



## **Member Management**

### **Build a Better Customer Experience.**

Gain valuable insight into your club. Launch CSI Member Management and get a powerful look at what your members are all about.

CSI Member Management delivers outstanding customer service when it counts the most. Quickly access critical data that makes a difference when member issues develop in person or over the phone. With a custom snapshot of both personal and financial information, your staff can provide faster feedback and make better decisions about your club's future.

And Member Management delivers outstanding customer intelligence when it's needed the most. Your sales staff can pull the right information to effectively engage members. Enroll, maintain, retain...and develop stronger customer relationships. Your back office staff can access financial and billing information to make flexible, accurate changes to a member's account. Attention to detail serving the best interests of your entire club.

Member Management is good at bringing a lot of member data into clear focus. View and edit membership type, family members, billing information, e-mail addresses, activity preferences, medical limitations, status, notes and more. And add key parts, too. Take pictures, make comments, access transactions, and print customized membership cards. Even track check-in history.

SpectrumNG puts your members first. And turns the little things into big performance.

### **Member Management Benefits:**

- Access critical member information for prompt action and discovery.
- Isolate data in key departments and guarantee a consistent workflow.
- Customize settings to reflect your billing rules and club practices.
- Enhance customer satisfaction with timely, meaningful responses.
- Maximize revenue opportunities and minimize billing errors using precise inputs.

### **Member Management in Action**

#### **Sales**

Arm your sales team with tools making enrolling and retaining members fast and easy. Member Management offers unlimited membership types and customizable membership lengths. Facility, activity and spending trackers monitor member behavior - a smart

indicator of participation and satisfaction. Give your sales team an edge because keeping members always costs less than finding new ones.

- Optimize customer relationships with detailed, relevant data.
- Save memberships through Case Management, Notes and unlimited report options.
- Identify issues and strategically engage customers before a membership is terminated.

## **Front Desk**

Make a big impression on members when they walk through the door. Member Management empowers your front desk with vital account information – the kind members want up front. Get your front-line staff ready to handle most inquiries and help automate the customer experience.

All Member Management information is permission driven, leaving you in control of who sees what. Member Management provides quick access to contract information, check-in availabilities, dues rates, transaction history, locker information, scheduled activities and other member data. Update contact information and edit or add comments, notes and check-in messages, too.

Member Management creates endless opportunities to make a great first impression.

- Protect sensitive billing information by customizing permissions.
- Position your front-line staff as a single point of contact for member inquiries.
- Leverage business intelligence for better customer service.

## **Back Office**

With Member Management, your staff can instantly change member status and billing information through robust options designed for speed and accuracy. Whether adding a family member or switching a billing method, SpectrumNG gives your back office and accounting staff the best tools available to meet the demands of your constantly changing business.

Member Management is customizable and comprehensive, providing access to member information -based on your rules - across one, integrated platform. Ensure each member account has the correct information: draft, dues rate and financial data. This maximizes billing integrity and eliminates rework. Update member status on the fly, using simple, intuitive features for making just about any change. Member Management delivers a reliable, agile response to your members and your business.

Start with a change feature to reflect a member's current status. SpectrumNG walks you through each step. Make changes to family members, dues, locker information and any scheduled activities. Select a reason for the status change and enter quick notes anyone can reference. Choose another option and charge, suspend, skip or remove dues. Even freeze accounts for members unable to use your club for a prescribed length of time.

And take action based on deeper insight into a member's financial information. Missed a charge on a member's account, add it through AR Entry mode. Need to account for a forwarded payment, apply it through AR Payment mode. A member wants a copy of

a transaction receipt, access it through Transaction Listing. Switch from statement billing to draft billing. Access 30 canned reports or create your own. Add family members, update contact information, verify member finance and installment options, and send e-mails with HTML, including attachments.

Capture everything you need in Member Management for better control over your bottom line.

- Make member status changes quickly through one, integrated source.
- Freeze a member account based on your club's billing rules.
- Enhance reporting capabilities through query builder.