

WHITEPAPER

WHICH MEMBERSHIP ADMIN TASKS CAN BE DONE
**EASIER AND
QUICKER ONLINE?**



Which membership admin tasks can be done easier and quicker online?

Introduction

Managing your members information can be a time consuming process. We know that your time is limited and that efficiency is key to your continued success as a successful organisation. As voluntary helpers you start off excited, and then often feel deflated when people make life difficult. At **Paysubsonline**, we're all about making your life easy.

'With this in mind we've compiled a list of common membership administration tasks and compared how they are done 'offline' and online using **PaySubsOnline.com** allowing you to judge for yourself which would work better for you and your organisation.'

Check out the comparisons overleaf.

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Which membership admin tasks can be done easier and quicker online?

Registration Forms	Offline	PaySubsOnline.com
Preparation and Distribution	<ul style="list-style-type: none">• Created in a word processing package.• Printed.• Posted to members or given to managers / coaches / captains to pass on to players.• A PDF version uploaded to the website.	<ul style="list-style-type: none">• 'Drag and drop' form builder (no HTML or programming skills needed).• Different forms for different membership categories.• Forms can be embedded into existing website.
Form Completion	<ul style="list-style-type: none">• Members often complete the parts of the form they want to and ignore other parts.	<ul style="list-style-type: none">• Questions and declarations can be made mandatory so members can't complete without entering all information required.
Form Collection	<ul style="list-style-type: none">• Forms are typically handed to organisers or sent in the post to the membership secretary.	<ul style="list-style-type: none">• Forms are submitted online and information is accessible instantly.
Recording Information	<ul style="list-style-type: none">• Registration forms for new members joining require manual input, typically in to a spreadsheet. Administrator then needs to send an email welcoming the new member.• Registration/renewal forms for existing members require details to be cross-checked with previous years spreadsheet.	<ul style="list-style-type: none">• As new members register, their details are added automatically to the membership list (there is an option to vet them first) and they automatically receive a welcome email.• Existing members login to an online account, check and update their own information.

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Payment	Offline	PaySubsOnline.com
Methods	<ul style="list-style-type: none"> Cash, cheque, bank transfer, standing order. 	<ul style="list-style-type: none"> Debit Cards, Credit Cards, Charge Cards, Direct Debit, PayPal transfers.
Collection	<ul style="list-style-type: none"> Money is collected in person, sent via bank transfer or sent in the post to the membership secretary. 	<ul style="list-style-type: none"> Members can make their payments online and also pre-authorise future payments so each time money is due, it gets collected automatically. Payment reminders sent automatically.
Reconciling	<ul style="list-style-type: none"> All payments have to be reconciled manually. Typically recorded in a spreadsheet. 	<ul style="list-style-type: none"> Online payments are reconciled automatically. 'Offline' payments can be recorded too.
Banking	<ul style="list-style-type: none"> Frequent trips to the bank. Lag time between receiving payments and cleared funds in the bank. 	<ul style="list-style-type: none"> Funds are transferred electronically to your organisation. Money received by card is cleared instantly. Payment by Direct Debit takes 6 working days to clear for the first transaction and 3 working days thereafter.
Reporting	<ul style="list-style-type: none"> Reports are derived from the information recorded in the spreadsheet. With money being handed to the treasurer at committee meetings, income reports generated for the meeting do not always give the latest information. 	<ul style="list-style-type: none"> Reports are up-to-the-minute with headline information given on what the forecasted income is for each membership category, what's been paid and what is outstanding. Detailed reports show information at member level and who has paid what by what method.

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Membership Information	Offline	PaySubsOnline.com
Storage	<ul style="list-style-type: none"> Information held on committee members computers. Often, different versions of the spreadsheet exist. 	<ul style="list-style-type: none"> In the 'cloud'. Dedicated servers located in a secure, purpose built data centre.
Security	<ul style="list-style-type: none"> Security is often compromised in sending members information via email in unprotected spreadsheets. 	<ul style="list-style-type: none"> When transferring data between the server and user's computer (administrators and members), information is encrypted using SSL (Secure Socket Layer) - the same technology as used by banks and financial institutions.
Accessibility	<ul style="list-style-type: none"> Only those with the spreadsheet can access information. If information is required by another committee member, it has to be requested and sent via email. 	<ul style="list-style-type: none"> Officials can be given access rights to groups so they can only see membership information related to members they are involved with. Authorised officials can access information via their smartphone, tablet or PC.
Tools to Manage	<ul style="list-style-type: none"> Typically organisations manage their membership information in Excel. Good for recording information but no automation or tools specific for managing members. 	<ul style="list-style-type: none"> Purpose built application with over 100 tools to help save time managing member and payment information.
Communication	<ul style="list-style-type: none"> To send emails to members, administrators have to copy and paste email addresses in to email application like Gmail or Outlook. Not possible to send personalised group emails. 	<ul style="list-style-type: none"> Ability to send targeted, personalised group emails in a couple of clicks. If a member logs in to their online account and changes their email address, the group email tool will automatically use the new email address.

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Fundraising	Offline	PaySubsOnline.com
<p>Supporters Club <i>(Also known as a 100 Club)</i></p>	<ul style="list-style-type: none"> Members are required to set up a standing order. Administrator needs to reconcile payments before each draw to see who has and hasn't paid. If administrator wants to increase the cost, all members are required to change their standing orders. 	<ul style="list-style-type: none"> Members can register for the Supporters Club online. Payments are collected and reconciled automatically. Administrators can view up-to-the-minute reports on who has and hasn't paid before making the next draw. If the administrators wants to increase the cost, they can without members having to take action.
<p>Monthly Donations</p>	<ul style="list-style-type: none"> Uncommon for organisations to accept small monthly donations because of the administration involved. 	<ul style="list-style-type: none"> Members can be asked to contribute a small monthly donation as they register or renew. Members can complete a gift aid form (where required) as part of the process. Money is collected and reconciled automatically. Gift aid declarations can be exported for submission to HMRC.
<p>Social Events</p>	<ul style="list-style-type: none"> Money and forms are sent to the organiser. Event organiser enters participants into spreadsheet and records payments. Money is handed to treasurer for banking. 	<ul style="list-style-type: none"> The organisation can promote the event directly to the members using the group email tool. Members can buy tickets for the event online. Money is transferred electronically. Event organiser can view an up-to-date reports of whose registered along with any information completed on the form.

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Wrap-up So what do you think? Still not sure of all of the benefits?

Here's a summary of the benefits to you:

Admin

- Emails can be automated and personalised.
- Set up rules and reminders (for future subscription reminders) so you don't need to remember to.
- Have all your membership data in one place. No more trying to track down someone's number or address.
- Improved security which means safeguards.
- As it's based in the cloud, you can access it via the internet from any location at any time.
- Multiple volunteers can all access the information, enabling people to work collaboratively (and you to delegate any work you need to).
- Payments are reconciled automatically so you don't have to spend your evenings ticking off who has paid.

Fundraising

- Track and collect all your fundraising and events income into one place. No more cash. No more hassle. Clear transparency.
- Have auto-collection in place so that donations are automatically collected and reconciled.
- Introduce new fundraising avenues you hadn't previously thought of (tickets to events, t-shirts, etc.).
- Wake up your membership base to be fundraisers, and make it easy for them to spread the word of your latest fundraising campaign. Instead of settling for one fundraiser, have multiple people helping.

This all gives you a chance to free up your time so you can spend more time doing the other things you enjoy.

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By now it's probably clear why many organisations are switching to managing their membership online. What will be less clear at this stage are the tools and features you'll need to look for when evaluating which membership software is right for your organisation.

To help you, we've put together 'Managing Members Online – 2014 Buyer's Guide' to give you a better idea of what you need, before you need it.

Click to download

