**ogether Culture CRM User Stories**

**Core Requirements**

**1. Community Journey Tracking**

As an administrator, I want to analyze the progression of members through our Community Journey by mining data and tracking engagement metrics, so that I can gain insights into user behavior and trends.

**Details:**

This feature will allow administrators to track how users progress through different stages of engagement. Administrators can define key milestones such as joining the community, attending events, participating in activities, and renewing memberships. The system should provide visual dashboards and reports that highlight conversion rates, drop-off points, and overall user engagement.

**Example:**

An administrator notices a drop-off in member engagement after the initial three months. By analyzing the data, they decide to introduce targeted outreach and incentives for members who reach this stage.

**2. Tagging and Relational Searches**

As an administrator, I want to create and apply tags to members and activities, and conduct searches using these tags, so that I can identify patterns and insights from the CRM dashboard.

**Details:**

Tags will be used to label members based on activities, interests, and engagement levels. For example, tags like "Frequent Attendee," "Workshop Participant," or "Caring Interest" can be added to members. The relational database should allow advanced searches combining multiple tags to find specific user groups.

**Example:**

An administrator searches for members tagged as "Creative Workspace Members" who have attended events in the last six months to send them a targeted survey.

**3. Password-Protected Members’ Area**

As a user, I want to log in to a password-protected members-only area, so that I can securely access my membership information and exclusive resources.

**Details:**

Members will have unique credentials to access a secure portal. The system should enforce strong password policies and offer two-factor authentication. The members’ area will be the central hub for accessing resources, benefits, and communication tools.

**Example:**

A member logs in to view upcoming events, access community documents, and check their membership status.

**4. Member Registration**

As an administrator, I want to add members who sign up via our website and categorize their predominant interests (e.g., caring, sharing, creating, experiencing, working), so that I can track and monitor their initial and evolving interests.

**Details:**

The registration process will include a form where members indicate their interests. These preferences will be saved in their profiles and can be updated over time. Administrators can use this data to tailor communication and event recommendations.

**Example:**

A new member selects "Creating" as their primary interest. The system highlights creative workshops and sends them invitations to relevant events.

**5. Membership Type Differentiation**

As an administrator, I want to categorize members into different membership types (Community Members, Key Access Members, Creative Workspace Members), so that I can manage and tailor their experiences based on their membership type.

**Details:**

Membership types will determine access levels, benefits, and pricing. The CRM should provide an interface for administrators to assign and modify membership types easily. Reports can be generated based on membership categories to track engagement.

**Example:**

Key Access Members might receive notifications about priority bookings for events, while Community Members receive general updates.

**6. Member and Non-Member Search**

As an administrator, I want to search for individual members and non-members to view their event attendance and visits, so that I can understand their engagement with Together Culture.

**Details:**

A robust search functionality will allow administrators to locate members and non-members using various criteria such as name, email, tags, or attendance records. The search results should display a timeline of the individual’s interactions with Together Culture.

**Example:**

An administrator searches for a specific guest who attended multiple events to invite them to become a member.

**7. Event and Time Period Reporting**

As an administrator, I want to search specific events or time periods to see guest attendance and identify who participated, so that I can generate accurate attendance reports.

**Details:**

This feature will provide filters to view event-specific data, such as attendee lists, engagement rates, and feedback scores. The system will also support exporting reports for analysis.

**Example:**

An administrator generates a report on all events held in the last quarter, noting attendance trends and identifying popular sessions.

**8. Membership Expression**

As a prospective member, I want to create a profile expressing my interest to join, so that my request can be reviewed and authorized by an administrator.

**Details:**

Prospective members will complete a profile form including their contact information, interests, and reasons for joining. Administrators will review these applications and approve or reject them. Notifications will be sent upon decision.

**Example:**

A prospective member submits an application highlighting their interest in "Sharing." The administrator approves the request, and the member receives a welcome email.

**9. Digital Content Module Booking**

As a member, I want to view and book digital content modules, so that I can easily access and participate in educational and creative opportunities.

**Details:**

The system will display a calendar of available modules, including descriptions and availability. Members can book slots directly through the platform and receive confirmation emails.

**Example:**

A member books a spot in a digital photography workshop and receives a link to access the session.

**10. Dashboard for Member Benefits**

As a member, I want to view a dashboard that shows the benefits I am using and those I have not yet utilized, so that I can see the value I am receiving and explore unused opportunities.

**Details:**

The dashboard will feature a summary of benefits such as event attendance, discounts, and exclusive content access. Unused benefits will be highlighted to encourage engagement.

**Example:**

A member sees they haven’t used their free monthly coworking session and decides to book a workspace.

**11. Interests and Intentions Overview**

As a member, I want to see the information I provided about my interests and intentions during the onboarding process, so that I can reflect on my goals and contributions to the community.

**Details:**

Members’ profiles will include a section summarizing their initial inputs during registration. This information can be updated over time to reflect changes in interests.

**Example:**

A member reviews their profile and updates their primary interest from "Experiencing" to "Working" as their focus shifts.

**Nice-to-Have Features**

**12. Event and Activity Suggestions**

As a member, I want to see personalized suggestions for events and activities based on my past engagement, so that I can discover relevant and enjoyable opportunities.

**Details:**

The system will use machine learning to recommend events and activities based on a member’s history. Recommendations will appear on the member dashboard.

**Example:**

A member receives a suggestion to attend an advanced pottery class after completing the beginner level.

**13. Digital Connections Board**

As a member, I want to access a digital connections board to see things other members need and can offer (e.g., timebank and skills library), so that I can contribute and connect with others effectively.

**Details:**

The connections board will function as a virtual bulletin board where members can post needs, offers, and collaborative opportunities. Posts will be categorized and searchable.

**Example:**

A member posts an offer to teach graphic design in exchange for help with social media marketing.

**14. Member Documents Access**

As a member, I want to view important member documents in the online members’ area, so that I can easily access resources and information shared by Together Culture.

**Details:**

The document library will include resources such as event guides, membership policies, and workshop materials. Members can download or view these documents online.

**Example:**

A member accesses the latest community guidelines document before attending an event.

**15. Online Member Communication**

As a member, I want to chat with other members in the online members’ area, so that I can build connections and collaborate with the community effectively.

**Details:**

The communication tool will include chat rooms, direct messaging, and group discussions. Moderation features will ensure respectful and productive interactions.

**Example:**

A member starts a discussion thread to organize a collaborative art project with others.