FlexRM

CRM solutions delivered with flexibility

Case Study - Association of University Administrators (AUA)

Our client

The AUA is the professional association for higher education administrators and managers. As well as being a representative voice for HE professionals within the sector, they support and guide members career ambitions. AUA extends their members professional networks.

By connecting with like-minded individuals Members can look beyond their current role and institution and become part of the wider sector. Through these connections Members can share learning, encourage best practice and, importantly, help give the HE sector added credibility.

Challenges

The AUA had previously attempted to implement Dynamics 365 with another Microsoft partner but the project failed.

FlexRM took on the project and had to implement Dynamics 365 within a 6-month window, as their existing Membership management system was scheduled to be retired.

By utilising FlexRM's prebuilt Membership/Events modules and working collaboratively FlexRM were able to deliver the solution within the required timeframe.

Listed below are several areas of the business processes that have improved by utilising FlexRM's modules:

Joining

The process for joining the AUA is now much more straightforward.

"With the previous system processing memberships took a while; we had to batch them and typically it took around a week from receipt of the membership application to welcoming the new member.

Now, memberships from the website are processed automatically. Members apply, pay their subscriptions and are welcomed to the organisation all in around ten minutes and without our office staff being involved."

Anna Green, Head of Finance

Direct Debits

The AUA are benefitting from the ability to automatically send out direct debit schedules to their members. This is important as it fulfils their DD scheme advance notice requirements. This process in the old system was manual and AUA staff spent a lot of time pulling together the required information.

Retention

AUA have been live on FlexRM's modules for 1 year and are starting to see retention rates increase. AUA believe this is down to their staff having more time to engage with their members.

AUA are planning to make use of the automated renewal reminder functions to build a segmented retention campaign. For instance, a long-standing member who holds a senior role in their university will receive different automated retention communications than a new member in a more junior role.

Renewals

The renewal process in CRM is much slicker than in the previous system.

"Renewal notifications can be automated, and we have the flexibility to send some notifications by email and others by post. Renewals now run daily, where in the previous system they ran monthly. This allows us to spread the admin workload and smooth out the peaks of activity we experienced when we ran the processes previously. The renewals and reminder notification process in the previous system required a day and half to be blocked out. Now, most processes are completed with a few keystrokes."

Anna Green, Head of Finance

Events Management

Event setup utilising FlexRM's Events module takes roughly the same time as the previous CRM solution but the end product is much more sophisticated.

"The previous solution could not automatically apply the appropriate member rates to bookings and we could not restrict bookings to certain groups or members. The functionality of CRM has improved our communication with delegates and we're now able to send automatic booking confirmations and personalised joining instructions. Through the website integration, delegates can view the events they have booked and update their breakout session choices. We can also automatically allocate CPD hours to members after they have attended an event.

Management information has much improved throughout CRM, but particularly for events. CRM has allowed us to build views to show how events are performing, how many have booked on and estimated profits."

Anna Green, Head of Finance
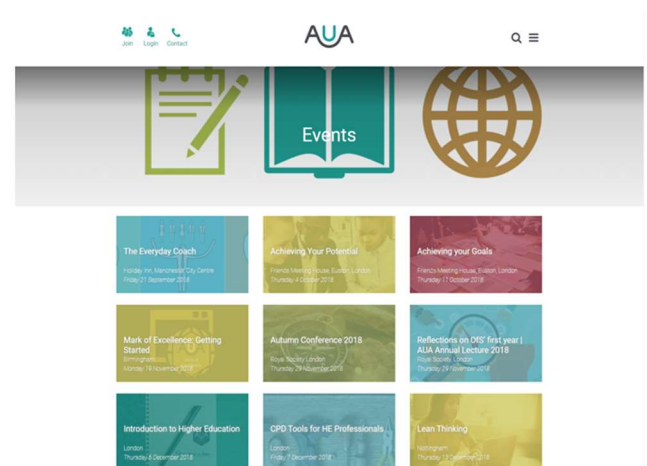
Knowing our Members

AUA have gained significant benefits regarding their Management Information and Business Intelligence reporting.

"The biggest change we have seen since launching CRM is how much information we are able to see about our members. From the main contact page we can view our communications with them, how long they have been a member, their membership status, the events they have attended and if they have any outstanding invoices. This is useful in itself, but additionally CRM enables us to straightforwardly aggregate and segment this data. This is allowing us to measure our performance much more effectively through member engagement scoring, it helps us to better understand the needs of members and it enables us to get the right message to right people through targeted communications."

Anna Green, Head of Finance
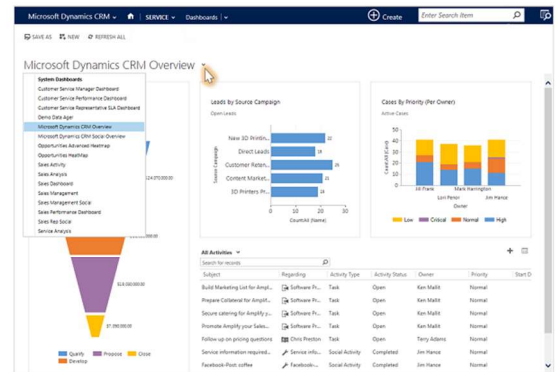
Website Integration

By utilising FlexRM's prebuilt API for website integration Members of the AUA are able to easily self-serve.

"The CRM integration has meant that pretty much all functions can be self-served by members. This is freeing up staff time to recruit, engage, plan and develop. It is also improving the member experience. We've been able to better connect members to the organisation through the MyAUA member dashboard (example below). And also AUA have been able to use the information from the API to better connect members to each other."

Anna Green, Head of Finance