



Making the Switch

Migrating Your Chapter to GlueUp

Anne Harper, Director of Programs and Operations
Lawrence Leonard, Executive Director

Agenda

- Quick Feature Tour of GlueUp
- Pricing and comparison to Starchapter
- Making the switch
 - Top considerations
 - Migration process
- Migration process Q&A



Glue Up Feature Tour

An All-In-One Platform for Chapter Success



Financial

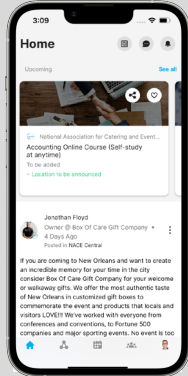
**Event Registration
and Management**



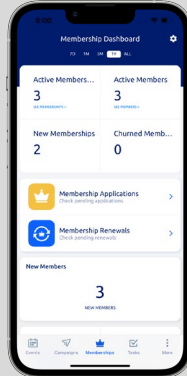
**Event
Registration**



**Event
Management**



**App for
Everyone**



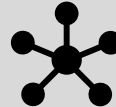
**Manager App
for Leaders**

Two Mobile Apps Included

Membership
Recruit | Retain | Engage



Marketing & Communication



Community and Connections

And More...

**Unified Data Platform / One Login
Sales Opportunity Tracking
Team Tasks
Data Security**

www.glueup.com

Unified Platform

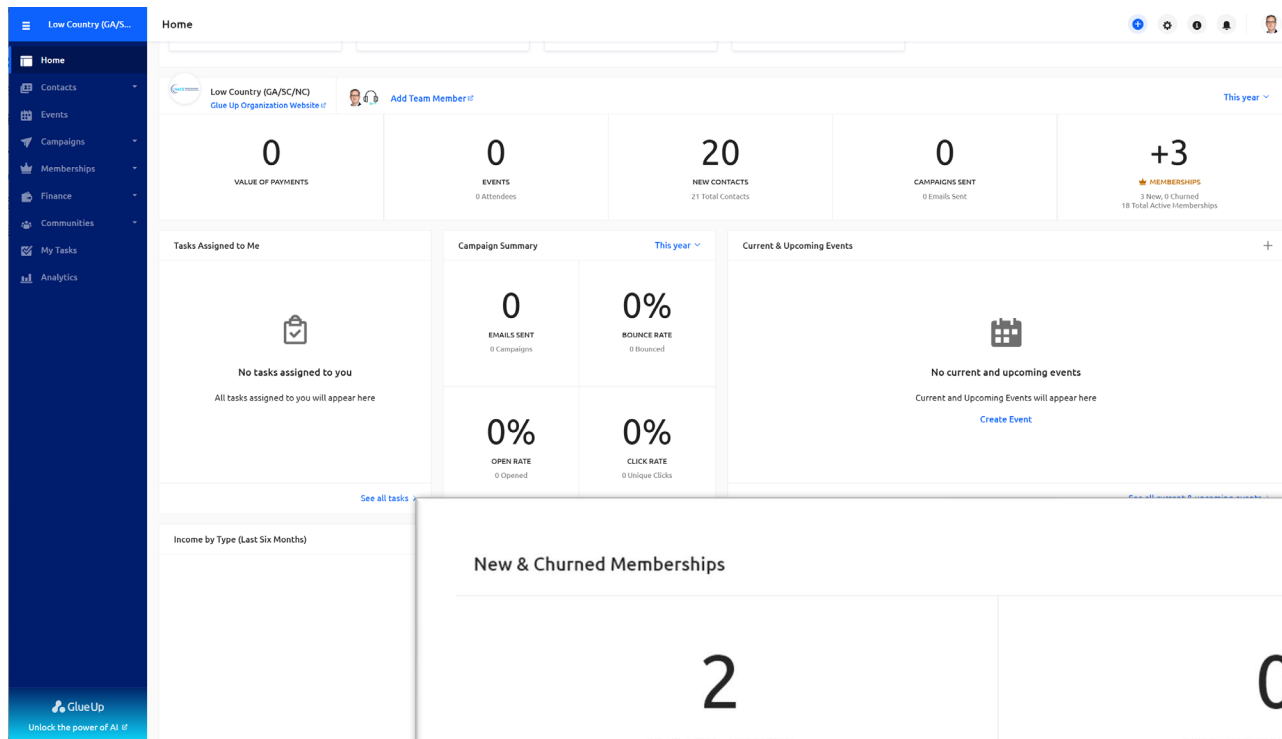
Unified Technology

- Central customer database
- Chapters get real-time membership data
 - No membership status delay
 - No overnight data sync
- Better customer experience
 - Single login
 - Consistent interface and branding
- Better chapter leader support and efficiency
 - Better and faster data
 - Better features and efficiency

Chapter Individuality

- Web site and branding
- Registration and events
- Finances and payment processing
- Email addresses and templates
- Chapter management system

Dashboards with Key Info and KPIs



New & Churned Memberships

Last 30 days ▾

2

NEW MEMBERSHIPS

0

CHURNED MEMBERSHIPS

All of Your Contacts in One Place

Home

Contacts

Dashboard

Contacts

Companies

Members

Opportunities

Data Update Verification

Events

Campaigns

Memberships

Finance

Communities

My Tasks

Analytics

GlueUp

Unlock the power of AI

Contacts

	FIRST NAME	LAST NAME	EMAIL	COMPANY	CITY	OWNER	ACTIVE MEMBER	EVENT SPEAKER	PAR	ACTIONS
<input type="checkbox"/>	Elaina	Jordan	elainajordan@citykitchencatering.com	City Kitchen Catering	Houston	--	Yes	No	No	:
<input type="checkbox"/>	Wendy	Kreider	wkreider@tamu.edu	Texas A&M University - School of Education & Human Development - Dean's Office	College Station	--	Yes	No	No	:
<input type="checkbox"/>	Bailee	Fraher	bfraher@braeburncc.com	BraeBurn Country Club						
<input type="checkbox"/>	Andrea	Castro	andreaastrocove@hotmail.com	--						
<input type="checkbox"/>	Lisa	Wantuck	lisa@7fodge.com	7F Lodge and Events						
<input type="checkbox"/>	Jasmine	Wesby	jasmine.wesby@idry.com	Westin Houston Downtown						
<input type="checkbox"/>	Diego	Montemayor	diegom@lachamba.app	Chamba						
<input type="checkbox"/>	Chapters	Services	chapters@nace.net	--						
<input type="checkbox"/>	George	Contreras	george.contreras@cbaldwinhotel.com	C. Baldwin Hotel						
<input type="checkbox"/>	Adam	Morgan	adam@adammorgan.com	DJ Adam Morgan						
<input type="checkbox"/>	Lauren	Fox	lauren.fox@premiereeventsonline.com	Premiere Events						
<input type="checkbox"/>	Michaela	Morrissey	michaelamorrissey@gmail.com	--						
<input type="checkbox"/>	Troy	Tominelli	aretartists@gmail.com	Troy Curtis Entertainment						
<input type="checkbox"/>	Heather	Alana	heather@epochcoevents.com	Epoch Co						
<input type="checkbox"/>	Virginia	Johnson	vjohnson@concertgolfclubs.com	Northgate Country Club						
<input type="checkbox"/>	Gina	Lopez	gina.p.lopezgonzalez@marriott.com	JW Marriott Houston by The Galleria						
<input type="checkbox"/>	Ronnie	Hallenberger	rhallenberger@skateersgrill.com	Adair Family Restaurant						
<input type="checkbox"/>	Porshae	Brown	porshae.brown@hyatt.com	Hyatt Place Houston Bush Airport						
<input type="checkbox"/>	Nina	Patel	nina@kiscubedevents.com	KIS Cubed Events						
<input type="checkbox"/>	David	Rexroat	drexroat@resberryevents.com	Resberry Luxury Weddings and Events						
<input type="checkbox"/>	Laurette	Veres	info@houstonbe.com	Bridal Extravaganza Show						

Home

Contacts

Dashboard

Contacts

Companies

Members

Opportunities

Data Update Verification

Events

Campaigns

Memberships

Finance

Communities

My Tasks

Analytics

GlueUp

Unlock the power of AI

Contacts

Back to Contacts

Add Note

Add New Task

Add Opportunity

Send Email Campaign

Activities

Profile Information

Memberships (1)

Engagement Metrics

Contact Profile

Data Update History

Contact Information

Edit

Contact Details

First Name

Jill

Owner

--

Designations

CPCE

Do Not Email

--

Phone

+1 8325739802

Address

3226 Atascocita Road
Houston, Texas 77346

Memberships (1)

+

▼

Payments

▼

Contact Lists

+

▼

Opportunities

+

▼

Tasks

+

▼

Attachments

+

▼

Right Column

First Name

Jill

Owner

--

Designations

CPCE

Do Not Email

--

Phone

+1 8325739802

Address

3226 Atascocita Road
Houston, Texas 77346

Memberships (1)

+

▼

Payments

▼

Contact Lists

+

▼

Opportunities

+

▼

Tasks

+

▼

Attachments

+

▼

CPCE Details

Certification Status

Certified

Certification Date

2014-07-01

Demographics

Specialty

Event Rentals - Decor

Alt Contact Information

Backup Email

jill@ebincvents.com

Home Phone

--

Home City

--

Home Postal Code

77345

Left Column

Last Name

Vidal-Raines, CPCE

Email

jill@ebincvents.com

Assistant Email

--

Company

EB Inc Events

Address

3226 Atascocita Road

State/Province

Texas

City

Houston

Certification Renewal Date

2024-07-01

Education

Bachelor

Mobile Phone

+1 8325739802

Home Street Address

--

Home State

TX


Source

--

Engagement Dashboard

[Back to Contacts](#)

[Edit Profile](#)[Add Note](#)[Add New Task](#)[Add Opportunity](#)



Julie Teran ✓

Senior Catering Manager at **CRAVE Catering + Events** working in Sales Industry

Member

Subscriber

Committee

Contact Details

Owner

--

Email

jteran@cravecatering.com

Phone

Address

2100 Summer St NE
Suite 50
Minneapolis, MN 55413

Memberships (1)

+

▼

Payments & Invoices

+

▼

Contact Lists

+

▼

Opportunities

+

▼

Activities

Profile Information

Memberships (1)

Subscriptions (8)

Engagement Metrics

Events

Last 365 days ▼

3

REGISTERED EVENTS

0% Canceled (0)

0% Not checked in (0)

100% Checked in (3)

0

CPD EVENTS

7 total registered events - Last event happened 9 days ago

[See all event activities >](#)

Subscriptions

Memberships

Event Tickets

EVENT NAME	EVENT DATE	STATUS	CHECK-IN TIME	TICKET
Making the Switch: Migrating Your Chapter to ...	03/14/2024 (3:00 PM - 4:00 PM)	Active	Not Checked In	Webinar Registration (Member Price)
2024 NACE Evolve Conference	01/20/2024 - 01/22/2024	Active	Checked in	Foundation of NACE Event - Members and Guest (Standard Price)
2024 NACE Evolve Conference	01/20/2024 - 01/22/2024	Active	Checked in	Chapter Leader Registration (Member Price)
Experience Conference for Catering and Events	07/23/2023 - 07/25/2023	Active	Checked in	A La Carte Ticket - Foundation of NACE Signat... (Member Price)
Experience Conference for Catering and Events	07/23/2023 - 07/25/2023	Active	Checked in	Conference Pass (Standard Price)

[See all event registration activities >](#)

Full View into Renewal Cycle / Status

Phoenix									
Memberships									
<div> <div>Upcoming (20)</div> <div>Awaiting Approval</div> <div>Awaiting Payment</div> <div>Closed</div> </div>									
Renewals									
<div> <div>All Memberships</div> <div>All Membership Types</div> <div>Any Owner</div> </div>									
MEMBERSHIP ID #	COMPANY NAME	MEMBER NAME	MEMBERSHIP TYPE	PRICE	EXPIRATION DATE	OWNER	ADMINISTRATIVE CONTACT EMAIL	ACTIONS	
1850806 1st term	Tripleseat	Jennifer Giglio	Corporate	\$315	06/07/2024	--	jenniferg@tripleseat.com	⋮	
1864821	Fresh from the Kitchen	Noelle Townsley	Professional	\$415	05/31/2024	--	info@freshfromthekitchenllc.com	⋮	
1864679	Sheraton Phoenix Downtown	Blaise Klein	Professional	\$415	05/31/2024	--	blaise.klein@marriott.com	⋮	
1847331	Check It DONE Events	Julie Brown Pfeuffer	Legacy	\$220	05/31/2024	--	juliedowntown@verizon.net	⋮	
1865954 1st term	M Culinary Concepts	Kacie Clark	Professional	\$415	05/05/2024	--	kacie.clark@mculinary.com	⋮	
1865540 1st term	--	Alexis McPeters	Professional	\$415	05/05/2024	--	a.mcpeters0@gmail.com	⋮	
1865533 1st term	Marriott Phoenix Chandler	Anita Bhandare	Professional	\$415	05/03/2024	--	anita.bhandare@marriott.com	⋮	
1865486 1st term	Guzman Hospitality Group	Eddie Guzman	Professional	\$415	03/30/2024	--	eddie.guzman@juleannas.com	⋮	
1865429	Industry & Commerce Image Works	Stacey Gioia	Professional	\$415	03/01/2024	--	ssm@icimageworks.com	⋮	
1865393	Bobbi Brinkman LLC	Bobbi Brinkman	Professional	\$415	02/21/2024	--	befabbo@bobbibrinkman.com	⋮	
1865359	Marc and Rose Hospitality	Nicole McCall	Professional	\$415	01/31/2024	--	nmccall@marcandrosehospitality.com	⋮	
1864934	Mesa Convention Center/The Post	Lawrence Vigil	Professional	\$415	04/30/2024	--	lawrence.vigil@mesaaz.gov	⋮	
1864937	Leslie Ann Photography, LLC	Leslie Lejar	Professional	\$415	03/31/2024	--	leslie@leslieannphotography.com	⋮	
1864882	Assaggiare Mendocino, Inc	Julia Conway	Professional	\$415	03/31/2024	--	julia@assaggiare.com	⋮	
1864818	Creations by Sergio Catering	Randall J. Ling	Professional	\$415	04/30/2024	--	info@creationsbysergio.com	⋮	
1864701	Cuisine Prive, LLC	Sandra Kazouh	Professional	\$415	03/31/2024	--	chef@eatcuisineprive.com	⋮	
1864194	NAU	Taylor Means	Student	\$55	04/01/2024	--	tm2383@nau.edu	⋮	

See Membership Renewal Status Through Entire Cycle

- Upcoming
- Awaiting Approval
- Awaiting Payment
- Closed / Complete

Get Membership Lists by Status

- Active
- Grace Period
- Expired

Quick Filters to Find Groups of Members, Contacts, Etc

Active Memberships ▾

18 results filtered by Membership Status ⓘ [Reset filters](#)

Filter Memberships by

Owner ▾ Membership Status ▾² Membership Start Date ▾ Membership Expiration Date ▾ Membership First Term ▾

Chapter Inclusion ▾ Primary Chapter ▾

[+ Add Advanced Filter](#)

Save Your Searches for Fast Repeat Access

[Save As New Smart List](#)

Active Memberships ▾

18 results filtered by Membership Status ⓘ [Reset filters](#)

Filter Memberships by

Owner ▾ Membership Status ▾² Member

Chapter Inclusion ▾ Primary Chapter ▾

[+ Add Advanced Filter](#)

[Save As New Smart List](#)

Membership Start Date ▾

Membership Expiration Date ▾

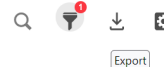
- ☐ This week
- ☐ Last week
- ☐ Next week
- ☐ This month
- ☐ Last month
- ☐ Next month
- ☐ This year
- ☐ Last year
- ☐ Next year

[Rolling date range](#)

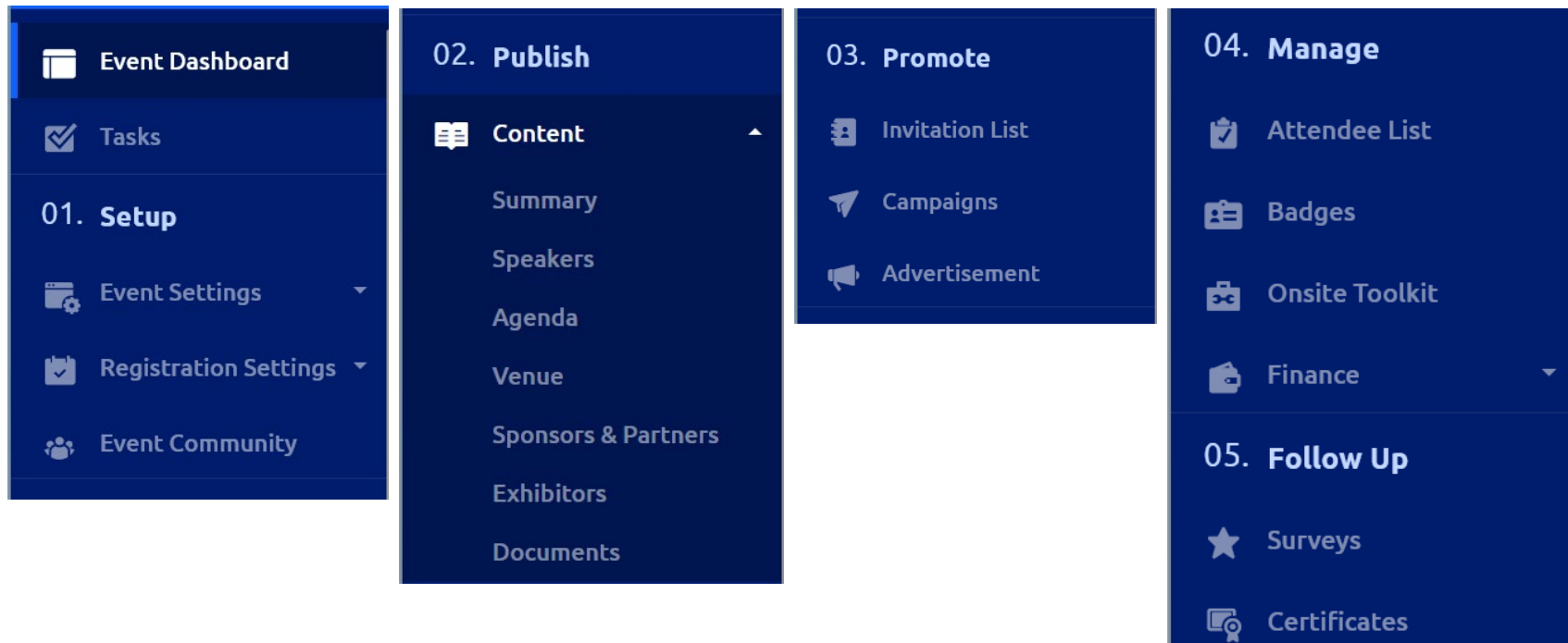
[Custom date range](#)

PRIMARY MEMBER LAST NAME	PRIMARY CHAPTER
Riehle	No
McCalmont	No
Duncan	Yes

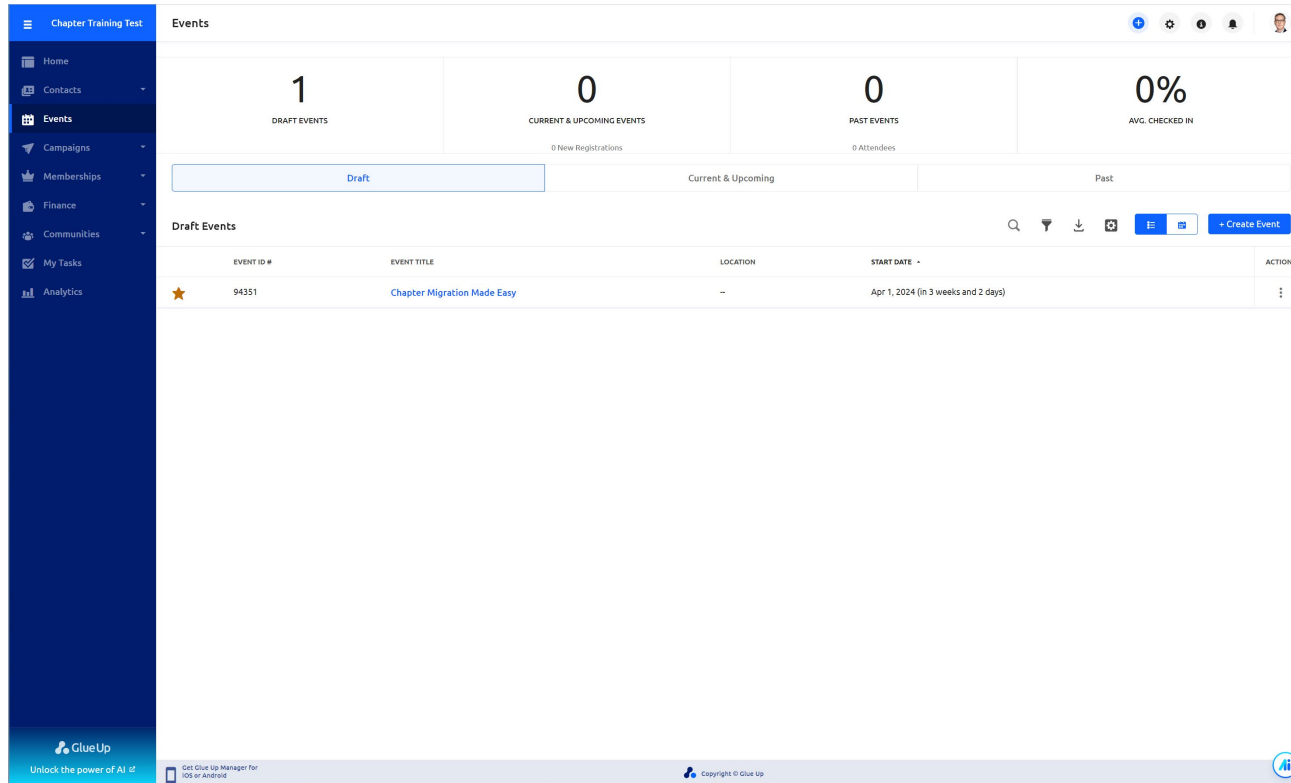
Easy Export to Excel



More than Registration – Total Event Management



Events - Dashboards



Events – Everything in One Place

Draft Event

★ Chapter Migration Made Easy ▾

Event Setup 40%

Chapter Migration Made Easy

🔗 Event Website URL <https://nace.glueup.com/event/chapter-migration-made-easy-94351/> [Share Event URL](#)

📅 Date and time

Apr 1 - 4, 2024

📍 Venue

[+ Set Venue](#)

👤 Internal contact

Lawrence Leonard

👥 Event Team

[Add Team Member](#)

0

ATTENDEES

👤 0 Members

+ \$1,000

PROFIT & LOSS

\$1,000 Revenue

\$0 Expenses

0

RECIPIENTS

0% Received (0)

0% Opened (0)

Event Configuration

Ready to publish 46% [Publish Event](#)

Set up the event

✔ Review the event settings

✔ Validate the payment settings

✔ Add tickets and discounts

Add your content

+ Add a summary

+ Add a venue

+ Add speakers

+ Add agenda

+ Add sponsors

Define design

📷 Upload top banner

✔ Choose a template

Post-event activities

★ Create survey

Recently Registered Attendees

Event Activity Timeline

2023

28 March The event settings were adjusted by Lawrence Leonard

Events – Powerful Ticketing Options

The screenshot displays the NACE ticketing interface with four ticket types: Chapter Member Ticket, NACE Member Ticket, Nonmember, and At La Carte Tickets. Each ticket type has a 'Standard Price' and a 'Door Price' with associated discounts and early bird options. An 'Edit Ticket Price' modal is open, showing options for 'Door price (Attendees can still register online before the event)', 'Primary Chapter Discount', 'Member Only', 'Early Bird', and 'Limit purchase quantity per registration'.

Tickets | Ticket Discount Codes | Add-Ons

Ticket Type	Standard Price	Door Price	Discounts
Chapter Member Ticket	\$1 Early Bird (expired on Saturday, December 2, 2023 8:22 PM) Primary Chapter Discount	\$2 Primary Chapter Discount	
NACE Member Ticket	\$2 Early Bird (expired on Friday, December 1, 2023 8:24 PM) Members Only	\$4 Members Only	
Nonmember	\$5 Early Bird (expired on Friday, December 1, 2023)	\$10	
At La Carte Tickets	Complimentary		

Edit Ticket Price

Edit Ticket
Price Type *
Door price (Attendees can still register online before the event)

Currency *
US Dollar

Price *
2

☒ Primary Chapter Discount
☐ Member Only
☐ Early Bird
☐ Limit purchase quantity per registration

Cancel Save

- Tickets
- Ticket Prices
- Discount Codes
- Ticket Add-Ons (Raffle Tickets, Upgrades, Merchandise, Donations, etc)
- Member, Nonmember and Chapter Member Pricing Control

Events – Easy Event Web Site Templates

The screenshot displays the NAACP Events website template selection interface. The browser address bar shows the URL: <https://naacp.glueup.com/events/94351/publishing/website/design/layout/>. The interface includes a top navigation bar with tabs for Chapters, Layout & Design, and Drafts. A left sidebar menu lists various sections: 01. Setup (Event Dashboard, Tasks, Event Settings, Registration Settings, Event Community), 02. Publish (Content, Summary, Speakers, Agenda, Venue, Sponsors & Partners, Exhibitors, Documents), Layout & Design (selected), 03. Promote (Invitation List, Campaigns, Advertisement), 04. Manage (Attendee List, Badges, Onsite Toolkit, Finance), and 05. Follow Up (Surveys, Certificates). The main content area, titled 'Chapter Migration Made Easy', displays a grid of ten website templates. Each template is represented by a thumbnail image, a title, a brief description, and 'Select' and 'Preview' links. The 'Espresso' template is currently selected, indicated by a blue border. A 'Continue' button is located in the top right corner of the template grid.

01. Setup

- Event Dashboard
- Tasks
- Event Settings
- Registration Settings
- Event Community

02. Publish

- Content
- Summary
- Speakers
- Agenda
- Venue
- Sponsors & Partners
- Exhibitors
- Documents

Layout & Design

03. Promote

- Invitation List
- Campaigns
- Advertisement

04. Manage

- Attendee List
- Badges
- Onsite Toolkit
- Finance

05. Follow Up

- Surveys
- Certificates

Chapter Migration Made Easy

[Back to Layout & Design](#) [Continue](#)

Stroopwafel Frappuccino
Stroopwafel Frappuccino is perfect for large-scale events and conferences. The polished interface is able to incorporate multi-track agendas and large promotional photos.
[Select](#) [Preview](#)

Café Mocha
Café Mocha is specifically designed for webinars and technology-related events. Attendees can easily view critical event information including an event countdown clock.
[Select](#) [Preview](#)

Americano
Americano is great for showcasing a product or venue. The single-page layout is ideal for small events and giving prominence to key event information.
[Select](#) [Preview](#)

Café Cubano
Café Cubano is designed for showcasing an event speaker. The single-page layout is also great for displaying bold photos that capture attention.
[Select](#) [Preview](#)

Espresso
Espresso is extremely useful for professional one-day events. The single-page template also lets organizers highlight their own banner images.
☒ [Selected](#) [Preview](#)

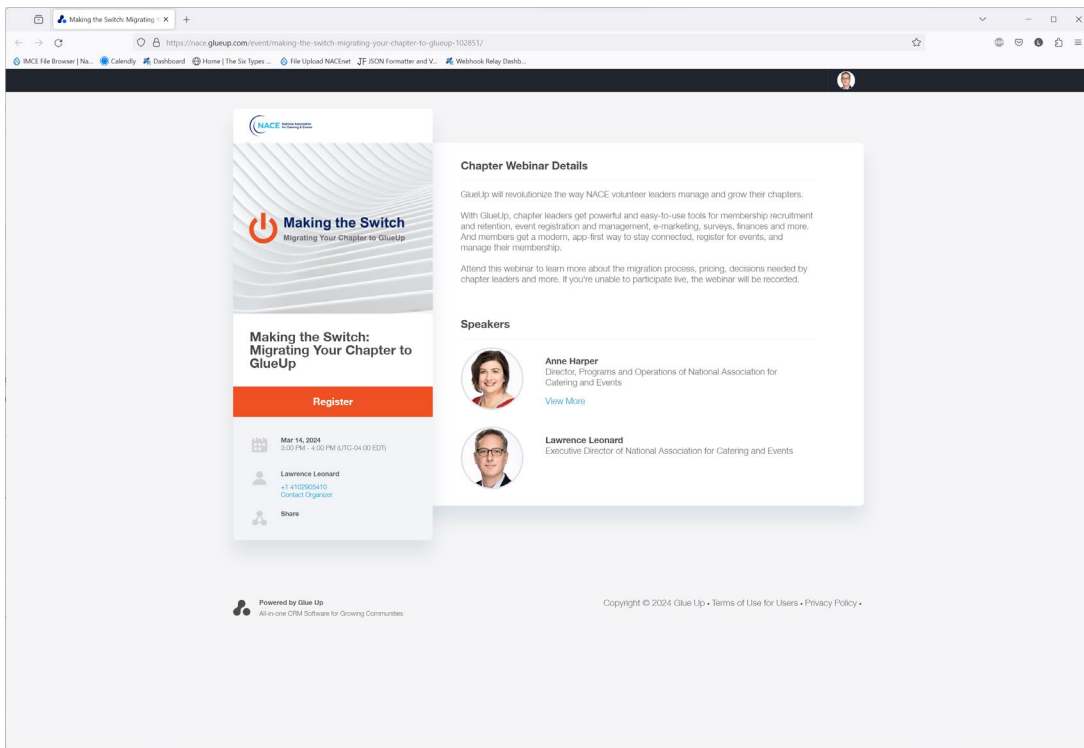
Noisette
Noisette is the go-to favorite for many chambers of commerce and professional organizations. The interface is efficient and functional due to its simple panel displays.
[Select](#) [Preview](#)

Iced Latte
Iced Latte is often used for vibrant event pages with multiple color settings. It especially draws attention to event sponsors and co-organizers.
[Select](#) [Preview](#)

Caramel Macchiato
Caramel Macchiato is regularly used for medium-sized events. The template is designed for occasions that require large amounts of informational content.
[Select](#) [Preview](#)

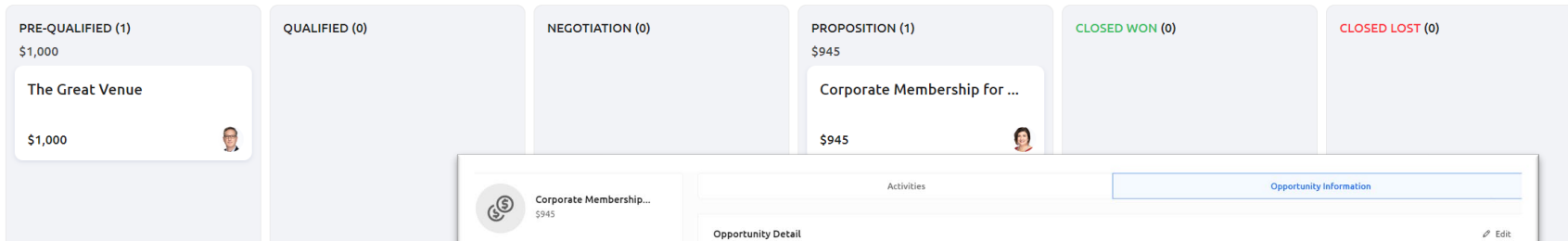
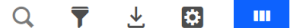
Lemon Tea
Lemon Tea is regularly used for medium-sized events. The template is designed for occasions that require large amounts of informational content.
[Select](#) [Preview](#)

Events – Easy Event Web Site Templates



Track and Assign Opportunities

Opportunities



Corporate Membership...
\$945

Opportunity Detail

Opportunity Name
Corporate Membership for DLUX Catering

Opportunity Stage
Proposition

Opportunity Value
\$945

Opportunity Source
Other

Expected Closing Date
--

Opportunity Detail
--

Owner
Anne Harper

Account Name
Jane Doe

Stage
Proposition

Probability (%)
70%

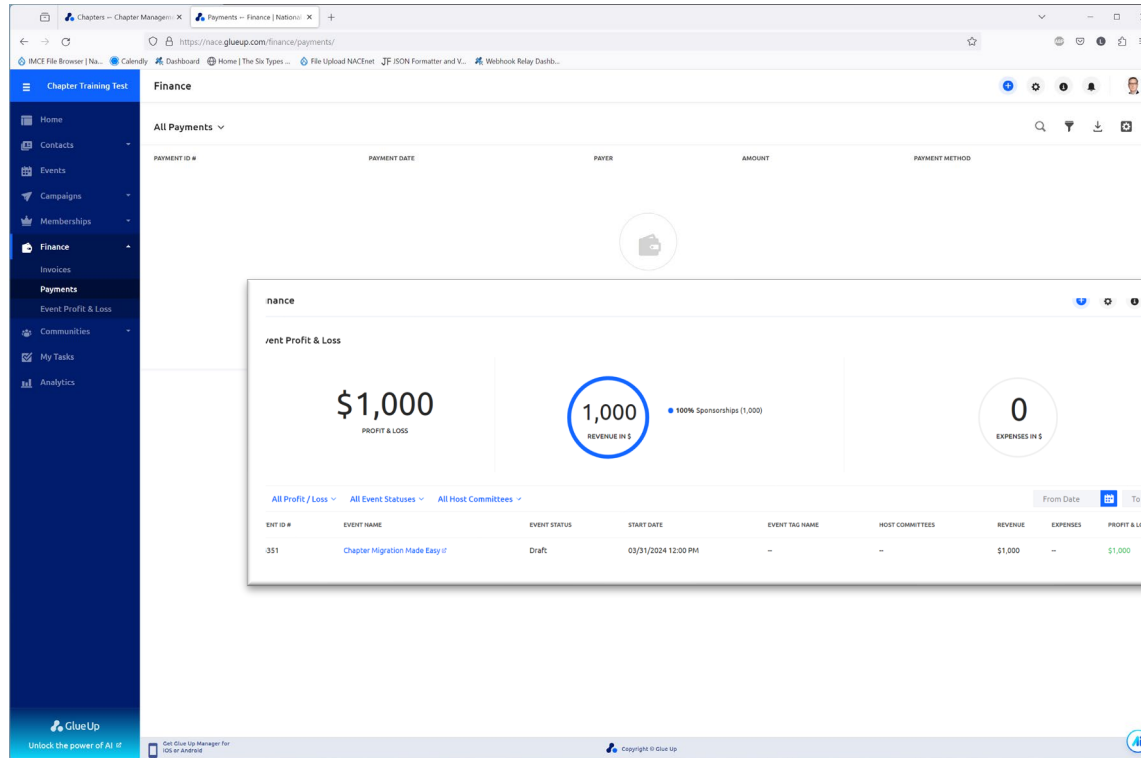
Date Created
Today

Proposals + -

Tasks + -

Attachments + -

Financial Tracking



Finances

- Invoices
- Payments
- Event P&L

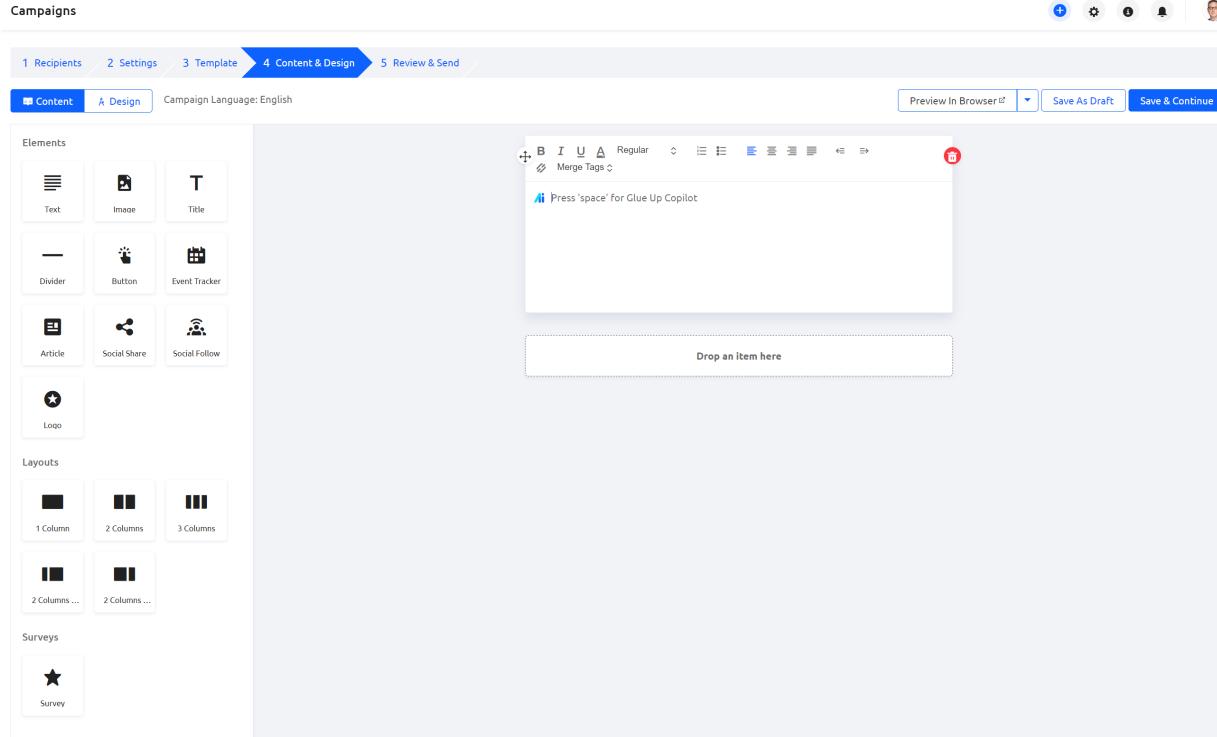
Accept Payments

- Card
- Check/Cash
- ACH/eCheck

Integrations

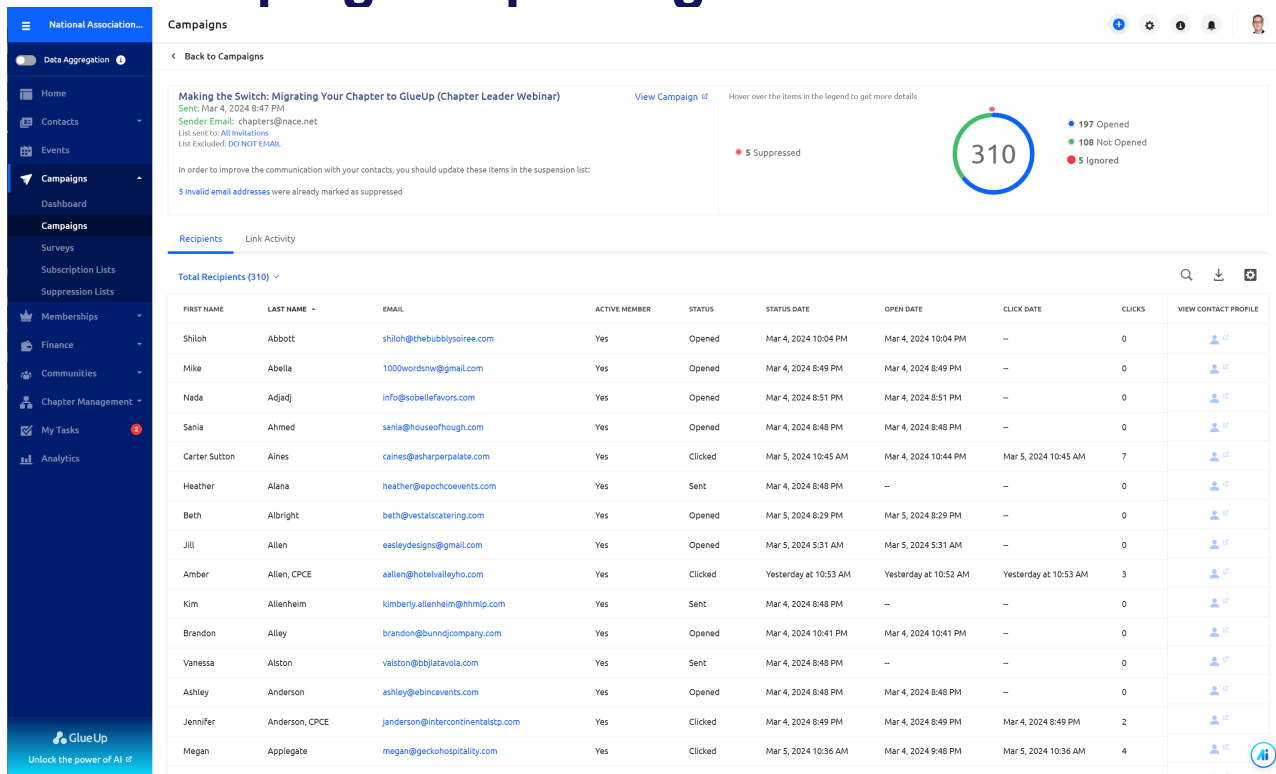
- QuickBooks Online
- Xero

E-Marketing and Surveys



- Powerful List Filtering
- Easy to Use Templates
- Drag and Drop Customization
- Immediate or Scheduled Send
- Full Reporting

Full Campaign Reporting



- Send Status
- Opens
- Clicks
- Link-Level Click Tracking

Email Subscription and Committee Lists

Subscriptions

[+ Add Subscription](#)

	NACE Express Public Created 12/02/2021	Subscribers 1,898	Auto-subscribe All new active members	
	National Partner Information Public Created 02/14/2022	Subscribers 1,891	Auto-subscribe All new active members	
	CPCE Quarterly Private Created 02/14/2022	Subscribers 12	Auto-subscribe Off	
	NACE Events and Education Public Created 02/14/2022	Subscribers 10,606	Auto-subscribe All new event attendees and new active members	
	NACE Updates Public Created 02/14/2022	Subscribers 9,639	Auto-subscribe All new event attendees and new active members	
	Chapter Leader News Created 02/18/2022			

Committees

	Sample Committee Public	Subscribers
	Created 03/08/2024	0

Chapter Communities

The screenshot displays the GlueUp Communities interface. On the left is a dark blue sidebar with navigation links: Home, Contacts, Events, Campaigns, Memberships, Finance, Communities, Community, Group Request, File Sharing, My Tasks, and Analytics. The main content area is titled 'Communities' and includes a 'Community' header with a status indicator 'Community is activated'. Below this, there are two community cards: 'NACE Chapter Training' (a sample community) and 'Create Community' (a button to create a new community). Two post details are shown in the foreground. The first post is by Alysha Torres, a Catering Sales Manager at Brulee Catering, asking for advice on catering bar layout. The second post is by Aundrea Hopkins, a Senior Account Executive at AFR Furniture Rental, seeking a North Carolina Partner ISO for an event on April 8th-12th. Both posts show engagement metrics (likes, comments, shares) and a comment section.

Chapter Training Test

Communities

Community Community is activated

Manage your My Glue Communities here. The community is available on the mobile app on both Android and iOS devices.

Create Community

Activated

NACE Chapter Training

A sample community.

Activity Activated

Date Created 11/28/2023

Created By

Groups 0

Members 2

Community Details

Create Community

Alysha Torres

Catering Sales Manager at Brulee Catering • 1 day ago

Looking for some catering bar layout/set up advice!

We are trying to optimize our bar set up, but it's all so big! I'm trying to figure out smaller options, but coming up short (no pun intended). We'd like for there to be sides, but not overly long or wide.

Anyone have any examples or ideas they could share?

0 likes • 3 comments • 0 shares

Like Comment Share

View 3 comments

Write a comment ...

Aundrea Hopkins

Senior Account Executive at AFR Furniture Rental • 3 days ago

North Carolina Partner ISO: Onsite Transportation and Onsite Coordinator in Raleigh, NC | Freelance | Event Dates: Monday April 8th - Friday April 12th. Email me at ahopkins@ntfurniture.com and I will connect you with the hiring team.

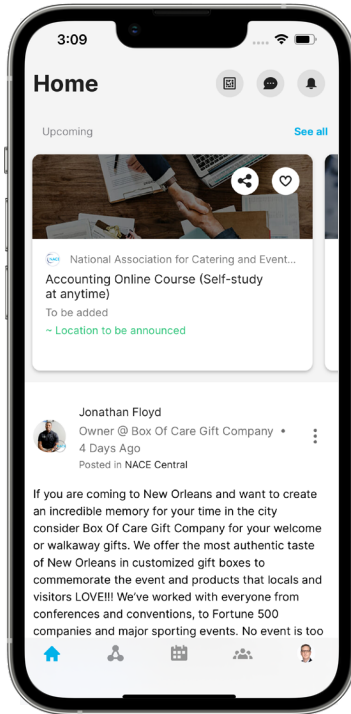
1 likes • 0 comments • 0 shares

Like Comment Share

Write a comment ...

- Member / Nonmember
- Public/Private
- Attach Access to Committees Lists, Events, etc

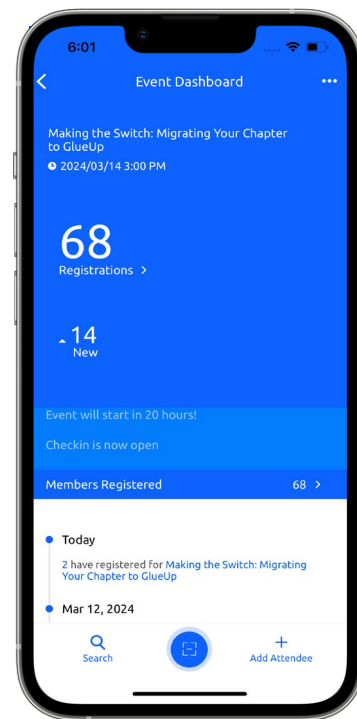
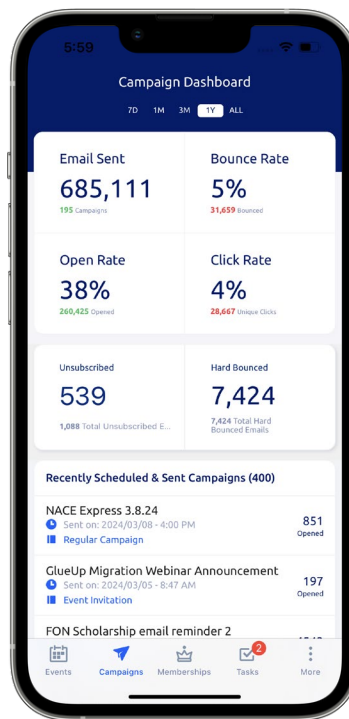
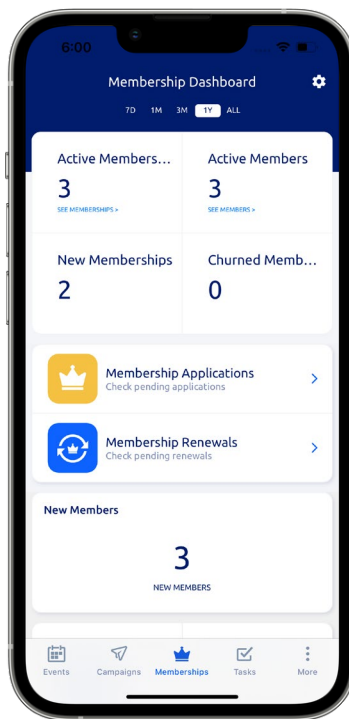
NACENet App for Everyone



- Equal features for Chapters, National
- Communities
- Events
- Networking

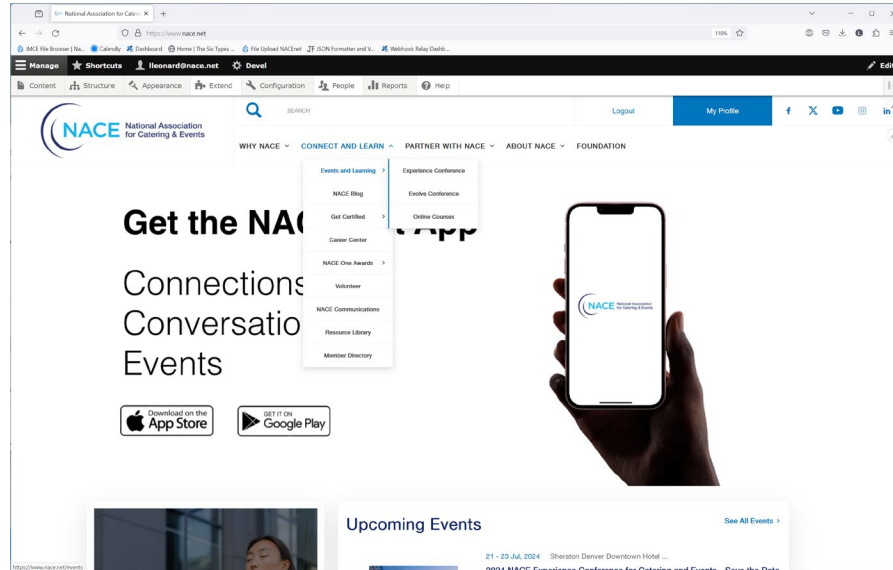
Glue Up Manager for Chapter Leaders

- Memberships
- Email campaign dashboard
- Events
 - Registration dashboard
 - On-site tools
 - Check-in!
- Tasks



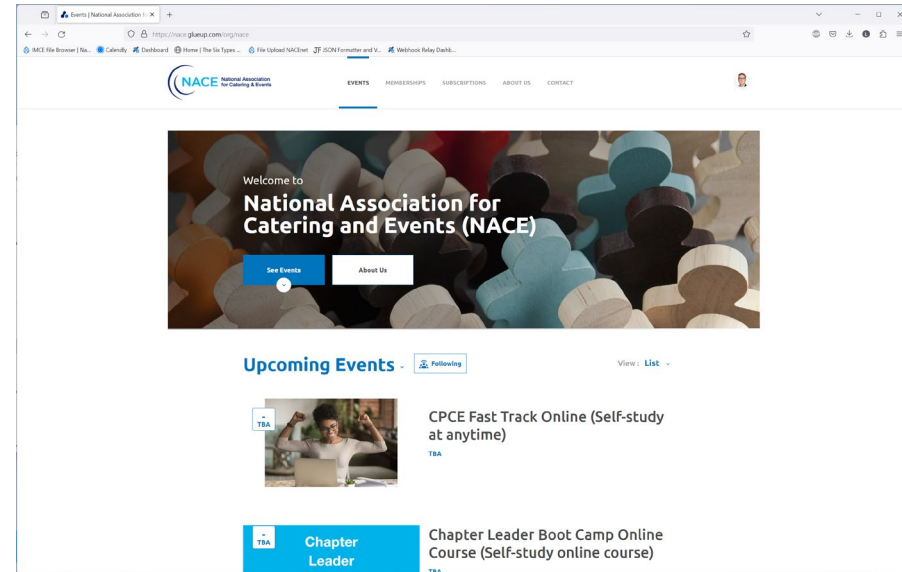
Web Site Options

Standard Site



Traditional web site with customizable pages, subpages, sliding images, etc

Mini Site



The essentials for a place on the web to share event information and offer online communities.

Web Site Options

	Mini Site (GlueUp)	Standard Site (Drupal)
	\$0	\$500
Events and Registration	●	●
About Us (Simple Text)	●	●
Membership / Join	●	●
Full Community Experience (Social feed/sharing, directory, networking)	●	●
Campaigns to News	●	
News / Blog		●
About Us (Text & Images)		●
Directory Link In Top Nav		●
Rotating landing page images		●
Custom Subpages		●

Glue Up Costs

Chapter Size	Glue Up w/ Mini Website (Annual)	Glue Up w/ Standard Website (Annual)	Standard Website Setup (One-time)
Up to 25 Members	\$250	\$750	\$500
26-75 Members	\$500	\$1000	\$500
76-200 Members	\$750	\$1250	\$500

Cost Comparison

GlueUp

Total Members	Annual Fee w/ Standard Web Site	Standard Website Setup Fee
Up to 25	\$750	\$500
26-75	\$1,000	\$500
76-200	\$1,250	\$500

- No add-on fee for payments subscription, only processing fees.
- Invoiced quarterly by HQ

Starchapter

Plan	Annual Fee	Setup Fee
Essential	\$1,188	\$935
Growth	\$1,524	\$1,297
Advanced	\$2,076	\$1,715

- Plus monthly Starchapter add-on fee for Starchapter Pay subscription (on top of processing fees)
- Billed annually or monthly by Starchapter



Making the Switch

Big Picture

1. Sign Up, Get Scheduled
2. Configuration
3. Data Migration
4. Web Site
5. Training
6. Chapter Member Communication

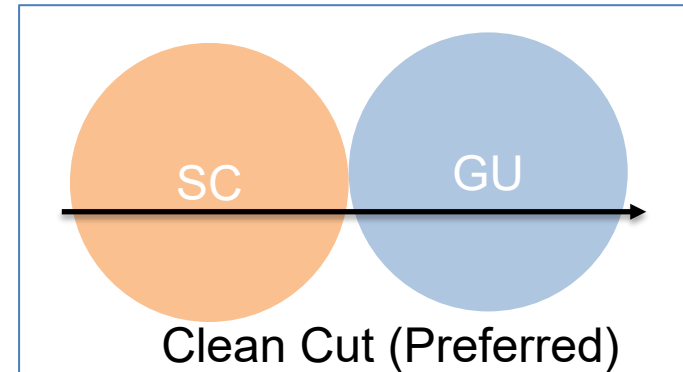
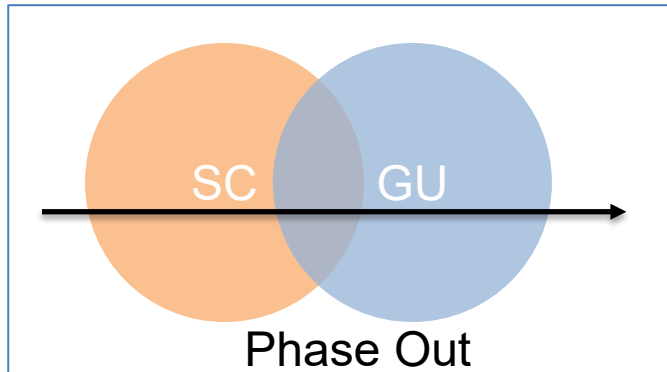


Important Considerations - Timing

- Starchapter (or other system) subscription
- Web site needs / complexity
- Event registration schedule (cut over)

Chapter - Decision

Chapter - Decision



Getting Started

- Review information on GlueUp and features
- Decide to switch
- President signs migration document
- Identify your migration team
 - Who will be hands-on in the migration?
- Identify your “train the trainers”
 - Who will become your GlueUp experts and help others?
- [Information page: www.nace.net/gu](http://www.nace.net/gu)

Additional Info Doc

Chapter

Chapter - Decision

Chapter

Chapter - Decision

Chapter - Decision

Step One: Payment Processing

Chapter - Required

- Establish Payage account and link to chapter bank account
- Required Information
 - Chapter EIN / Tax ID
 - Bank account information
 - Business address
- Must be completed by chapter board member
 - Person with authority to sign contracts/agreements
 - Identity verification
- Onboarding continues when complete

Financial

- Payment policies, forms of payment
- Invoices
 - Use predefined invoice categories (Recommended)
 - Use chapter-defined invoice categories
- Accounting Integration
 - Connect QBO or Xero if used (Uncommon)

Chapter

HQ

Chapter

HQ

Chapter

HQ

Identify Chapter Users and Roles

Additional Info Doc

- Who will be allowed access to the chapter's GU backend?
- What type of access should each have?
- Submit web form
- Chapter user setup

Chapter - Decision

Chapter - Decision

Chapter

HQ

Data Collection, Migration and Archiving

- Identify all places nonmember data is stored (Excel, Starchapter, Eventbrite, etc)
- Non-SC: Gather data in Excel format
- SC: Give HQ a Starchapter Login
- Save registration lists, etc for history
- Extract SC data for import to GU
- Import data to GU

Chapter

Chapter

Chapter

Chapter

HQ

Chapter

HQ

Web Site

Additional Info Doc

- Web site options and needs
- Web site setup and configuration (Standard Site)
- Content migration (Standard Site)
- Future content updates
- Domain name options
- Domain name settings

Chapter - Decision

GlueUp

GlueUp

Chapter

Chapter

Chapter - Decision

Chapter

HQ

Events & Registration

- Registration data archiving from previous system(s)
- Migration focus areas:
 - Training
 - Adapting your processes
- The events module is very robust but not hard to use
 - Plan for training
 - Create event blueprints to save time

Chapter

Chapter

GlueUp

Online Communities

- Start with one community and grow from there
- Configure initial community

Chapter

HQ

Training and Support

- Chapter orientation
- NACE-specific help
- Chapter user maintenance
- Branding resources
- Training videos and guides
- Support knowledge bank
- Technical support issues
- Paygage support

HQ

HQ

HQ

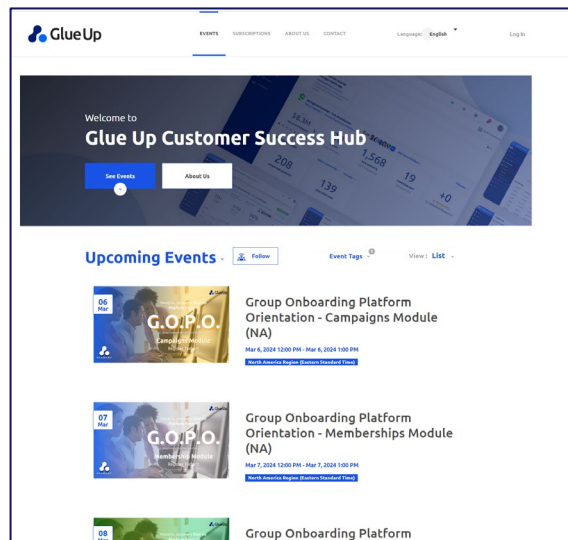
HQ

GlueUp

GlueUp

GlueUp

GlueUp



Chapter Member Communication

Chapter

- Example messages
 - “We’re upgrading our technology to serve you better”
 - “Install the app to get started”
 - “Find your NACE community in the app”



Use “app first”
messaging

Additional Information Docs

- [Info center at www.nace.net/gu](http://www.nace.net/gu)
- Migration and use document
- Web site options
- Chapter user role descriptions

Scheduling Factors – Who Goes First?

- Starchapter expiration date
- Need (new chapters, chapters not on Starchapter)
- Web site complexity
- Chapter event calendar
- Data source complexity
- Decision / commitment date

How Long Will It Take?

- Main things that could affect migration time:
 1. Number of open event registrations
 2. Web site selection and complexity
 3. Data sources (number, type and source)
 4. Training readiness and comfort level
 5. Resources and Schedules

(For Chapter Leaders, National Staff, GlueUp)

Process Recap

1. Make decision to move, sign migration document
2. Identify chapter migration team
3. Establish Paygag account
4. Select web site options
 - Standard site: customize and migrate your content pages
5. Plan what registration data you want to archive
6. Gather non-member data if not on Starchapter / Share SC login with national staff
7. Training
8. Go Live

Get Started

1. Decide to make the switch
2. Visit www.nace.net/gu
3. Sign Migration and Usage Document



All migration coordinated through National Headquarters, do not sign up directly with Glue Up



Q&A

Other Questions and Additional Information

- Email: chapters@nace.net
- Schedule time with staff
 - [Calendar links at www.nace.net/gu](http://www.nace.net/gu)