



Why Institute a New Membership Management System & Register Companion?

By Jessica Jones, CFC Admin Coordinator

We'd like to be able to convey the answer to the above in three lines or less.... but it's complicated. So, while this may be a bit long we hope that it will convey the thought that the board and staff have put into the changes described, the intention behind using some new technology at the Co-op, and that you'll be convinced that moving in this direction is important.

All of us have different levels of knowledge of the ever-changing availability, features, security issues, and benefits when it comes to computer technology. How does a small organization try to increase efficiency in workflow and gain better insights into operations to improve decision making without turning into a data-hungry commercial monster? It seems that forethought, open communication regarding intention, and policies are a great place to start. Let's talk about what's been happening in the background, what some of the goals are with this change, and the organizational policies needed to accomplish them.

Over the past couple of years, the board and staff of the Cambridge Food Co-op has been trying to evaluate workflow and practices with the goal of improved efficiency and more accurate information. If you have ever worked with the spreadsheet software Excel, you know it is a powerful tool. The staff had started to rely on this app to create formulas for working member shifts, membership dues payment, product list and pricing, and the mailing/contact list. A lot of "stuff" is made easier when you shift it from pen and paper to Excel. However, if you work with Excel you also know that once you create a sheet with all the perfect formulas, it is fairly easy to overwrite the formulas and never know it. The more folks you have using the same sheets the more confusing it can get. Someone may have a more basic understanding of the program and not realize that when they change one cell it could possibly disrupt another – it can get messy fast!

Membership Data Management – The Old Way

Let's run through how management of membership data has occurred up until recently.

- ◆ A new member household pays annual dues.
- ◆ Contact information is entered into Excel – name, date of payment, type of member, etc.
- ◆ Contact info is then added to MailChimp
- ◆ Contact info is added to Gmail
- ◆ A paper membership card is placed in a box at the counter.

A year flies by and the membership is up for renewal. The membership manager or authorized working member would:

1. Search the long list of members of various types to see who is coming due to renew.
2. Upload this list to Mailchimp and send out a notice that the membership is expiring.
3. Update the Excel sheet
4. Update the card on the counter.
5. Update Mailchimp



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6. Update Gmail

What would go wrong with this old system?

What happened if the member didn't remember to renew? Theoretically, after several reminders, their card would be pulled from the counter, they would no longer receive a discount or receive the fish list, etc. until the membership is renewed. Unfortunately, with the old system, there were many ways that this could go wrong. In the vast Excel workbook that is made up of several sheets the membership manager might have missed that they didn't make this member inactive, or the card didn't get pulled, or the person on register remembered that the customer is a member and didn't check for the card, or their name didn't get removed from Gmail or Mailchimp and ... nothing changes. **They haven't paid their dues and yet are still receiving all the benefits of being a member. This could and did happen and in some cases, it went on for years.**

On the other hand, there have been households where multiple members have paid. For example, a person comes in and pays and leaves their contact info on the membership renewal form. The next day this person's spouse comes in, remembers they have to renew and pays again and leaves *their* contact info with a different e-mail and phone and now there's a duplicate payment that might not get corrected.

A member may want to renew but works a lot and is in a hurry. They go to the store to shop, tell the cashier that they'd like to renew their membership. The cashier says I'll get a manager for you.... But a delivery truck just came in and the manager is helping the driver, or the cashier can't step away from the counter because there is a long line. The member can't wait and does not renew – they may try several times and eventually give up.

All these scenarios happened regularly with the old way of managing the membership database. It was inevitable. The busy staff tried to keep up – but there were too many steps, too many systems to update, too many variables to manage well, and thus both staff and membership were unhappy, losing time, and frustrated.

A New Way with Wild Apricot

Let's just get this out there right away – the new way isn't perfect....but it is better. Wild Apricot (a membership management system) allows for a simpler way to manage membership info. The application does away with the need for updating Mailchimp, Gmail, and those massive confusing Excel sheets. Of special note is the fact that Wild Apricot is a service the Co-op pays for. The Co-op's data is no longer the product, unlike in the case of Gmail which is free to use and has a very loose privacy policy.

With Wild Apricot, a new member would still need to sign up in the store. This way the Co-op knows with whom they are doing business and the new member can have an orientation regarding what being a member actually means. The membership manager will then take their contact information and put it into the database.

A year flies by and the membership is up for renewal. In this case, Wild Apricot automatically sends an e-mail notice out as a friendly reminder to the member. The member gets the e-mail notice and a link to renew online (faster for those who are in a hurry). While there they can also update their contact information if necessary. If they complete the renewal online then they are done. **The member can still renew in the store if that is more convenient.** The staff would be happy to help and then update the information internally. This single database makes it much simpler to record multiple members of a household and duplication is less likely as the software will show if renewal has already occurred. What if someone forgets to renew? They'll be reminded, but eventually, their membership will lapse and they will no longer receive the fish list, other specials, and event notifications via e-mail.

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This system was rolled out in the late summer and while there were some minor hiccups there have been very few member complaints and the staff has become accustomed to the new system. They are able to spend less time managing data and more time planning for events, attending to operational concerns, or thinking big picture.

What the application doesn't do

The above scenario still didn't handle the front end/cashier issues, the main challenge being that register workers do not have an easy way to know what discount to give a member or if the membership is current. They'd have to rely on the paper cards which were often out of order or missing and thus, were often just not used. They also didn't know if the working member had met their shift requirements and whether or not they should receive their working member discount. It was clear, to the board and staff, when reviewing Wild Apricot that more was needed. Thus, an inhouse application called the Register Companion was built to work with Wild Apricot to address these issues.

The Register Companion

The Register Companion is composed of several pieces. First, you'll see new scanners at the counter that can scan a durable Cambridge Food Co-op membership card. These cards are printed in house and have a barcode on them. When a card is scanned the Register Companion app inquires of Wild Apricot regarding membership status/level and conveys this information to the cashier. It also will let the cashier know if the membership is coming up for renewal so that information can be conveyed to the member. **A card is not required.** Your membership can be looked up by name. However, it will most likely be faster to provide the card to the cashier. Another benefit of carrying the card is other co-ops might be more likely to honor reciprocal discounts.

At the time of the sale the cashier will record the total dollar purchase of that member into The Register Companion. This information is only used internally and is not shared with Wild Apricot.

Why record this info? The Co-op needs to know and understand the discounts that are given. The current registers are limited in their capacity to record discounts, only having one or two keys to record them. But **the Co-op offers six types of discounts.** This makes tracking discount cost difficult. How much is senior discount vs. supporting? There is no real way to know. How much do the staff use their discount? How many working members take advantage of the discount program? Which type of working member uses their discounts the most? The current register tape does not provide these details. This makes budgeting tricky.

Information the Co-op records through the Register Companion will also allow us to investigate the possibility of using a patronage dividend model. This is a program that many co-ops have switched to, but it is impossible for us to understand its implications without accurate information.

To be clear, the Register Companion is only recording a very limited amount of information for the Co-op, much less than any other store that is using a full point-of-sale system. The purpose is to analyze the use of the member/staff and promotional discounts systems and will only be reviewed by authorized personnel. Thinking about the use of this information has led to a review of the Co-op's privacy policy that was written long ago and does not address the modern complexity of technology and information. A new policy will be reviewed at the upcoming membership meeting in December.

The staff asks that in the coming weeks as the Register Companion gets implemented you are patient with the folks who are learning how to use it. The Co-op really appreciates your support for management's efforts to implement more efficient, accurate, helpful technologies and processes.



THE CAMBRIDGE FOOD CO-OP

Wholesome, affordable foods in a spirit of respect for each other and our world



Please plan on attending the upcoming

MEMBERSHIP MEETING

Sunday, December 8, 2019

4-6 p.m.

Brieman Building

Please bring a snack or dessert to share

DOLLARS & SENSE

It's budget time! See this year's proposed budget here:

http://www.cambridgefoodcoop.com/private/Budget_Proposal_2019.pdf

Have questions about the budget? Sit down with Co-op Treasurer Charlie who will answer all your budget questions. Drop In anytime on the following days/times:

Wednesday, Nov. 20th 2- 4 p.m.

Saturday, Nov. 23rd 3-5 p.m.

Thursday, Dec. 5th 6-8 p.m.

Help Neighbors in Need

This holiday season, help us help others!

Beginning Friday, November 22nd, the Co-op will be collecting canned goods and other non-perishable food items for donation to the Cambridge Food Pantry. **Look for the box at the front of the store, and thank you for your generosity.**



Monday-Wednesday, Friday-Saturday 9-6

Thursdays 9-8

Sundays 9-4

Closing at 4 p.m. on Christmas Eve and New Year's Eve

Closed Thanksgiving, Christmas Day, and New Year's Day