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| BUSINESS PROCESS: | CHECKING & ADDING ACCOUNTS CONTACTS AND ENQURIES TO CRM |
| RESPONSIBLE/CRM AUTORITY: | ALL STAFF/ADVISOR STATUS |

Notes:

To record activity against projects and enable MI data collection all activities/outputs must be recorded on an/the Enquiry.

Per company it can have a number of Information Enquiries however only one Pledge Enquiry.

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| FUTURE ACTION TO IMPROVE PROCESS/DELIVERABLES: | |
| Growth Hub (Core) | 1. Integrated IDB template and process 2. Automate Referral process 3. Automate Satisfaction responses |

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| BUSINESS PROCESS: | REPORTS & MANAGEMENT INFORMATION |
| RESPONSIBLE/CRM AUTHORITY: | MANAGER STATUS |

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| FUTURE ACTION TO IMPROVE PROCESS/DELIVERABLES | |
| Growth Hub (Core) | 1. Enable appropriate other users access to reports |
| Growth Hub (Pledge) | 1. Set up view for all users 2. Set up engagement reports for manager 3. Enable Pledge Manager access to reports |
| LEP Policy | 1. tbc |

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| BUSINESS PROCESS: | MARKETING AND DISTRIBUTION LISTS |
| RESPONSIBLE/CRM AUTHORITY: | MANAGER STATUS |

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| FUTURE ACTION TO IMPROVE PROCESS/DELIVERABLES | |
| Growth Hub (Core)  Growth Hub (Pledge)  LEP Policy | 1. Integrate Mailchimp 2. Integrate Eventbrite 3. Integrate Surveymonkey |

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| BUSINESS PROCESS: | REFERRAL PROCESS ACROSS PROJECTS |
| RESPONSIBLE: | ALL TEAM MEMBERS |

