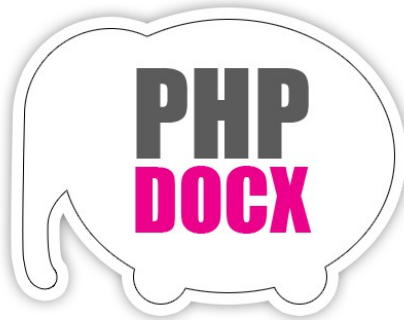


Expression of interest (Eol)

Briefing document

For

Juliana Koh



Test

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Test, Test, Test

08 October 2014

Juliana Koh

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1. Introduction

About this document

This document has been created to brief you and your organisation on our pending project and to ascertain your level of interest in participating in its delivery.

The document is only intended as a high level brief, full and detailed project documentation will be supplied to you soon, including functional requirements, should you wish to provide a quotation for the delivery of the project.

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Key project Objectives

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2. Project Scope

Currently we have identified a number of high level functional areas that we require the project to deliver upon. There are total **7** functional areas.

Future documentation will include a drill down into each of these areas, specifying a list of features within each.

Contact Database

In almost all membership system builds, whether on or off line, the contact database is a central feature. It is mandatory to the implementation of a working membership system.

Your contact database records information on all of your constituency, independent of their relationship to your organisation. These attributes (for example, subscriber, current member, committee member) all refer back to the central contact database.

A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

Contact database features include:

- Adding new contact details
- Managing and editing contacts and status
- Manage access and user permissions

Membership Application

Automation of membership processes, and providing the ability for members to self serve, can represent a significant saving (operational efficiency) to your organisation at the same time as providing improved (self) service.

Online membership application and membership processing can also encourage quicker renewals and an increase the overall number of renewals and new member applications. A list of functional line items relating to Membership Application are provided below for you to include or exclude.

Key Membership Application features are:

- Individuals / corporations can apply for membership via the public website
- Members can choose applicable options and levels
- Communications and payments are handled by the system

Marketing Communications

Moving your communications from the traditional posting of letters also represents significant savings and flexibility. Many organisations are in-fact being pushed by there members and constituents to stop sending letters, in preference to email.

Whilst for many the transition from letters to email can take some time, even moving 50% of your communications will save money and benefit the environment. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

Key features include:

- Newsletters (as well as notifications to individuals) can be sent from the system
- Subsets of database can be chosen based on a range of profile information and/or custom segments
- Statistics are available to allow analysis of success of communication

Events Registration

The management of events is a common activity and therefore requirement for Associations and non-profit systems. Its automation often represents dramatic savings because of the high level of manual processing required for each ticket and attendee for every event.

A list of functional line items relating to Event Registration are provided below for you to include or exclude and to provide a ranking of importance for your project.

Key features include:

- Events can be quickly and easily published onto the website
- Members receive different event pricing to non-members
- Registrants can purchase tickets to all events in a suite of events or purchase in groups

Event Administration

The 'back-office' activities required when running an event can be extensive and time consuming. Many however can be automated to some extent, which represents a significant saving of time and money.

Key features include:

- Seating allocation can be done automatically but with manual override as required
- Name tags can be automatically generated for event
- Follow up emails can be sent to both attendees and non-attendees after event

Continuing Professional Development

Many Associations focus on assisting in improve industry standards by providing, monitoring and rewarding members for undertaking ongoing professional development activities.

The steps and actions required to be taken by members in this process vary between industries, but many are based on points systems that require tracking. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

Key features include:

- CPD goals and points can be set-up flexibility in the system
- Members can be prevented from renewing their membership if CPD goal(s) have not been met
- Members can track and manage their own CPD record e.g. to add external activities that qualify for CPD recognition

Online Store

Online stores, or mechanisms to purchase products and resources can drive considerable revenue for Associations. They are also becoming quicker and easier to build into online platforms. In combination with a willingness to purchase online, this means that the ability to generate revenue from selling merchandise and products via your website is becoming increasingly attainable and popular.

Online stores can range dramatically in complexity and sophistication, so truly specifying and costing this area of functionality can be difficult.

Key features include:

- Any number of categories/subcategories of products can be defined
- Online payment can be taken flexibly via payment systems
- Different shipping methods and pricing can be configured

3. Milestones and timelines

The project duration is expected to be **0** days.

- The intended start date is: **30 November -0001**
- The target completion date is: **30 November -0001**

The project will include key milestones, these will help us monitor and keep the project on time and budget. The milestones are not finalised, but are likely to include:

Milestone No.	Milestone name	Date
1	Project Commencement	30 November -0001
2	Supplier engaged	30 November -0001
3	Scoping and planning complete	30 November -0001
4	Interface design complete	30 November -0001
5	Development complete	30 November -0001
6	User testing complete	30 November -0001
7	Training complete and system live	30 November -0001
8	Project Completion	30 November -0001