idealist

CONSULTING

forward thinking, advanced solutions

Idealist Solution Kit
Memberships

An Idealist Solution Kit is a bundle of vetted solutions designed to help the organization lower deployment costs and simplify adoption through a streamlined and versatile development process.

What it does…

The membership solution kit is built in a mash up between the Salesforce.com, Vertical Response, Click and Pledge, and Form Assembly platforms.

With this solution your organization will be able to:
- Facilitate the process of membership management
- Avoid the additional fees of portal access
- Increase membership engagement by delivering calls of action directly to the member's email inbox

Designed by: Franklin Joyce

Solutions

1. Salesforce.com
2. Click and Pledge
3. Form Assembly
4. Vertical Response*

Features

- No passwords or portals required
- Membership dues payment-processing (from active members)
- Donation processing (for new members)
- Mass communications: includes reminders related to membership updates, payment notifications and other pertinent membership administrative tasks
- Customized contact information updates (for new and old members alike)
- Can recognize multiple membership levels and membership enrollment time spans
- Works with B2B and B2C process

Benefits

1. Lower deployment costs
2. Lower TCO
3. Faster membership dues collection
4. Lower overhead for updating records
5. Faster user-adoption for members and users

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Case study

Center for Nonprofit Management

Mission: Center for Nonprofit Management's mission is to strengthen nonprofits to enhance sustainability and maximize impact.

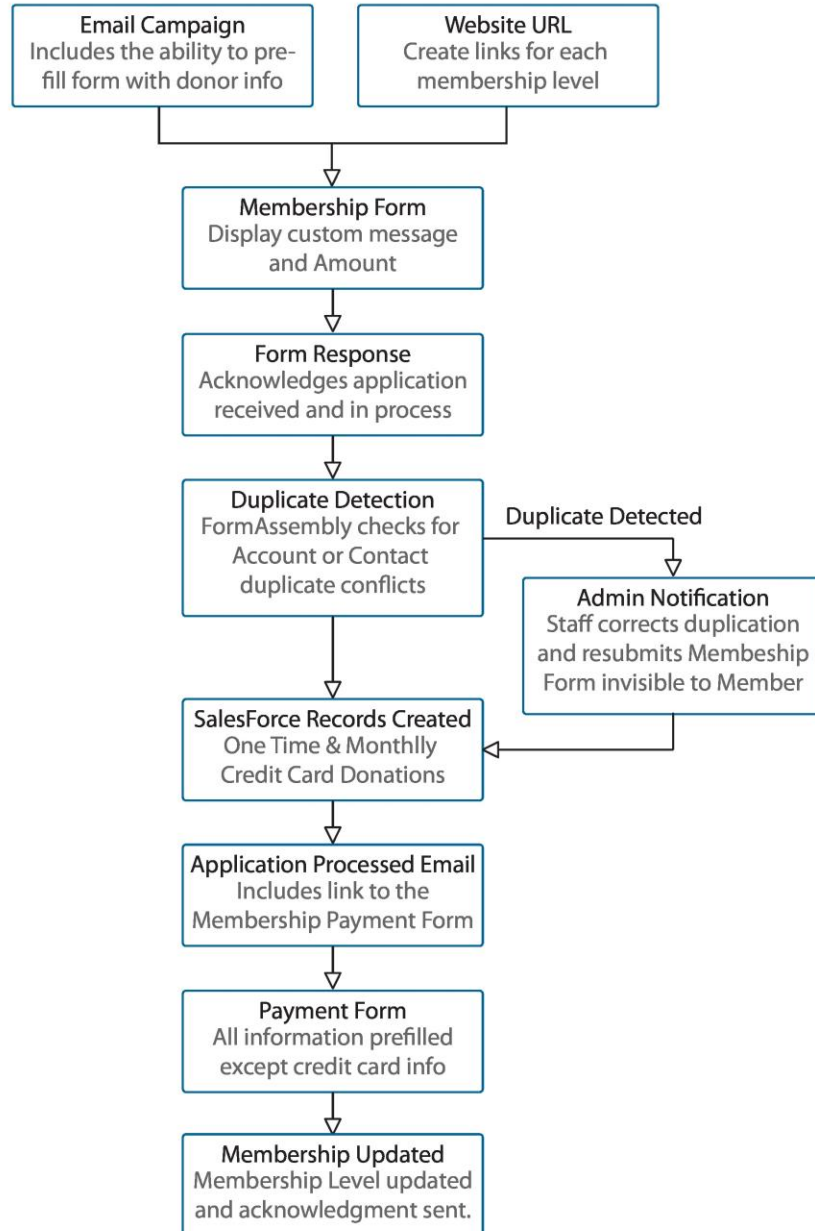**Project Goals:** To set up a membership process that was both affordable to deploy and agile for its members.

Members: 700 org memberships, 5 tiers.

Example of work

Presentation

Membership Process

Email Campaign
Includes the ability to pre-fill form with donor info

Website URL
Create links for each membership level

Membership Form
Display custom message and Amount

Form Response
Acknowledges application received and in process

Duplicate Detection
FormAssembly checks for Account or Contact duplicate conflicts

Duplicate Detected

Admin Notification
Staff corrects duplication and resubmits Membeship Form invisible to Member

SalesForce Records Created
One Time & Monthlly Credit Card Donations

Application Processed Email
Includes link to the Membership Payment Form

Payment Form
All information prefilled except credit card info

Membership Updated
Membership Level updated and acknowledgment sent.

What your staff will see

▼ Membership Information

CNM Membership Status	Current	iMIS Initial Join Date	
Membership Type	Mmbr Org	Initial Membership Join Date	4/14/2014
Membership Dues	$395	Renewal Date	4/30/2015
Membership Application Date	4/14/2014 9:40 AM		
Most recent membership payment date	4/14/2014		
Number of Members	1		

Renewal Letter

Franklin Joyce
City of Cannon Beach
123 Main St NW
Cannon Beach, OR 97110

Dear Franklin,

Your annual membership with the Oregon City is due to expire on 05/01/2014.

We hope you will renew and join us for another exciting year.

To continue receiving your membership benefits without interruption, please Click Here to update your membership application.

We look forward to continuing our relationship with you.

Sincerely,

How to sign up

Link to Payment Page

Franklin Joyce
City of Cannon Beach
123 Main St NW
Cannon Beach, OR 97110

Dear Franklin,

Thank you for updating your membership application. Just one more step to complete your renewal. Click Here to pay pay your annual dues of $1000.

Sincerely,

Renewal Page

Acknowledgment letters

LEAGUE of Oregon CITIES

Franklin Joyce
City of Cannon Beach
123 Main St NW
Cannon Beach, OR 97110

Dear Franklin,

Congratulations on renewing your Oregon City Membership.
Oregon City is proud to count Cannon Beach among it's
member cities.

Sincerely,

Deployment Specifics

1. 70 hours deployment time
2. 4 weeks deployment
3. Customizable to architecture
4. Additional customization beyond native solution kit billed hourly

Questions…

- Features
- Benefits
- Cost
- Customization