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How to Eliminate Manual Workarounds in YourMembership Without Rebuilding Everything

“We’ve already spent too much time trying to fix this. Just do it manually.”

If that phrase sounds familiar, you’re not alone.

Your team didn’t plan to build workarounds in YourMembership, but somehow, they’ve become part of the weekly routine. Reports get exported and “cleaned up” in Excel. Approvals happen over email instead of inside the system. The same workflows get rebuilt over and over again. And those “temporary fixes”? They become “that’s just how things are done.

If you’re nodding along, check out this quick video. It could help you eliminate a common workaround we have seen many associations struggle with in YourMembership.

[👉 Watch Fix Hidden Workarounds in YourMembership \(YM\) + New Member Join Update Explained](#)

The Hidden Cost of “Just Doing It Manually”



At first, workarounds feel efficient. They help you move forward without submitting a ticket or waiting for a fix.

But over time, they create bigger problems:

- **Inconsistent data** from manual edits
- **Lost staff time** on repetitive tasks
- **Reporting errors** that impact decision-making
- **Team frustration** from duplicated effort

A system designed to save time ends up doing the opposite.

[Get a Clear Breakdown of What’s Slowing Your Team Down](#)



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What This Actually Looks Like in Real Life

We just worked with a client who was dealing with a common issue.

Every month, she needed accurate reporting on:

- New members
- Renewing members
- Lapsed members

Instead of pulling clean reports directly from YourMembership, she was:

1. Exporting data from the Member Directory
2. Removing rows manually
3. Sorting and filtering in Excel
4. Rebuilding the same report structure each month

It worked, but it was time-consuming, error-prone, and frustrating.

In just two hours, we reconfigured her reporting setup inside YourMembership so that:

- Each membership category had its own automated report
- The data stayed consistent and accurate
- The monthly manual work disappeared entirely



No rebuilding. No complicated overhaul. Just using the system correctly.



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The 4 Most Common Workarounds and What They Signal

If your team is doing any of the following, it's a strong indicator that something deeper is off:

1. Exporting Data to Excel to “Fix” Reports

This usually means your reporting configuration isn't aligned with how your organization tracks data.

2. Manual Approval Processes

If approvals are happening in email or spreadsheets, your workflows likely aren't fully configured, or they're misaligned with your real processes.

3. Rebuilding the Same Workflows Repeatedly

For example, manually recreating event setups, email segments, or forms each time instead of using saved templates or automation. This usually signals that reusable system logic hasn't been fully set up.

4. “Temporary Fixes” That Became Permanent

For example, workarounds like using placeholder member types, tracking committee participation in spreadsheets, or using internal note fields instead of fixing the underlying configuration.

Want a specific example of rebuilding the same workflows repeatedly?

[🔗 Watch: Fragmented YM Onboarding Experience](#)

Here's the Truth Most Teams Miss

When workarounds pile up, the instinct is to assume:



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“The system just can’t do what we need.”

But in most cases, that’s not true.

YourMembership is highly configurable, but that flexibility only works if it’s set up correctly.

This leads to an important shift in perspective:

If your team has built YourMembership workarounds, the issue isn’t staff effort. It’s configuration.

You Don’t Need to Rebuild Everything

One of the biggest misconceptions we see is that fixing these issues requires a full system overhaul.

It doesn’t.

Most of the time, the solution involves:

- Adjusting how data is structured
- Reconfiguring reports and filters
- Streamlining workflows that already exist
- Eliminating redundant steps

Small, targeted changes can eliminate hours of manual work every week.

Where to Go From Here

If your team is stuck in manual workarounds, you don’t need to keep pushing through it.



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There's a better way, and it usually starts with identifying where your configuration is working against you.

[!\[\]\(bd1a142de767a21e5362c595f844a4ff_img.jpg\) Review Your YM Setup With an Expert](#)

We'll walk through your current setup, identify where the inefficiencies are coming from, and show you exactly how to fix them without rebuilding everything.

Because at the end of the day:

It's not about working around YM, it's about deciding to fix what's creating the extra work in the first place.