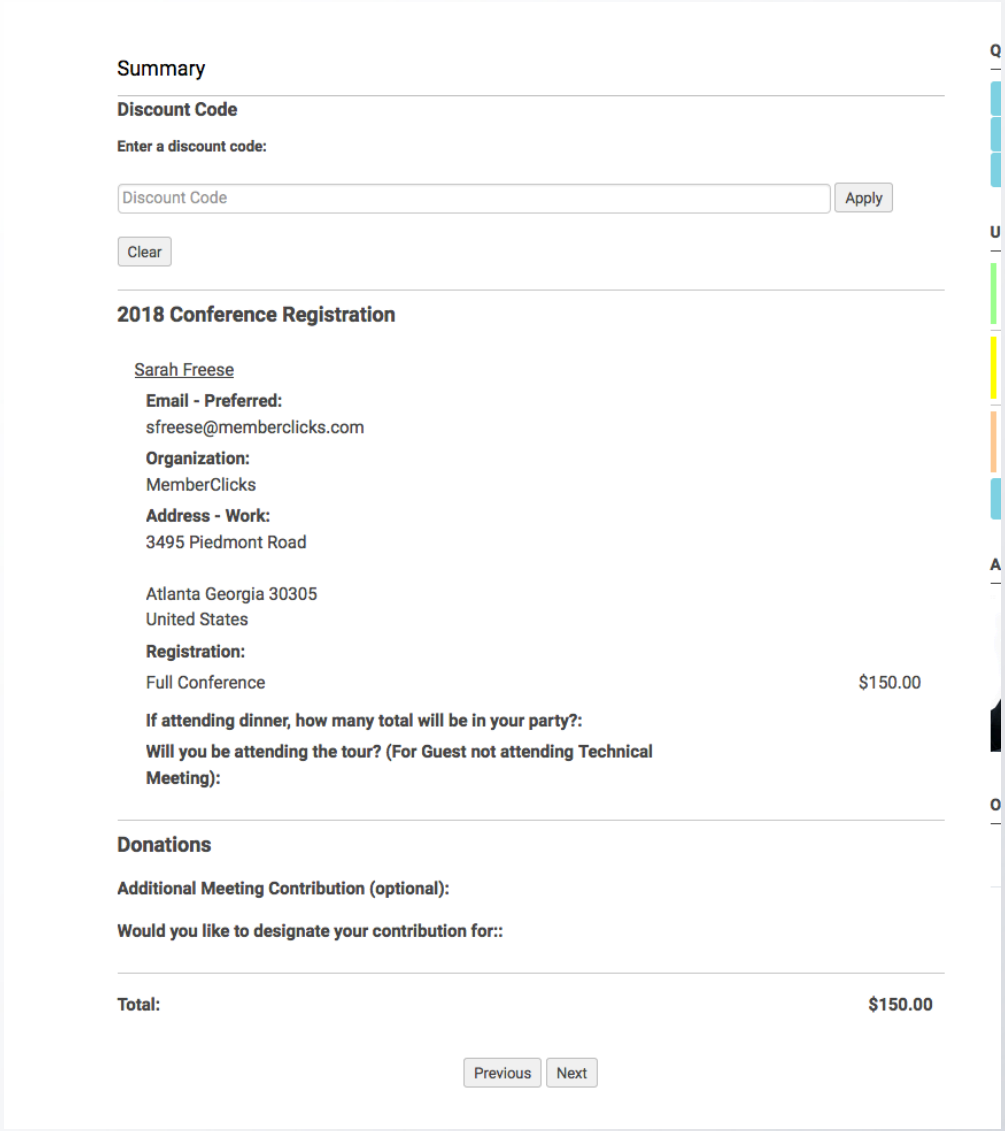


The bottom of page 1 of the registration form is where I've added IRD-specific info, such as their Registration info, dinner attendance, tours, transportation, etc.

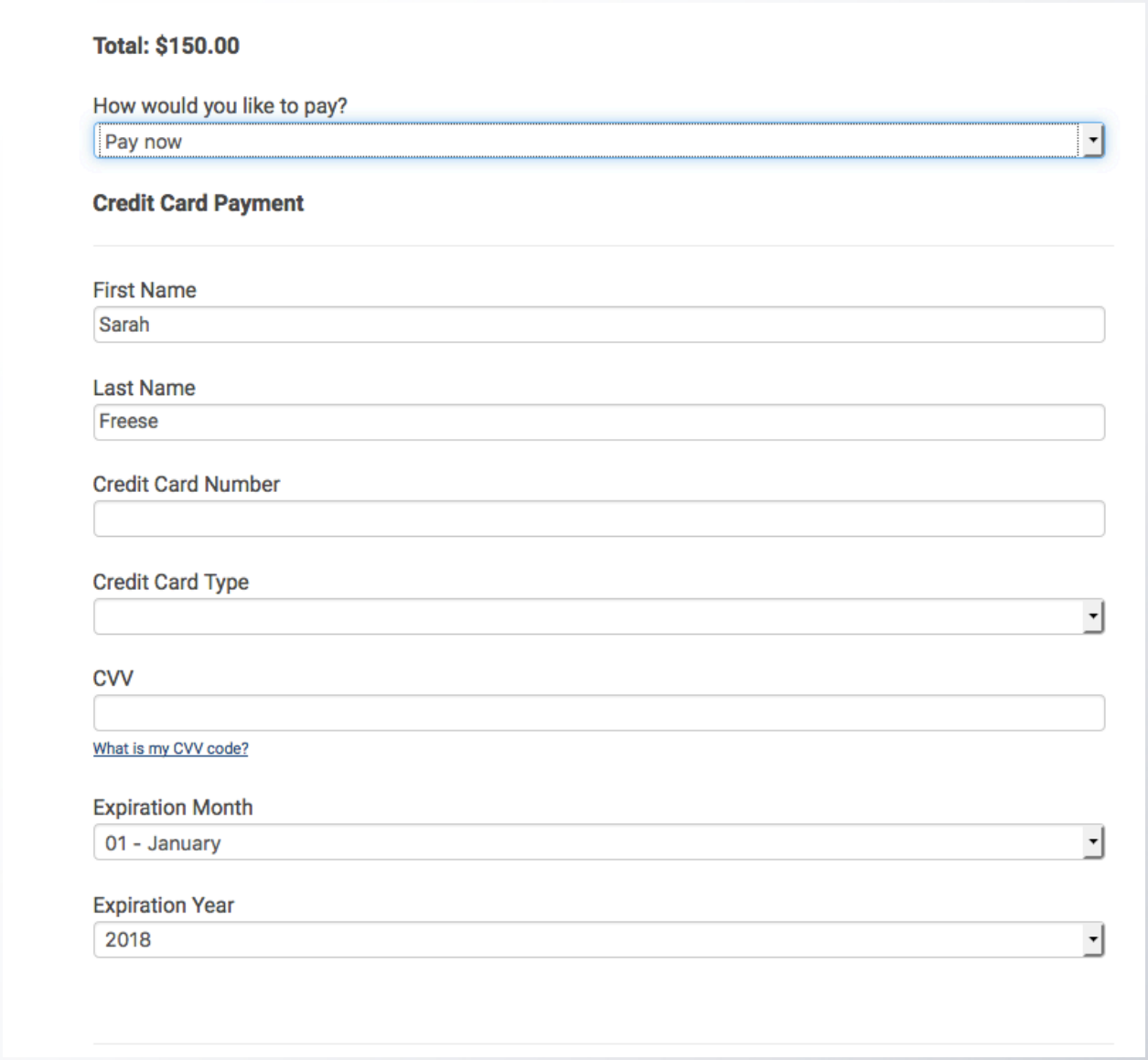
If this member is bringing a Spouse or a guest, they also have the ability to register them both in one transaction using the Register Guest button at the bottom.



You would also be able to process a donation.

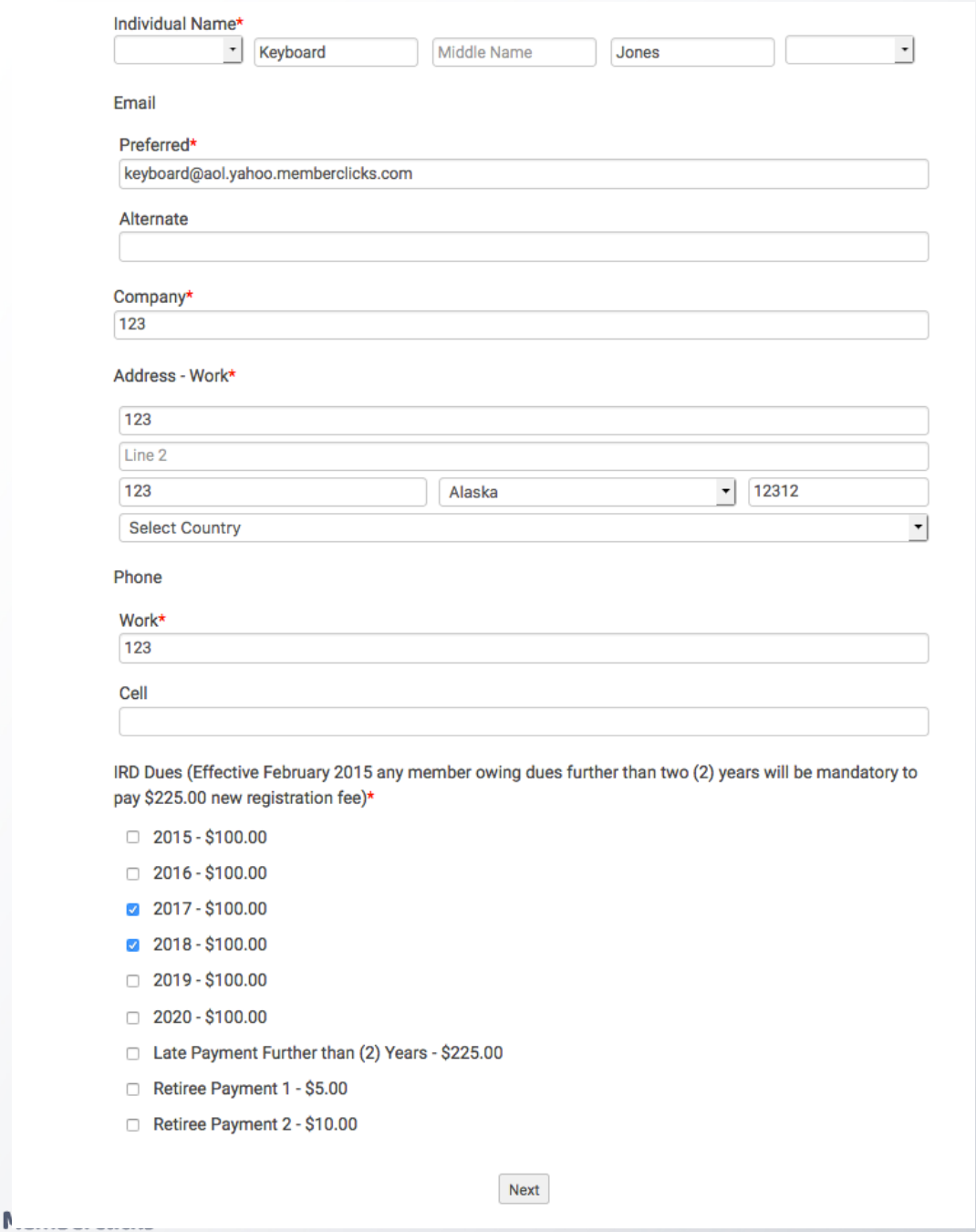


Here is our summary page that shows the selections I have made. If there is early-bird pricing, the system will automatically recognize that in the form (and that Discount Code section will not show.)



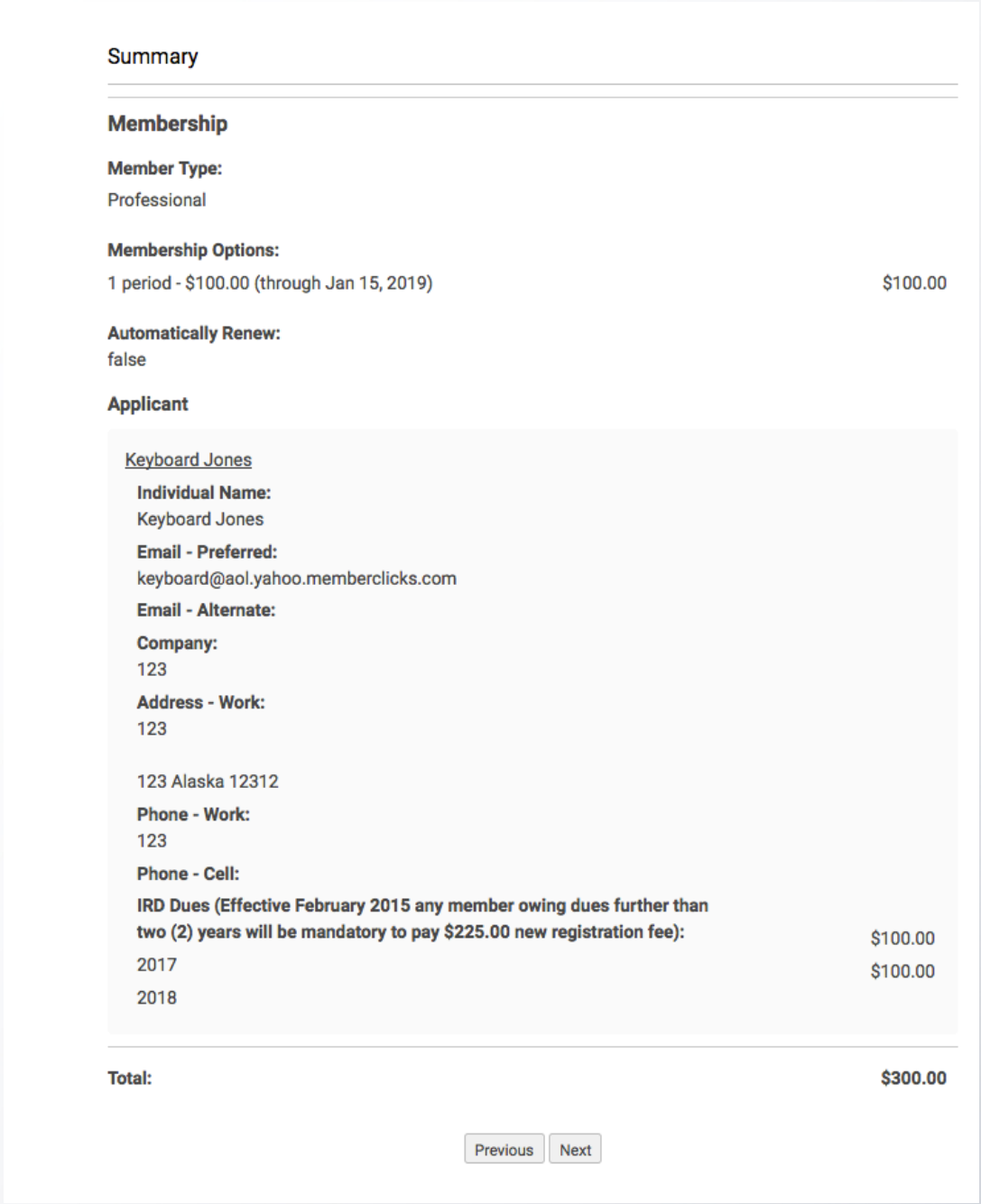
Payment Info

Once the form is complete, this member can proceed to payment – they can easily input their credit card into the Form. Once submitted, this form AND its associated invoice is stored in the members profile, as well as emailed out to them as confirmation.



Membership Application

This is a sample of the Membership Application – This is a sample only, our specific application will mirror closely what todays form looks like.



Here is a sample summary page of the Membership application before going to payment information (which will look identical to payment information in event registrations.

Administrative Dashboard

Website | Community | Database | Forms | Reporting | Financial | Settings | Log Out | Profile List | Search

Membership Dashboard

Current Membership Rosters

Member Type	Lapsed	Graced	Pending	Active
Admin	0	0	0	2
Corporate Sponsor	0	0	0	2
- Corporate Sponsor Employee	0	0	0	4
Individual	20	0	1	5
Organization	2	0	0	17
- Staff	0	0	0	13
Professional	172	0	0	21
Student	26	0	0	3
Total	**220**	0	**1**	**67**
Prospect				49
Total Active				**116**

New Members in the Last 90 Days

Member Type	New Members
Admin	0
Corporate Sponsor	0
- Corporate Sponsor Employee	0
Individual	0
Organization	0
- Staff	0
Professional	2
Student	0
Total	**2**
Prospect	0
Total New	**2**

Event Dashboard

Past Event Attendance

Event Name	Date	Attended
2017 Conference	10/27/2017	3
October Member Event	10/23/2017	0
Event Section	10/19/2017	0

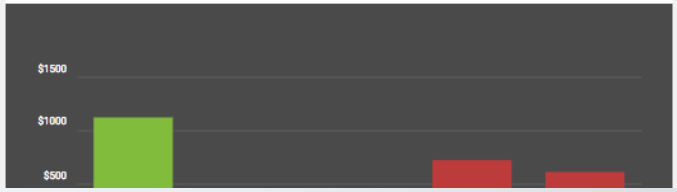
Upcoming Expected Event Attendance

Event Name	Date	Registered
2017 NEVCA Event	11/30/2017	3

Financial Dashboard

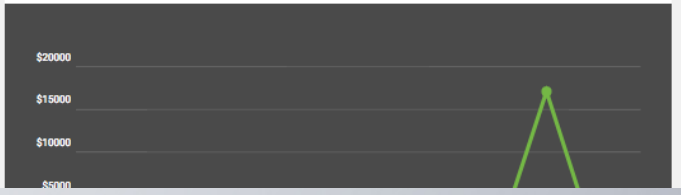
Aged Receivables (updated: 11/7/2017 12:03:11 AM) Refresh

Total $2,540.00



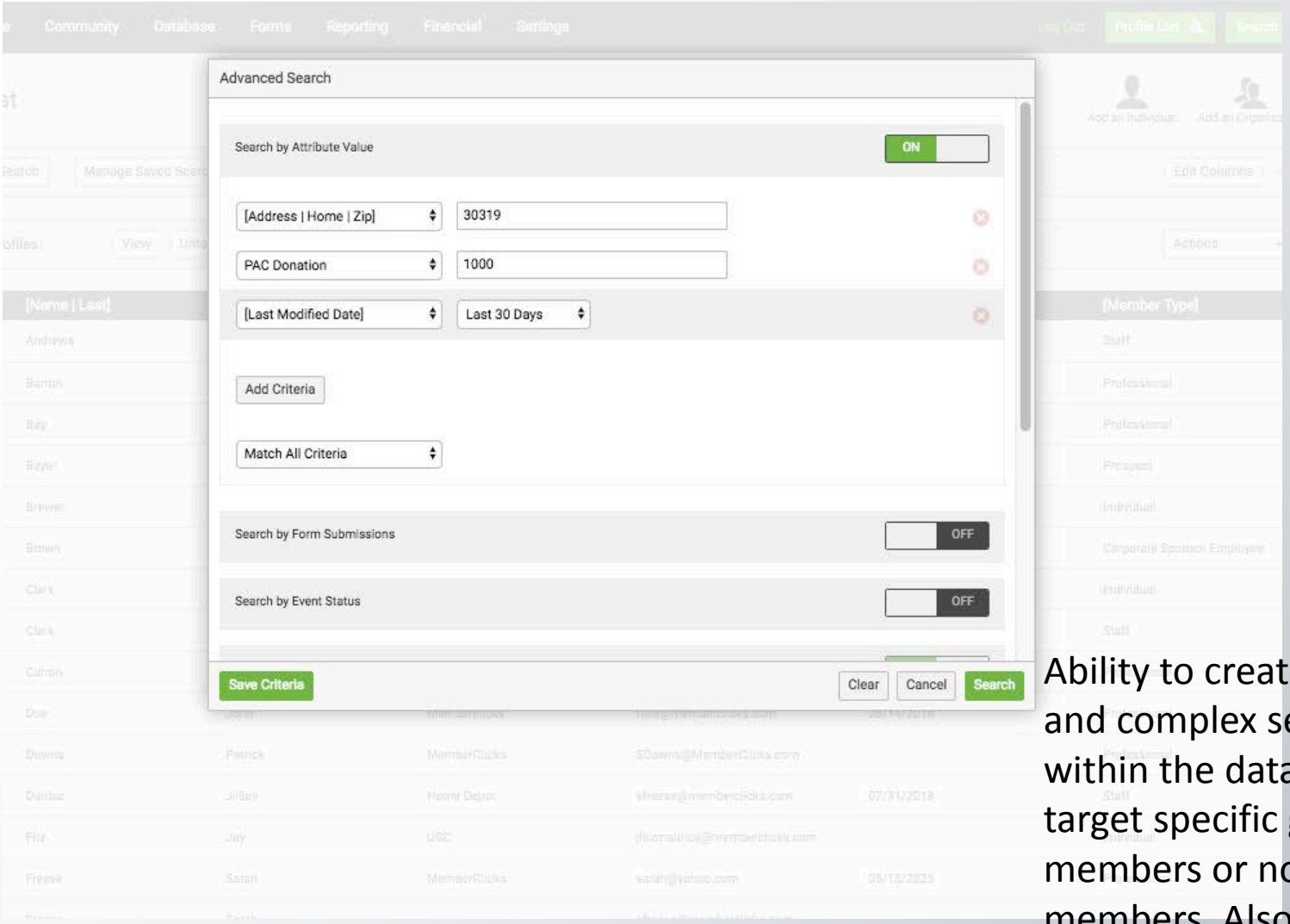
Sales Over Time (updated: 11/7/2017 12:03:11 AM) Refresh

Total $18,400.00



MemberClicks

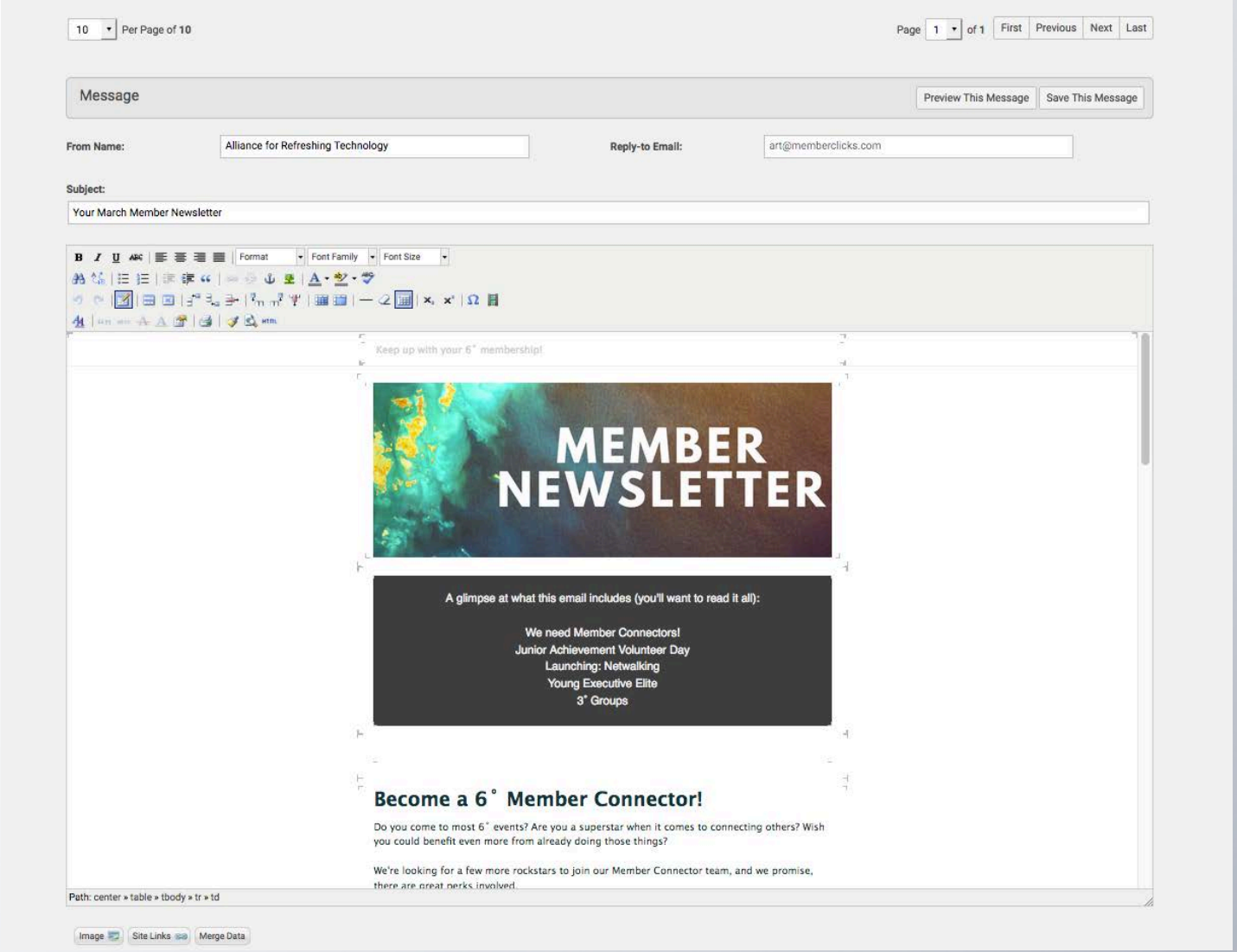
Database/Profile List



Ability to create simple and complex searches within the database to target specific groups of members or non-members. Also have the ability to save those searches for frequent use.

Contact Center

Contact Center
- Create + Customize newsletters, welcome emails, etc
- Can embed graphics, attachments, links, etc



Questions?