



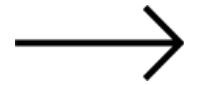
CAUSEIS PRESENTS

# Digital Academy for Associations

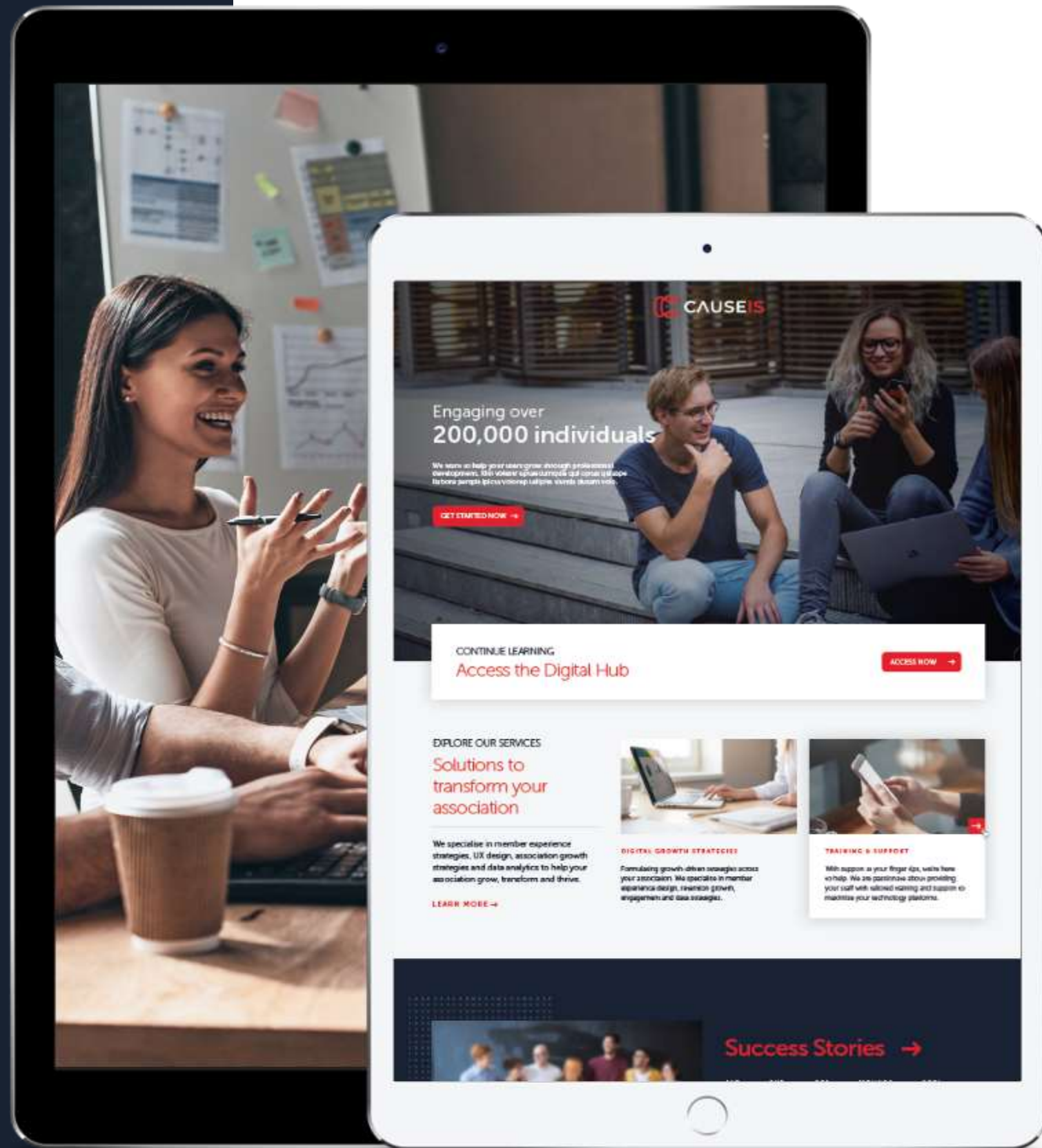
→ Course: Promotion Codes: Creating  
Personalised Pricing



Digital Academy



# Welcome to the Digital Academy



- Time to focus on your Association Strategy
- Learn from other associations and your peers
- Use Member Experience techniques to shift your strategies
- Dedicated Engage iMIS courses to maximise your knowledge of iMIS.
- Consider new culture, innovation and ideas
- Tools and frameworks to help you



# About Causeis

## Causeis exists to support associations.

Causeis is the complete Digital Partner for your association, and we bring a shared vision for your success.

With unmatched experience in association strategy and technology to draw on, every aspect of our service is centered around the member experience.

Partnered with global best-in-class technology, we ensure you have all bases covered with Causeis.

Recently named by ASI as the Global iMIS Partner of the Year for the 2<sup>nd</sup> consecutive year.





# Supported by AuSAE

The home for association professionals.

A place where you belong, connect with others, advance your career and be inspired.

[www.ausae.org.au](http://www.ausae.org.au)



# Presenters & Facilitators



Travis Campbell, CiA, CiP  
Director of Consulting Services  
Causeis



Yolande Smith  
Digital Marketing Specialist  
Causeis

# Maximise your Workshop Experience



## Mute as required

To allow for clear audio please mute yourself when presentation sessions are in session. At times we may mute your line if you may have forgotten.

## Session recording

Today's presentations are being recorded however to maximise you're sharing and networking the breakout rooms will not.

## Presentation Slides

Presentation slides and recording will be distributed on course completion.

## Chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat. Share ideas, successes and learnings.

## Use your camera

Especially in the breakout rooms, please don't be shy and turn on your camera to increase your engagement.

## Update your Name

So that we know who you are, and to let everyone know where you are from – lets rename ourselves to show our full name & acronym





# Agenda

Tuesday, 8th November



Why personalise price?



What options does iMIS have?



Promotion Codes vs Pricing Groups



Hands-on time!





**Let's start  
from the  
beginning ...**

**Why personalise price?**





# Why Personalise Price?

- Reward Members or potential members and show value proposition
- Drive participation and engagement
- Influence retention through engagement of new members
- Reward loyalty





# Why Personalise Price?

- Discount Committee and Volunteers
- Incentivise behaviour such as completing a survey, data update or logging into the website
- Incentivise Joining or renewing
- Provide hardship discounts
- Take processes online that you haven't been able too (speakers, complimentary members)







# Why Personalise Price?

- Improve the Member and customer value proposition
- Tailored and an improved experience
- Show you value your members = Member Experience!
- Amazon does it, Uber does it and all the other shiny stars. Why can't you?





# PERSONALISED PRICING

What options does iMIS have?



# How can you personalise pricing in iMIS?

- Member and Non-Member Pricing
- Time based events
- Promotion Codes
- Pricing Groups
- Alert driven





# What options does iMIS have?

Member and Non-Member Pricing

Events

Orders/Commerce

Subscriptions



# Non Member (Default) and Member

Edit event - Music Educators Conference

## Add Registration Option

Info Pricing Accounting Questions Program options Plan

[+ Add Pricing Group](#)

Pricing Group	Not Available	Comp	Early Price	Regular Price	Late Price	Income Account
Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Default ▼
Members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Default ▼



# What options does iMIS have?

Time Based Pricing

Events





# Early and Regular Pricing Setup

Info **Pricing** Questions

Financial entity

	Early	Regular
Cutoff date	<input type="text"/>	<input type="text"/>

Tax authority

### Registration options

No records to display.



# Early, Regular and Late Pricing

Edit event - Music Educators Conference

## Add Registration Option

Info Pricing Accounting Questions Program options Plan

[+ Add Pricing Group](#)

Pricing Group	Not Available	Comp	Early Price	Regular Price	Late Price	Income Account
Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Default ▼
Members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Default ▼



# What options does iMIS have?

Pricing Groups

Events

*The Queen of Personalised Pricing!*

PS: Coming soon to products/commerce!





# Group Types

Add Pricing Group

Use existing pricing group

Add new pricing group

\* Display name

Group type

Group

- (None)
- Chapter
- Committee
- Dynamic Group
- Member Type



# Group by Member Type

Add Pricing Group ↻ □ ×

Use existing pricing group

Add new pricing group

\* Display name

Group type  ▼

Group

**New Members:**  
Student Member group  
All roles



# Group by Committee

Add Pricing Group ↻ □ ×

Use existing pricing group

Add new pricing group

\*Display name

Group type

Group

Role

Board of Directors group

All roles



# Group by Dynamic (IQA Driven)

Add Pricing Group ↻ □ ×

Use existing pricing group

Add new pricing group

\*Display name

Group type

Group

**New Members:**  
New Members 6 Months group  
All roles





# Edit pricing group line

Info **Pricing** Accounting Questions Program options Plan

Available to guests

Also available to primary registrants

[+ Add Pricing Group](#)

Pricing Group	Not Available	Comp	Early Price	Regular Price	Late Price	Income Account	
Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="100.00"/>	<input type="text" value="200.00"/>	<input type="text"/>	Default	▼
Members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="100.00"/>	<input type="text" value="200.00"/>	<input type="text"/>	Default	▼
Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="100.00"/>	<input type="text" value="200.00"/>	<input type="text"/>	Default	▼ ✕



# Pricing Groups Warnings

## Scheduling

Dynamic Pricing groups in iMIS EMS refresh each time you click “Register”, whereas iMIS 2017 is only once a day.

## Can't Delete

In all versions of iMIS, Dynamic Pricing Groups currently can't be deleted.



## Document System

### Records with specific property

Define Run Report **Group** Security

Optionally, create a group where the members of the group are determined by th

\* Group name

DiscountVolunteers

\* Contact key column

NetContactData.Contact Key

Refresh members  
every

Do not schedule

Create Group

Day

Week

Month

Do not schedule



# What options does iMIS have?

Promotion Codes

Events

Orders / Commerce

Join Online

Renew in Advance



- Community
- Membership
- Fundraising
- Events
- Commerce
  - Dashboard
  - Find products
  - Add product
  - Find orders
  - Process orders
  - Promotions**
  - Inventory receipts

## Promotions

PROMOTION NAME ▲	PROMOTION CODE	BEGIN DATE	END DATE	APPLY AUTOMATICALLY	
10OffOrder	SpecialDiscount	10/04/2014		No	✕
20OffOrder	IMISMarkdown	1/04/2016		No	✕
50OffPub				No	✕
AnnualConferenceDiscount				No	✕
Webinar Discount Test				Yes	✕

### Add

•Promotion name

•Promotion code

Promotion available  to

What kind of promotion is this?

•Discount percent offered

Limit usage

Maximum uses per customer

Maximum uses overall

Minimum purchase amount

Qualified customers:  [select](#)



**Edit** ↻ □

\*Promotion name

\*Promotion code

Promotion available  to

What kind of promotion is this?

Apply promotion automatically

Limit usage

### Required purchase

Which purchases qualify?

\*Quantity required to qualify

Select event functions that qualify as purchase for this discount:  
Purchases of ANY of these items will be counted towards the quantity required to qualify. Functions that allow multiple quantities per registrant are not permitted.



## Discounted items

Quantity discounted  Blank value indicates no limit to the quantity discounted.

Select event functions that receive a discount if the required purchase is met:  
Functions that allow multiple quantities per registrant are not permitted.

ITEM	DISCOUNT TYPE	DISCOUNT AMOUNT	
Pricing Test 5 REG Event	<input type="text" value="a fixed amount off"/>	<input type="text" value="25.00"/>	<input type="button" value="x"/>

Save & Close






Save

Cancel

# Shopping cart

Override transaction date

## Items

ITEM	QUANTITY	PRICE	TOTAL	
 Pricing Test 1	1	105.00	105.00	<a href="#">Remove</a>
 Pricing Test 2	1	105.00	105.00	<a href="#">Remove</a>
 Pricing Test 3	1	105.00	105.00	<a href="#">Remove</a>
 Pricing Test 4	1	105.00	105.00	<a href="#">Remove</a>
 Pricing Test 5	1	80.00	80.00	<a href="#">Remove</a>

Discount applied (WEBSDISC): -25.00

[Update](#)

## Cart charges

Item total	500.00
Shipping	0.00
Handling	0.00
Transaction grand total	500.00

Promotional code

[Apply](#)





# Join Online

Edit ↻ □ ×

\*Promotion name

\*Promotion code

Promotion available  to

What kind of promotion is this?  ▼

Apply promotion automatically

Limit usage

Select item(s) to be included in the discount:

Item Name	Discount Type	Discount Amount	
Regular Member Fees	<input type="text" value="a percentage off"/> <span>▼</span>	<input type="text" value="25.00"/>	<span>×</span>



# Renewal Discounts

Will only work for renew in Advance

Cannot work for existing AutoPay Enrolments

Cannot work for Accrual billing



# Promotion Codes vs Pricing Groups

## Pricing Groups:

- Automatic
- Lowest price wins
- No need to enter a code

## Promotion Codes:

- More easily reportable
- “hidden” discount
- Can be applied automatically
- Have to qualify for the discount



# Examples of personalised pricing using Promo Codes

What examples would you like to cover in our session?





# Let's take a 5-minute break

Grab a refreshment

Please feel free to mute and turn  
off your camera

Don't close the Zoom  
session



# Hands-on time – creating and reporting on personalised pricing

Let's start small!

1. Percentage off Discount
2. Dollar off Discount
3. Restricting the discount to a specific purchase type
4. Auto Applying Discounts





## Let's get creative

1. New Member Discount
2. Birthday Promo
3. Discount for member organisation staff
4. Discount for member organisation staff based on purchase history
5. Bulk Purchase of Webinars
6. Join Online Discount
7. Reporting on Discounts





# Questions and Ideas







# Next Course: Digital Academy


## Customer Mapping And Journeys for Associations

22<sup>nd</sup> and 24<sup>th</sup> November – Daily 10am – 12pm

AEDT



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