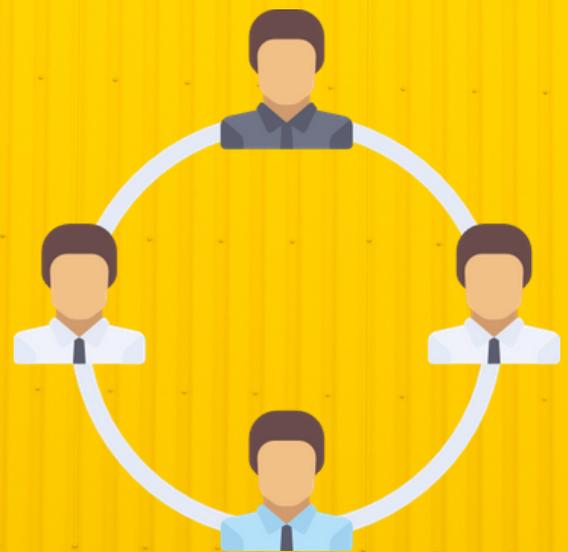




# DYNAMICS ASSOCIATION BLUEPRINT

We take the guesswork out of  
Microsoft Dynamics 365

As a gold certified  
Microsoft partner, our  
association and  
constituent  
management solution  
will provide you with  
a blueprint for  
success.



# WHAT IS DYNAMICS ASSOCIATION BLUEPRINT?

Dynamics Association Blueprint can help associations efficiently manage and maintain their member's needs in a fully automated fashion. Whether your goal is to increase membership numbers, provide members with professional growth opportunities, or increase fundraising success, Dynamics Association Blueprint can help you by reducing the amount of time and effort needed to deal with administrative tasks. In short, a Membership Management solution will allow your staff to spend more time doing the things that are important to your members. CRM Dynamics brings more than 20 years of experience in finding solutions to the problems that membership associations face.

## BENEFITS OF USING A CRM SYSTEM

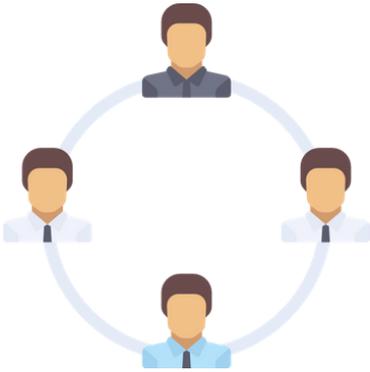
Dynamics Association Blueprint is built within the Microsoft Dynamics platform and integrates with many popular accounting systems. This provides a 360-degree view of each member as well as operational control over, Sales, Service, Marketing and Social Engagement Insights.

Benefits include:

- Working In One End-to-End System
- Managing Grants
- Managing Donations & Volunteers
- Workflow Automation
- Social Media & Campaigns
- Saving Money & Reducing Costs
- Developing Insight Through Reporting & Dashboards

# FEATURES OF DYNAMICS ASSOCIATION BLUEPRINT

## Member Management



Dynamics Association Blueprint is able to sort members by type or level and accommodate staggered or irregular fees, dues or renewal periods. Automatically apply payments to credit cards with pre-authorized payments and loyalty discounts or discounts tied into continuing education are all possible. Members will be able to easily change their membership level, or cancel membership. The software allows you to streamline new member applications through the easy-to-use portal and it automates the sending of renewal notifications and invoices.

## Event Management



Whether you're managing a small executive retreat or a giant annual convention, Dynamics Association Blueprint will allow you to seamlessly accept registrations, track attendance numbers and accept payments. Multiple price points and partial or full cancellation refunds are all easily handled with Dynamics Association Blueprint.

## Store Front



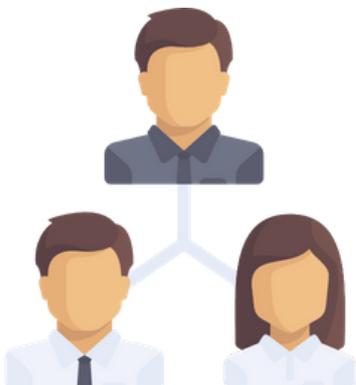
You can provide your members the opportunity to purchase relevant professional material directly through your online store. Multi-layered loyalty or promotional pricing is all possible. Dynamics Association Blueprint will be able to process credit card payments and refunds in real time and will schedule payments to suppliers. Tax and shipping charges will be calculated automatically.

## Continuing Education



Dynamics Association Blueprint will allow you to easily track your members' continuing education requirements. You can check if members meet the pre-requisite requirements for registration and make registration simple for the members. Additionally, we integrate with popular webinar registration tools. Dynamics Association Blueprint allows you to create multi-level fee pricing and simplifies the payment process.

## Information Sharing



Members and perspective members can easily sign up to various newsletters or mailing lists. With Dynamics Association Blueprint you can gather valuable information from those subscription lists that can help you maintain and attract new members.

# Fundraising & Donor Management



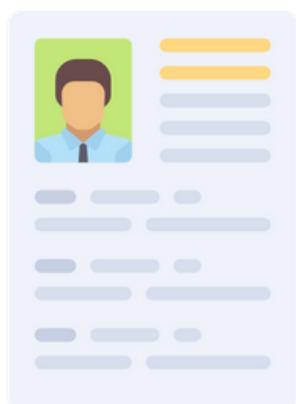
Manage and track multiple campaigns and identify potential new donors. Additionally, Dynamics Association Management can allow you to see a donor's giving history and can send out automatic, targeted appeals with suggested donation amounts. By integrating the membership renewal process with an option to add a donation to the annual fee, you can increase the amount that you raise and find new, annual donors.

## Security



Dynamics Association Management can create multi-layered, secured sign-in pages based on membership levels. If your association is dealing with confidential information, we can ensure that only those with clearance to see it have access.

## Membership Directories



Where appropriate, Dynamics Association Blueprint can provide searchable directories and individual membership profiles. These can be searchable contingent on membership status, or open to the public.

## Bilingual Ready



As a North American company, our design is fully functional in English, French and Spanish. The only translation work needed will be if you require customized fields. By utilizing our pre-designed bilingual templates, we will save valuable time and money in getting your system live.

## Office 365 & ClickDimensions Integration



Powered by Dynamics 365, Dynamics Association Blueprint benefits from being integrated with the Office 365 family of software. Included in that is the powerful ClickDimensions. Fully integrated with Dynamics 365, ClickDimensions provides key marketing tools like email marketing, campaign automation, web intelligence, surveys, web forms and landing pages, social marketing and more. It can help associations identify potential new members and reach out to them in a cost effective and time efficient manner.

## Portal



CRM Dynamics will work with your association to create a self-serve portal that works with your existing web design. The portal will allow your members to easily manage their own profiles with little to no assistance from your staff. The portal will be integrated with all relevant aspects of your site to allow you to take full advantage of your Membership Management solution.

# Finance & Performance Reporting



You will be able to customize accounting reports and track tax, shipping and other costs. By giving you a full view of your finances you will have a greater insight into your associations' operation. You can then better identify inefficiencies and fix them.

Reports can include:

- Projects completed
- Time spent on service cases
- Status of grant applications
- Donations received and sources
- Recent campaign performance

