

## Prospect Journey – Tier 2

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This Prospect Journey includes the Nominee Form, that is sent to the Prospect to gather their detailed information, that will get captured into the Northstar Back Office. Reduces manual data capture work for the Client. The Nominee Form also has the ability to capture any membership fee which the Client would like Prospect to pay at the time of becoming a member.

Turnaround time required for configuration: 2 weeks (10 business days).

Start of Prospect Journey	
Anyone can submit a request from the Client's Public	An existing member submits their nomination of a new
Website with their interest to become a Member by filling	member from the Private Website using a CRM based
up a CRM based form.	form.
Prospect receives an automated e-mail that their request	Member receives an automated e-mail that their
for membership has been submitted.	nomination has been received by the Client
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The information submitted by the Prospect gets captured in	the NS Back Office Application> Membership Module -
-> Prospective List	
$\checkmark$	
The Client reviews the submission and decides internally whether or not to proceed with this application further	
$\checkmark$	
Client chooses to proceed with the Prospect Application.	Client decides to reject the Prospect Application. Will
Will change the Prospective Status of the application so	change the Prospective Status of the application to
that the Nominee Form can be triggered to the Prospect.	DENIED.
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The Prospect receives an e-mail with the secure link of a	
Nominee Form, in which the Client can ask the	
Application to submit detailed information like Employer,	
Address, Spouse Information, Children Information, etc.	
,.,.,.,.,.,.,,,.,	Member receives an automated e-mail that their
An option to collect payment from the Prospect can also	nomination has been rejected by the Client
be added to this Nominee Form. If the payment option is	
enabled, then a Guest Account will automatically get	
created in the NS Back Office Application for the Prospect,	
against which the payment will be captured.	
	End of Prospect Journey
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Prospect submits the Nominee form. All the information from this form gets captured automatically into the NS Back Office Application> Prospect Application		
Additional Prospect Records automatically get created for Spouse and Children in the Prospect List		
An automated e-mail is sent to the Prospect to acknowledge submission of the Nominee Form		
$\checkmark$		
The Client reviews the submission and decides internally whether to approve or reject this application		
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Client decides to approve the Prospect Application. Client will convert Prospect into a Member.	Client decides to reject the Prospect Application. Will change the Prospective Status of the application to DENIED.	
$\checkmark$	$\checkmark$	
New member receives a confirmation e-mail informing them that their membership has been approved and the details of their login credentials	Prospect receives an automated e-mail that their nomination has been rejected by the Client	
End of Prospect Journey		