



# Internal Processes Best Practices

Presented by Jaime Morgan, CAE and Jessica Fullerton



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# Innovative Publishing

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# Meet Your Presenters



**Jaime Morgan, CAE**  
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Senior Customer Experience Specialist



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San Antonio, TX  
Customer Experience Specialist



Poll: How often do you review your  
already established processes?



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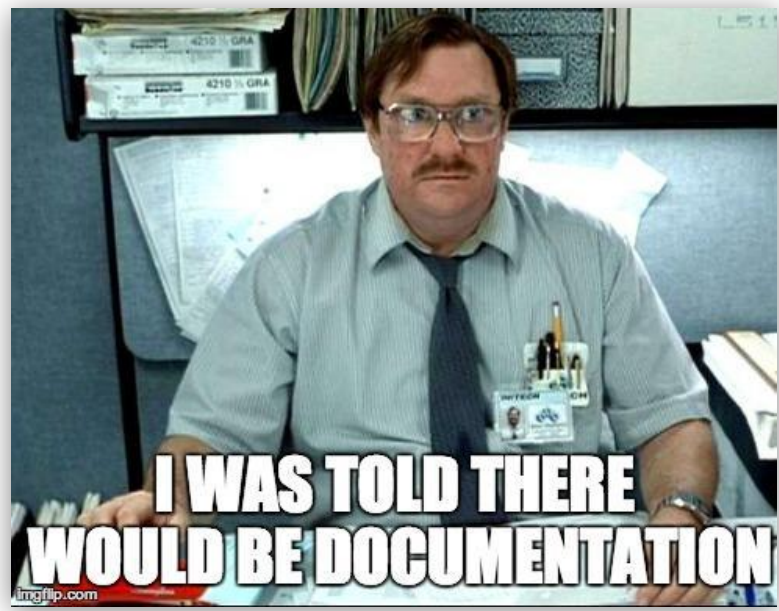
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# NOVI NOTES

Internal reference section on how to use the Novi AMS platform!

[Novi Notes](#)



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# DATA CLEANUP

Clean data is the foundation of member management!

How often do you reach out to get updated information from your membership?

**Tip:**

Direct Members to the member compass!

[/member-compass#profile](#)

[/member-compass#companies](#)

Data Cleanup  
Roundtable Resources



# DATA CLEANUP

Clean data is the foundation of member management!



Tell us! How do you incentivize your members to update their profiles?

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# MEMBERSHIP - When to Review Dues

## Checking for unsent invoices & upcoming drops

### Dues Renewals:

- Review dues rules and make updates **before** the renewals run.
- If your dues includes a custom field input, account for “null” as an input.
- Data Clean up Reports - Missing Billing Contact, Missing "X" Custom Field

### Invoices not Sent/Printed

- Review & confirm they look accurate
- How often?

**Drop Process:** How long after their invoice is overdue?







# MEMBERSHIP

Checking for unsent invoices & upcoming drops

**Drop Process:** How long do you wait to drop after the invoice is overdue?

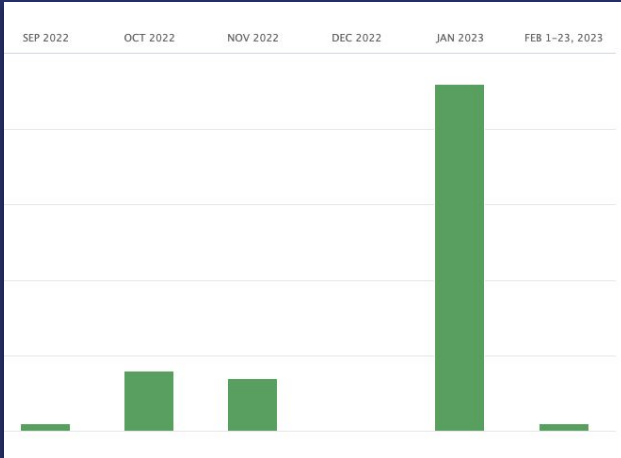
Tell Us!

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A large black and white QR code is positioned to the right of the text, enclosed in a white square with a thin black border. The entire content is set against a solid blue background.

# MEMBERSHIP

## When to revisit your processes



Use your reports for help!

- **Anniversary:** Keep your whole team in the loop throughout the year
  - When are your least/most popular months?

← *January is definitely NOT the time for adjustments*

- **Calendar:** Strategically set alarms leading up to renewals





# MEMBERSHIP

## Managing new signups

How often are you checking your Recent Signups list?

- Daily/Weekly/Whenever you remember?

The screenshot shows the Novi AMS Training interface. On the left is a dark blue navigation menu with the following items: Members (with a red dot), Members, Member Types, Groups, Group Categories, Leadership Roles, Directories, **10 Recent Signups** (highlighted in a darker blue), QuickBooks Merges, and Task Center. The main content area is titled 'Recent Member Signups' and features a search box labeled 'Filter by name'. Below the search box is a table with columns for NAME, TYPE, and CONTACT. The table contains two entries:

NAME	TYPE	CONTACT
<b>Vandy Palmer</b> <i>Association for Holidays</i>	Do	
<b>Tim Drake</b> <i>ABC Company</i>	Do	

# Our

# Don't let it get over 10!





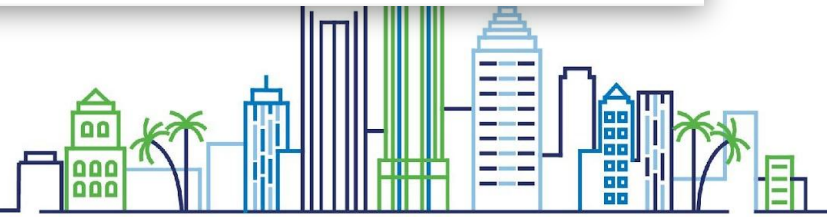
# CONTENT CHANGES

## Keeping your frontend content spotless

Develop a system for your Novi Files and avoid broken links!

The screenshot shows a file management interface. On the left, there is a sidebar with 'AONW' and 'Uploaded' folders. The main area shows a 'demo' folder containing three subfolders: 'Images\_and\_Headshots', 'Sponsor\_Logos', and 'PDFs'. The interface includes a top bar with 'Create' and 'Upload' buttons, a refresh icon, a menu icon, a 'Sort' dropdown, a 'Filter' search box, and a magnifying glass icon.

<input type="checkbox"/>	Filename	Size	Type	Modification date
<input type="checkbox"/>	Images_and_Headshots		dir	-
<input type="checkbox"/>	Sponsor_Logos		dir	-
<input type="checkbox"/>	PDFs		dir	-



# CONTENT CHANGES

## Keeping your frontend content spotless



### Edit Article

ACTIVE X

**\* Title**  
What Is AMS? Association Management Software

**Author**  
Begin typing to see a list of authors...

**Blog Categories**

- Career Center
- Community Outreach
- Industry
- Industry | Education Corner
- Industry | Legislative Updates
- Integrations
- Member Engagement
- Members Only

**\* Published On**  
2/6/2023

**Unpublish On**  
3/8/2023

### Other Tips:

- Don't forget to "Unpublish" blogs
- Document any code you might reuse
  - Div columns, social media feeds, etc.



# EVENTS

## Managing Events Processes



### Tips:

Categorize to stay organized!

Online events - resend confirmations within 15 minutes of start

Syncing Event attendee lists & cleanup

Marking Attendance & CEUs





# ECOMMERCE

## Managing subscriptions and new product orders

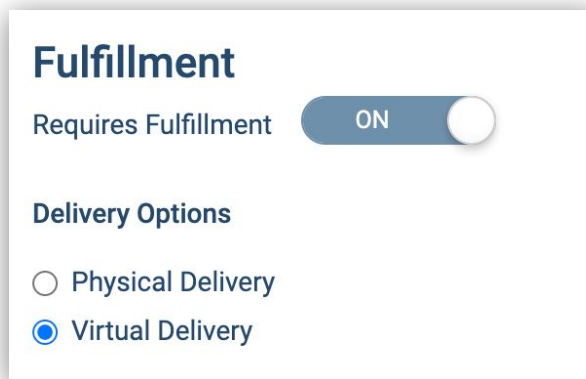
On top of membership renewals, make sure to monitor subscription renewals.

Review your **Orders** like your **Recent Signups!**

- And don't forget to check "Requires Fulfillment"

Make use of ecommerce categories

- Consider the user experience. How will they search for this product?



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