

## case study

---

### The Brief

As a UK chartered professional body with more than 10,000 members, and a network of branches and special interest groups, as well as being a world-wide accreditation body for 8,000 professionals, the organisation needed to ensure that it met the diverse needs of both its members and the industries it served.

Being a body comprised largely of management professionals, the organisation realised that it had a problem – and needed to change if it was going to continue to be effective in providing the products and services needed by the membership. Business processes needed to improve in order to be more flexible and competitive; it needed to understand its membership better through improved contact relationship management (CRM), enabling improvements in the way it communicated and the targeting of its services and products; and the organisation's auditors were saying it needed to improve its financial accounting systems.

Whilst the organisation knew what needed to be done, there was a significant barrier to change – old and inappropriate IT systems and poor data. The organisation had separate databases for its membership and accreditation activities, and with an overlap in membership they didn't have a 'single view of the customer' across the two systems. The IT itself hadn't been upgraded for several years, was inflexible and didn't meet the needs of a changing business needing to work smarter.

Recognising the necessity to change their IT, the organisation launched a procurement process to identify new suppliers for integrated financial accounting, membership management and CRM systems. Having progressed to the stage of identifying a short-list of four suppliers, they realised that to achieve the benefits needed the change was going to be wider than just the IT and, if it was going to be successful, then professional project management would be essential.

# Chartered Professional Membership Organisation



The organisation engaged E AND H to provide project management expertise to complete the procurement and manage a successful implementation.

### Approach

Working with the executive team and senior managers, E AND H took a benefits based approach to gain a shared understanding of what was required, and the full range of components needing to be delivered through the project. A key constraint in the project was the budget – the organisation needed to maximise the benefits from the investment available.

A short exercise mapping customer journey experience identified the key business process improvements that were needed.

Future process scenarios, and a robust evaluation and due diligence process, formed key elements of E AND H's project initiation work, resulting in the appointment of IT suppliers for Finance and CRM systems.



Management.  
Projects.Change.

## Approach cont.

E AND H helped the organisation put effective project governance in place, and built a multi-disciplinary project team, involving full-time secondments of internal staff and the recruitment of external technical and data migration specialists.

The first three months of project delivery included a facilitated review of all the organisation's customer facing processes, and the documentation of new processes focused around their future needs. Working with the suppliers, the team completed a high-level configuration of the new databases and agreed an outline 'solution design'.

As delivery progressed, two significant problems quickly became apparent:

- The CRM's supplier's implementation method and approach weren't adequate for the scale and complexity of the implementation
- Data complexity and integrity – and the future need for data to be used in a different way.

In response to the CRM implementation challenges, E AND H established an 'agile' development approach, focusing on developing and testing individual areas of the solution in a series of 2-week 'sprints'. Whilst extending the overall implementation timescales, this changed approach enabled an appropriate solution to be delivered in a controlled way. In order to maintain the costs within the original budget, the organisation were able to use the benefits framework to identify and re-schedule less critical elements.

The 'agile' approach itself added to the data migration complexity, but through E AND H facilitating a future-focused view of the data requirement, and bringing in some additional expertise to ensure robust migration controls, the data challenges were successfully overcome.

The new financial system was implemented on time and below budget, and the new CRM system went 'live' later than originally planned, but still within budget.

## Benefits

The organisation now has a 'single view' of each of its members across both activities, enabling better communications and marketing and more effective service delivery. New and improved business processes have been introduced in key customer-facing areas. Integration with the new financial systems has resolved the historic financial control issues, and improved both management information and efficiency.

Having robust, flexible, integrated and fully supported IT systems has reduced the risks to the organisation, and importantly has provided a platform from which they are now able to fulfil their aim of 'continuous improvement', to better meet the needs of their membership and deliver the organisation's vision for the future.