



MICHIGAN
WEST COAST
CHAMBER OF COMMERCE

There's A Journey For That:



Working Smarter, Not Harder

Britt Delo, **Vice President of Membership & Marketing**



✓ West Coast Chamber

- Location: Holland, MI
- Members: 1200
- Staff Members: 6
- 5-star Accredited
- Run on EOS







Who is in the Room?

- **Your Team**

- 1-2
- 3-10
- 10-20
- Over 20

- **Your Members**

- Under 500
- 500-1000
- 1000-2000
- Over 2000





What to Expect

- What the heck is a Journey?
- Where we were & where we are
- Discover the power of the Journey
- Drive with data
- Activity
- Begin YOUR Journey





What the Heck is a Journey

- The Journey Mindset
 - Core processes
 - How to's/checklists
 - Accountability
 - Clear, consistent, and accessible
 - Positive results





Where We Were

*December
2017*

- Binders, Word documents, & paper trails
- No customizations
- No accountability



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Where We Are

*September 2020
through today*

- Core processes
- Highly customizable
- Clear accountability
- System and data base driven
- Consistent
- Universally utilized
- We put it to the test...



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✓ Discover the Power of the Journey

New Member Journey



✓ Discover the Power of the Journey

New Member Journey

Name: Project Type:

Description:

Template Tasks Add Task

	Name	Task Priority	Task Type	Assigned To Person	Start Date	Due Date	Completed Date
<input type="button" value="↑↓"/>	Welcome Phone Call	Normal	New Member Journey				
<input type="button" value="↑↓"/>	New Member Setup	Normal	New Member Journey				
<input type="button" value="↑↓"/>	More Info Tab	Normal	New Member Journey				
<input type="button" value="↑↓"/>	Send Your New Member Journey Starts Here Email	Normal	New Member Journey				
<input type="button" value="↑↓"/>	Add to Automated New Member Journey Group (and any groups).	Normal	New Member Journey				
<input type="button" value="↑↓"/>	Confirm New Member Photo Plan	Normal	New Member Journey				





✓ Discover the Power of the Journey

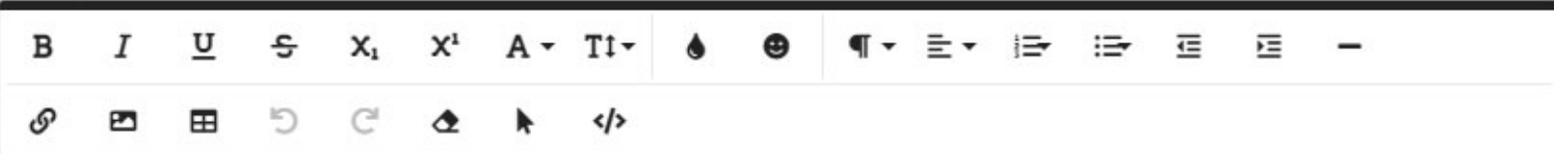
New Member Journey

Name

Task Priority

Template Milestone

Description

B I U S X₁ X¹ A Tt 

- Confirm membership is activated
- Double check no duplicated contacts (individual & business), merge if necessary
- Confirm directory listing is activated (web content tab)
- Set primary rep and user settings (individual contact)
- Set billing preferences based on application and add an billing contact if necessary (Under Profile tab and Billing tab)
- Add new member LinkedIn to [Staff Meeting Agenda](#) and/or Facebook Page
- Add new member to photo schedule: [New Member Social Post](#)





Discover the Power of the Journey

- Ambassadors
- Board of Directors
- Collections
- Current Member
- Leadership Program
- Monthly Publication
- New Member
- Onboarding Staff
- Programs
- Prospect
- Sponsor
- West Coast Cash





Drive with Data

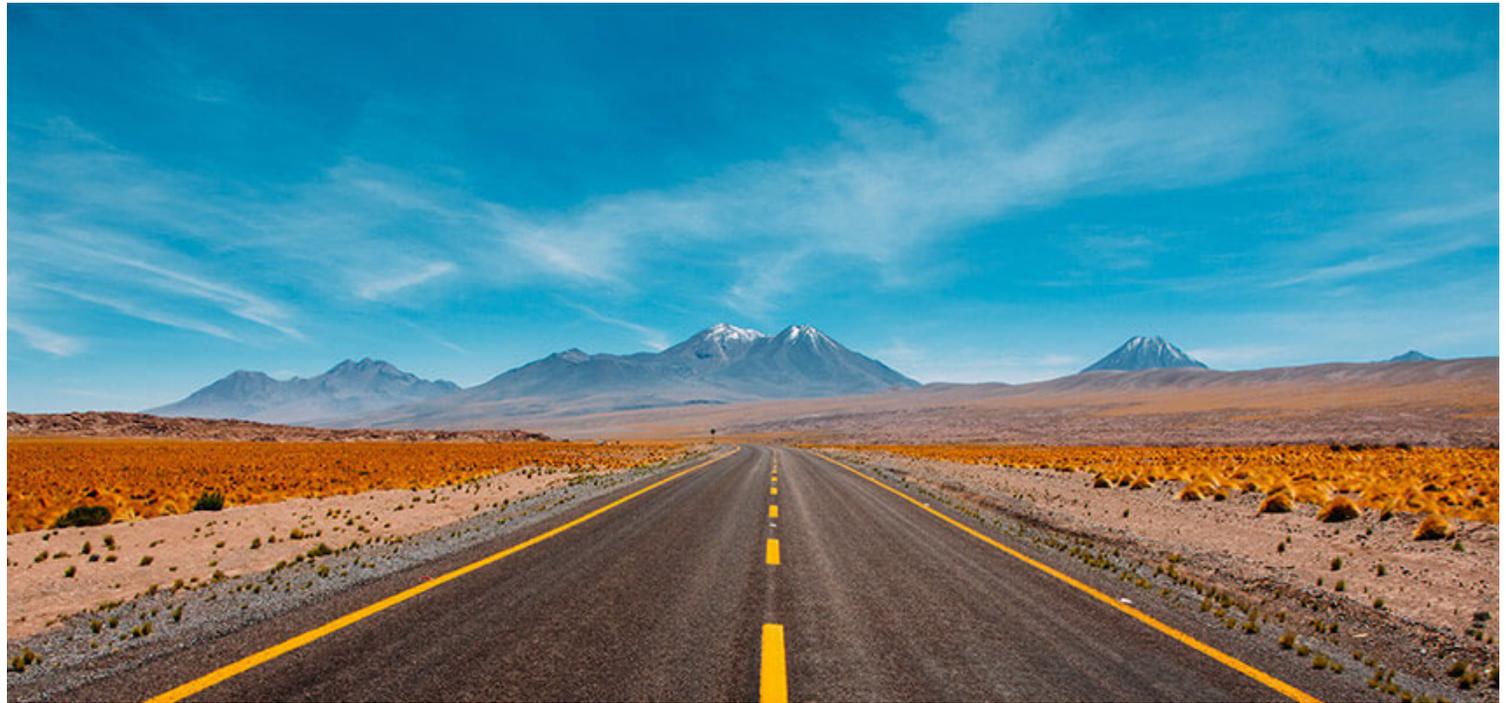
- A&B member renewals
- Ambassador
- Board
- Dollars to budget
- Journey tasks
- New member sales
- Onboarding tasks
- Open invoices in collections
- Outreach calls
- Program metrics
- Renewed members from collections
- Retention
- Sponsorship revenue





Activity

Create a Journey



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Begin YOUR Journey

- Create core processes
- Establish clear accountability
- Develop project and email templates
- Customize!
- Drive with data



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