Member Evolution
CRM Overview

ME CRM delivers the first 'cloud' CRM Solution specifically designed to cater for the unique needs of Membership driven organisations.

Our CRM platform fits seamlessly with the 'end to end' functionality of Member Evolution. With all aspects of your membership acquisition, retention and value delivery processes natively connected, your members will experience new levels of customer satisfaction leading to increased engagement with your community.

The components that truly define the ME CRM include:

- Contact Management
- Activity Management
- Membership Management
- Event Management
- Groups and Committee Management
- Document Management

- Finances and Debtor Management
- Membership Plans and Subscriptions
- Business Process Automation
- Content Management
- Automated Renewals
- Business Intelligence Reporting

member evolution

"These components contain powerful tools that deliver a wealth of benefits to improve member satisfaction and engagement, and your organisations financial performance."

Business Process Automation

- Automated member renewals.
- Automated invoicing to streamline administration processes.
- Membership Schedules to automatically deliver pre and post expiry notifications.
- Automated Grace Period allocation and Membership Expiry.
- Automatically push payments into Xero Accounting System.
- Newsletter lists are updated automatically depending on individual member communication Preferences.

Integration

- Automated Email archiving against User record
- Automated voice recording via VoIP system.
- Powerful API capabilities to interconnect with third party software programs.
- Member Portal "Self Service" to update personal and/or business details.
- Automated email opt-out for Spam Act 2003 compliance.

Reporting

- Real time 3600 view of all business data.
- Access to system reports with powerful filtering capability.
- Export reports to CSV documents to save and review offline.
- View current and expired member subscription reports.
- View full list of all people, members, businesses or activities.
- Custom report creation per project.

Marketing and Communication Management

- Professional newsletter templates customized for your branding.
- Fast editing and dynamic list filtering when creating newsletters.
- Mailing lists are integrated into the contact management. This allows automatically updated lists including removing members who have unsubscribed.
- Send by categories including people, businesses, event attendees and Interest Group subscribers.
- Mail queue capture and release process to ensure quality is maintained.
- Shows campaign level statistics with emails opened over time to show response rates for improving future campaigns.

Content Website

- Create and manage the content contained on the front end website directly from the CRM.
- Moderate staff or member contributed content.
- Add and administer a wealth of different content types including: news, events, Q&As, FAQs, resources, events, sponsors and more.

Membership Management

- Member signups from the front end website automatically get recorded in the CRM.
- View, validate and approve new member sign ups.
- Filter members by payment status, membership type and more.
- Manage event attendees, transactions, roles, tasks, calls, notes, documents, and meetings.
- Impersonate members to ensure their user experience is correct and diagnose any support issues they may be having.
- Expire, cancel or automatically renew members all from the CRM.

Finances and Debtor Management

- Create and view transactions completed by members and users.
- Xero integration.
- Import BPAY reports for automated bank reconciliation.
- SecurePay and PayPal integration.
- Overdue debtors reports for accounts receivable follow-up.
- Transaction CSV export to streamline import to offline systems.

Contact Management

- Manage all people contained in the CRM including staff, members, contacts, and current and expired members.
- Manage member business administrators adding business and finance roles.
- Manage businesses and their key contacts.
- Manage & view all person "cards" with easy to edit actions, transaction creation, event attendance and more.

Event Management

- Set Member discounts and early bird rates
- Manage event attendees.
- Automatically update CPD points event attendees.
- View upcoming events including ID, title, date, type, region, number of tickets purchased and the amount of revenue acquired from ticket sales.
- View recent event registrations and the number of tickets purchased by each individual.