

Make Happen

Professional, efficient marketing communications for Make Happen

Project summary:



First ever CRM system for Make Happen



ClickDimensions and EventBrite for professional and coordinated client communications and event management



Campaign automation for more productive use of admin time



One complete and reliable centralised data repository



Accurate reporting on campaign progress and results

The Challenge:

Slicker, more efficient marketing communications

Stephen Pomfret is Make Happen's Head of Collaborative Outreach. He explains: "We wanted a more professional marketing communications solution that would help us track performance and create a consistent, effective set of email templates. We don't have a dedicated marketing team, so everyone needs to be able to create and distribute content with our communications tools – ease of use is really important."

Make Happen did not have an existing CRM solution. The University of Essex, where the team is based, uses Dynamics 365 CRM and works with Xpeditio: Stephen approached us because of their positive experience.

Stephen adds, "We also spoke to other CRM specialists about what they could offer, but the combination of Xpeditio and Dynamics 365 CRM was the best fit for our approach and requirements."

The Solution:

Scoping and deploying CRM and marketing tools from scratch

Xpeditio's consultants scoped and planned the entire solution from scratch. There were some challenges at the start, because Make Happen uses some University of Essex technology resources. Once the team had established how to work within this context, the design and build went ahead.

As CRM was completely new to Make Happen, lead consultant Nealesh Patel advised building and releasing the core functionality so that the users could get used to the system and then provide feedback about extra features and

functions that might be most useful. Xpeditio's consultant Venous Khodabandehlou worked side by side with the Make Happen team to help them set up initial email templates and adopt a best practice approach to email marketing and communication. Using standardised email templates provides the Make Happen team with the ability to demonstrate consistency in its branding and enable more efficient subscription management. Through this knowledge transfer, Make Happen have learned how to make the most efficient use of their resources, reducing repetitive manual tasks and increasing efficiency.

Initial user workshops took place on-site at Make Happen's offices: when lockdown measures were in place, the training and rollout continued remotely, through digital channels. Stephen says, "It has been brilliant – pretty much seamless. We were already conducting meetings remotely as it was efficient. The training Xpeditio delivered online felt just as high quality as the initial in-person workshops."

Make Happen's CRM solution is integrated with Microsoft Outlook and SharePoint, and with marketing automation software solution, ClickDimensions. As well as being an innovative marketing solution, ClickDimensions integrates with popular event management and ticketing platform, EventBrite. This integration enables Make Happen to drive an holistic approach to successful collaboration and marketing management via email and with direct connection to the event booking gateway.

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Make Happen is a regional Uni Connect programme based at the University of Essex. The programme brings together universities, colleges and local partners to deliver outreach programmes to young people in years 9 to 13, with a particular focus on areas where higher education participation is lower than might be expected. Working with partnership schools and colleges, Make Happen's team of 24 has reached more than 66,500 students through activities like events, workshops and tours.



The Results:

A coordinated and complete marketing and customer information system

The Dynamics 365 CRM deployment has made a big difference to the Make Happen team. Stephen explains: "Before, we didn't have any coordinated marketing systems in place. With Dynamics 365 CRM, we have our data in one place, including information about schools and institutions we work with. Everything was scattered around in spreadsheets and individual filing cabinets. Now we have a central hub for all event information. From a management point of view, all this feeds into a reporting dashboard that shows us an accurate picture of finances and how our projects are tracking. This is a big improvement."

The Benefits:

Efficiency, consistency and effective, professional marketing communications

For Make Happen, centralising information is particularly important. Stephen says, "We quite often bring in temporary staff to work on particular projects or at busy periods. It was difficult to retain their knowledge, contacts and interactions when they moved on, because it would be in their individual email accounts or stored separately. Our short-term staff can now use Dynamics to keep records of their outreach and contact activities, so it's easy for us to refer to or evaluate whenever we want."

Another major benefit is automation. "People don't have to send manual emails anymore. It saves a lot of time and makes our comms far more consistent. We can send out a larger volume of communications, which helps us reach more people, more often."

With Dynamics 365 CRM, Make Happen can communicate with its audience in a professional way, using consistent formats and avoiding duplication of effort. Emails, newsletters and bookings are all recorded and tracked in one system, giving a reliable and clear picture of activities and results.

"Xpeditio has been fantastic at supporting us with using the system. It has hugely improved our processes and efficiency, which is great, because it frees up more of our time to spend supporting students rather than doing admin. I can't speak highly enough of our consultants Nealesh and Venous: they helped us identify what we needed from the system and found the best ways to make it work. They were there to offer advice and tips whenever we needed them."

Stephen Pomfret, Head of Collaborative Outreach, Make Happen

About Xpeditio

With 20 years as a Microsoft Gold Partner and more than 630 successful Dynamics 365 projects delivered, Xpeditio is one of the UK's leading and trusted Microsoft Dynamics 365 implementation partners.

Whether you're looking to move to the cloud, implement a new business application, enhance your existing Dynamics 365 implementation, or need support, we're here to help businesses transform and grow.

To find out more about Xpeditio and how Microsoft Dynamics 365 can benefit your business, contact one of our experts today.

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**Fast-track your journey
to CRM success with
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To learn more about Xpeditio visit:
xpeditio.co.uk
Or contact us on
+44 (0)20 7121 4705

46 Worship Street
London
EC2A 2EA