

## Developing Custom Reports From Your Membership Database

Membership databases are a great way to manage your members, their details, and the services they have access to. Whether you're running a membership organization, an exclusive members' club, or a subscription service with members paying monthly fees for access to specific resources and information, what you track in your database will significantly impact your organization's success.

If you need help setting up a user-friendly membership database or want to learn more about its potential uses, keep reading! In this article, we will introduce you to custom reports in membership databases and provide you with some initial thoughts on how to use custom reports can help make your membership management processes more streamlined and efficient.

### 1 . What is a Custom Report?

A custom report is a report you create in your membership database that pulls information from all or specific members' records. Typically, membership databases allow you to create one or more "standard" reports that display all the information you want to show for all or most of your members on one screen.

Custom reports are a way for you to personalize that report for a specific member or small group of members. You can select specific fields (information) for the report and change the order in which the data appears on the report. The report will then display just the data from those specific members' records that you select.

### 2 . Create a Member Profile Report

A member profile report can be a helpful way to give each person in your membership database a personalized view of their membership. You can collect and display all the information you have on that person: their contact information, their payment history, which services they have access to, any recurring payments they might be making, etc.

With a member profile report, you can display that information to make it easily accessible and visible to the member. For example, suppose you're running a membership organization. You want to give each member a view of their membership record, including the upcoming events they have access to attend, their membership tier, and the benefits and privileges.

You might collect and display the following information for each member on their Member Profile Report:

1. Member tier (Silver, Gold, Platinum)
2. Event listing for upcoming workshops, retreats, and special events
3. Duration, location, prices for individual events
4. Access to special discounts, promotions, and coupons
5. Member's payment history (including membership fees and payment due dates)

# makeithappen.nyc

## web based sites & applications

### 3. Create an Activities Report

If your members have access to specific resources (like online courses or podcasts), activity reports are a great way to track how often each member accesses those resources. It can also let you know which members use the most resources. You can collect and display this information in an activities report. You might want to create an activities report that includes things like:

1. Membership tier
2. Membership plan (access to online or in-person resources, Online courses, podcasts, etc.)
3. Number of times that someone accessed a resource.
4. Date resource was last accessed

### 4. Create a Marketing Activity Report

Marketing activities reports can help you track how often you're reaching out to each of your members and how they're engaging with your marketing efforts. You can collect and display this information in a marketing activity report. You might want to create a marketing activity report that includes things like:

1. Membership tier
2. Member's communication preferences (email, text, etc.)
3. Date outreach communication was made
4. Subject line for communication
5. Communication type (email, text, etc.)
6. Member's response to communication - Notes

### 5. Create a Recurring Activities Report

A recurring activities report is an excellent way to keep track of which resources your members have access to regularly. For example, if your members have access to a monthly coaching call with an expert or a monthly online course, you can track this information in a recurring activities report. You might want to create a recurring activities report that includes things like:

1. Membership tier
2. Membership plan (access to online or in-person resources)
3. Resource (online course, podcast, etc.)
4. Date resource was last accessed (and when it will be reaccessed)

### 6. Create an Events Report

An events report is a helpful way to track which events your members are attending when they are scheduled and any unique details associated with each event. You can collect and display this information in an events report. You might want to create an events report that includes things like:

1. Membership tier
2. Event name
3. Event date and location
4. Special, associated details

# makeithappen.nyc

## web based sites & applications

### **7. Create a Products and Services Usage Report**

A products and services usage report can be an excellent way to track your members' services and products. You can collect and display this information in a products and services usage report. You might want to create a products and services usage report that includes things like:

1. Membership tier
2. Member's method of payment
3. Date services and/or products were purchased or used
4. Resource or product purchased/used
5. Cost of service or product
6. Amount due for service or product purchased/paid for

### **8. Create an Engagement Activity Report**

An engagement activities report can be a helpful way to track which engagement activities your members are participating in. Engagement activities are things like:

1. Voting in your polls
2. Participating in live polls and surveys
3. Participating in polls and surveys that are emailed to members
4. Surveys on your members' record

### **9. Report Data Updated in Real-Time**

You can view reports, but you can also set up real-time sync to have data updated as it happens, not days or weeks later. This is a huge advantage for anyone using third-party software to access your company's data warehouse. If your reports take a long time to generate, those users may not be able to access your data when they need it most. Real-time reporting also allows you to act on data as it happens, giving you a competitive advantage.

### **10. Creating a Dashboard from the Report Data**

You have several options for sharing the data you have collected. You can save it as a report to view later, export it to a CSV file, or create a dashboard with it. The latter option is the best if you have a lot of data you want to display on a dashboard. Dashboards are a visual representation of your organization's critical data points and trends. By providing a snapshot of what is going on at any given time, dashboards can: - help you identify trends and opportunities; - make your numbers more accessible to your organization and non-members; - help you prioritize your work; and - help you and your board monitor progress more closely. - help you and your board monitor progress more closely.

### **Conclusion**

Membership databases are an excellent way to streamline membership management processes and collect the information you need to provide each member with the specific resources and services they have access to. Whether you're running a membership organization, an exclusive members' club, or a

# makeithappen.nyc

## web based sites & applications

subscription service with members paying monthly fees for access to specific resources and information, what you track in your database will significantly impact your organization's success.

### Why work with us

We offer comprehensive on-demand design and development services. Ideal for companies that do not have a design and development team in-house. Working with us means you have a partner to help manage your design and development needs so that you can focus on running your core business. By partnering with us, you can have our dedicated team help and guide you with:

- Data Visualization
- Custom web development
- Website creation and maintenance
- Database development
- User Experience and User Interface design

### Company Experience:

- Ten years of experience developing real-time, performance-critical applications
- Five years of Angular-js and React-js development experience
- Proficient in cloud platforms such as Amazon Web Services
- Proficient in AGILE methods such as TDD, continuous integration, scrum, user stories, iterative development, and domain-driven design.
- Skilled at delivering modular, decoupled, user-friendly applications optimized for performance.
- Expert in Design Patterns and real-time messaging systems.
- Excellent written and verbal communication skills.

### Technical Proficiency:

MakeltHappen.nyc can help! Call us today for a free consultation, and let's talk about how we can help you get the most out of your current legacy systems before investing in new ones! We have a proven track record of assisting companies to save money on their IT budget, reduce downtime, and improve their current application and systems. Let's talk about whether MakeltHappen is the right fit for you today!

ReactJS  
Redux  
MVC Architecture  
AngularJS  
Node.js  
Axios  
Javascript  
Stripe integration

HTML5  
Responsive UI  
GIT  
SQL Server  
Postgres SQL  
Bootstrap  
C#.NET  
REST Web Services

Amazon Web Services  
EC2  
RDS  
Lambda  
SNS  
Elastic Beanstalk  
s3  
EFS