Prospect Journey – Tier 3

Prospect Journey Tier 3
In addition to the Nominee Form and , this Prospect Nomination Journey includes the ability to send additional forms to Prospect Application Supporters, who may submit their comments and letters of support for the Nominee.
Turnaround time for configuration: 3 weeks (15 business days).

Start of Prospect Journey	
Anyone can submit a request from the Client's Public Website with their interest to become a Member by filling up a CRM based form. Prospect receives an automated e-mail that their request for membership has been submitted.	An existing member submits their nomination of a new member from the Private Website using a CRM based form. In the same form, the Proposer will also provide details of additional existing members who are supporting this Prospect Application in the capacity of Seconder, Supporter, Referencer, etc. Member receives an automated e-mail that their 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**	
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The Client reviews the submission and decides internally whether or not to proceed with this application further	
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Client chooses to proceed with the Prospect Application. Will change the Prospective Status of the application so that the Nominee Form can be triggered to the Prospect.	Client decides to reject the Prospect Application. Will change the Prospective Status of the application to DENIED.
↓	↓
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. An option to collect payment from the Prospect can also 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.	Member receives an automated e-mail that their nomination has been rejected by the Client
↓	**End of Prospect Journey**

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

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At this stage, automated e-mails get triggered to the other Sponsors defined initially in the Prospect Journey by the Proposer. Their form may contain the following questions:

1. Tenure since they know the Nominee

2. Any comments they would like to mention about their relationship with the Nominee

3. Any attachment they would like to upload to support this Prospect Application

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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.
↓	↓
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