● FlexRM

CRM solutions delivered with flexibility

Case Study - The Nationwide Caterers Association (NCASS)

Our Client

NCASS are the only specialist organisation for independent food & drink businesses in the UK. NCASS is an association dedicated to supporting catering businesses, particularly mobile and event caterers. The organisation aims to provide a range of services and resources to help caterers navigate the challenges of the industry. They have been supporting their members be safe, legal, and profitable for 30 years.

When NCASS engaged FlexRM they had a bespoke Membership and Communication management system that had been developed internally. Although NCASS had technical capabilities supporting the bespoke system, business as usual activities were very time consuming and inefficient.

Key Business Processes

Membership Management: NCASS had a mixture of online and phone sign-ups with different membership tiers. They needed flexibility to accommodate changes in membership tiers with immediate access to online services. Renewal reminders often required calls due to the nature of their customer base.

Price increases caused issues as when fees changed this affected all outstanding invoices, not just the newly created invoices. This required manual work by account managers to retrospectively alter existing invoices after a price increase which was subject to human error.

Semi-Automated CPA: Several members used Continuous Payment Authority as their payment method and although NCASS's previous system allowed for this, taking future payments was a manual process ran by a member of staff out of hours.

Data and Reporting: NCASS's bespoke membership management system didn't have a reporting engine. As a result, generating reports was a time-consuming manual process.

Sales Pipeline and Targets: NCASS didn't have a system which would allow them to track sales leads and opportunities. As a result, these were managed in Spreadsheets outside of the system. Although the existing system had a Dashboard built to show counts of sales per day, week, month, and year there was a lot of manual work carried out to monitor sales goals.

Welcome Packs: Creating Welcome Packs previously involved an office administrator manually copying and pasting a list of packs for dispatch. Subsequently, each certificate and members' risk assessments had to be printed individually. This procedure used to consume approximately 2 hours daily.

Marketing: The NCASS membership management system wasn't integrated with a marketing platform and relied on the Marketing teams exporting data from the system before importing into their marketing platform. This resulted in a minimal number of regular marketing emails due to the effort required and the inability to segment on different criteria.

Finance Integration: Invoices raised in the previous membership management system required manual integration to move them to QuickBooks. This took on average 2-3 hours per day.

Frequently, invoices were generated both manually in QuickBooks and automatically transmitted from the membership system, leading to the occurrence of duplicate invoices. Subsequently, manual efforts were necessary to reconcile these duplicates.
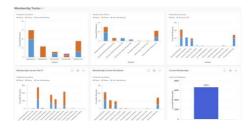
Process/Integration Improvements

Automation of CPA: With FlexRM's solution, NCASS automated their CPA process, saving several days of administration time throughout the year.

Improved Member Engagement: NCASS enhanced member engagement through customised communication rules, ensuring members received timely information and support.

Efficient Reporting: Dynamics 365 and Power BI dashboards provide NCASS with valuable insights into their membership data and business trends, facilitating informed decision-making. This includes tracking new members, retention, upgrades, downgrades, cancellations, sales goals, financial and regional trends.

Enhanced Member Experience: The website integration improved the member experience, allowing members to access services easily and stay connected with the organisation.

Flexibility and Control: NCASS gained the flexibility to modify communication rules and manage their CRM system independently, reducing reliance on external support.

Integration: The Dynamics 365 solution is integrated to external applications including DPD, QuickBooks, SOTpay, Opayo and the NCASS Website. NCASS leveraged FlexRM's pre-built API for website integration, enabling members to access self-service functions and improving member experience.

Marketing: NCASS selected Dotdigital as their Marketing automation platform. Marketing Lists are created from filters in Dynamics 365 and synced to the Dotdigital platform. Campaign statistics for Clicks/Opens/Unsubscribes sync back to Dynamics 365 from Dotdigital.

Data Migration

FlexRM transferred all legacy Companies, Contacts, Memberships, Invoices and Transactions records to the FlexRM and Membership Apps.

To load the data into Dynamics 365, a trusted third-party tool called KingswaySoft was 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 was created, enabling records to be either inserted if they don't already exist or updated if they have already been migrated. This ensured a seamless and efficient data migration process.

Challenges

Due to the way NCASS's bespoke system had been created there were several challenges with the data migration. A particularly challenging area was the finance data where there was a mixture of invoice and quotation records which couldn't be identified. This resulted in a close collaboration between FlexRM and NCASS to export and translate data from the finance system to migrate to Dynamics 365 rather than the Membership system which was the original plan.

Support Post Go-Live

FlexRM currently maintains an active support contract with NCASS. Additionally, there are plans to further develop the solution with future phases scheduled.

We chose to collaborate with FlexRM because of their flexibility, professional and practical approach, attributes that were challenging to find in other partners. They successfully delivered the Dynamics 365 implementation to manage Memberships, streamline business processes and integrate with external Business Applications.

In addition to thoroughly grasping our requirements and procedures, FlexRM provided insightful recommendations to enhance workflows and streamline existing integrations, reducing the need for manual processes and optimising the team's use of the CRM. With a punctual, responsive, and friendly approach, along with clear advice and effective solutions, FlexRM has proven to be an exceptional team to collaborate with. Daren Fox, IT and Technology Director