

**Website Design & Membership Management Function Brief**

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| **Organisation:** |  |
| **Contact:** |  |
| **Date:** |  |

1. **OVERALL SITE DESIGN REQUIREMENTS**

**OBJECTIVES OF YOUR NEW SITE**

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| Please describe the major objectives for the site, as well as the activities you would like users to perform. *Copied from Helen’s email:* |
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**ENVIRONMENT SCAN - WHAT ARE YOUR COMPETITORS OFFERING?**

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| Who are your main competitors? |  |
| List 3 or more competitor sites that you like. Explain why: |  |
| List 3 or more competitor sites that you don’t like. Explain why: |  |

**USER ENGAGEMENT DATA & TRACKING INFORMATION?**

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| Is your current site tracked for user engagement - such as Google Analytics? If so, please supply access or engagement reports. *What does the data tell you about user behaviour on the site? (popular content, time on page, bounce rate)* |  |
| How will you measure the effectiveness of the new site? ( enquiries, sales, bookings or subscriptions) |  |

**REQUIREMENTS**

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| Do you have any color palette / font preferences? Do you have any text / copy / graphics for the site ready to go? |  |
| List 3 or more sites that you like to engage with. Explain why: |  |
| What key features need to appear on the HOME PAGE? (eg. Subscription sign up, Contact form? Photo Gallery, Map, product category list, etc.) |  |
| Are there any special requirements - multiple languages, accessibility, specific technologies? |  |

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**2.MEMBERSHIP MANAGEMENT REQUIREMENTS**

**GENERAL MEMBERSHIP INFORMATION**

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| Approximate number of members: |  |
| Membership categories: |  |
| Membership Subscription period: | * Annual (prorata – all members renew on same day) * Perpetual * Annual (12 monthly) |

**NEW MEMBERSHIP REGISTRATION**

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| Briefly describe the steps (including approvals) for a new member to register with your organisation online. |
| Do new members pay a joining fee + annual fee? |
| What payment methods do you offer? |

**MEMBERSHIP RENEWAL PROCESS**

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| Briefly describe the steps (including notifications) for an existing member to renew their membership |

**MEMBERSHIP MANAGEMENT ONLINE FEATURE REQUIREMENTS**

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| **FEATURE** | For each feature, please choose either: M = Mandatory, N= Nice to have, N/A = Not required |
| Members can view and edit their profiles (Users can update their name, email address, password, and any custom fields) |  |
| Payment gateway for membership fees |  |
| Content restriction (member only content pages) |  |
| Membership directory – display member list to other members (with search for members by name or location) |  |
| Public view membership directory |  |
| Electronic direct mail integration (sending member e-newsletters) |  |
| Shopping cart integration (to sell products or services to members – other than membership fees) |  |
| Event calendar and registration (member only) |  |
| Event registration – exclusive member pricing |  |
| Membership list and export to CSV file for Admin users |  |

**CRM REQUIREMENTS**

Member management systems are very good at providing a web-based ‘self service’ portal to manage and recruit members.  They are not so good at maintaining an archive of your interactions with members over time. The reverse is also true for CRMs.  Most are very good at lead management and contact history, but they don’t provide a portal for members to self-serve or Membership renewal and lapses processes.

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| Briefly describe how you need the member management system to integrate with your CRM, or if you require CRM type features in your solution. |

**GENERAL NOTES**

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| Briefly outline any additional features or functions that need to be added to your membership system. |

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