



HIGHLIGHTS



User-friendly Member Portal provides seamless access to memberships, payments, and professional development.



Real-time, accurate data in a centralised location provides a single source of truth, enhancing staff efficiency

The PWI enhances member engagement and operational efficiency with Dynamics 365 and the Power Platform

The challenge

The Permanent Way Institution (PWI) faced inefficiencies with an outdated membership system, relying on an old website and back-end database that lacked modern functionality for managing memberships and Professional Development Plans (PDPs). Membership sign-ups required manual intervention, and the use of spreadsheets increased the risk of data duplication. The lack of integration between Sage and the membership system required manual financial reconciliation. Additionally, members experienced a fragmented journey, needing multiple logins to access resources, hindering efficient engagement.

The solution

Pragmatiq replaced PWI's outdated website with a Power Pages portal, offering a single sign-on (SSO) system for seamless access to resources, events, and renewals. Dynamics 365 Sales centralised stakeholder, contact, and membership data, allowing members to self-manage profiles. Sage and Sage Pay integration automated payments, streamlining processes. Members can track PDPs and CPD activities, with data available for reporting. Event management was optimised using Dynamics 365 Customer Insights – Journeys, which also enables the automation of all marketing communications.

The results

- The connected solution provides **real-time access to accurate data**, streamlining operations and improving staff efficiency with a single source of truth.
- Automation across processes like member sign-ups and invoicing **reduces manual tasks**, enabling staff to focus on higher-value activities.
- The self-service portal **enhances the member experience**, allowing easy management of memberships, payments, and professional development, all with a seamless single sign-on.
- Real-time integration with Sage **ensures accurate financial data**, while automated **communications boost member engagement** and the scalable, cloud-based platform **supports PWI's long-term growth**.

Learn more: [View full PWI case study on Pragmatiq website](#)