

NHS Providers relaunch a trusted Dynamics CRM to scale national member engagement

NHS Providers is the membership organisation and trade association representing every NHS trust in the UK, covering acute, ambulance, community and mental health services.

Its members collectively account for £87bn of annual expenditure and employ more than one million staff. The organisation exists to help trusts deliver high-quality, patient-focused care by enabling shared learning, acting as a collective voice, and influencing health policy



"Why smartimpact? They are clearly experts in their field and proved to be the friendly solution-focused partner we were looking for. When we ran workshops together, it was clear they really listened to us.

There was a great rapport and a feeling of general respect whenever we met with any of their team."

Sandra Marshall, Senior Strategic Membership and Engagement Manager, NHS Providers

The challenge - rebuilding trust in Dynamics

NHS Providers was already using Microsoft Dynamics, delivered by a well-known Dynamics membership specialist, but the implementation no longer met organisational needs. The CRM had become unreliable and difficult to use, and staff no longer trusted it. Data quality had deteriorated, records appeared to disappear, and confidence in the system collapsed. As a result, adoption fell away and the CRM could no longer operate as a single source of truth for member data.

At the same time, the events system was effectively broken, limiting the organisation's ability to deliver conferences, training and large-scale member engagement activity. NHS Providers needed to rescue and relaunch its CRM capability at pace, without disrupting business-critical operations.

The requirement was clear: a trusted, organisation-wide Dynamics platform that worked, integrated cleanly with finance, email and web systems, and could support long-term growth.

The approach - a rapid, phased CRM relaunch

Over a focused 12-month programme, smartimpact delivered a phased replacement and relaunch of NHS Providers' Dynamics CRM, membership and events platform.

Working in very close partnership with NHS Providers' project board, sponsor and operational teams, the programme prioritised rapid stabilisation followed by incremental improvement. Regular workshops, open discussion and hands-on guidance helped rebuild confidence, improve understanding and bring staff fully back on board.

The smartimpact team remained closely embedded throughout - providing education, practical advice and solution-focused support, rather than simply delivering technology. The platform was fully integrated with the NHS Providers website, Sage finance system and bulk email tools, creating a joined-up digital foundation.

A self-service member portal gave members control over communication preferences, personal details and areas of interest, supporting GDPR compliance while improving the overall member experience.

"The addition of the smartengagement module has helped us deliver better member intelligence and insight."

Sandra Marshall, NHS Providers



Gather member intelligence



Online self-service portal



Future-proofed platform

What we changed – moving from fragile systems to scalable delivery

With a stable and trusted Dynamics platform in place, NHS Providers regained confidence in its core systems and unlocked the ability to scale.

A foundation for the future

NHS Providers now has a Dynamics platform that staff trust, understand and value – and that is capable of supporting continued growth in engagement, influence and services. The CRM is no longer a risk to be managed, but a stable foundation the organisation can build on with confidence.

*“The support that the **smartimpact** team gave us during an intense implementation plan was second to none.*

They regularly went above and beyond the call of duty to provide us with great advice.”

Sandra Marshall

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| <p>smart membership</p> | <p>smart connector</p> | <p>smart events</p> | <p>smart engagement</p> |
| <p>to drive joining, subscriptions and renewals & manage member details, new members and new membership schemes,</p> | <p>for easier integration with the website, Sage finance system and bulk email marketing system</p> | <p>to manage annual conference, marketing, packages, discounts, bookings, multiple payment methods, locations and speakers</p> | <p>for measuring, monitoring and automated driving up of levels of member engagement</p> |

What is the transformational impact the new system has made?

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| <p>138% growth in events delivery from 166 to 395 events</p> | <p>83% uplift in annual event participants from 4,805 to more than 8,800 delegates</p> | <p>Delivery of 395 events providing the operational capacity required for high-volume national engagement</p> |
| <p>Annual Conference scaled by increasing attendance and generating nearly £400,000</p> | <p>100% of NHS trusts in England in voluntary membership</p> | <p>68% membership subscription income growth from £3.79m to £6.36m</p> |
| <p>Member satisfaction 96% CEO satisfaction 93% Chair satisfaction 94% say membership is vital</p> | <p>“ I have thoroughly enjoyed working with you all at smartimpact over the last few years and we have certainly benefitted from our relationship with you, not least because of your extensive knowledge that led to our brilliant CRM system ”</p> | |

Sandra Marshall