

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 Website with their interest to become a Member by filling up a CRM based form.	An existing member submits their nomination of a new member from the Private Website using a CRM based form.
Prospect receives an automated e-mail that their request for membership has been submitted.	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.
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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. 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

