

Member 365

WHAT SUPPORT MEANS TO MEMBER365

HOW MEMBER365 PREVENTED AN
ACCOUNTING NIGHTMARE AND WEEKEND
WORK FOR MARCIA HALL, EXECUTIVE
DIRECTOR AT THE INTERNATIONAL NANNY
ASSOCIATION.

MARCIA'S CHALLENGE:

MANUALLY MIGRATE 900+ MEMBERS TO NEW CATEGORIES, IN A WEEKEND.

It sounds simple in theory. Build all-new membership categories for your organization, and migrate all your members over to the new system.

Like a lot of things in membership management, Marcia Hall from the International Nanny Association found this task to be a whole lot more complicated in practice.

The plan was for Marcia and her assistant to devote a Saturday to manually migrating each member to their new category. Having sent out an email notifying members of the upcoming change, she was committed, and the stage was set for what *could* have become a total nightmare for her organization and members.

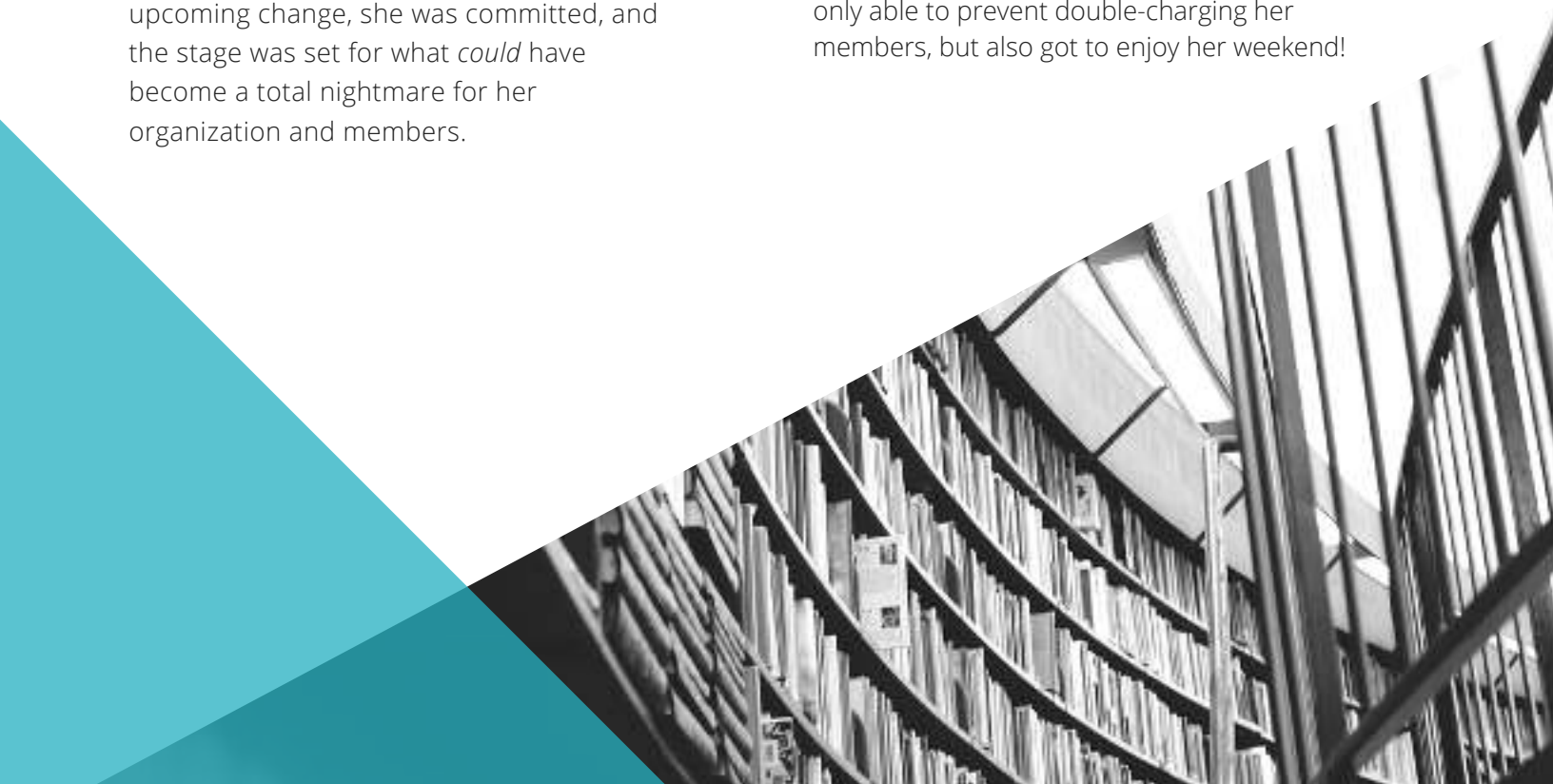
MARCIA'S PROBLEM:

SHE WAS ABOUT TO UNKNOWINGLY DOUBLE-CHARGE HER ENTIRE MEMBERSHIP.

Marcia's approach was straightforward enough. Simply move each and every member, one at a time, from their original category to the new one.

What she didn't know, however, was that her plan would have triggered every one of her members to be automatically billed *twice!* Once for their initial membership, and again for their new one!

Fortunately, a little initiative by Member365's Michael Foley was all it took to recognize and address the situation *before* it became a problem. With Michael's help, Marcia was not only able to prevent double-charging her members, but also got to enjoy her weekend!



SOLVING PROBLEMS, BEFORE THEY'RE PROBLEMS

After sending out the notification of changes to her members, Marcia received an email from Michael, head of support at Member365.

He had seen the changes that Marcia and the INA were making to their membership categories, and wanted to check in to see if he could help the process be made more smoothly.

After a quick chat to understand their intention and plan, Michael immediately identified the payment problem they were unknowingly heading into - and that there were *far* easier ways to get Marcia's job done!

**"MICHAEL MADE THE
PROCESS FAR
EASIER, BUT MORE
IMPORTANTLY,
OPENED MY EYES TO
MEMBER365'S
CAPABILITIES."**

SOLUTIONS:

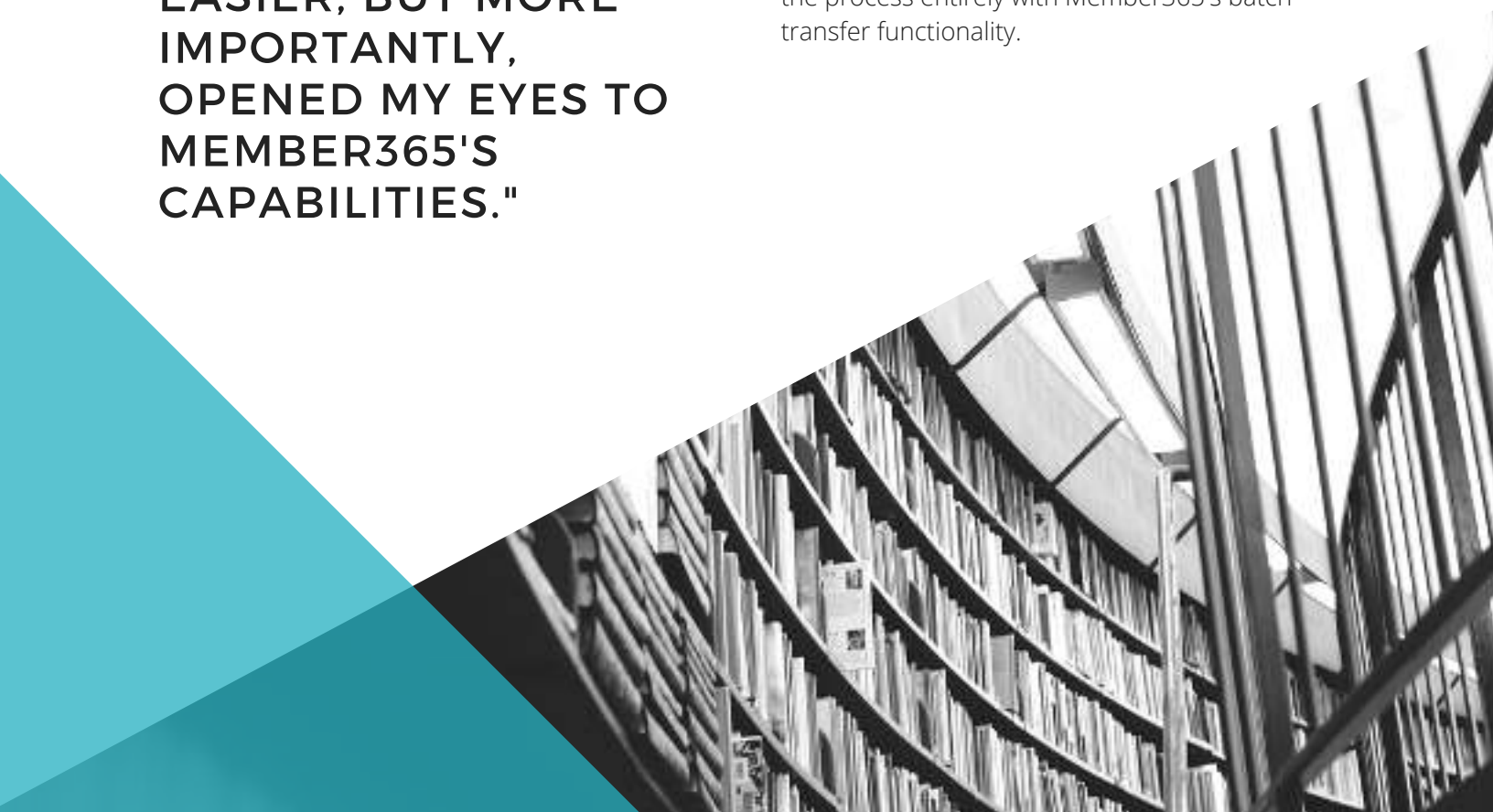
FINANCIAL CONFIG

Michael's first order of business was to show Marcia how her Member365 suite had been configured to automatically charge members their renewal fees.

He guided her through the configuration of her settings, helping Marcia prevent any automatic charging due to her transfer, avoiding future headache for her and her members.

BATCH TRANSFER

Marcia had planned to manually transfer every one of her members. Michael helped her avoid this by showing her how to automate the process entirely with Member365's batch-transfer functionality.



PROACTIVE SUPPORT MEANS MEMBER365 HAS YOUR BACK

Member365 isn't about software. It's about success for membership managers, the organizations they work for, and their members.

For most software businesses, Support is about helping customers put out fires. For Member365, the focus is on preventing problems before they happen.

We seek to differentiate ourselves by emphasizing customer support as a primary responsibility. For us, it's not enough to simply respond to requests for support. We want to anticipate problems and address them for our members *before* they happen.

After all, 'success' is about enjoying positive outcomes - not addressing bad ones. By always keeping our finger on the pulse of our customer's success, we can identify problems before they become problems - and help our customers enjoy their success, just like we did with Maria!

**"I'M USED TO
COMPANIES SAYING
'NO, WE CAN'T DO
THAT'.**

**MEMBER365'S
ATTITUDE IS ALWAYS
'LETS MAKE IT WORK'.**

**THAT'S WHY I'M A
LOYAL CUSTOMER."**

