Innofactor **STEP** 

Member Engagement Enablement Pack

"STARTER PACKS TO INITIATE THE JOURNEY TOWARDS AN ATTRACTIVE AND RELEVANT MEMBER EXPERIENCE"





# STEP AS A CONCEPT

Innofactor's STEP offering is designed to accelerate the journey within refining and **optimizing the engagement capabilities of Membership organizations**. It is about allowing the opportunity to **think big and accelerate the steps towards that vision**.

STEP contains three starter packs that are designed to identify the customer's unique needs and find a natural next step.

In close collaboration with the customer, our subject matter experts lead and participates to create the best solution according to the customer's wishes and conditions.





# STEP | FORMAT

ENVISIONING WORKSHOP	PLANNING	ACCELERATED IMPLEMENTATION	EVALUATION & NEXT STEP	MANAGED SERVICE
<ul> <li>Initially, we run a joint workshop to create consensus and understanding of the current situation and vision ahead. The workshop also includes inspiration for opportunities within the platform.</li> <li>The goal is to map where the customer is today and what needs and expectations there are.</li> <li>We also decide the scope to be included in the delivery phase linked to the starter package.</li> </ul>	<ul> <li>Based on the output from initial envisioning workshop Innofactor provides a recommendation for the appropriate way forward and associated starter pack.</li> <li>Together we set the framework for conditions, delimitations and the first target. To establish a common view of what can be achieved with given implementation budget.</li> <li>Innofactor also provides recommendations for appropriate stake holder representation within implementation</li> </ul>	During the implementation we perform the necessary activities & deliverables associated with the starter pack.   Image: TAILORED MEMBER FOUNDATION ASSESSMENT   Image: TAILORED MEMBER FOUNDATION   Image: TAILORED MEMBER FOUNDATION	<ul> <li>Together with the customer we evaluate the implementation and discuss recommendation for next step and effort associated</li> <li>The customer will also receive documentation from the implementation based on what has been agreed in the planning phase.</li> </ul>	After the implementation of the platform the customer is provided with the option of using our support and maintenance offering. The agreements are stipulated based on the solutions and the SLA of the customer.
<u> </u>	)			
Free	5	Implementation (<100)		Managed services (optional)

## INNOFACTOR®



We know **\*\*** We know the membership market You know your organization

Together we can get the most out of your investments!

# MEMBER FOUNDATION

For organizations that wants to get off to a flying start with D365 for membership management



MEMBER FOUNDATION enables organizations to take an important step towards a more active role within reimaginging what memberhip is and can could be...



#### RECRUIT

Reimagine your organizations ability within providing simplicity and availability when recruiting new members to your



#### ENGAGE Reimagine your ability to build high engagement levels.



### NURTURE

Reimagine your organizations ability to offer efficient and proactive member care.



#### **BUILD LOYALTY**

Reimagine your organizations ability to build loyalty and strong sense of belonging



#### ATTRACT

Reimagine your organizations ability to provide a relevant and attractive membership offering.

#### FUTURE PROOF



Reimagine your organizations ability to secure a platform that supports change over time, as the organization grows and changes shape.



### MEMBER FOUNDATION

### WHOM IT CONCERNS?

We turn to decision-makers and people within the organization that has a commitment and responsibility within growth. This is to obtain a good dynamic in assessing the current state and targeted future state. This starter pack aims to give customers the opportunity to quickly anchor, set up and get started with the use of a modern member engagement platform built upon Dynamics 365 for Customer Engagement/CRM.

#### HOW IS IT DELIVERED?

STEP MEMBER FOUNDATION - Is a standardized process where the initial workshop aims to inspire, anchor current state and create consensus within the scope of the first delivery. During a delivery period of 3-4 weeks, the necessary activities associated with introducing our preconfigured foundation (based on D365 CE/CRM) are performed. Finally, Innofactor compiles and presents a recommendation for the appropriate next step.

#### WHAT IS THE RESULT?

After the workshop and delivery you will have;

- Engagement within the opportunities associated with a modern membership platform and an established understanding of your the first targeted delivery
- Implemented member platform ready for use
  - ✓ Account- and contact definition
  - ✓ An unified member process definition
  - ✓ An unified activity managament within common engagement formats like; mail, meetings and

cases.

- $\checkmark$  An unified storage for associated membership documentation
- Basis for next prioritized target delivery



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