

# Case Study

## Charity seeks certainty and dependability in its Dynamics CRM provider



**EPILEPSY  
ACTION**

Epilepsy Action is a UK charity that supports 600,000 individuals living with epilepsy.

The charity also supports caregivers, educators, healthcare workers, nurses, and employers. It has 70 staff members, a network of volunteers, and an annual turnover of approximately £3.5m with no government funding.

### THE TRANSFORMATION CHALLENGE

In 2017, Epilepsy Action partnered with a different Microsoft Dynamics provider for a new NFP product, replacing ProgressCRM. Progress on the project was slow, with only one team live by October 2020, despite the project being estimated at 40-50% completion after 18 months.

EA then enlisted HartSquare to gather requirements, create a tender, and guide internal teams for a successful implementation. The procurement process started in September 2021, and by Christmas, Bluelight was chosen to kickstart the project.

### THE APPROACH

EA approached Bluelight via HartSquare to migrate to Bluelight's BlueCRM Dynamics product, which was developed specifically to focus on the NFP sector. The requirement was to ensure that the product would also offer the future-proof CRM EA needed to support their evolving objectives.

The CRM was seen as the heart of the transformation, but two satellite projects were running simultaneously: one to move the Finance platform over to Business Central and another to replace the existing Portal and expand the functionality to manage Membership, Preferences, and Events. Both systems would need to integrate with BlueCRM.

**"Our search for a reliable and experienced CRM supplier led us to Bluelight, and I'm pleased to add myself and Epilepsy Action to the comprehensive list of Bluelight's clients who are massively positive supporters of them."**

**Jon Eaton**

Director of Communications &  
Digital Engagement

**Epilepsy Action**



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## THE TRANSFORMATION SUCCESS

- 1 Detailed analysis of business requirements across all departments
- 2 Dynamics CRM implementation
- 3 Enhanced support via data migration from legacy Progress CRM to the Helpline Service's Dynamics 365 instance.
- 4 Integration functionality deployed across multiple platforms, including:
  - JustGiving, GivePanel, Enthuse, and MuchLoved for fundraising
  - Assemble and EventBrite for volunteering
  - SmartDebit and HMRC for finance
  - E-Learning for training
  - ClickDimensions for marketing

## THE BENEFITS

- A unified 360° view of users to deliver improved value to members, fundraisers, volunteers, and support contacts.
- Integrated and accessible CRM system that staff can access and utilise effectively.
- An increase of member engagement through targeted communication using ClickDimensions
- Access to an overview of contacts and charity information avoiding silos.
- Efficient staff collaboration within one system, providing resources to members through automation and integrations,
- Reduction in manual processes.
- Dynamics CRM implementation and data migration from legacy sources
- Departmental dashboards to allow a complete overview of each business area within the system

"Bluelight's energy, expertise, and guidance were instrumental in helping us reach our go-live point. We are excited about the opportunity to expand upon the strong foundation they've established for us."

**Jon Eaton**  
Director of Communications &  
Digital Engagement  
**Epilepsy Action**