A fully integrated membership management system that has streamlined operations and minimised admin costs

LONDON FIRST

As a membership organisation London First needed to ensure that its members derived greater benefits from their annual subscriptions.

They achieved this with a bespoke Microsoft CRM implemented by Core.

London First is a not for profit business membership organisation with a mission to ensure that London is the primary city to do business in globally. They achieve this through influencing both local and national Government policy. Their membership represents a quarter of London's GDP, offering them a public voice and a conduit of communication to Government.

They needed to replace their legacy Goldmine system with a powerful membership management system which would allow them to streamline their business processes and reduce administration costs whilst maintaining a relevance to their core mission.

Core worked with London First to implement a Microsoft Dynamics CRM, specifically for use by member organisations. Offering a workflow driven model for contact management which integrated with Microsoft Outlook and the whole Microsoft suite, offered them real value for money and exceptional usability.

London First chose to work with Core as they were able to offer a lean project that was flexible, relevant and centred on the way in which they communicate with their members. The entire project was supported by leaders in CRM implementation and customisation, with a strong pedigree of working with other membership organisations.

Short Overview

- London First is a not-for-profit organisation, entirely funded by its members. Its agenda is developed independent of party political motives or affiliations.

- London First's mission is to make London the best city in the world in which to do business; influencing government policies and investment decisions. Its influence is built on the breadth, depth and calibre of its membership.

- Clients include Coca Cola, GlaxoSmithKline, John Lewis, Comic Relief and Yahoo.

To begin the customisation process Core initially carried out a complete data migration from the previous Goldmine system, using our own patented data migration systems to immediately populate the new Microsoft CRM, making it useable straight away and affording London First with a flexible and minimal cost solution.

Core then worked with London First to customise the entity structure of the CRM to allow individuals and businesses to be narrowly defined ensuring that relevant member lists could be populated quickly providing an accurate and efficient communication method.

The customisation did not stop there; Core then went on to work with London First to customise Microsoft's CRM activities options; offering up to 50 different methods of communication with each entity. Combined with bespoke workflow processes and integration with Microsoft Outlook to allow automatic activities and an enhanced communication management systems that would minimise administration costs whilst maintaining membership expectations.

Today London First have a segmented membership and stakeholder database that can be contacted, analysed and updated through workflow drive processes within Microsoft CRM, which has streamlined operations and minimised admin.

Working with Core has enabled London First to develop a fully integrated membership and stakeholder management system that provides an accessible and comprehensible overview of the organisation.

The enhanced data management and the ability to schedule communications as part of an integrated system has improved productivity and member interactions. They are now conducted faster and with greater accuracy, saving at least two members of staff a year which is essential for a not-for-profit organisation that is running to a tight budget.

Core were able to develop a flexible and collaborative deployment method that places the focus on the client first and the IT second. Using our unrivalled membership platform, designed exactly for this purpose along with our sector expertise and affordable licensing options we were able to provide a product that was fully integrated with London Firsts processes, providing an implementation that was cost effective and time efficient.

About Core

Core provides consultancy, development and support for SharePoint, CRM Dynamics, System Center and Microsoft Online Services (Office 365, Windows Intune and Windows Azure). We have over 25 years' experience helping clients across a range of industries to improve productivity, efficiency and achieve their business goals.

As an established Microsoft Gold partner, we enjoy the highest level of support from Microsoft and have consistently been launch partners for new Microsoft technologies and releases.

Core has configured Microsoft Dynamics CRM specifically for use by member organisations. The result is the familiar Microsoft interface centred around the member journey.