

I'm in charge of receiving membership listings from chapter leaders for renewals, new joins, corrections, updates, etc.

When these are received, I reformat the spreadsheets, map the assigned information, and bulk upload these into EveryAction. Once, these are uploaded into the system, I verify that all the information is accurately transferred to the system. At times, there's information that I must adjust manually, so all listings are checked as follows:

- Has there been a duplicate created?
- Is the current address applied as preferred, or just added as one of their addresses?
- Is the Chapter Affiliation properly assigned?
- Is the current E-mail address set as preferred?
- Is the start date, and expiration date, accurately assigned?
- I then check for any other issues.

Then this listing is forwarded to Marcus, so that the Payment Dues can be properly linked to the membership.

I then contact the Chapter Leaders to let them know that the profiles have been added to our system. (At this point the profiles are waiting to be linked with their payment dues.)

Marcus is then assigned to notify the chapter leaders when the dues have been linked. Emails are to be CC to me, so that I know the process has reached full circle.

Is the customer service side of membership, I tend to profiles that need updating, or correcting, whether this comes from a Chapter Leader or a Member.

I also assist New Members when joining, by helping them sign up online.

I answer the phone calls with questions, problem solving, etc. in term to membership or transfer them to the correct department.

Emails are now tended in a timely manner, where the person feels heard, and the issue is tended immediately. If more time is needed, a 2-4-day window is asked in order to solve a problem.

Membership attends Zoom meetings with MWD in regards to acquisitions, membership cards, and more. Here we have updates on campaigns, and other membership strategies. Meeting is led by our Developments Manager.

Membership has weekly meetings with the Chapters' Manager for updates, and upcoming events.

We have weekly meetings with our Finance Department for updates, compliance, and other preparations, especially for accounting and auditing purposes.

Reports are now assigned for generating at the end of the month. The number of New Joins at a monthly basis must be reported at the end of the month at the Finance Meetings to VPs and staff.

Once in a week, I am to report with COS for updates on the membership side.

