



# The Member Management Manual

An All Inclusive Guide to Member Management Solutions

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## Introduction

A membership based organization's ability to grow is directly related to its ability to expand their membership base. More importantly, the organization has to undertake necessary steps to retain its existing members to create a favorable impact on the minds of prospects. This objective can be achieved by offering value and excellent service to the members. It is also important to mention that a positive word of mouth about the services provided by membership based organizations helps to grow the member base easily.



***Administrators at member based organizations need to ensure their services are appreciated by existing members who will spread the positive word around.***

# 1. Member Management – Challenges

For many years, administrators at the membership based organizations struggled to grow their organizations due to certain issues that created communication problems and other hassles. The common problems that the administrators have faced include the following:

## 1.1 Maintaining Membership Lists

For most small associations, managing multiple membership lists is a major challenge. Since it is difficult to track membership applications, it becomes even harder when it comes to accessing an updated list of new members. This poses a big challenge for administrators working at the associations.

## 1.2 Reconciling Payments and Registrations

The inability to manage registrations can result in significant losses for organizations. The problem is far more pronounced for the small sized organizations that operate on low budgets. Notably, this problem appears when organizations struggle to manage their data effectively.

## 1.3 Managing Member Information

As the organization grows and the number of members increases, membership based organizations are struggling with the bulk of member information. Moreover, it becomes difficult to track each member constantly.

## 1.4 Safety Issues

While most membership-based organizations have boosted their online presence to draw more members, the risk of attracting spyware and malware looms large. Without protecting the information, associations cannot ensure the safety of the data. This calls for an all inclusive management system that can provide a safe and secured online platform for transactions and member management.

## 1.5 Handling Your Member Database

Most small organizations have no option of streamlining their database to their official website to eliminate backend problems.

## 1.6 Communication Hassles

Maintaining communication with members at all times is critical to ensure the success of the organization. Administrators at the organization need to boost communications to inform members about the various activities that are held all through the year. This will include renewal dates, upcoming events and more. Without strengthening communications, administrators will end up wasting precious time on alerting their existing and prospective members.



## 2. Benefits of Member Management Solutions

**M**anaging and coordinating with members is often considered a challenge by most organizations. Notably, organizations with a wide membership base devise strategies to enhance their communication and member service. To help organizations manage their members effectively, a number of sophisticated member management solutions have been introduced in the past couple of years. These cutting edge tools are transforming the way organizations manage, retain and grow their member base.

Alumni, faith-based organizations and associations require comprehensive member management solutions to sustain and grow relationships. Advanced member management solutions offer complete assistance to these organizations to improve communications between different members. In addition, these cutting edge tools provide several other key benefits to the users that include the following:

### 2.1 Improved Communication to Manage Members

One of the key factors that have pushed the demand for comprehensive member management solutions is enhanced communication between members. Administrators have come to realize that their members expect professional assistance and enhanced member service from them. As a result, organizations are now opting for end-to-end member management software tools to strengthen their relationship with members.

Organizations use sophisticated member management tools to send emails about surveys, event invitation and more. This is required to keep the members updated about the various events at all times.

### 2.2 Strategic Planning

With effective planning, organizations can steer ahead of competition. It helps administrators to employ best practices that can help serve members in the most effective manner. Cutting edge tools for member management streamline the process of planning for organizations. Due to this, organizations can focus more on developing strategies to draw and retain more members.

### 2.3 Cost-Effective Solutions for Mid-sized Organizations

Buoyed by the increasing demand for cutting edge member management solutions from the small and mid-sized organizations, a number of software tools have been designed and developed. These feature rich solutions are affordable for all small organizations looking at boosting their member management. By investing in these affordable solutions organizations can manage their members without spending anything extra.

### 2.4 Integrated View of All Members

An integral aspect of member management is staying updated about the members at all times. Organizations need to have necessary information about their members to expand their base. A scalable member management solution offers a comprehensive database of all members with necessary details in an easy to view format. The database provides an aggregated view of the prospects, alumni, volunteers, attendees and more. Therefore, with an integrated member management solution organizations find it convenient to manage their day to day activities and interactions with members.

### 2.5 Significantly Reduce Administrative Workload

For most organizations, managing backend workload is a major challenge that requires effective planning. Moreover, effective data management calls for significant investment and work allocation. To minimize the administrative workload generally associated with organizations that need to manage members, a number of sophisticated tools have been introduced. These tools enable administrators to add, remove or modify data with a click of the mouse. As a result, data is easily updated and stored for convenient viewing.

For most organizations,  
managing back-end  
workload is a major  
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effective planning.



## 2.6 Improved Member Management

Members of an organization expect excellent member service and other facilities. For organizations, offering improved member management services helps to manage and grow the membership base effectively. A customizable member management solution allows administrators to offer different types of memberships to cater to more members for the organization. In addition, they can promote their organization by creating discount rules for specific type of members.

## 2.7 Ease of Payment

Apart from managing members, administrators are also required to ensure that an effective payment management system is in place that can facilitate dues collection. To eliminate the hassles involved in collecting membership and renewal fees, a growing number of organizations are choosing safe and secure member management tools that come equipped with integrated payment management modules. With this option, members can pay securely online and also use multiple payment options. These solutions support all major credit cards and also accept different payment gateways including Payflow Pro, PayPal, and CyberSource.

In addition to making it extremely convenient for the members to make their payments, these cutting edge solutions also track the payment and report on the same via centralized data.

## 2.8 Financial Analysis

The success of an organization depends on its ability to attract more members, donors and sponsors who ultimately raise funds and push the organization forward. With the help of a professional member management tool, organizations get complete information about the dues, collections and funds. The detailed reports enable administrators to gauge the success of their initiatives to draw more members. Moreover, this feature enables them to adopt appropriate strategies to acquire new members.

## 2.9 Renewal Management

For all membership based organizations, dues and member fees account for the most sizeable amount. However, keeping a track of the members who have made the payments and those who have not is a tough challenge for most administrators. A member management solution lets the administrators see a list of members who have cleared their payment. Furthermore, it enables them to set up payment schedules and create in depth reports.

## 2.10 Online Webpage for Members

Enabling members to access necessary information helps organizations to save time which is otherwise wasted on sending out emails and notifications about upcoming events, renewal notices, and membership discounts. Organizations can easily create customizable online member pages that offer information to members 24x7. This helps administrators to cut down costs on employing dedicated resources to handle the work.

A dedicated webpage for members helps existing members to find out about the organization and the events scheduled to be held soon. Organizers can choose to have the option of restricted access to ensure that the information is

# Conclusion

Considering the pivotal role that member management tools play for membership based organizations, it is necessary to select a feature rich solution that provides all the key benefits. By selecting the options properly, associations can choose an affordable solution that enables integration of all relevant data concerning the members. They can streamline the process of dues collection and make it convenient for members to process payments and avoid defaults.

Have Questions About Acteva? Call (877) 933-4730, to speak to one of our sales representatives. We're available to handle all your online registration needs Monday through Friday from 7:30 am to 5:00 pm (PST).

We hope you found The Member Management Manual helpful and informative. For more information on Acteva and our Online Event Registration Solutions, please go to [www.acteva.com](http://www.acteva.com).

## About Acteva

Founded in 1998, Acteva is the largest and most experienced Event Registration, Class Registration and Private Community Software provider in the market today. They have been helping organizers “know who is coming to their meeting, class or event”. Acteva has not only provided more than 20,000 organizers with a solution to online payment management, but also a place for attendees, members and donors to interact, collaborate and communicate. Acteva has been a pioneer in the event technology industry for more than 12 years, and has hosted over 400,000+ events that have been attended by more than 7 Million+ people.

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