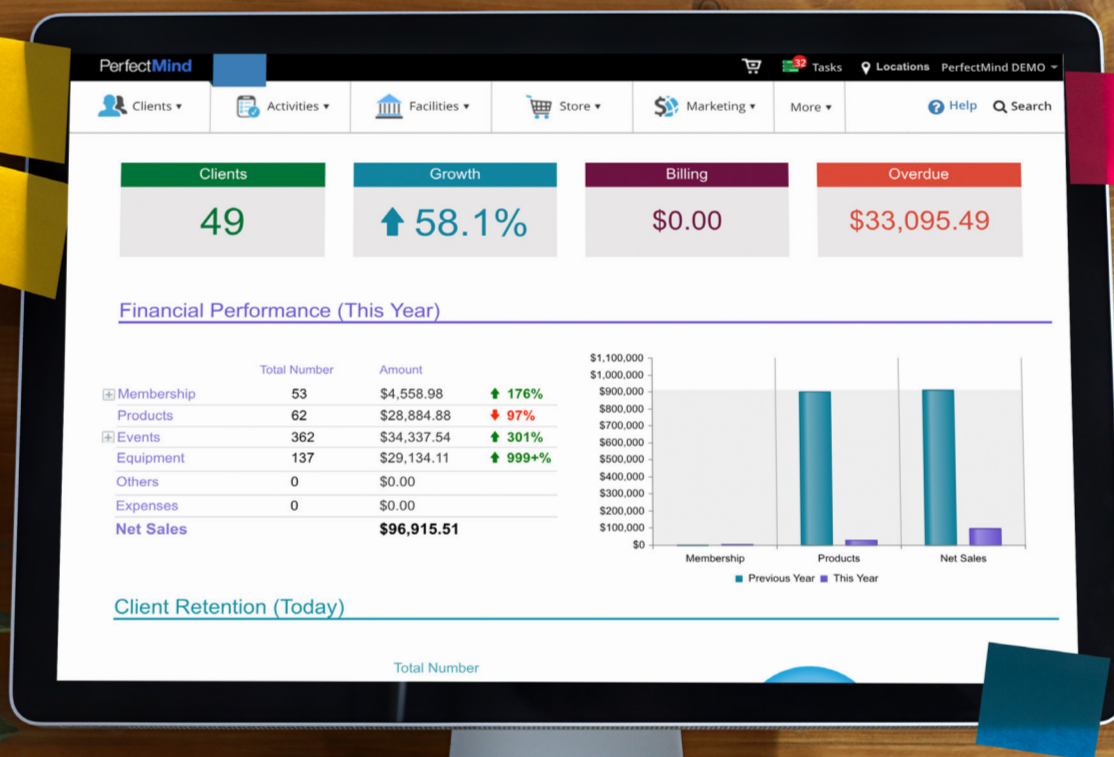


# 6 Features to Look for in a Membership Management Solution



# Do I Need a Membership Management Solution?

I own or manage a

- |  |   |
|--|---|
| <input type="checkbox"/> Health & wellness facility    | <input type="checkbox"/> School, college or university    |
| <input type="checkbox"/> Parks & recreation department | <input type="checkbox"/> Gym, fitness club or yoga studio |
| <input type="checkbox"/> Martial arts academy          | <input type="checkbox"/> Dance or music school            |

Did you check off any of the boxes above? If so, the answer is a resounding yes.

If you own or manage a member-based organization, you know that it is challenging. Whether you have 100 members or 10,000 you need to track payments, schedule programs, manage renewals and a lot more.

As an organization continues to grow, it gets even tougher to manage the day-to-day aspects of the business while ensuring your members are well taken care of.

That's where a membership management solution comes in.



# What Are the Benefits of a Membership Management Solution?

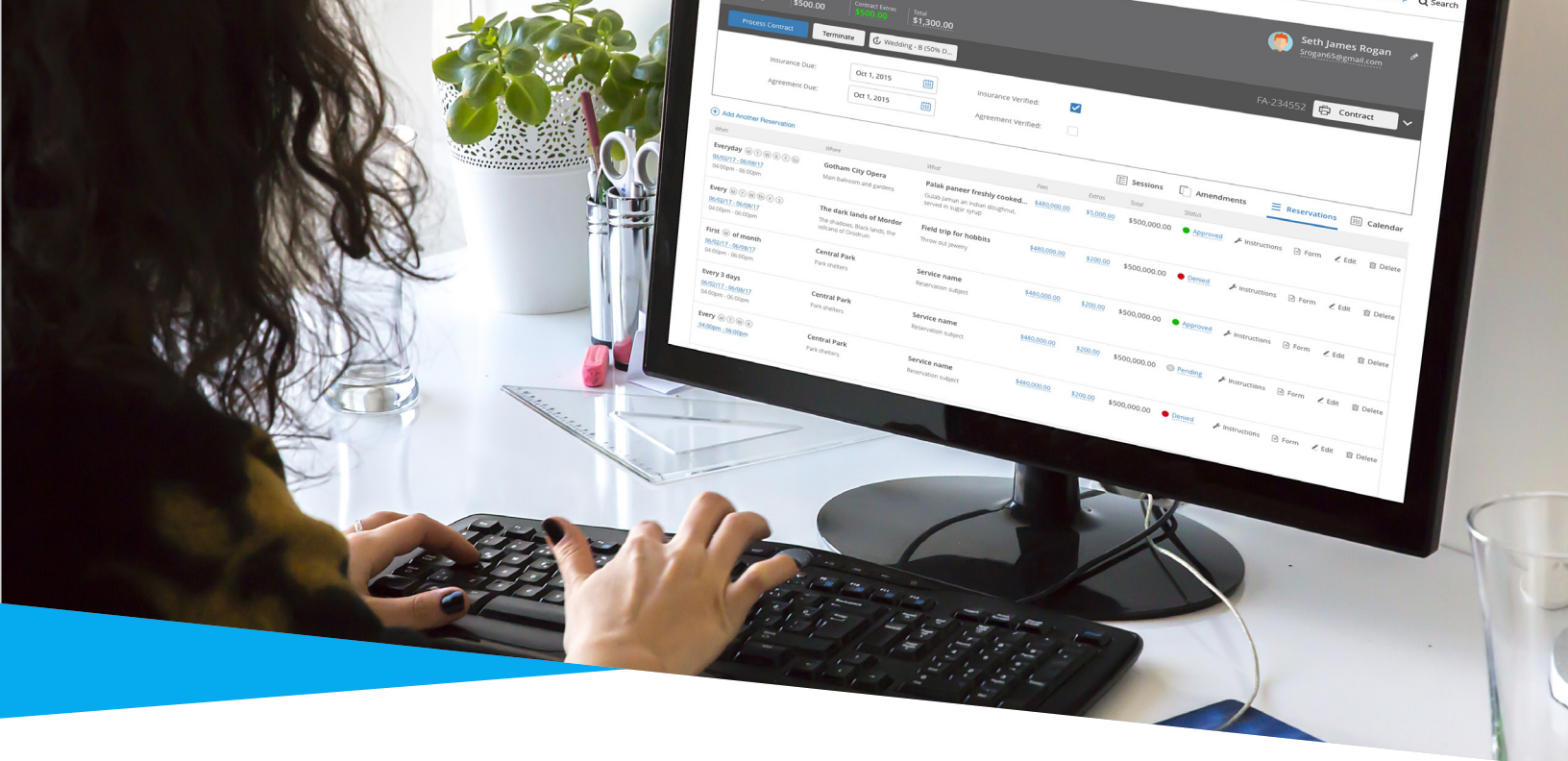
With a membership management solution, you'll find it easy to

- ✓ Streamline your processes
- ✓ Reduce routine operational tasks
- ✓ Increase efficiency and revenue
- ✓ Improve member experience
- ✓ Grow & retain your community

A dedicated membership management platform can help you gain valuable time by automating and streamlining your operations. This means more time to connect with your members!

We have rounded up the top 6 features you should look for in your next membership management solution.





# 1. Comprehensive Member Profiles

Every membership management solution will record your members' basic information, like name and contact details. To set yourself apart from the crowd, look for one that automatically populates information from other plugins integrated into the software, such as events, connections, and memberships.

For example, if a member attends a special event, has claimed a specific discount, or is related to another member in your database, your membership management solution should automatically record and store this information.

The platform should also allow your members to access their information online, so they can modify and update it themselves. This ensures that your members' data is accurate and current. Accurate member data can help you make key business decisions as well as develop successful communications and marketing strategies.



## 2. Data Security & Backup

According to Gemalto, a global leader in digital security, North America makes up the majority of all data breaches and compromised records in the world at 59% and 72% respectively.<sup>1</sup> In today's digital age, improving data security and mitigating risk is an integral part of doing business.

Before selecting a member management solution, here are some questions you should consider to ensure the safety of your members' data:

Where is the data hosted?

Is there a disaster recovery plan?

How are updates deployed?

Is the platform PCI compliant?

How often is data backed up?

Do you offer 24/7 technical support?

### What is PCI Compliance?

The Payment Card Industry Data Security Standard (PCI DSS) is a set of security standards designed to ensure that all companies that accept, process, store or transmit credit card information maintain a secure environment.<sup>2</sup>





### 3. Intuitive Payment Processing

Let's face it, managing payments manually is an enormous drain on your valuable time. This is one routine task your membership management solution should handle for you.

Before selecting a solution, make sure it can seamlessly integrate with your current payment processor. Your membership management solution should also be able to track and manage important financial information such as membership purchases, registrations, reoccurring payments, refunds, and overdue invoices.



## 4. Integrated Email Automation

Need to notify your members about holiday closures, upcoming events or a special promotion? One of the most important features your membership management solution can have is an effective email marketing component.

A good membership management solution should allow you to segment your database and tailor different messages to those groups based on criteria such as demographics, interests or past behaviour. For instance, you could send a welcome message to new members or send a reminder to those whose membership is up for renewal.

Segmenting your database this way can result in greater engagement. According to a study by MailChimp, a leading email platform, people who segmented their email campaigns saw 14.31% higher open rates and 100.95% higher click-through rates. <sup>3</sup>





## 5. Scalability

How scalable is your membership management solution? Chances are, your organization will change and grow over time. An ideal membership management solution should allow you to scale your operational and storage needs as required – and quickly.

Look for a Platform-as-a-Service (PaaS) model which will offer this type of flexibility. According to an article by IBM, PaaS allows for the rapid allocation and deallocation of resources a business needs with a pay-as-you-use model.<sup>4</sup> This will allow your organization to grow organically without having to commit to capital expenditures for hardware and networking infrastructure.





## 6. In-Depth Reporting

Reporting on the performance of your organization is vital. If you are the sole proprietor, you may feel that you don't need regular reports since no one else is involved in running your business. However, research shows that business reports can actually save you time and money. <sup>5</sup>

Reports can help you formulate your budget and marketing plans for the upcoming year. They can also help you analyze which programs and services are more successful than others.

A good membership management solution should not only compile and centralize all your data, but also give you deeper insights that can inform your organization's strategy.

### What Is The Next Step?

So now you know the top features to look out for when shopping for a membership management solution. Once you've shortlisted your top choices, it's time to compare and test before making the final decision.

Schedule some time for a demo of the software or take advantage of a free trial if possible. At the end of the day, choosing a membership management solution is a big task and hitting that balance of management, automation and reporting is key to a great system.



# About PerfectMind:

PerfectMind is a membership management solution that uses cloud-based technology to help member-based businesses connect with their communities. Automating routine daily operations, email correspondence, and online booking empowers your staff to increase registrations and create the best possible experience for your customers. Combined with powerful marketing and reporting modules, PerfectMind is a powerful, but agile, membership software system that configures itself around your business and its people—not the other way around.



## PerfectMind

To learn more about how PerfectMind can help you visit

[www.perfectmind.com](http://www.perfectmind.com) or simply give us a **call 1-877-737-8030**.

Connect with us:    

<sup>1</sup> Data Breaches Compromised 4.5 Billion Records in First Half Of 2018  
Business Wire - <https://business.financialpost.com/pmn/press-releases-pmn/business-wire-news-releases-pmn/data-breaches-compromised-4-5-billion-records-in-first-half-of-2018>

<sup>2</sup> Pci Compliance Guide Frequently Asked Questions I Pci Dss Faqs  
<https://www.pcicomplianceguide.org/faq/>

<sup>3</sup> Effects Of List Segmentation on Email Marketing Stats  
<https://mailchimp.com/resources/effects-of-list-segmentation-on-email-marketing-stats/>

<sup>4</sup> Practical Guide To Paas: Benefits and Characteristics  
<https://www.ibm.com/blogs/cloud-computing/2016/08/22/paas-benefits-characteristics/>

<sup>5</sup> The Importance Of Business Reports  
Linda Ray - <https://smallbusiness.chron.com/importance-business-reports-55843.html>