



## CRM MEMBERSHIP DATABASE GENERAL OVERVIEW

# What is the CRM Membership Database?

The CRM Membership Database will help you in your daily work  
for the management of:

**Your MEMBERSHIP data**

**SERVICES provided to your members**

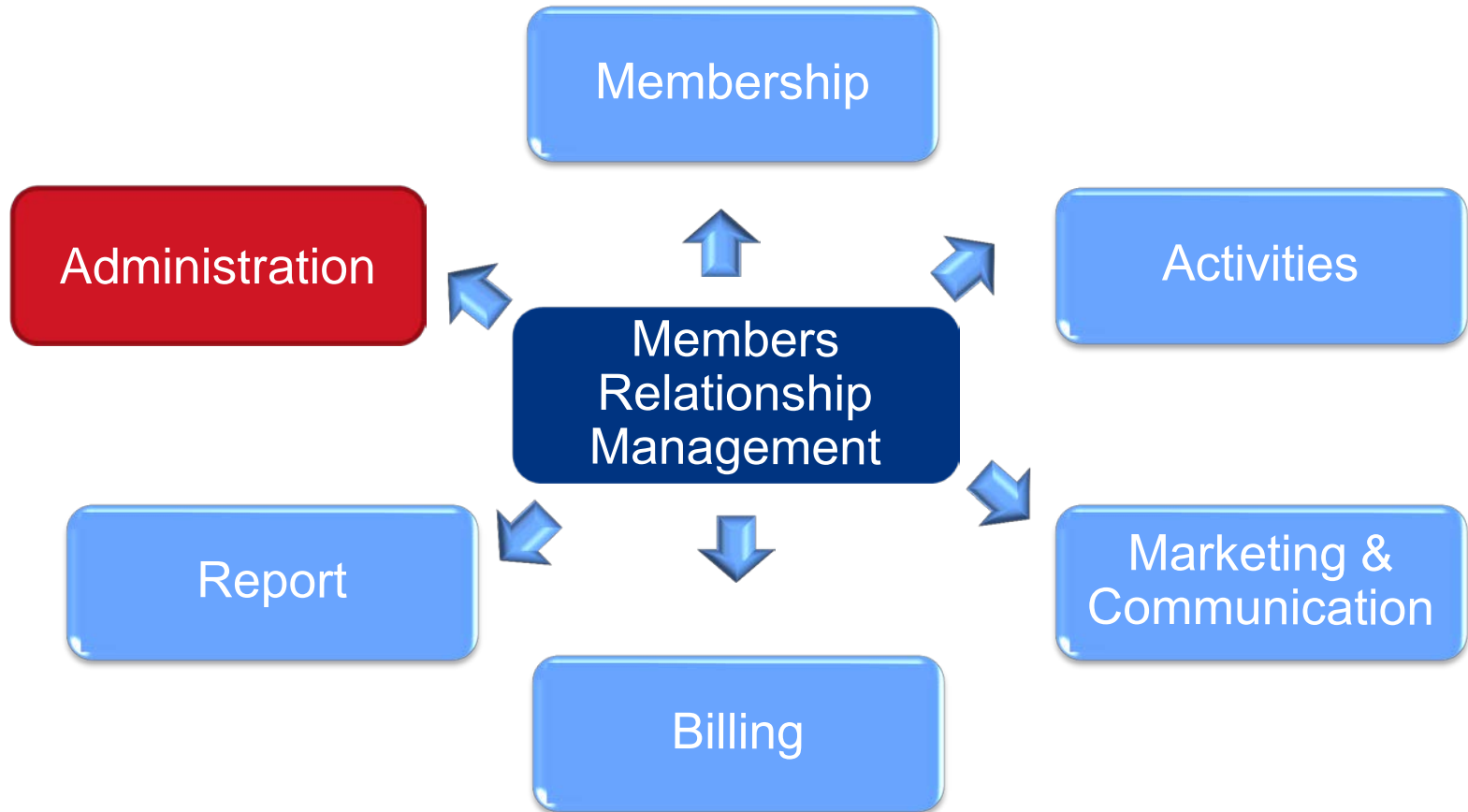
**MARKETING and COMMUNICATION**

**The BILLING Procedure**

**REPORTING**



# CRM Membership Database

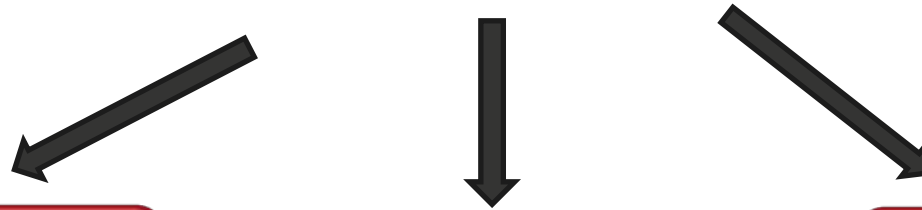


# Membership section

## What can you do?

*Use it as extended, up-to-date,  
searchable and shared address book*

### FUNCTIONALITIES



Store data about  
members and potential  
members and contacts

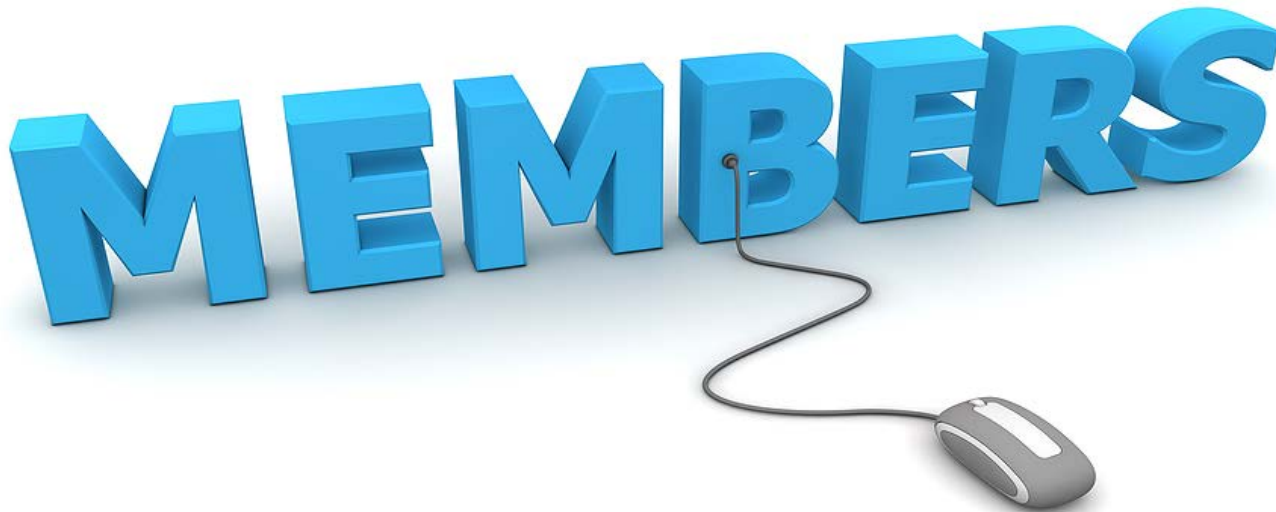
Analyse members and  
potential members

Look or specific information  
about members and  
potential members

# Membership section

## Which type of information?

*Email & Phone numbers of all contact persons*  
*Website, Sector of activity of the companies*  
*Number of employees, Annual turnover*  
*Etc.*



# Activities section

## What can you do?

- *Record the services you are providing to your members.*
- *Register participation to group activities organized by your EO.*
- *Keep track of all services your are providing, in real time, in order to be able to show the value added by the membership to your EO*
- *Organize the work internally for the delivery of the services*

# Activities section

## TYPES OF SERVICES



SERVICES FOR INDIVIDUAL  
COMPANIES

GROUP ACTIVITIES  
(Training, conferences, other  
events, statutory meetings etc.)



# Marketing and Communication section

## What can you do?

*Send collective emails to your members and contacts.*

*Create and re-use standard communications.*

*Organize marketing activities.*

*Segment your communication.*

*Track responses.*

*Export data and Generate documents  
such as lists of participants or desknames.*

*Etc.*





# Marketing and Communication section

## What is it useful for?

*LOBBY → Survey, Communications*

*SERVICES → Invitation, Promotion to segmented targets*

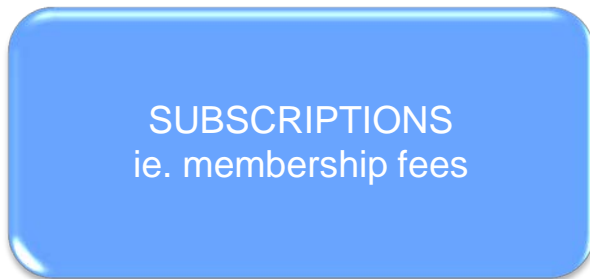
*MARKETING STRATEGY → Membership Campaigns*

# Billing Section

## What can you do?

*Record subscription fees payments and payments for group activities,  
See the status of payments in real time, Export data, Generate invoices  
Etc.*

## TYPES OF FEES

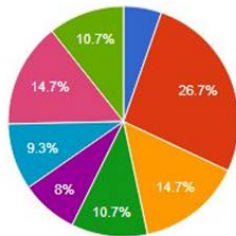
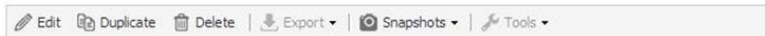


# Reporting section

## What can you do?

- *You can set criteria using all the variables of the database and create reports*
- *Very useful management tool (day-to-day management as well as annual reports etc.)*

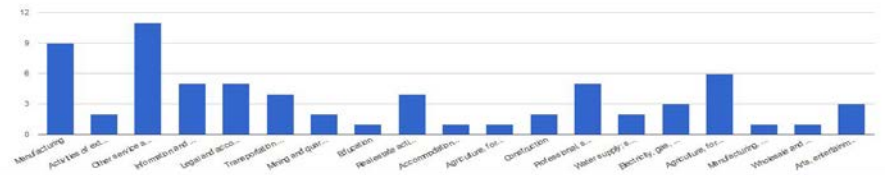
Nr. Of Members by Nr. of Employees



■ From 101 to 200 ■ From 51 to 100 ■ From 501 to 1000

◀ 1/3 ▶

Nr. Of Members by Sector



# Administration section

The CRM Membership Software is:

- Configurable and customizable
  - Opensource (no licences)

To make of the software..  
**YOUR MEMBERSHIP  
MANAGEMENT SYSTEM!**



# Summary of benefits

- **Better information sharing among colleagues (different departments; different locations etc.)**
- **More professional and efficient relations with members**
- **Improved management of services/activities**
- **More visible added value of membership -> Maximise the retention of existing members**
- **Easier recruitment of new members**
- **Increased transparency on payment of fees**
- **Easier and powerful analysis (reports)**
- **Complete control of your data and of the software**

