

Community Platform Requirements

Background

Currently L-soft listservs are being utilized to provide a forum for members to network with one another, share successes, get updates, and learn about resources and opportunities available for members. Though the listserv has been an important medium for members, APA is looking for a medium to increase member engagement and collaboration with a more personalized member experience. We are seeking out white-label platforms that fit our requirements and integrate with Salesforce and our IDEM system.

APA needs a portal that can provide the following benefits:

- Connect members around shared interests; “connect in ways that are meaningful and context-driven”
- Offer an intuitive, seamless experience via web or mobile
- Segment members based on criteria like division membership, interests, and more
- Facilitate collaboration between members, as well as between members and APA
- Detailed reporting capabilities
- Consolidate event management capabilities
- Plugs into Salesforce and Salesforce Marketing Cloud for contact and communication management

The requirements in this document are prioritized as follows:

	Value	Rating	Description
1	1	Critical	This requirement is critical to the success of the project. The project will not be possible without this requirement.
2	2	Medium	This requirement is high priority, but the project can be implemented at a bare minimum without this requirement.
3	3	Future	This requirement is somewhat important, as it provides some value and has been included here for a future release.

Business Requirements

	Req#	Priority	Description
1	BR-001	1	Create a “member central” page on the website: Help members to easily find the online forums they want by providing a member portal page
2	BR-002	3	Build website “how to” pages and 2-3 minute webinars demonstrating how to use the tools. This page also provides a “teaser” for nonmembers to see what they could access online if they join.
3	BR-003	1	The ability for both community manager and member-led content creation through forums, comments, chat. The community manager should be able to assign roles to any user including a moderator.
4	BR-004	1	Discussion groups should have the ability to be segmented by topic, division, or role. Sample roles include: New Member Community, Board Members, Division Officer. Sample topic include: Advocacy, Ethics, Child Psychology, Science. Workflows should be put in place to automatically assign users to appropriate roles and division forums. Automate recommendations for additional forums or content that use would be of interest to the user
5	BR-005	1	<u>Single Sign On</u> - Users should be able to access members-only section of the portal without being asked again for their username and password when clicking over to the online community.
6	BR-006	1	The community manager should have the ability to set the defaults for their frequency of post and the end user should be able to set notifications to arrive on a schedule they prefer.
			The community manager should have the ability to set permission for any post including: videos, files, and other uploaded content. The community

7	BR-007	1	manager should have the ability to set the content privacy to member only content or public content. Additionally, the community manager could highlight the post as a featured post.
8	BR-008	1	E-mail notification auto-login feature - Users should have the ability to post to the community without logging into the community.
9	BR-009	1	Allow community manager to send messages to certain segments of users, merge in member or community data, and have messages sent automatically when triggered by a member's activity or at certain time-based intervals.
10	BR-010	3	<p>Events - Publish and manage branded websites for both in person events, webinars, and learning management content. Create itineraries, session and speaker resources, event-focused discussions, and announcements</p> <p>Handle end-to-end collection and processing of registration data for events and webinars</p> <p>Establish payment routing providers for all your organization's Divisions, sections, and other subgroups</p> <p>Differential pricing to delineate staff, members, and nonmembers</p>
11	BR-011	1	<p>Reports - Automated Reporting will be delivered to APA stakeholders and community managers.</p> <p>Reporting topics can include: which users (how many, and specific people who) have taken a specific action during a timeframe that is defined; First time users to communities</p> <p>Dashboards that can be customized APA stakeholder</p>
12	BR-012	2	A two-way transfer of member data from the CRM package to the community platform.