

# Innofactor STEP

## Member Engagement Enablement Pack



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



# STEP AS A CONCEPT

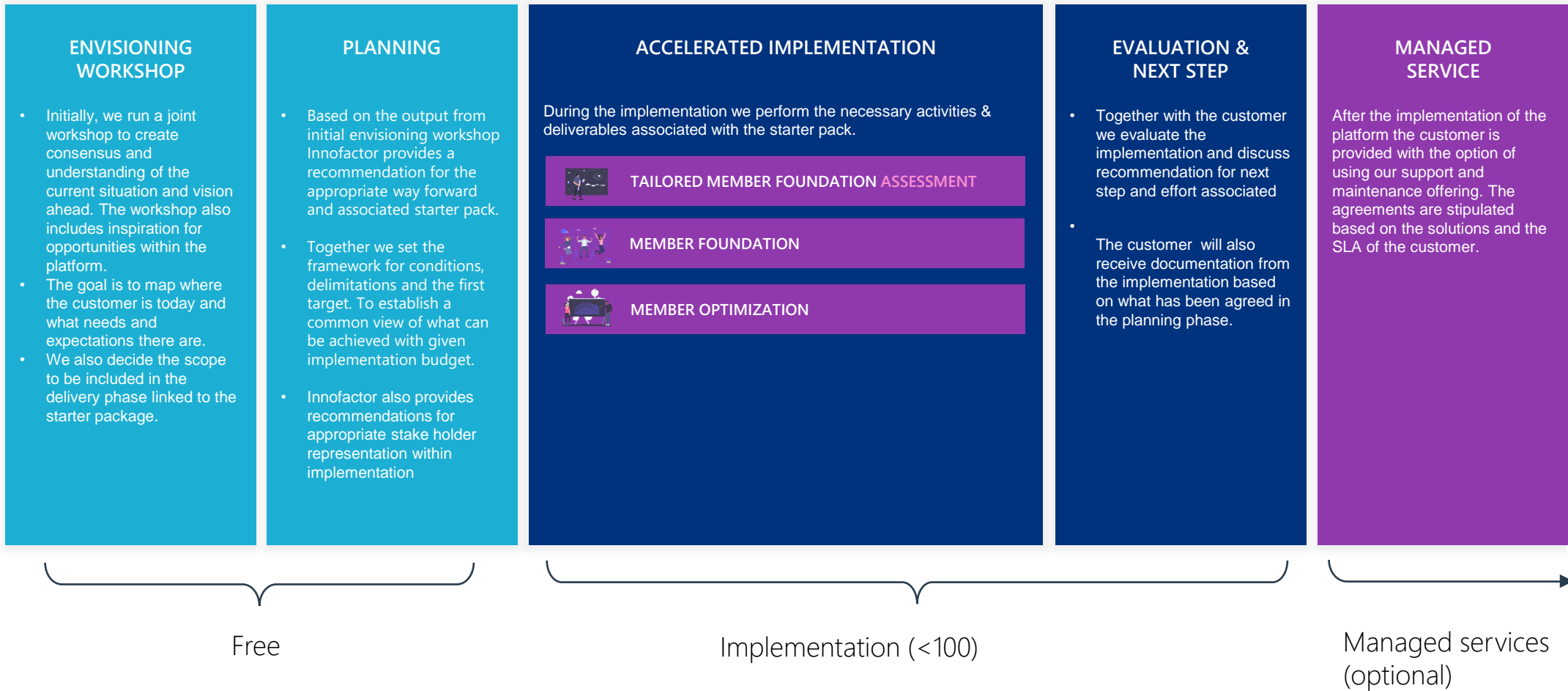
Innofactor's STEP offering is designed to accelerate the journey within refining and **optimizing the engagement capabilities of Membership organizations**. It is about allowing the opportunity to **think big and accelerate the steps towards that vision**.

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





We know 

We know the membership market

You know your organization

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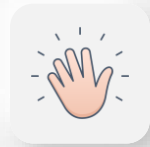
**Together we can get the most out of your investments!**

## MEMBER FOUNDATION

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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 reimagining what membership is and can could be...



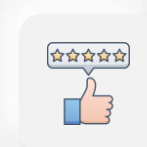
#### RECRUIT

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



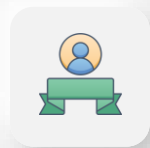
#### ENGAGE

Reimagine your ability to build high engagement levels.



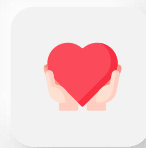
#### NURTURE

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 managment within common engagement formats like; mail, meetings and cases.
  - ✓ An unified storage for associated membership documentation
- Basis for next prioritized target delivery

### Activities & Deliverables

1. Technical installation of environment
2. Installation of pre-configured solution
3. Minor customizations through configurations
4. Access and security role setup
5. Imported member list (accounts & contacts)
6. Activated Sharepoint connection for document mgmt.
7. Activated Outlook connection for activity mgmt.

### Recommended add-ons excluded from starter pack

- Training & adoption activities

### Potential add-ons excluded from starter pack

- Migration activities (data other than member list - e.g. cases, activities, documents.)
- Integrations other than O365 services mentioned