

MEMBERSHIP MANAGEMENT DATABASES

WORKBOOKS CRM

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MEMBERSHIP MANAGEMENT SYSTEMS JUST CAN'T GIVE YOU WHAT THE WORKBOOKS CRM CAN... WORKBOOKS CAN HELP YOU TO IMPROVE YOUR MEMBER EXPERIENCE, INCREASE RETENTION RATES AND PROVIDE YOU WITH THE TOOLS YOU NEED TO GROW YOUR ORGANISATION. IN THIS INFOGRAPHIC, WE COMPARE THE FUNCTIONALITY OF THE TWO SOLUTIONS.

MANAGING THE MEMBERSHIP DATABASE

MEMBERSHIP MANAGEMENT DATABASE

A STANDARD MEMBERSHIP MANAGEMENT DATABASE:

- STORES GENERAL CONTACT DETAILS AND SUBSCRIPTION INFORMATION FOR EACH OF YOUR MEMBERS

AND THAT'S ABOUT IT!

"PERSONAL DATA SHALL BE ACCURATE AND, WHERE NECESSARY, KEPT UP TO DATE."

PRINCIPLE 4 OF THE DATA PROTECTION ACT

WORKBOOKS

WORKBOOKS CAN DELIVER A 'NEXT GENERATION' SYSTEM THAT ALLOWS YOU TO:

- MANAGE ALL YOUR DATA IN ONE PLACE: NOT JUST MEMBER DATA BUT ALSO DATA OF OTHER CONTACTS AND ORGANISATIONS
- EASILY KEEP MEMBER DATA UP TO DATE, ENSURING THAT YOU MAINTAIN COMPLIANCE WITH THE DATA PROTECTION ACT
- SEGMENT MEMBERSHIP TO PROVIDE BETTER TARGETED, MORE RELEVANT OFFERS AND UPDATES TO MEMBERS
- EASILY SEND EMAIL NEWSLETTERS AND PROMOTIONAL EMAILS
- AUTO-SEND RENEWAL NOTIFICATIONS

"BY 2020, CUSTOMERS WILL MANAGE 85% OF THEIR RELATIONSHIPS WITHOUT TALKING TO A HUMAN."

GARTNER RESEARCH

KEEPING DATA CURRENT:

MEMBERSHIP MANAGEMENT DATABASE

YOUR MEMBERSHIP MANAGEMENT DATABASE SHOULD CONTAIN THE INFORMATION YOU NEED TO KEEP ON TOP OF YOUR MEMBERS. THIS RELIES ON:

- YOU REMEMBERING TO KEEP IT UP TO DATE
- YOU CONTINUALLY EMAILING AND PHONING MEMBERS TO VERIFY THEIR DATA

WORKBOOKS

WORKBOOKS CRM INTEGRATES WITH YOUR WEBSITE, ENABLING 'MEMBER SELF-SERVICE'. MEMBERS CAN:

- EASILY UPDATE THEIR OWN INFORMATION, SUCH AS CHANGE OF ADDRESS OR MOBILE NUMBER, VIA YOUR WEBSITE
- MANAGE THEIR COMMUNICATIONS PREFERENCES, MAKING SURE THEY RECEIVE THE MESSAGES THEY ACTUALLY WANT FROM YOU

YOUR TEAM CAN THEN USE THE TIME SAVED TO EXPLOIT THAT DATA, IMPROVING YOUR CUSTOMER SERVICE AND MARKETING.

75%

"OF THE ORGANISATIONS SURVEYED ADMITTED THAT DEFECTIVE DATA HAD A NEGATIVE FINANCIAL IMPACT ON THEIR BUSINESS. FIFTY PERCENT INCURRED EXTRA COSTS TO RECONCILE DATA"

CRM DATA STRATEGIES: THE CRITICAL ROLE OF QUALITY CUSTOMER INFORMATION - GARTNER

MEMBERSHIP MANAGEMENT DATABASE:

MEMBERSHIP MANAGEMENT DATABASE

USING THE STORED CONTACT DETAILS IT WILL REQUIRE A LOT OF TIME-CONSUMING MANUAL INTERVENTION TO:

- SEND OUT ROUTINE NEWSLETTERS
- MASS MAIL SPECIAL OFFERS

AND UNFORTUNATELY, THERE WILL BE LITTLE OR NO PERSONALISATION.

WORKBOOKS

WORKBOOKS CRM MAKES IT EASY TO SEND OUT PERSONALISED, ROUTINE NEWSLETTERS AND ALLOWS YOU TO:

- STORE DETAILS OF INCOMING COMMUNICATIONS SO YOU CAN SEE THE MEMBERSHIP HISTORY OF EVERY SINGLE CONTACT AT A GLANCE
- RECORD BOTH SIDES OF YOUR INTERACTIONS GIVING A TRUE PICTURE OF YOUR RELATIONSHIP WITH EACH MEMBER

SEGMENTING YOUR AUDIENCE:

MEMBERSHIP MANAGEMENT DATABASE

ALTHOUGH YOU HAVE MANY RELEVANT DETAILS ABOUT YOUR MEMBERS, YOU CANNOT SPLIT THEM INTO GROUPS OF SHARED INTERESTS, GEOGRAPHICAL REGIONS OR EVEN GENDER. ANY MAILINGS SENT WILL THEREFORE BE:

- GENERIC
- BORING
- IRRELEVANT
- DELETED UNREAD BY YOUR MEMBERS

WORKBOOKS

WORKBOOKS CRM ALLOWS YOU TO:

- SUBDIVIDE YOUR MEMBERSHIP QUICKLY AND SIMPLY, ANY WAY YOU CHOOSE
- GAIN BETTER INSIGHT INTO YOUR MEMBERS, TARGETING THEM WITH INFORMATION AND OFFERS THEY ACTUALLY WANT TO READ
- INCREASE SALES, THANKS TO BETTER TARGETED COMMUNICATIONS AND OFFERS

"SEGMENTING CUSTOMERS RESULTS IN A 9% IMPROVEMENT IN EMAIL CLICK-THROUGH RATES, A 9% IMPROVEMENT IN CONVERSION RATES AND A 5% RISE IN CUSTOMER RETENTION RATES."

EMAIL MARKETING: GET PERSONAL WITH YOUR CUSTOMERS - ABERDEEN GROUP

"50% OF BEST-IN-CLASS COMPANIES USE THE INFORMATION COLLECTED WITHIN THEIR CUSTOMER PROFILE DATASET TO PERSONALISE EMAIL CAMPAIGNS."

EMAIL MARKETING: GET PERSONAL WITH YOUR CUSTOMERS - ABERDEEN GROUP

"NURTURED LEADS MAKE 47% LARGER PURCHASES THAN NON-NURTURED LEADS."

LEAD NURTURING: THE SECRET TO SUCCESSFUL LEAD GENERATION - ABERDEEN GROUP

AUTOMATING MEMBERSHIP PROCESSES:

MEMBERSHIP MANAGEMENT DATABASE

YOUR MEMBERSHIP MANAGEMENT DATABASE MIGHT RECORD IMPORTANT ANNIVERSARIES, BUT:

- IMPORTANT ANNIVERSARIES WILL NEED TO BE FOLLOWED UP MANUALLY
- RENEWALS NEED TO BE SENT AND PROCESSED MANUALLY
- SOME DATES WILL INEVITABLY BE MISSED OR FORGOTTEN ON OCCASION BECAUSE OF THE MANUAL LABOUR REQUIRED

WORKBOOKS

WITH WORKBOOKS, KEY MEMBERSHIP ROUTINES CAN BE AUTOMATED AND MEMBERS NOTIFIED AUTOMATICALLY, INCLUDING:

- RENEWAL NOTICES
- BIRTHDAY OFFERS
- MEMBERSHIP UPGRADES

"THERE IS NOTHING SO USELESS AS DOING EFFICIENTLY THAT WHICH SHOULD NOT BE DONE AT ALL."

PETER F DRUCKER, AMERICAN MANAGEMENT CONSULTANT

PLANNING AND MANAGING EVENTS:

MEMBERSHIP MANAGEMENT DATABASE

YOU HAVE YOUR MEMBER'S DETAILS TO HAND AND POSSIBLY EVEN A CALENDAR FOR NOTING IMPORTANT DATES. BUT:

- YOU CAN'T TELL WHO IS INVITED TO A COURSE BECAUSE YOUR CONTACTS AND CALENDAR ARE NOT INTEGRATED PROPERLY
- YOU DON'T KNOW WHO HAS RSVP'D
- YOU HAVE NO IDEA WHICH INVITATIONS NEED CHASING UP

WORKBOOKS

WORKBOOKS CRM ALLOWS YOU TO:

- SCHEDULE EVENTS AND TRAINING SESSIONS AND THE RESOURCES REQUIRED
- EMAIL OR POST INVITATIONS AND REGISTRATION FORMS AUTOMATICALLY TO MEMBERS
- RECORD DETAILS OF GUESTS ATTENDING AND ANY PERSONAL REQUIREMENTS
- EASILY FOLLOW UP OUTSTANDING INVITATIONS

TAKEAWAYS:

IF YOU DON'T UPGRADE FROM A MEMBERSHIP MANAGEMENT SYSTEM TO CRM SOFTWARE, YOU'RE MISSING OUT ON:

- THE OPPORTUNITY TO KEEP EXTENDED DETAILS ON YOUR MEMBERS
- EASY DATA UPKEEP
- COMMUNICATION OPPORTUNITIES
- EASY AUDIENCE SEGMENTATION FOR MARKETING CAMPAIGNS
- AUTOMATED MEMBERSHIP PROCESSES
- EASY EVENTS MANAGEMENT AND PROMOTION
- INCREASED RETENTION RATES