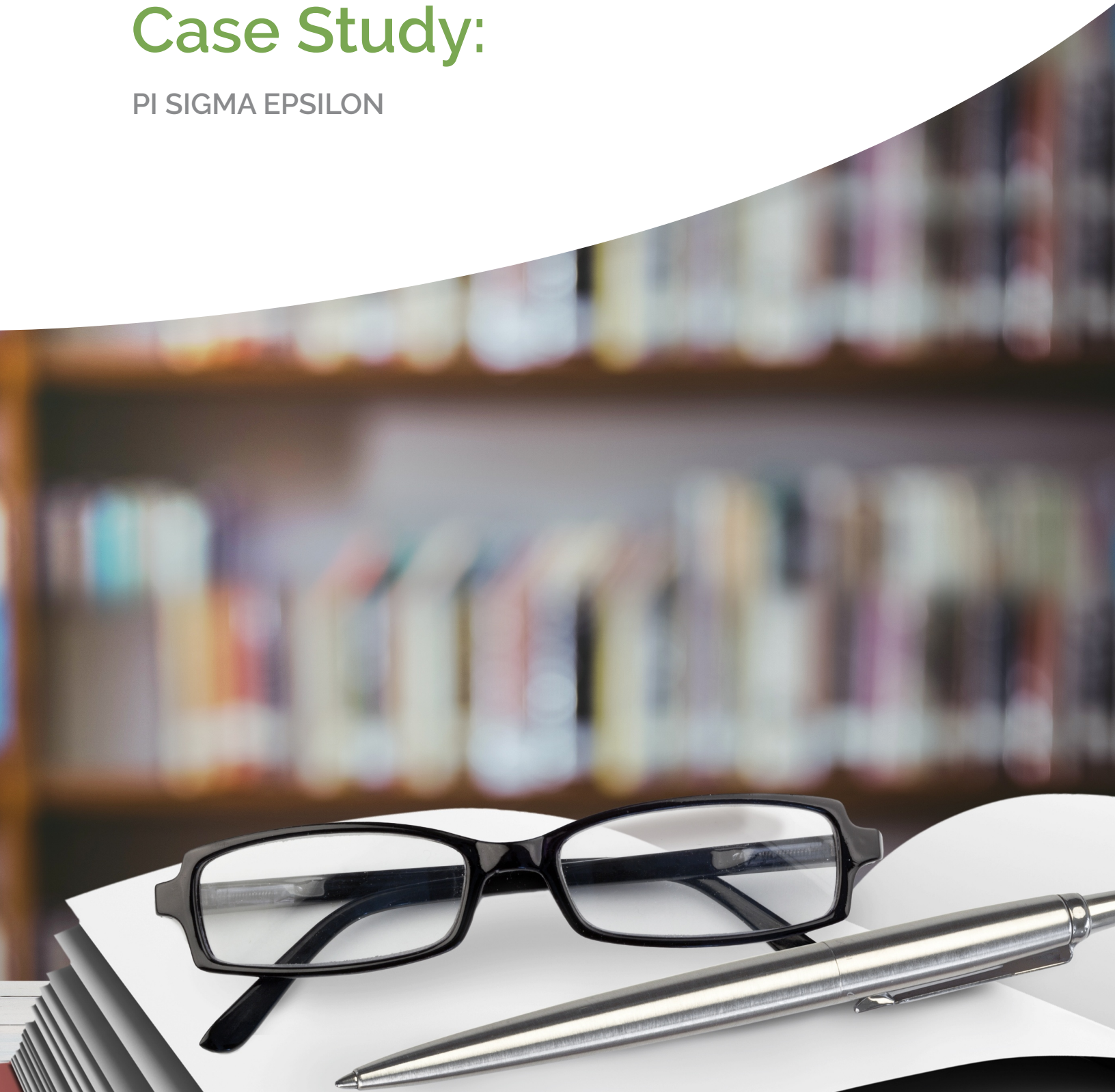


# Case Study:

PI SIGMA EPSILON



## Lessons Learned from Pi Sigma Epsilon

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MemberSuite has changed how Pi Sigma Epsilon does business. They can now manage a complex membership and partnership structure, empower chapter leaders to focus on programming, and give staff the data they need to increase engagement and revenue.

*"MemberSuite is worth the investment. It allows our staff to focus on driving and increasing numbers... It's changed our members' relationship with PSE, it's changed the chapter leader's job, and it's changed how we do business."*



- Gabrielle Williams,  
Database Administrator  
Pi Sigma Epsilon

## About Pi Sigma Epsilon

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Pi Sigma Epsilon (PSE) is the only national co-ed professional fraternity in the fields of sales, marketing, and management with nearly 60 chapters at universities and colleges across the country. PSE members gain hands-on experience through experiential learning opportunities, participating in regional and national conferences, and networking with professionals through PSE's corporate partner program.

## Working with Complex Membership Structures

### The Challenge

Pi Sigma Epsilon (PSE) offers four types of individual memberships: student, student life member, alumni, and faculty. PSE also has formal relationships with two types of organizations: schools affiliated with PSE chapters and corporate partners. However, these schools and corporate partners are not PSE members.

The complexity doesn't end there. Within these memberships and partnerships are multiple roles, each with a specific level of access to PSE benefits and resources, as well as pricing variations.

Before PSE implemented MemberSuite, they had to use two CRMs: one for managing members and one for managing partners. The CRM for partners merely kept track of the different contacts at each partner company. "Nothing was automated so when a company became a partner or

cancelled its partnership, everything had to be done manually," said Gabrielle Williams, Database Administrator for PSE.

### The Solution

"We didn't have to customize MemberSuite. We use the core functionality and modules because we could configure the system to make it work for our complex membership and partnership model," said Gabrielle.

*"We like that MemberSuite allows us to serve all our stakeholders in the same system. While our membership is young college students, we also have alumni in their 70s, and corporate partners and faculty in their 50s. We can serve them all from one platform, which is definitely a value-add for us as staff. Not having to keep different segments in different areas, that's been huge."*

Because corporate partners are not members, PSE manages them with the MemberSuite CRM module. Partners are not sponsors in the traditional sense; they want to hire members (students), not sell to them. They also provide financial support for PSE scholarships and programming.

"It's a company-level partnership. The individual employees (recruiters and representatives) don't carry the benefits, the company does, but there are organizational flow-down benefits we can give different employees."

Instead of managing 1,000 individual partners (employees), PSE staff only

has to manage around 60 companies. They use relationship types to define the primary contact—the one who renews the partnership and assigns roles to individual partners—and other individual partner roles, for example, those who can post jobs or who can only attend events.

"We can set up a hierarchy of relationships. We don't want a local recruiter doing something the primary contact doesn't want them to. MemberSuite greatly benefits our management of the corporate partner program and all the different relationships, benefits, and levels of access."

## Managing Career Center and Corporate Partner Benefits

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### **The Challenge**

A key benefit for corporate partners is access to PSE's career center and the ability to post jobs and search resumes. Before MemberSuite, PSE used a job board plug-in for their website's content management system (CMS).

Because the CMS wasn't integrated with either of the CRMs they were using, posting jobs and accessing resumes could get tedious. PSE had to give the job board password to recruiters who had permission to post jobs. "It wasn't an automated process, so if the partner didn't renew their membership or if a recruiter left the partner company, the only way to prevent them from posting jobs was for the webmaster

to block the user or delete 'unauthorized' postings."

### **The Solution**

With MemberSuite, career center access is controlled and automated. An individual's level of access is defined by their assigned relationship type. Certain types are given entitlements—permission to post jobs and access resumes on behalf of their partner company.

If a corporate partner doesn't renew, Gabrielle turns off entitlements for the organization and all individuals associated with the organization lose online access to career center functions. "We don't have to turn off entitlements for the 70 to 100 individuals associated with that organization, that would be time-consuming."



## Dealing with Event Registration Complexity

### The Challenge

Before MemberSuite, PSE used their email marketing platform's event registration forms. They had to create four separate registration forms for partners, faculty and alumni, student, and student life members since each group has their own pricing. "It was complicated. Am I sending the correct link to the correct person? Then we had to compile four spreadsheets into one. It involved a lot more manual checking because no business rules were in place."

The old method didn't allow PSE to set member/non-member pricing or control the use of promo codes.

"People would use the wrong pricing or someone else's promo code. I had to check registration reports, contact the person who paid the wrong amount, make the correction, and then collect the balance due after the fact."

### The Solution

The MemberSuite event registration module handles PSE's complex registration needs:

- Pricing for different member types and nonmembers
- Discount codes
- Unique individual promo codes
- Bulk registrations
- Waived registration list for partners

"When a member, faculty advisor, or partner logs in, they see the rate they should get, so they select the right one, unlike before. That has definitely been a huge win for us."

Gabrielle's colleagues appreciate having access to accurate event registration data. "MemberSuite helps everyone in the office with event planning. The events coordinator can keep an eye on room block needs by seeing the mix of member types, knowing partners want king beds and students want two queens."

"The partner coordinator can see how many reps and recruiters have registered. Partners serve as competition judges so if we have 100 student competitors but only two judges registered, we know we need to get more judges, and maybe more competition rooms."

## Accessing Data Snapshots and Insights

### The Challenge

In the past, PSE had access to data, but it was spread out in silos—membership dues were in one spot, event registrations were in another, donations in a third, and resumes in a fourth. “Staff had to rely on someone to pull data for them. You couldn’t get realtime data or run quick queries. So many queries returned ‘null’ results, and didn’t tell you where you went wrong, it was frustrating.”

“If someone asked me for a list of new members who paid their dues, uploaded resumes, and registered for an event, I had to gather and layer several Excel spreadsheets upon each other and cross-check - which was an entire day of work!”

### The Solution

“MemberSuite gives us the ability to store data for all our different stakeholders—students, faculty advisors, alumni, partners—in one spot. Now, staff can access information faster because they can run a search themselves.”

“It only takes me ten minutes to build a search and run it. It’s beyond helpful that I can pull the most random things and layer them into an advanced search and export it all into one Excel sheet, done.”

Gabrielle is a fan of MemberSuite’s advanced searches. “I love being able to build searches however I want. I tend to make them very intricate because I can pull data from many different modules to get a snapshot.”

She uses data from several MemberSuite modules to set up a search that’s delivered to staff every week. She also saves it as a public search so they can run it if she’s not around. For example, PSE’s chapter consultants rely on MemberSuite event registration, member engagement, and resume data to help chapters improve their operations. “I make these searches very robust and staff can hide what they don’t want to see.”

*“I love the one-stop shopping of MemberSuite, having one location for staff to check anything if a member calls. They can see a snapshot of the person they’re talking to—their chapter, company, role, event history. You can see all that in two clicks. It’s very convenient and gives the caller personalized service.”*

## Empowering Student Members and Chapter Leaders

### The Challenge

Student chapter leaders used to get in the way of member service. Before MemberSuite, chapter leaders were responsible for collecting dues, updating new and renewing member data, and updating the leadership roster.

Consequently, they would turn in dues late, forget to make updates, and make data entry errors. As a result, students weren't getting their memberships activated, their membership materials wouldn't arrive on time, and member data wasn't accurate.

### The Solution

Now, students can join, pay, renew, and update their profile individually by using the MemberSuite member portal. "None of this was possible before, which is why we had to rely on the chapter leaders to do it."

"One of the main things we like about MemberSuite is that we can cut out the third party, the chapter leader. Student members don't have to rely on their chapter leader to turn their money into HQ.

They can log in to the member portal to pay, register for an event, and upload their resume." PSE has cleaner data since members log in and enter it themselves. "Data isn't going through other hands where there's an opportunity to introduce errors."

As she does with staff, Gabrielle set up a search that's delivered to chapter leaders every Monday morning. "I also created search entitlements by member role so if at 11:00 p.m. a chapter leader has a question, they can log in and run that search in real-time. They can help themselves, which cuts down on them asking us for information."

*"MemberSuite has made the chapter leader's life easier. They no longer have to be a bill collector. They don't have to collect money, deposit it, write a check, and mail it. Members do it themselves, which eases the burden of the chapter leader and allows them to focus on chapter programming."*



## Saving Time and Being Proactive

### The Challenge

"Some of the solutions we used before MemberSuite were free or inexpensive, but they cost us time and headaches. They created a burden for our six-person staff who were stretched thin. Instead of spending our time serving and developing programming for our members, we were very reactive, doing audit logs, cross-checking and double-checking to make sure everything was right, spending all day on minutia and never getting ahead of it."

### The Solution

"Now, with MemberSuite, we have business rules and processes in place to prevent all these problems. MemberSuite allows us to be proactive, not reactive. Having such a robust AMS like MemberSuite allows our HQ team to restructure job positions and streamline processes, which is a huger time-saver.

Now, we're able to focus on communication so we can increase event registrations, improve programming, and build professional development activities. We're spending more time serving members, and not spending so much time opening mail, processing checks, and collecting and entering data."

*"MemberSuite is worth the investment. It allows our staff to focus on driving and increasing numbers. MemberSuite has changed how we manage the partner program and how we manage event registration. It's changed our members' relationship with PSE, it's changed the chapter leader's job, and it's changed how we do business."*

## Conclusion

- 1 The configurability of MemberSuite's modules allows PSE to manage several types of individual and group memberships and relationships. Based on their assigned role, individuals receive specific levels of automated access to PSE benefits and resources, as well as pricing variations.
- 2 The MemberSuite event registration module handles PSE's complex registration needs, including variable pricing for different member and nonmember types, discount codes and unique individual promo codes, bulk registrations, and automated waived registrations.
- 3 Staff can pull data from many different modules to quickly get a snapshot of a group or individual.
- 4 MemberSuite has eliminated the administrative burden of chapter leaders, allowing them to focus on chapter programming.
- 5 Because of MemberSuite, PSE has restructured job positions and streamlined processes. Instead of spending time on administrative work and data entry, staff can now focus on data analysis and other strategic work that better serves members.

*MemberSuite is the premier software and services provider of association management solutions. Purpose-built for the nonprofit market, MemberSuite harnesses the power of the cloud to deliver scalable, enterprise-class solutions that enable organizations to accomplish every activity they need to serve their constituents.*

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