



DYNAMICS ASSOCIATION BLUEPRINT

MADE FOR MEMBERSHIP AND VOLUNTEER ASSOCIATIONS

SEPT 20, 2018

Why Choose CRM Dynamics



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CRMD has the resources to efficiently and effectively find solutions that Associations need. We've been doing this for more than two decades and we're confident that our team has the ability and know-how to quickly deliver a customized solution that is uniquely right for membership associations. We believe in our product and we will show associations how to get the maximum benefit from their Dynamics 365 experience. You're not just a client when you work with CRMD—you're a partner and helping to drive our customers success is what motivates us.

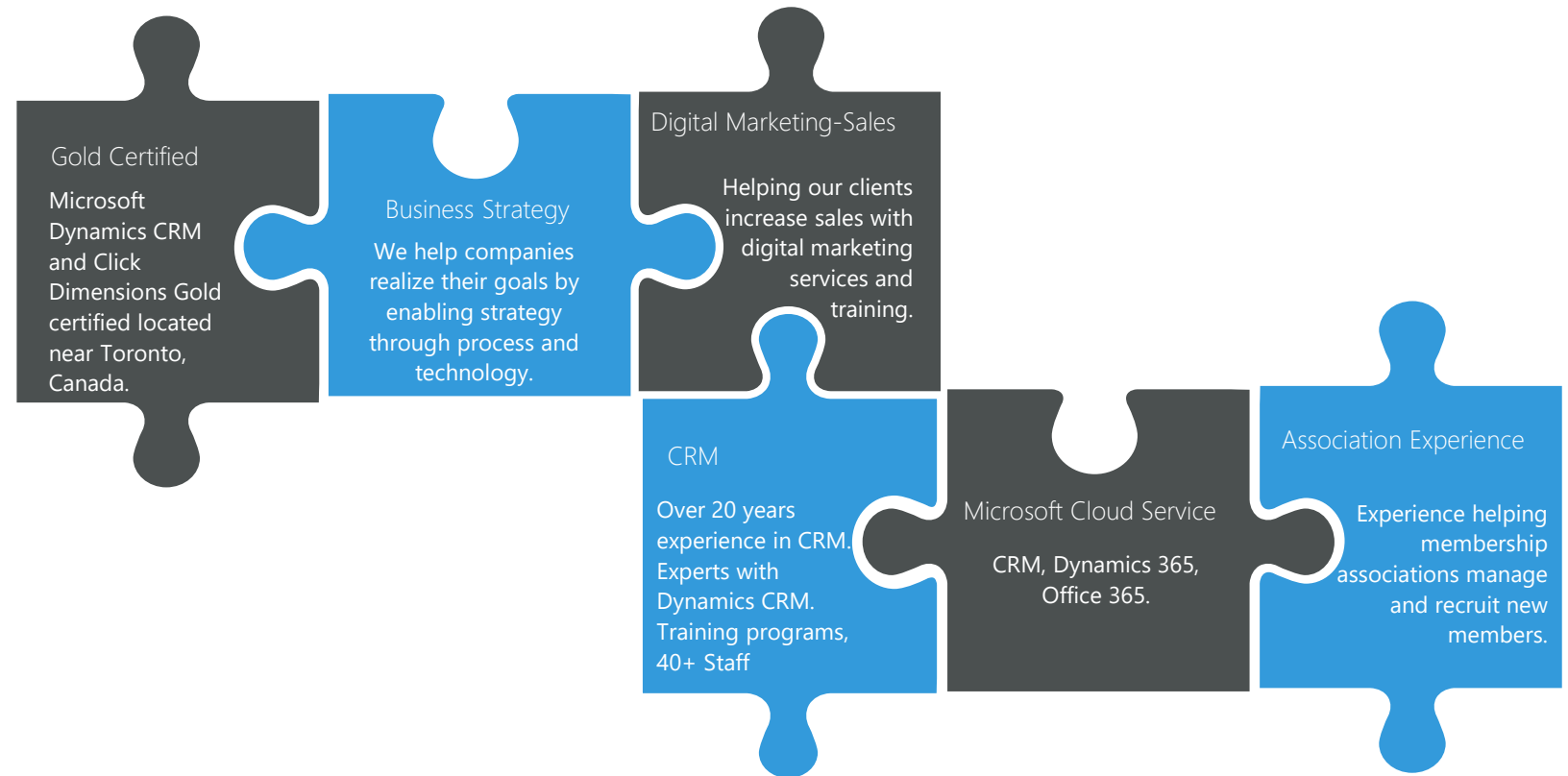
2

Our greatest value is our people. CRMD is the largest Microsoft Dynamics 365 partner in Canada and the size and skill of our team allows us to create unique solutions faster, more effectively and less expensive than our competition. We will work with Membership Associations every step of the way to help them unleash the full power of the Dynamics 365 platform.

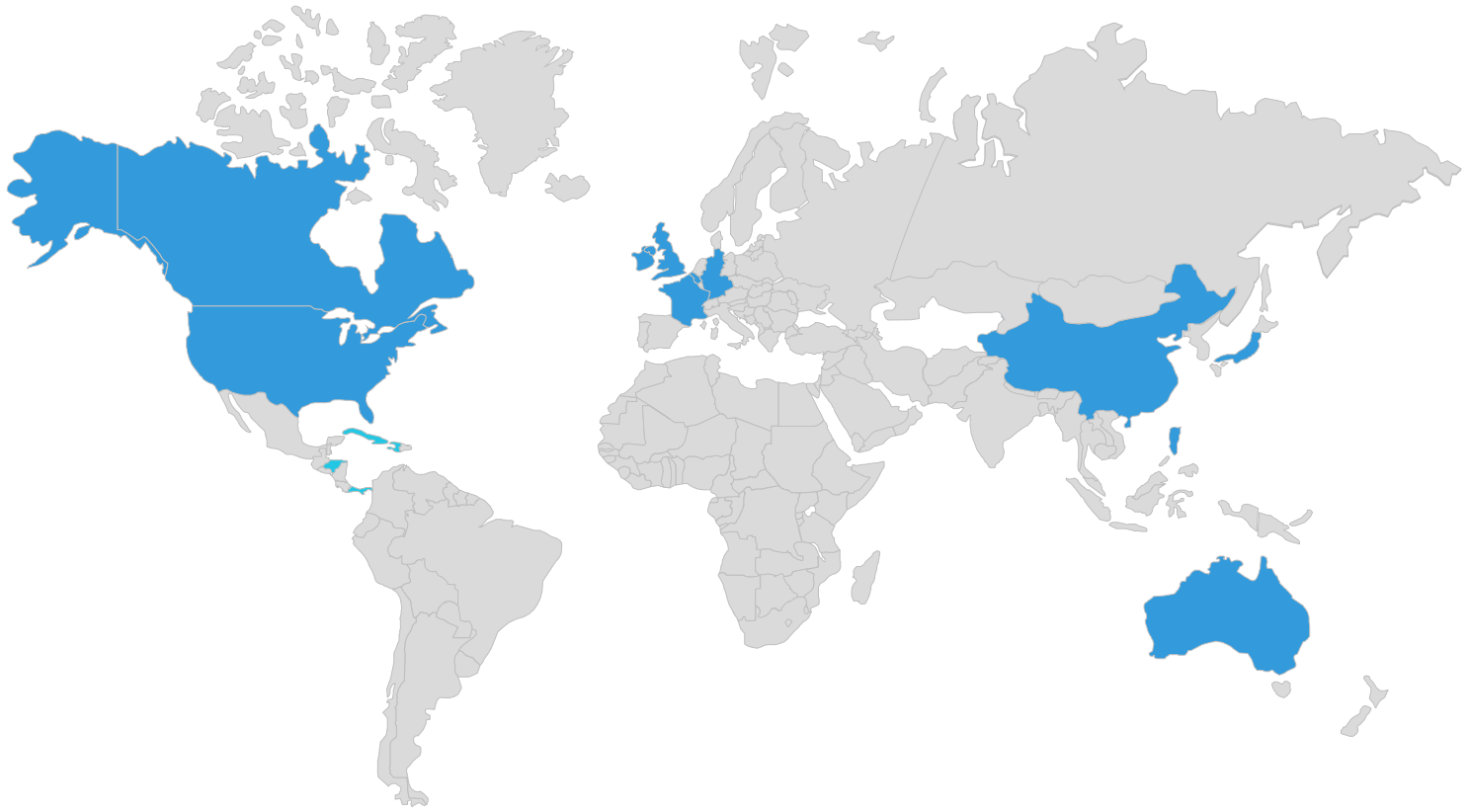
Who We Are



There are advantages to being one of the largest Microsoft Dynamics CRM / 365 partners in Canada. Advantages that you will directly benefit from. Our wealth of talent and experience provides us with the ability to utilize an “assembly line” approach to developing, which saves you time and money in the implementation process. We minimize the risk associated with a CRM implementation and operate in a fully transparent way throughout the process. By communicating with you at every step you won’t have any surprises and maintain control throughout. We know Dynamics 365 and want to work to show you how to take full advantage of all that it offers.



Where we Serve



WE ARE NORTH AMERICA FOCUSED AND SUPPORT GLOBAL IMPLEMENTATIONS

- We are a Canadian company
- Largest Dynamics 365 (CRM) partner in Canada
- All project resources live and work in Canada



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ASSOCIATION MANAGEMENT FOR CRM / D365

CRM Dynamics' Member Management 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, Membership Management can help your association 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. As a Microsoft Gold Certified Partner, we use the power of the Dynamics 365 CRM platform to give you a Membership Management solution that works.

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ASSOCIATION MANAGEMENT FOR CRM / D365

Member Management 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:

- Bringing all departments in one confidentially segregated system
- Managing Grants
- Managing Donations and Volunteers
- Workflow Automation
- Connecting to social media supporters to track trends and build campaigns
- Saving money and reducing costs
- Developing insight through Reporting and Dashboards

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FEATURES



Member Management

Membership Management 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, Membership Management will allow you to seamlessly accept registrations, track attendance numbers and accept payments. Multiple price points and partial or full cancelation refunds are all easily handled with Membership Management.



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. Membership Management 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 by Membership Management.



Continuing Education

Membership Management 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. Membership Management 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 Membership Management you can gather valuable information from those subscription lists that can help you maintain and attract new members.



Fundraising and Donor Management

Manage and track multiple campaigns and identify potential new donors. Additionally, Membership 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.

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FEATURES



Security

Membership 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, Membership Management can provide searchable directories and individual membership profiles. These can be searchable contingent on membership status, or open to the public.



Multilingual Ready

As a North American company, our design is fully functional in both 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 and ClickDimensions Integration

Powered by Dynamics 365, Membership Management 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 and 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

For more information:



- Please visit our website: www.crmdynamics.ca
- Email us at: Sales@crmdynamics.ca