

Membership Development Director Orientation - Feb/Mar 2015

Date	Topic	Trainer
Friday, February 27, 2015		
8 am - 8:15 am	-Welcome & Introductions	Stacy
8:15 am - 9:15 am	<ul style="list-style-type: none"> -Workspace Tour -Office & Building Tour <ul style="list-style-type: none"> -Severe Weather Storm Shelter/Fire Evacuation Location -AED Location (Mall) -First Aid Kit Location -Fire Extinguisher Location -Magic Closet - Drop off Tuesday, Pick up following Tuesday -Mailbox -Supply Cabinet/Ordering Supplies -Review of Training Schedule -Job Description Review & Back-Up Plan -Org Chart & Reporting -Role of Team, Team Leads & Team Meetings -Professional Development Plan -Casual Fridays & Flexible Fridays? -Process for Calling In 	Stacy
9:15 am - 9:40 am	<ul style="list-style-type: none"> -Chamber & Affiliates Overview <ul style="list-style-type: none"> -About the Chamber & History <ul style="list-style-type: none"> -Mission, Vision & Core Commitments -Accreditation -Policy Governance -Bylaws -Strategic Plan -Fiscal Year -Committees & Boards -Chamber Foundation -MCDEVCO, CWED, RLF Program (Former Affiliate) -CWP 	Stacy
9:40 am - 11:30 am	-Membership Committee Meeting	Stacy
11:30 am - 12:30 pm	-Lunch	
12:30 pm - 1 pm	-Completion of Chamber & Affiliates Overview	Stacy
1 pm - 1:30 pm	<ul style="list-style-type: none"> -New Employee Paperwork -Key & Parking Pass Distribution -Door Code -User Credentials for Network 	Sue

1:30 pm - 2:30 pm	<ul style="list-style-type: none"> -Equipment Training -Tablet (Windows 8.1) -Hosted Server -VPN -Change Password While Docked & Prior to Expiration -Installing Software & Updates -Virus Scan on Thursdays -Fonts (Brandon Grotesque) -Microsoft Office (Set Default Font) -Network Drives (Where to Store Files) -Outlook Signatures & Webmail -Outlook Calendars/Add Standing Meetings -Phone & Voicemail (Office & Cellphone) -MiFi -Credit Card Machine <ul style="list-style-type: none"> -PCI Compliance -Conference Phone -Postage Meter -Computer/TV in SMR -Printers & Printing Codes -Projector 	Stacy
2:30 pm - 4:30 pm	<ul style="list-style-type: none"> -Benefits Review -Affinity Programs -Business Advocacy -Central Times Relocation Guide -Certificates of Origin -Chamber Calendar -The Chamber Connection -Chamber Gift Certificates -Chamber Pak -Credibility (The Schapiro Report) -Member Information Center (MIC)(*) -Member Mailing Lists -New Member Coupons -New Members List -Regional Map -Social Media 	Stacy
7:30 am - 8 am	<ul style="list-style-type: none"> -Check E-mail -Review of Friday's Training & Questions 	Stacy

8 am - 11:30 am	<ul style="list-style-type: none"> -Benefits Review -Annual Meeting -ATHENA Leadership Awards® -The Authentic Sales Person™ -Business AMs & PMs (Also Include Ambassador Club/Liquor Licenses) -Business Break -Business EXPO -Coffee Talk -E3 Young Professionals (E3YP) -Economic Outlook Program -Educational Programs -Golf Outings -Leadership Excellence -LEADS Groups(*) -Ribbon Cuttings & Groundbreakings(*) -Servant Leadership -Small Business of the Year Awards -Small Business Week -Technology Tuesdays -Volleyball Tournament -WAKE UP Wausau Region -Women's Conference -Workforce Hub 	Stacy
11:30 am - 12:30 pm	-Lunch	
12:30 - 1:30 pm	-Self-Review of Materials/Programs	Self
1:30 pm - 2:30 pm	-Staff Meeting	Stacy
2:30 - 4:30 pm	<ul style="list-style-type: none"> -General Office Procedures -Credit Card Check-In/Out Procedure -Expense Reports & Receipts -Request for Payments -Accounts Payable Process -Reserve-A-Room Calendar Procedure -HR Reporting & Complaint Process -Cleaning Schedule -Ambassador Committee -About the Committee -Meetings & Meeting Notices -Assigned Accounts -Retention Contact Reports -Accountability & Metrics for Effectiveness -Holiday Party -Committee Application & Recruitment -Committee Training Sessions & Training Materials -Ordering Business Cards & Jackets -Ambassador of the Year Award -Special Pricing - Programs & Events -Ambassador Club - Liquor Licensing -Membership Committee 	Stacy
7:30 am - 8 am	<ul style="list-style-type: none"> -Check E-mail -Review of Yesterday's Training & Questions 	Stacy

8 am - Noon	-Benefits Review (In-Depth Training) -Chamber ROI -Coordination -Attendance -Presentation -LEADS Groups -Coordination -Attendance -Operating Guidelines -Leads -Ribbon Cuttings & Groundbreakings -Coordination -Eligibility -Attendance, Certificate Presentation & Photo	Stacy
Noon - 12:10 pm	Introduction at Chamber Board Meeting	Stacy
12:10 am - 1:10 pm	-Lunch	
1:10 pm - 4:30 pm	-ChamberMaster Training -Logging In -General Navigation -Member Information Center (MIC) -Members & Reps -Groups -Communications -Task List -New Member Applications -Logging Calls & Reports -Prospecting & Reports -Events -Basic Reports -Member & Staff Apps	Stacy
5 pm - 7 pm	-Business PM - Associated Bank (Optional)	Stacy
7:30 am - 9 am	-Check E-mail -Review of Yesterday's Training & Questions -Personal Workspace Time (Stock with Supplies, Organize)	Stacy
9 am - 10 am	-Membership Team Meeting	Stacy
10 am - 11:30 am	-Personal Review of Website & MIC	Stacy
11:30 am - 12:30 pm	-Lunch	
12:30 pm - 4:30 pm	-Sales Review -Goals -Budget & Expectations -Tracking/Dashboards -Status Report -Types of Membership (Including Retired Members) -Ineligible Industries -Branch Locations -Dues Calculation -Sales Marketing Pieces & Member Toolkit -Dues Ad-Hoc/Tiered Dues -Upselling	Stacy
7:30 am - 8 am	-Check E-mail -Review of Yesterday's Training & Questions	Stacy

8 am - 11:30 am	-Review of Major Investors -Key Highlights of Membership Accounts -Top 20 Prospects & Sales Strategy -Business EXPO Networking & Sales Strategy	Stacy
11:30 am - 12:30 pm	-Lunch	
12:30 pm - 1:30 pm	-ACCE & US Chamber Website Review	Stacy
1:30 pm - 2:30 pm	-Staff Meeting	Stacy
2:30 pm - 4:30 pm	-Retention Review -Goals -Billing Cycle, Payment Options & Pro-Rated Memberships -Collections -Reinstated Memberships -Resignations -Member Renewal Packets -Risk Reports -Membership Plan (To Be Developed)	Stacy
Tuesday, March 10		
7:30 am - 8 am	-Check E-mail -Review of Yesterday's Training & Questions	Stacy
8 am - 11:30 am	-Personal Review of Membership Accounts	Self
11:30 am - 12:30 pm	-Lunch	
12:30 pm - 4:30 pm	-One-on-One Meetings with Staff -Retention & Sales Calls with Aaron and Ambassadors	TBD
Wednesday, March 11		
7:30 am - 9 am	-WAKE UP Wausau Region - Boys & Girls Club of the Wausau Area	Stacy
9 am - 11:30 am	-One-on-One Meetings with Staff -Retention & Sales Calls with Aaron and Ambassadors	TBD
11:30 am - Noon	-Prep & Travel to LEADS Group	Stacy
Noon - 1 pm	-LEADS Group - Days Bowl-A-Dome	Stacy
1 pm - 4:30 pm	-One-on-One Meetings with Staff -Retention & Sales Calls with Aaron and Ambassadors	TBD
6 pm - 9 pm	-E3YP on the Move - Greenheck Fieldhouse (Optional)	Stacy
Thursday, March 12		
7:30 am - 11:30 am	-One-on-One Meetings with Staff -Retention & Sales Calls with Aaron and Ambassadors	TBD
11:30 am - 12:30 pm	-Lunch	
12:30 pm - 4:30 pm	-One-on-One Meetings with Staff -Retention & Sales Calls with Aaron and Ambassadors	TBD
Friday, March 13		
7:30 am - 11:30 am	-One-on-One Meetings with Staff -Retention & Sales Calls with Aaron and Ambassadors	TBD
11:30 am - 12:30 pm	-Lunch	
12:30 pm - 4:30 pm	-One-on-One Meetings with Staff -Retention & Sales Calls with Aaron and Ambassadors	TBD