

Case Study - The Goldsmiths' Centre

Our Client

The Goldsmiths' Centre is the UK's leading educational charity dedicated to improving skills and shaping the careers of jewellers, silversmiths and people working in the precious metal industry.



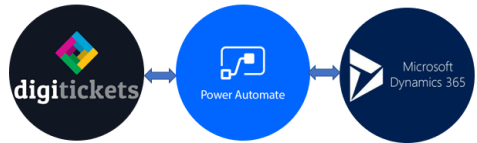
The
GOLDSMITHS'
Centre

CREATIVITY | CRAFTSMANSHIP | COMMUNITY

When The Goldsmiths' Centre engaged FlexRM they had a support contract in place with another partner but wanted to move to a new supplier. FlexRM started by completing an Audit of the existing implementation and made recommendations on how processes could be improved. This included migrating to the FlexRM Events App and updating the integration with DigiTickets (the Goldsmiths' Centre ticketing system).

DigiTickets Integration

FlexRM have built a integration to DigiTickets utilising Power Automate which is a low-code workflow automation engine. The integration provides the Goldsmiths' Centre a 360-degree view of their customers with all Membership/Event ticket sales automatically feeding into Dynamics 365 to enable streamlined reporting and marketing.

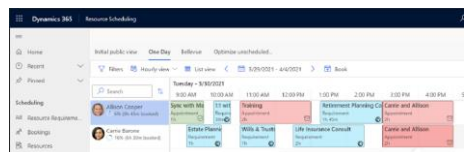


Venue Hire

The solution is also used by the Venue Hire team to manage different venues at the Goldsmiths' Centre for private Event hire.

The FlexRM Events App enables Venue Hire teams to create Appointments for different facilities against an Event record. A scheduling calendar displays all bookings for the different facilities (colour coded depending on booking status) in an interactive calendar view. This visibility enables the Venue Hire team to easily schedule and manage multiple Events.

Event revenue and expenses are documented for each event to assess its profitability. Dynamics 365 is used to create various documents, such as booking confirmations and function sheets, using Word templates. This allows for streamlined and standardised document generation within the system.



Membership

Various membership types are available for purchase through different channels. DigiTickets handles the sale of Link and Student Memberships, while Gold Memberships require users to submit an inquiry on the website and undergo manual approval in Dynamics 365. To ensure data synchronisation, FlexRM has developed the following Power Automate flows between Dynamics and DigiTickets:

- Pull from DigiTickets: All membership purchases are imported into Dynamics 365.
- Push from Dynamics 365: New memberships are added to DigiTickets.

In the case of Gold Memberships, the application process is managed within Dynamics 365. Once an application is approved, a flag is set on the membership record to trigger the transfer of relevant details to DigiTickets.

Data Migration

FlexRM effectively transferred all legacy Events, Event Bookings, Room Bookings, and Membership records to the FlexRM Events and Membership Apps.

To load the data into Dynamics 365, a trusted third-party tool called KingswaySoft is utilised. Known as a leading solution in the market, KingswaySoft is specifically designed for handling large data volumes within Dynamics 365. For each entity being loaded, an Upsert package is created, enabling records to be either inserted if they don't already exist or

updated if they have already been migrated. This ensures a seamless and efficient data migration process.

Challenges

FlexRM successfully implemented the solution within a 6-month timeframe, ensuring completion before the support contract with the previous supplier expired. The project was delivered on schedule and within budget.

Furthermore, FlexRM currently maintains an active support contract with the Goldsmiths' Centre. Additionally, there are plans for further development work scheduled for phase 2 of the project.

FlexRM came on board to help us to ensure our Microsoft Dynamics CRM system remained robust and agile in light of future Cloud based system upgrades. They ensured the longevity of the Goldsmiths' Centre's operational site calendar, events management module and ticketing and membership integrations. FlexRM not only spent time to really understand our charity's needs and processes,

but also made recommendations to improve workflows and existing integrations to cut down on unnecessary manual processes and improve use of the CRM by the team. Punctual, responsive, friendly and offering clear advice and solutions, FlexRM are a fantastic team to work with. Isabel Kem, Marketing and Communications Manager



Gold Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions
Silver ISV