**PRODUCT EDUCATION** | Webinar

# **Stakeholder Engagement** in the CRM

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# PRODUCT EDUCATION | Our Experts

## Josiah Craig
CRM Training Manager

## Katlynn Land
CRM Training Manager

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# Agenda

- Dues, Invoices, Refunds, Item Credits, and Write-offs
- Using the Dues Revaluation Tool for 2021+
- Managing Staff and Partner Turnover
- Client Communication Examples

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# Dues: Refunds, Credits, and Write-offs

## Things to consider

- Talk with your DMO **accountant** to confirm which method is best for your destination
- Make sure your team is on the same page with these changes and who will do them.

- If you are using an Accounting Integration Software (Quickbooks, etc.), this does not apply to you as any changes are handled in those products.

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## Things to consider

- If you are using Payment Integrations (Authorize.net, PayPal, Etc.)
  - Consult your accounting team
  - Reach out to your CRM analyst before proceeding

- This demo is focusing only on the **basics** of the CRM tools in regard to Manual Transactions (Cash, Check, etc.)

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## Refunds

Track a whole or partial refund for Dues and Fees

## Write-offs

Cover Dues with a Write-off

## Invoice Update

Add Credit on Invoice Items

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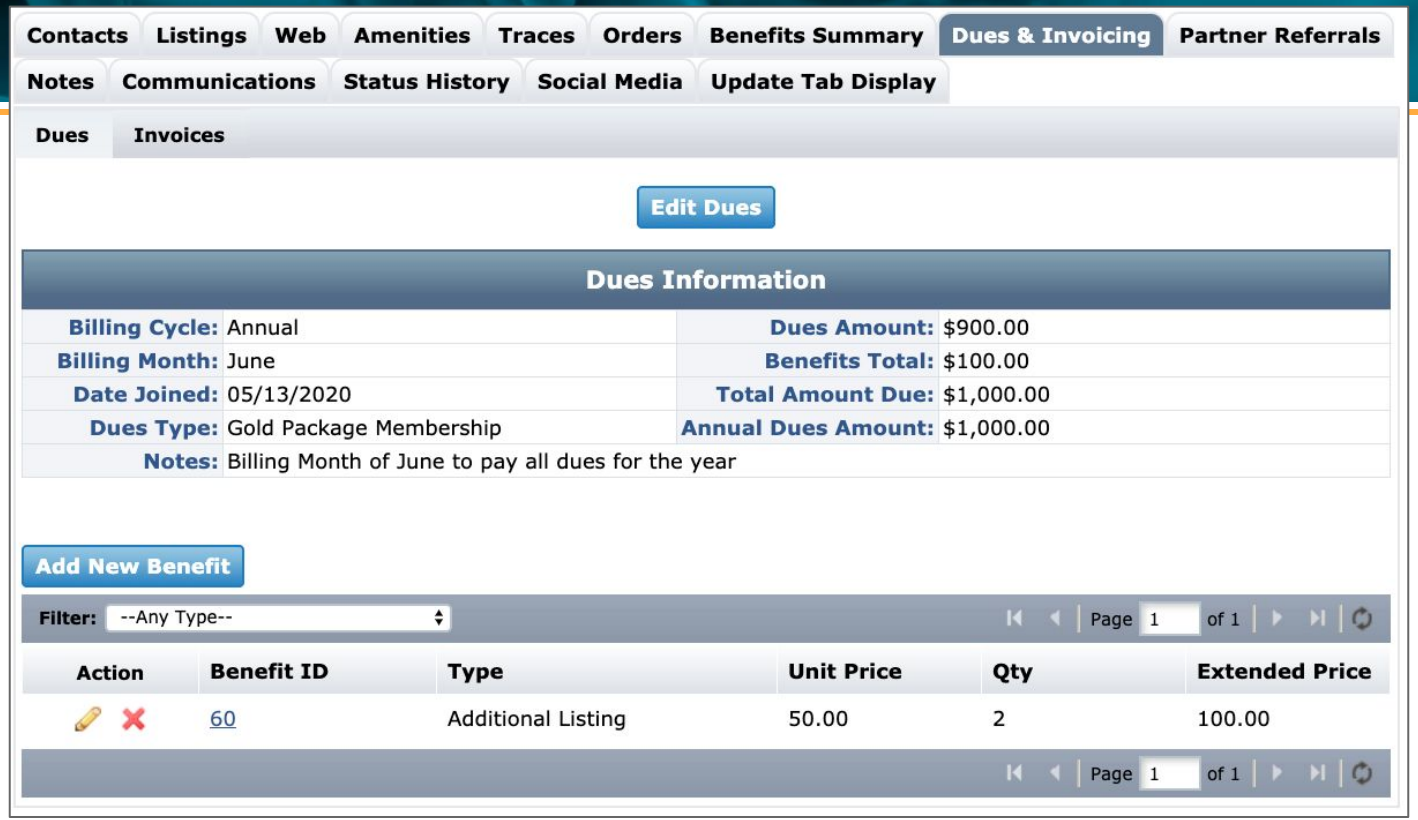
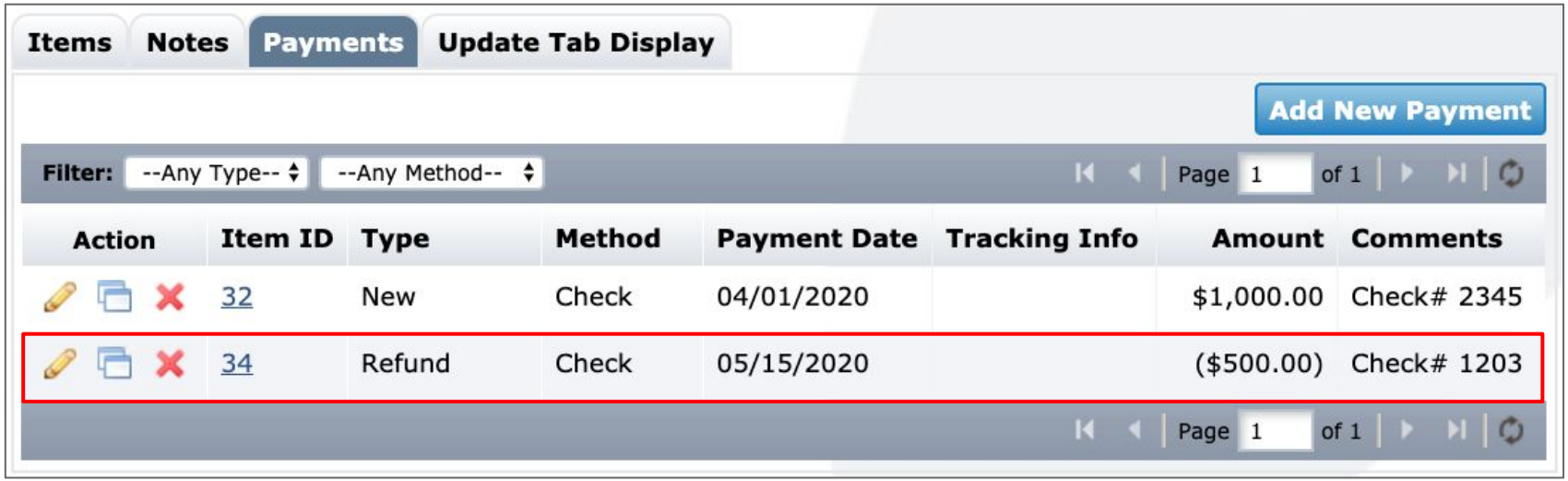
# DUES AND INVOICES



# REFUND

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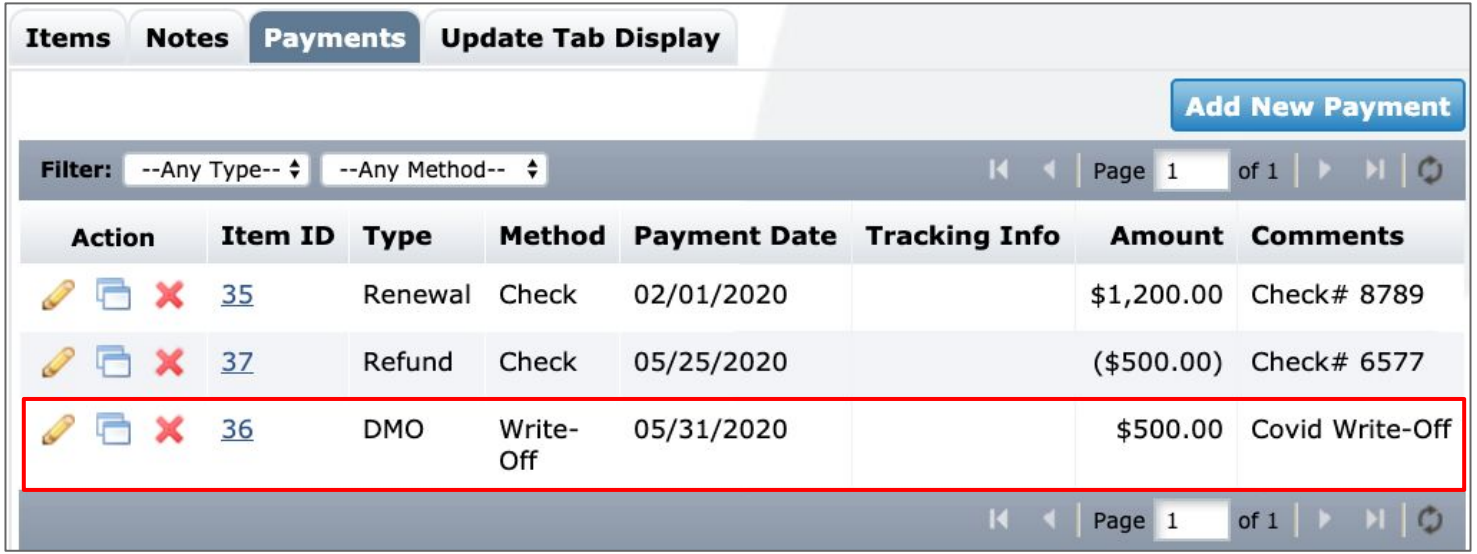
# WRITE-OFF

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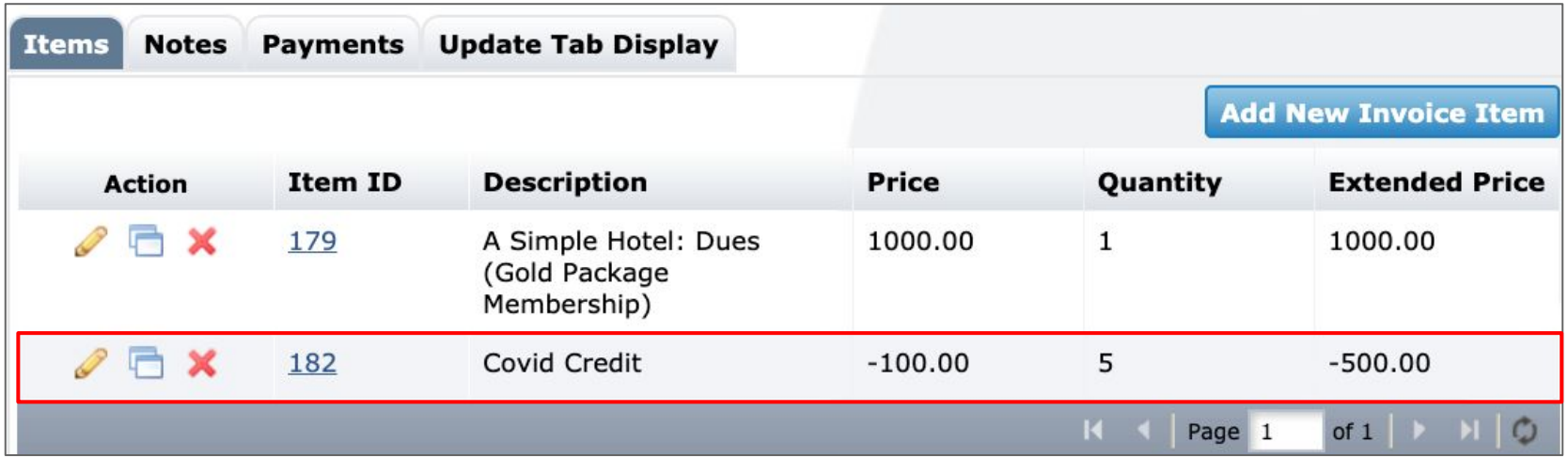
# INVOICE ITEM CREDIT




Perk: Items show on Printed Invoices

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# INVOICE ITEM CREDIT

| | |
|---|---|
| **John Simple**<br>**A Simple Hotel**<br><br>**,** | **Date: 01/01/2020**<br>**Invoice #: 131**<br>**From: 06/01/2019**<br>**to 05/31/2020**<br>**Due: 04/01/2020** |

| **Description** | **Amount** |
|---|---|
| A Simple Hotel | |
| Dues (Gold Package Membership) | $1,000.00 |
| Covid Credit | ($500.00) |
| **AMOUNT DUE:** | **$500.00** |

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# Admin: Create New Dropdowns

# OPTIONAL DROPDOWNS - REFUND & WRITE-OFF

## “Invoice Payment Types”

1. Refund
2. DMO

| ID | Payment Type |
|---|---|
| 1 | New |
| 2 | Renewal |
| 3 | Partial |
| 4 | Other |
| 14 | Refund |
| 15 | DMO |

## “Payment Methods”

1. “Write-Off” or “Covid Write-Off”

| ID | Payment Method |
|---|---|
| 1 | Check |
| 2 | Credit Card |
| 3 | Cash |
| 5 | Write-Off |
| 6 | Other |
| 11 | COVID Write-Off |

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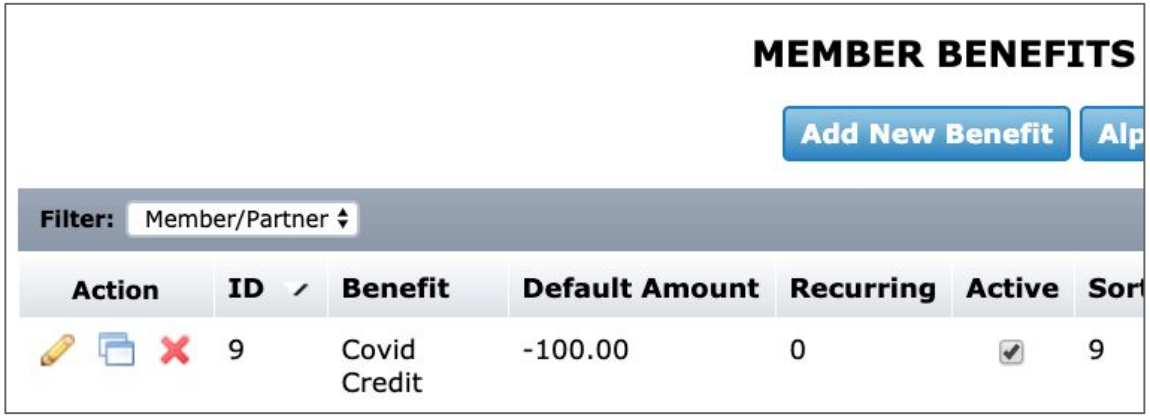
# OPTIONAL DROPDOWNS - INVOICE ITEMS

## “Member Benefits”

1. Covid Credit

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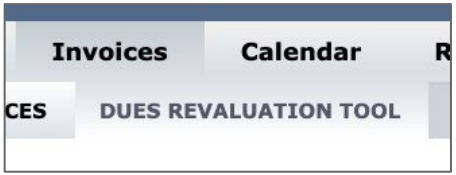
# Dues Revaluation

# DUES UPDATES

## Two Options:

- Update “**Member Dues Types**” in Admin
- Revaluate Dues using the “**Dues Revaluation Tool**”

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# DUES: NEW DUES

## Things to consider

- Admin>Dropdowns>“Member Dues Types” to change Dues Default $ price.
- Wait until 2020 Invoices are complete unless changing 2020 Dues.

- Admin changes will **only** affect new Accounts or Accounts that are having their Dues Type changed.

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# DUES: CURRENT MEMBERS

## Things to consider

- Revaluating Dues does not affect Generated Invoices, only future Invoices
- Revaluating Dues only affects Accounts with Existing Dues
- Can do (-) negative changes if reducing Dues for 2021.

- Wait until all 2020 Dues Invoices are done being generated before changing to 2021 Dues.

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# Staff and Partner Turnover

# STAFF AND PARTNER TURNOVER

## For DMO Staff

- “Manage Groups” for Staff with new Responsibilities
- Review “Security Roles”
- Review “Inactive” CRM Users

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# STAFF AND PARTNER TURNOVER

## For Partner Staff

- Utilize “Inactive” or “Furloughed” Contact Types
- “Covid Furlough” Contact Tag

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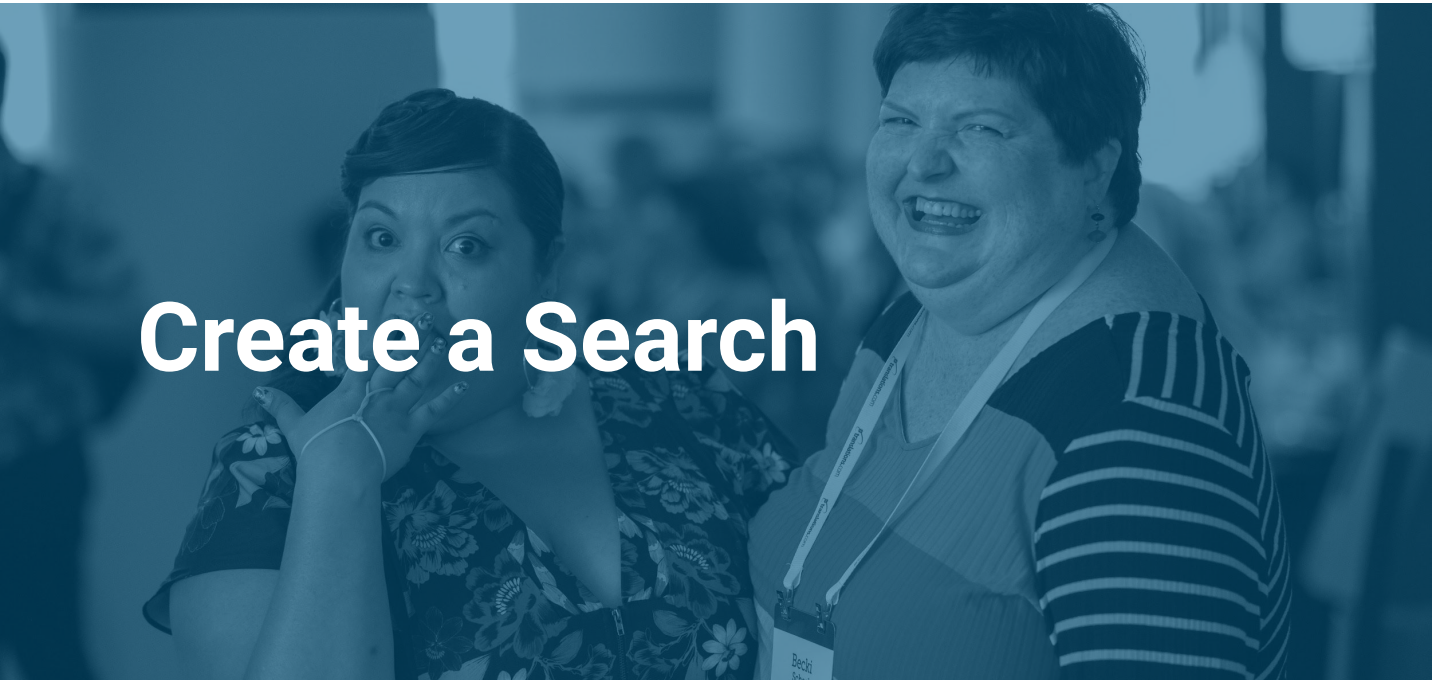

# Create a Search

# BALANCE DUE INVOICE SEARCH

Report Filters

Balance Due: Greater than | 0 | Invoice Date: This Year

Apply Filters

**BALANCE DUE INVOICES: QUERY RESULTS - 184 RECORDS RETURNED**

Modify | Clone | Print | Export | Return

| | Invoice ID | Invoice Date | Recipient Company | Invoice Type | Invoice Amount | Balance Due | Due Date | Description |
|---|---|---|---|---|---|---|---|---|
| ail | 11970 | 01/01/2020 | Crowne Plaza East | Membership | $2,057.91 | $2,057.91 | 01/31/2020 | Invoice for Crowne Plaza East, membership dues |
| ail | 11971 | 01/01/2020 | Holiday Inn | Membership | $1,126.65 | $1,126.65 | 01/31/2020 | Invoice for Holiday Inn, membership dues and be |
| ail | 11972 | 01/01/2020 | Fairfield Inn by Marriott Airport | Membership | $695.74 | $695.74 | 01/31/2020 | Invoice for Fairfield Inn by Marriott Airport, memb |
| ail | 11973 | 01/01/2020 | Rockresorts Downtown | Membership | $2,070.52 | $2,070.52 | 01/31/2020 | Invoice for Rockresorts Downtown, membership d |

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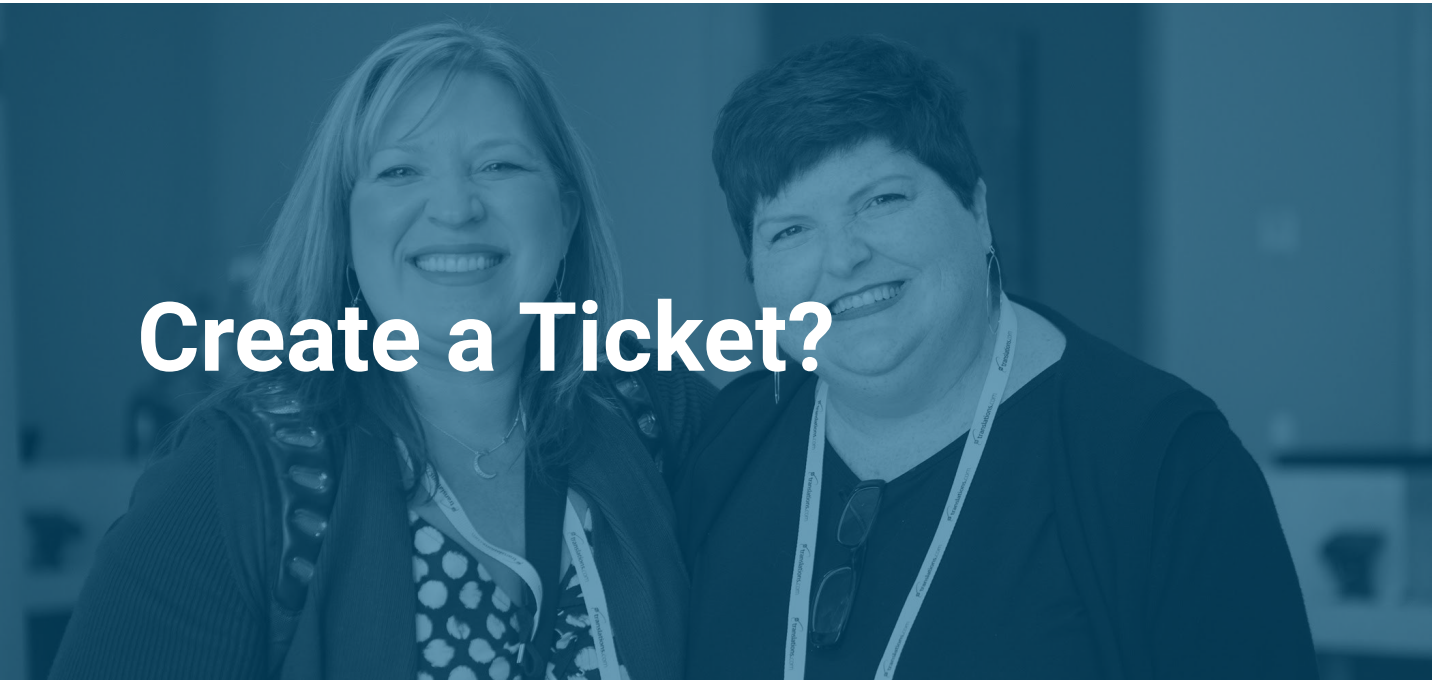
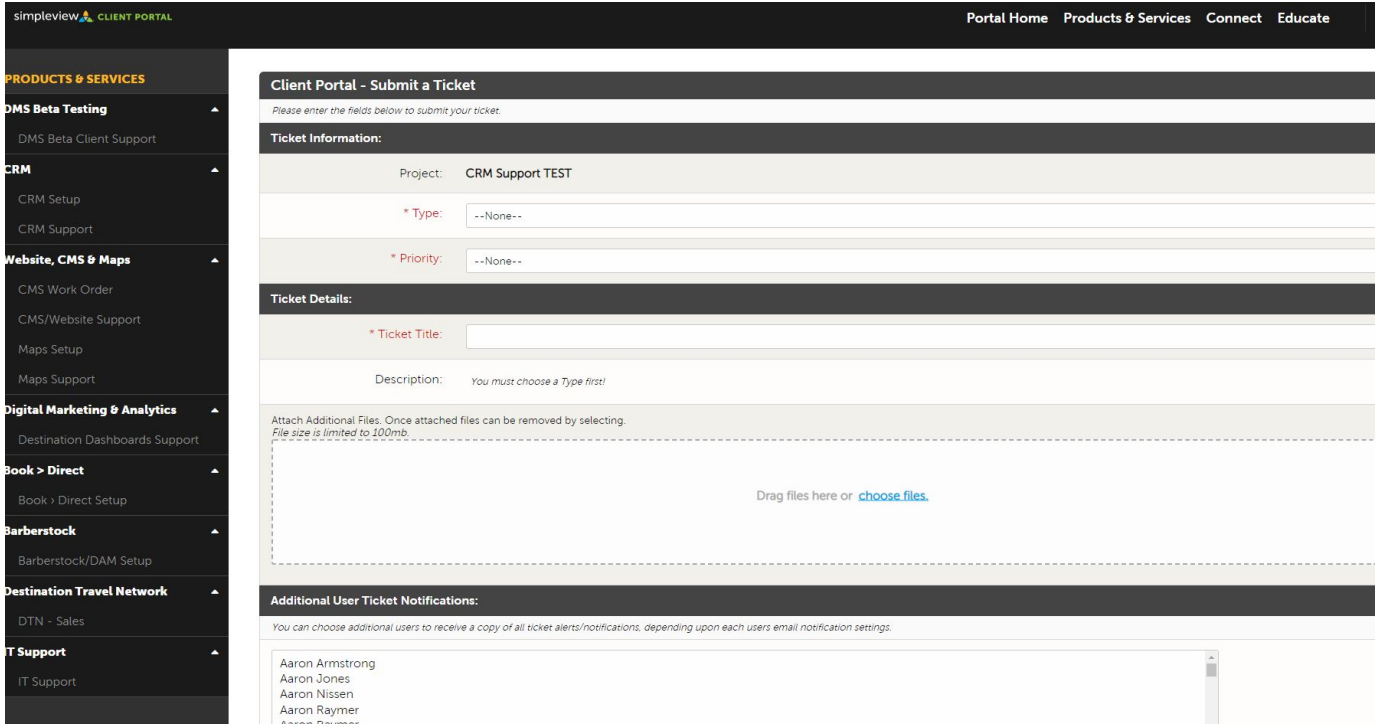


# Create a Ticket?

# SUBMIT A TICKET



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# Partner Communication Examples

# VISIT SOUTH WALTON PARTNER EMAIL

VISIT SOUTH WALTON

## MARKETING

**COVID-19 Response:**

In response to COVID-19, South Walton has taken steps to adjust its marketing strategy. Currently, we're focused on keeping potential visitors up to date on businesses, new regulations and answering any safety concerns related to COVID-19.

For those in market already, our focus is on how they can help keep our community safe, as well as information on which local businesses are offering adjusted services or are open for business.

As we continue to navigate through these tough times, we will continue to help keep South Walton top of mind with our guests by providing up-to-date information, virtual experiences and opportunities to help South Walton employees and small businesses.

**COVID-19 Travel Updates Page Stats:**

The main VSW COVID-19 Travel Updates page launched on March 18 and has seen 40,739 Page Views (for March and April), 31,560 of which were unique Page Views, meaning the page was viewed 9,179 times by users returning to the page for another reference. The majority of this traffic originated from Organic Search (44%). Users spent an average time of 2:09 on the page.

- The Restaurant Updates page received 3,131 Page Views with an average time of 3:26 spent on the page.
- The Accommodation Updates page received 2,007 Page Views with an average time of 3:12 spent on the page.
- The Events Updates page received 442 Page Views with an average time of 2:02 spent on the page.
- The What You Need to Know Before Visiting South Walton page received 209 Page Views with an average time of 3:39 spent on the page.
- The Support South Walton page received 522 Page Views with an average time of 4:06 spent on the page.

# VISIT SOUTH WALTON PARTNER EMAIL

Interested in getting involved? Reach out to Catie Feeney, our social media specialist, at Catie@visitsouthwalton.com.

**March Website Stats:**

- **Users & Page Views:**
  - Users who visited the site in March were mostly females (60.6%), between ages 45-64 (39.8%) and new visitors (72.7%). While new visitors and returning visitors both exhibited decreases, returning visitors had a larger decrease this month at -54.8% compared to a decrease of -44.4% for new visitors. Due to a decrease in the ability of our visitors to plan trips, and a freeze in paid marketing, the number of Page Views decreased, as expected in March.
  - Month over month, traffic to the site has decreased — with sessions down by -48%, users by -46.8% and Page Views by -37.3%. While acquisitions decreased, engagement metrics exhibited considerable improvements largely due to the significant increase in Organic Search traffic this month which tends to have better engagement metrics. Traffic trends throughout the month were low during the first half of the month, but increased considerably around April 16th due to a large increase in traffic from Organic Search sources which increased in sessions by +60.8%. Other notable channel increases were seen in Referrals which increased by +41.7% and Videos which increased by +69.8%.
- **Geography:**
  - Most sessions to the site came from Georgia this month. Texas had a substantial decrease of -66.4% making Texas the state with the third-most sessions the month. Out of the top 10 states, Mississippi was the only state to show an increase in session count this month.
- **Top Areas viewing our site:** Atlanta, Houston, Chicago, Nashville, and Dallas-Fort Worth.
- **The most viewed pages**:
  - The most viewed pages on the site in March were the Hilton Sandestin Beach Golf Resort & Spa page, the Home page, and The Pearl Hotel page. Of the top 10 pages, those with the largest increases in Page Views were the Beach Safety page (which increased by +530.1%) followed by The Pearl Hotel page (which increased by +413.1%).
  - Of the top 10 viewed pages, The Pearl Hotel page showed the longest average time on page at 3:38 (which increased by +15.1% this month) followed by the Hilton Sandestin Beach Golf Resort & Spa page at 3:31 (which increased by +21.1%). Both pages had higher entrance and exit rates, suggesting that most visitors were sent straight to the pages, stayed on the pages to consume the content and then didn't feel the need to explore any additional pages on the site.
- **March eNewsletter:** Overall, there were 5,483 new email subscribers gained in March, a 5.6% increase from the previous month. While the open rate decreased, click-through rate was 9.39% this month which exceeds the 7.02% industry standard. The majority of clicks within the email happened on the main picture and headline.

**CONTACT US**

Visit South Walton
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VisitSouthWalton.com | (850) 267-1216

# ATHENS GA CVB

## INFORMATION AND RESOURCES FOR OUR PARTNERS

We at the Athens Convention & Visitors Bureau are standing alongside our hospitality and tourism community as we navigate these uncertain times. We aim to champion our small businesses, support locals and continue to foster the spirit of our city.

In addition to providing updates and resources for the public, we will also be compiling information and resources for our local hospitality community members. We hope you will find this information of use, and we also ask that you let us know how we can help. We will be sharing **#SupportAthensOwn** stories and would like to share yours. We know that our creative community is innovative and resilient, and we want to hear from you. Use the #SupportAthensOwn hashtag, tag @VisitAthensGA on social, or email us at **media@VisitAthensGA.com**.

LAST UPDATED: May 13, 2020

As restaurants across the country lay off workers, "Diners, Drive-Ins and Dives" star Guy Fieri has **raised more than $21 million** to help them. In partnership with the National Restaurant Association, Fieri is providing laid-off workers with $500 grants — more than 40,000 of them so far. Fieri is not the only person making an effort: Nation's Restaurant News has compiled **a list of funding sources** available to restaurant workers.

### JUMP TO:


- Local Resources
- State Resources
- Travel Industry Resources


### CLASSIC CITY LOVE

This new website is a collaboration by Kaptiv8 and the Athens Downtown Development Authority to provide updated information on business hours and offerings. There is a prominent link for businesses to submit information and request a free listing.

### FACEBOOK GROUPS, LOCAL

- **Support Athens' Own:** https://www.facebook.com/groups/2652396331556878
- **Athens Service Industry**: https://www.facebook.com/groups/734244299982586/
- **Athens GA COVID-19 Resources and Discussion:** https://www.facebook.com/groups/athenscovid19

### GARRIE VEREEN EMERGENCY RELIEF FUND FOR MUSICIANS

Nuçi's Space launches a relief fund to provide financial assistance for those in the music industry affected by COVID-19. This is a restricted fund and will be distributed directly to those who have lost work due to venue closures and tour & festival cancellations. In addition to musicians, there are many behind the scenes who are suffering and we aim to help them through this difficult time **https://www.nuci.org/garrie-vereen-emergency-relief-fund/**

# ATHENS GA CVB

## SUPPORTING YOU ON OUR BLOG

### HOW TO SUPPORT ATHENS RESTAURANTS

Athens has become known for its food scene, particularly our small, local restaurants. These small...

MORE →

### HOW TO SUPPORT LOCAL ATHENS SHOPS AND MAKERS

Athens' shopping landscape is packed with small local businesses that provide the city with an...

MORE →

### HOW TO SUPPORT LOCAL ATHENS MUSICIANS

Social distancing in Athens, Georgia, has meant that the famous music scene and legendary nightclubs...

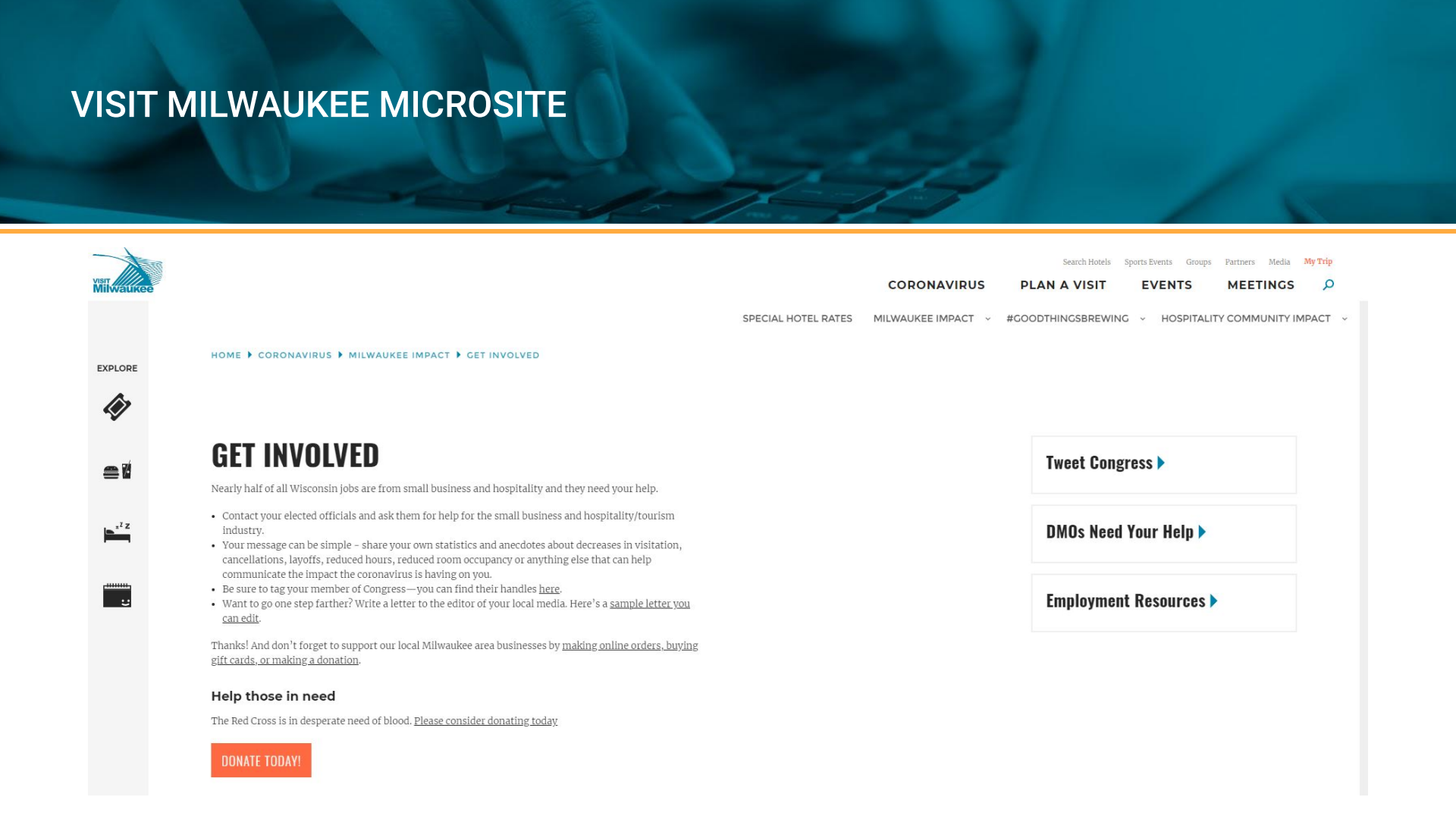
MORE →

# ATHENS GA CVB

## #SUPPORTATHENSOWN

We encourage you to look for ways to #SupportAthensOwn on social, including our new **Facebook Group**. We'll be posting updates there (live streaming, anyone?) and look forward to hearing live music playing again throughout Athens!

# VISIT MILWAUKEE MICROSITE



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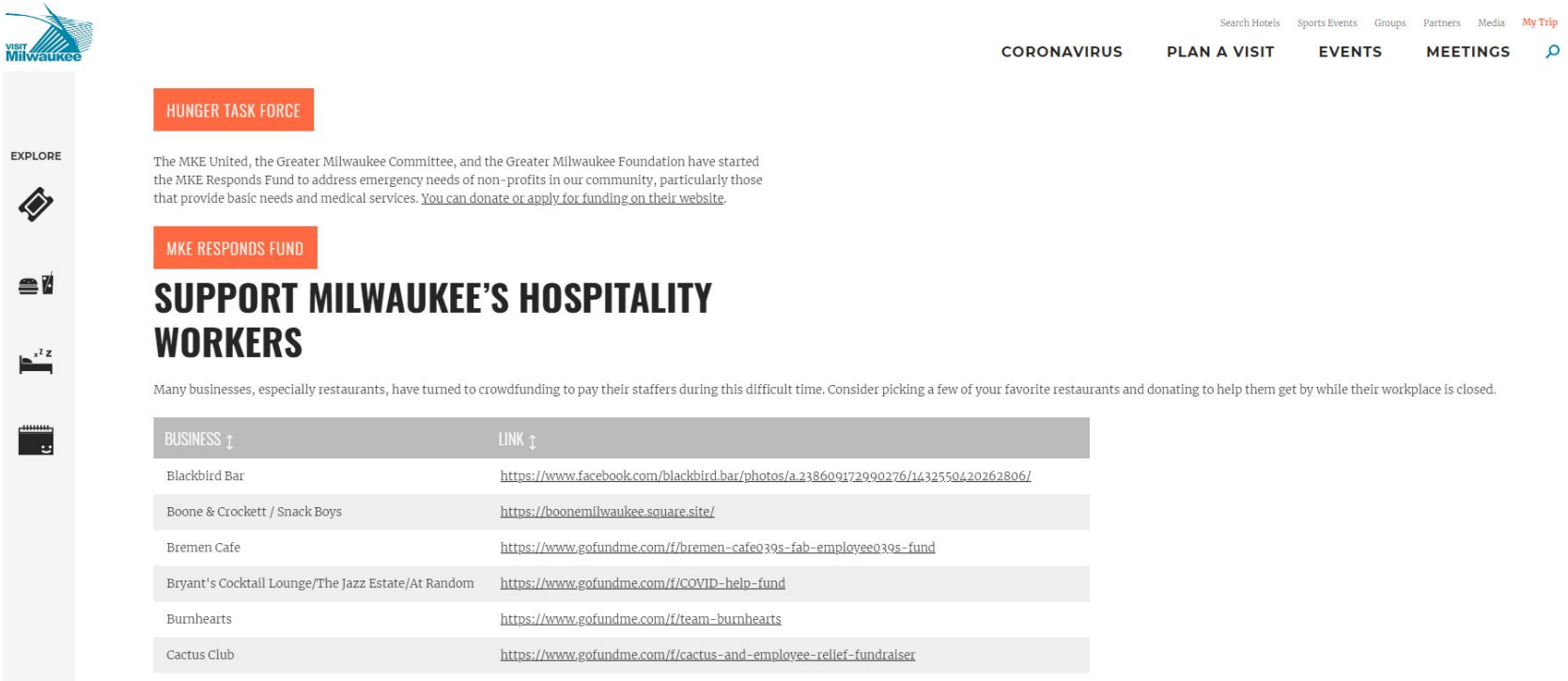


# VISIT PHOENIX SIGNAGE & RECIPES

Back

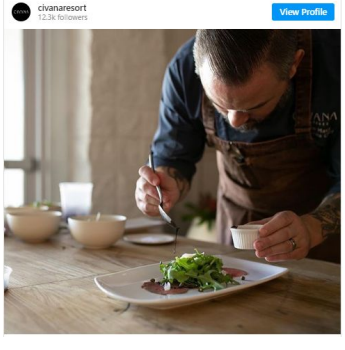
## RECIPES FROM YOUR FAVORITE PHOENIX RESTAURANTS

By Visit Phoenix on Mar. 31, 2020

There's a good chance that you're cooking at home now more than ever. You may miss eating out at some of your favorite spots, but don't fret: the chefs and restaurants of Greater Phoenix are sharing the secrets of their kitchens.

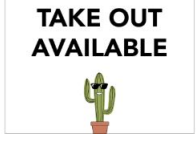
Here, you'll find recipes for cocktails, appetizers and more, so that you can enjoy your favorite dishes in the comfort of your own home. If you're more of a takeout person than a cooking person, check out our blog on delivery and to-go deals in Greater Phoenix. Bon appétit!

### CIVANA Wellness Resort & Spa




### Signage to Print

Please feel free to print these signs to display if you now have modified hours or you are shifting to takeout and/or delivery.



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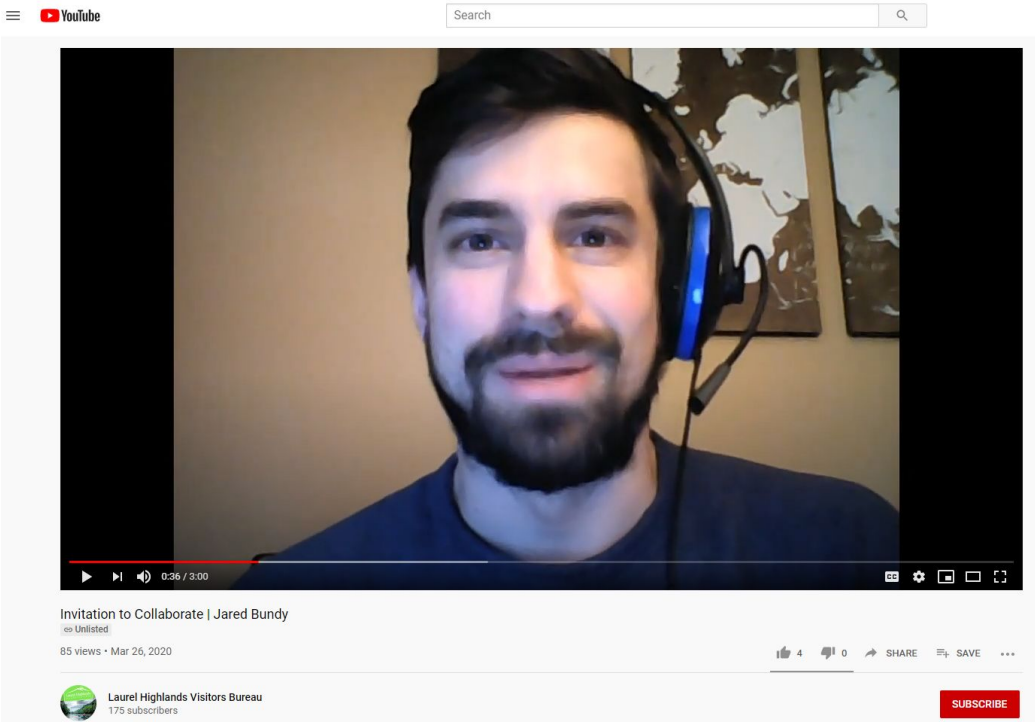

# Questions?

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Thank you

# PRODUCT EDUCATION | Our Experts

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