

# Strengthen the bond with your members

The comprehensive marketing and management solution for membership organisations, based on Microsoft Dynamics

**Dynamics for Membership (DfM) is the first comprehensive IT system for the marketing and management of membership organisations.** It enables you to replace a patchwork of piecemeal solutions with one robust, integrated and durable system. By doing so you can be of better service to your members, and strengthen your bond with them.

#### Appealing and user friendly

The system has a fresh, user-friendly front-end: an online portal where your members or affiliated organisations will feel instantly at home. The professional back-office makes it easy to manage all your memberships. From complex invoicing to campaigns, all the essential functionality is combined in one system.

#### Integrated and up-to-date

With a well-oiled and integrated IT system you make it as easy as possible for your members. On top of that, correct and up-to-date information is ensured. Whereas before different departments had to maintain records, sometimes even on paper, organisations will now have access to a centralised data source. This means a reduced chance of errors and greater efficiency.

#### **Based on Microsoft Dynamics**

DfM is based on the proven IT solutions: **Microsoft Dynamics 365 for Finance and Operations** (for Enterprise Resource Planning) and **Microsoft Dynamics 365 for Sales** (for customer relationship management, marketing, sales and service). We developed extra modules especially for membership organisations. These modules join seamlessly together with **Microsoft Dynamics** and **Microsoft Office.** This makes DfM very approachable for your employees.

### Your benefits

You will have a single, integrated system in which back-office and front-office are linked in a logical way

You can rely on our comprehensive service and support, where needed supplied 24/7 on location worldwide

You only pay for the modules you use

We take care of the users training and installation, including transferring all financial and membership information

You can opt for traditional or cloud-based delivery, depending on what best suits the preferences and requirements of your organisation

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## DfM at a glance

<ul> <li>Revenue and invoicing</li> <li>Predict revenues from contracts</li> <li>Financial administration and invoicing</li> <li>Supports digital invoicing</li> </ul>	<ul> <li>Contract management</li> <li>Awarding promotions</li> <li>Setting rates and discounts</li> <li>Setting contracting and invoicing periods</li> <li>Assigning pilot contracts</li> </ul>
<ul> <li>Self-service system</li> <li>Via portals, websites and apps</li> <li>At a personal and organisational level</li> <li>Option of creating links with the service desk</li> </ul>	<ul> <li>Training and course management</li> <li>Course and training calendars</li> <li>Management of course locations and trainers</li> <li>Registration of participants, including</li> </ul>
<ul> <li>Human resources and workflows</li> <li>Setting up customised dashboards</li> <li>Recording processes and schedules</li> <li>Linking processes to employees</li> </ul>	<ul> <li>à-la-carte options</li> <li>Management of waiting lists, exams and exam results</li> <li>Registration of qualifications and credits after successful completion of exams</li> </ul>
<ul> <li>Customer and case management</li> <li>Member administration</li> <li>Management of profiles and cases (complaints)</li> <li>Setting rates and discounts based on customer profiles</li> <li>Data analysis and social listening for profiles and members</li> </ul>	<ul> <li>Qualifications and registration</li> <li>Qualifications of members and employees</li> <li>Management of register(s) of professionals</li> <li>Registration and renewal of qualifications and register entries</li> <li>Registration of points</li> </ul>
	<ul> <li>Predict revenues from contracts</li> <li>Financial administration and invoicing</li> <li>Supports digital invoicing</li> </ul> Self-service system <ul> <li>Via portals, websites and apps</li> <li>At a personal and organisational level</li> <li>Option of creating links with the service desk</li> </ul> Human resources and workflows <ul> <li>Setting up customised dashboards</li> <li>Recording processes and schedules</li> <li>Linking processes to employees</li> </ul> Customer and case management <ul> <li>Member administration</li> <li>Management of profiles and cases (complaints)</li> <li>Setting rates and discounts based on customer profiles</li> <li>Data analysis and social listening for profiles</li> </ul>

Interesting for all organisations with members and contractors. For example sports organisations, unions, charities or leasing companies.

#### Want to know more?

KPMG Crimsonwing forms part of the international KPMG network. We are certified Microsoft Partner.

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