Membership 2.0.1:
Tips on Verifying Memberships – for the annual count and day-by-day throughout the year

NOVEMBER 2020

Instead of waiting until the end of the year to verify all your members, you can handle a lot of database clutter if you get into the habit of verifying your members as you go.

The next few pages contain a few tips on light housekeeping you can do regularly.

Membership 2.0.1: Tips on Verifying Memberships – for the annual count and day by day throughout the year

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Filters to help you find expired memberships

But before we talk about daily housekeeping, here are some saved filters to help you find the members to be verified as a first priority for the Jan. 31, 2021 count:

2021 Expired - all the people with memberships expiring before 2021-02-01

2021 Expired Emailable – people who can be emailed

2021 Expired NotEmailableNotCallable – not emailable, for any reason, but can be called

2021 Expired BadEmailCallable – email is bad, but they can be called

2021 Expired Opt-OutCallable – person has opted out of email, but can be called

2021 Expired NotEmailableNotCallable - not emailable (any reason) with no phone number or marked as do not call

NoAddressNophone - people who will be excluded from the membership count because they have no local contact information

REMEMBER: DO NOT create these filters for your country. When using them they will work perfectly to only display people in your own country or chapter.

Social Media - Helpful… with important limits

It can be helpful to look people up in social media to confirm whether they are still living in your country (so you can update the LVD).

However, due to GDPR, there are strict rules about this for all our members - even those not living in Europe.
- You cannot use social media information to move a member to another country or delete their membership if they are back in the USA.
- You can, however, write or email them asking them to confirm if they are still in your country, but you cannot write saying "I see you are now living in….")
- Do not message them via facebook, but use their member record to send an email (if they are emailable) or call (if they are not marked 'do not call')

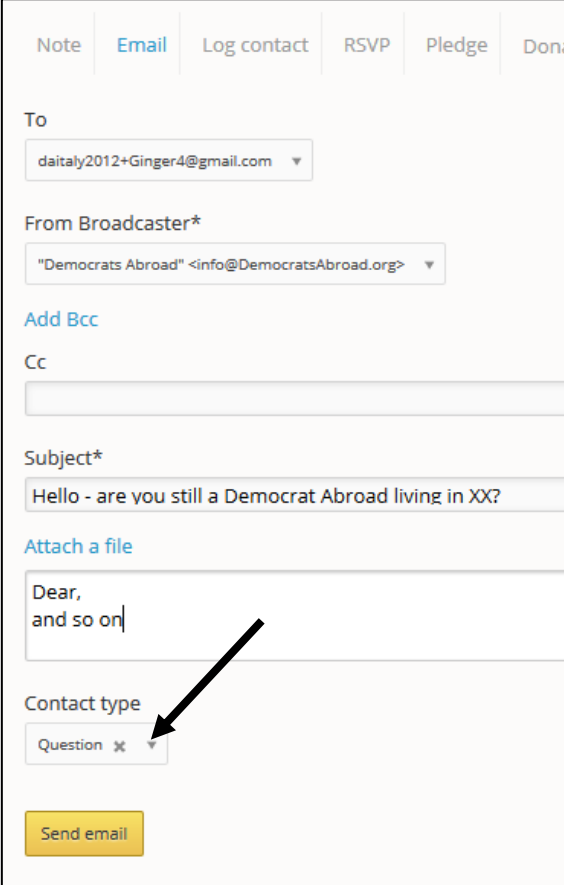# Emailing individual members from their own member record

The best way to keep track of your contacts with individual members is to email directly from the person's member record. Click Email and prepare your message.

Note: For reasons of privacy and DA credibility you should never send an unsolicited email to members from your own personal email account!

VERY IMPORTANT though: If you are asking the member a QUESTION to verify her/his membership make sure you use the contact type:
Question
You can consult your email later on the member's dashboard, as shown below.

✉ ⬤⬤⬤⬤⬤⬤⬤⬤ emailed ⬤⬤⬤⬤⬤⬤⬤ for question: Hello - Are you still living in XX? 🔒 less than a minute ago

Show email

Note | Email | Log contact | RSVP | Pledge | Dona

To

daitaly2012+Ginger4@gmail.com ▾

From Broadcaster*
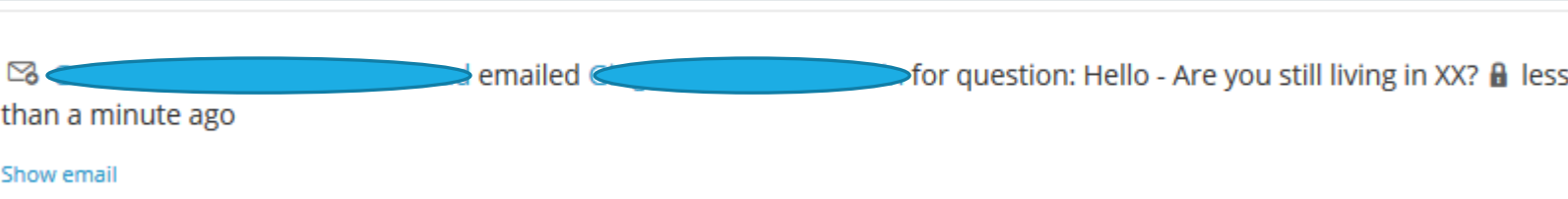
"Democrats Abroad" <info@DemocratsAbroad.org> ▾

Add Bcc

Cc

Subject*

Hello - are you still a Democrat Abroad living in XX?

Attach a file

Dear,
and so on

Contact type

Question ✕ ▾

Send email

To delete or not to delete?

To begin with – if a person explicitly asks to be deleted from our membership list, or has passed away, you must delete the member record within a week after notification. This is required by the European GDPR and is general good practice.
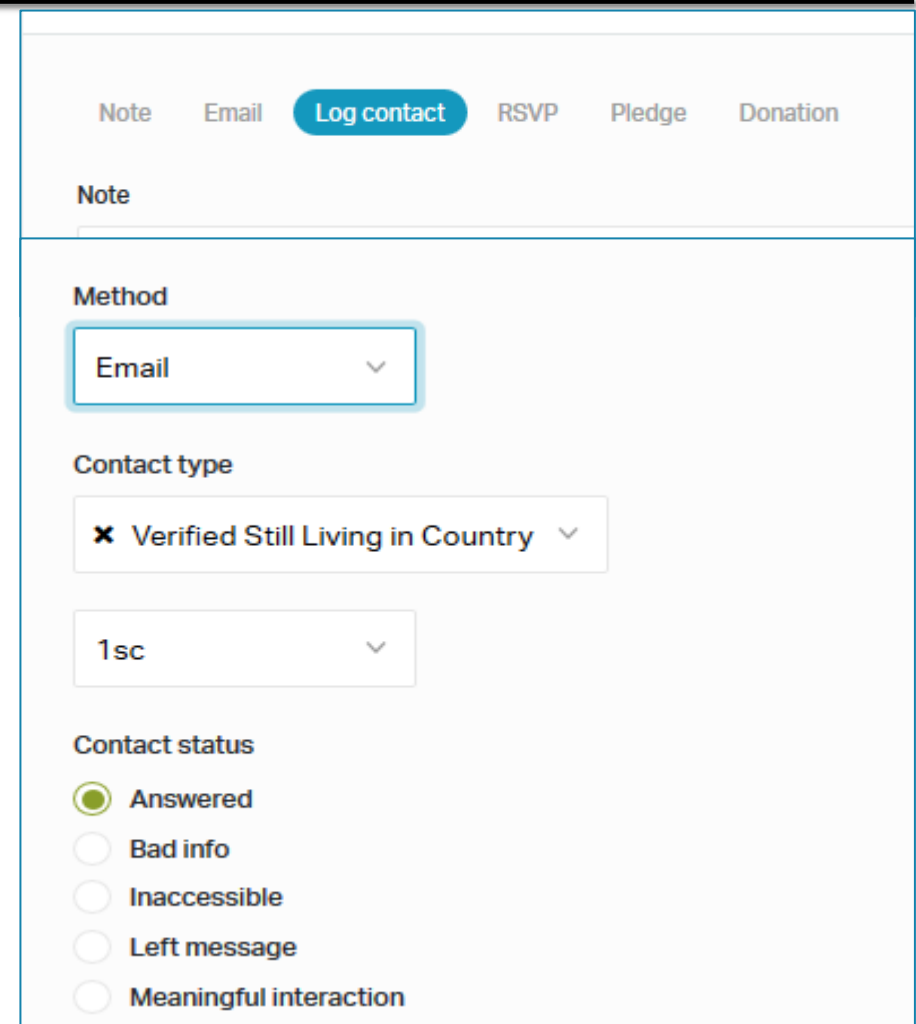
And then, once you've done your emailing and phone banking, what are you going to do with those vague cases – such as people who don't answer their email messages or phone numbers that are no longer in service?

It is not often straightforward when exactly to delete a member, but here are some guidelines based on experience by several longstanding membership managers:

https://wiki.democratsabroad.org/display/LVDwg/LVD+Guidelines+-+Last+Verified+Date+and+tips+on+when+to+delete+a+member

After each email blast: 1. Replies

- Open the member record of people who reply and log a contact:
- Method/ Status:
  Email / Answered   or
  Email/Meaningful interaction

- Vacation Replies can also be useful, *as long as it's **fully clear** from the message that they still live in your country*. In this case, it's better to use contact **Method: Other**

After each email blast: 2. The sending results

- **Look at the results of your email – unsubscribes, bad email and bounced**

- If you see that someone has unsubscribed, contact them to see whether they want to simply remain off the mailing list or whether they have moved to another country or wish to be completely removed. Depending on the reply you can:
  • Still member but off mailing list: log a contact (type: Other) and tag with "Valid opt-out 2018"
  • Has moved to another country: see the membership manual for instructions on moving a member.
  • Or if they wish, delete their member record.

- Contact people with bad / bounced addresses to see if they have a new address.

After each email blast: 3. Clickthroughs

- **Look at the list of people who clicked, especially if this the email was fairly location specific, like an event announcement:**

  Click the **+** button to add all the 'clickers' to a list. Review the list and then you can update their Last Verify Date using a bulk update. (see pages 8-9 for instructions)
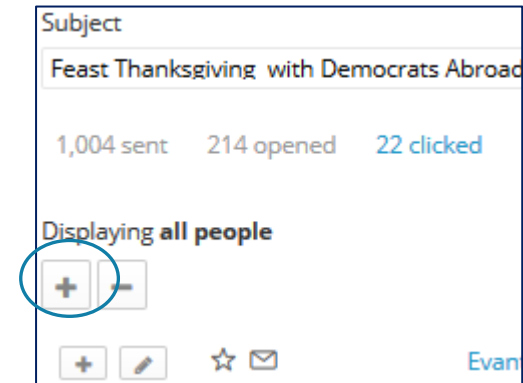
Logging a phone contact:

- Open the member record of people who have answered a call and log a contact – Method/ Status:
Phone Call/ Answered   or
Phone Call /Meaningful interaction

For each event: RSVPs

A new feature:
**The Last Verified Date is now updated automatically when a member RSVPs for an event**

But regardless of how people RSVP:

- **Have people sign up at the door, writing their name and email as clearly as possible – OR have a membership list ready that people can check and update.**

- **After the event go through the list and log a contact for each attendee.**

Batch update of members using a list

- **After you've added your members to a list you can update a batch of up to 50 members in various ways**

- Select the Lists tab at the top of the People screen and start typing the name of your list. Click to open the list page.

- Choose Batch update.
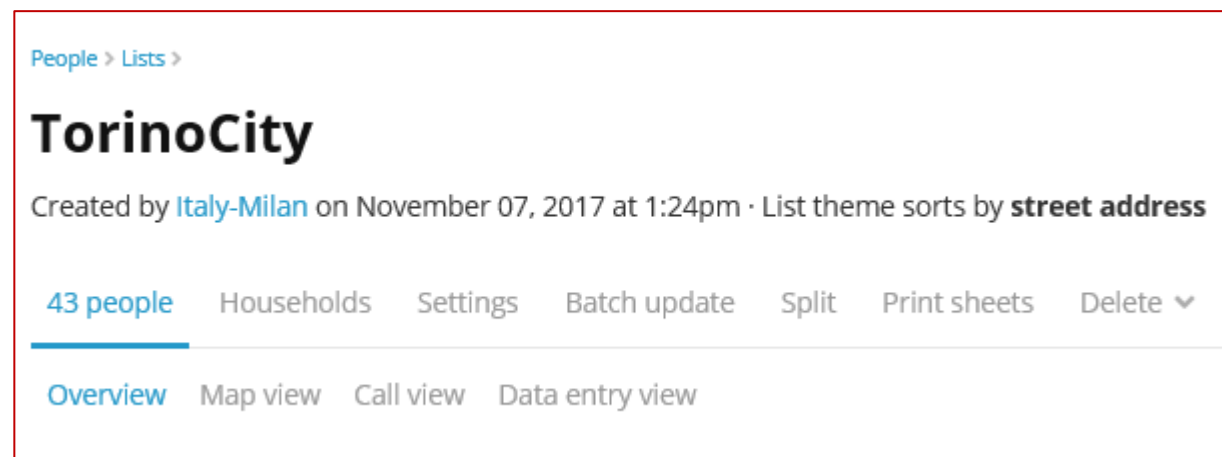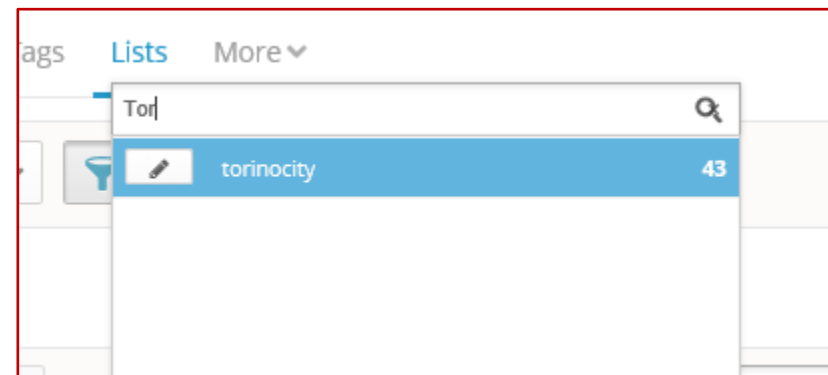
When to contact a global admin

Contact the Global Admin mailbox helpdesk@democratsabroad.org if you

- Have forgotten your info-* login password – do not change it yourself – this is being done centrally

- Need a data extract (Excel spreadsheet)

- Need an import of data (must have had an export first since need the member ID in the file)

- Are a country officer who wishes to have someone's admin access removed, or need to have a login password changed.**

- Have questions not covered in anything on the wiki training page – you are expected to look there before asking.

** If you are a country chair wishing to **request membership, emailing and/or web access rights**, use our wiki page:

https://wiki.democratsabroad.org/display/ZORA/New+Admin+Access+Request+Form