



ABOUT THE CLIENT

The Charity, Healthcare Financial Management Association (HFMA) is the leading membership organisation for healthcare financial management professionals in the UK. It represents some 5,000 finance staff working in UK healthcare and provides practical resources, insightful thought leadership, support through Continuing Professional Development and access to an influential network.

Driving membership management through Microsoft Dynamics CRM Online

KEY BENEFITS



- A central source of membership data
- Visibility across the organisation, internally and externally
- Automated membership renewals process
- A full understanding of their membership
- Improved communication with their members
- Integration with existing systems
- A future proof Cloud strategy with the potential to extend beyond Microsoft Dynamics CRM Online

Gap Consulting revolutionises the way HFMA manages their members, giving them better visibility and transforming the member experience

CHALLENGES

HFMA has experienced a period of rapid growth. Additionally, significant changes within the NHS meant finance professionals working in the healthcare sector and particularly the NHS needed a stronger voice and a clear understanding of the impact of the changes on them. As a result HFMA wanted to increase awareness of what they do and improve the visibility of their members within the wider NHS community. It was recognised that their current infrastructure did not support their new strategy and member needs as well as they would have liked and so the decision was made to invest in a new system to underpin their continued growth.

James Hood, Head of IT and E-Learning, explains, *“We are investing heavily in strengthening the infrastructure of our business to ensure we are in a stronger position for future challenges. Our work with Gap and the implementation of Microsoft Dynamics CRM Online has been a key building block in that strategy”*.

Historically the organisation held information on a number of disparate systems. Data was held in 20-30 different places, and as HFMA grew, this became increasingly difficult to manage. *“It was difficult to view and maintain data and searching for and analysing business critical information was extremely time consuming.”* The ongoing management of data and ensuring compliance with The Data Protection Act was also proving to be a significant issue.

TECHNICAL FACTS

- Microsoft Dynamics CRM Online
- Microsoft Office 365
- Azure Portals
- Scribe integration with Binleys

THE SOLUTION

HFMA conducted significant research when looking for their desired CRM solution. They needed a platform on which they could consolidate membership and events data, as well as more traditional CRM information.

"We ruled out some smaller organisations who produced specific membership systems as we felt the technology was ultimately outdated and we didn't think they could adapt and meet our needs going forward". Microsoft Dynamics CRM Online appealed because it was well recognised and supported, and ultimately would extend beyond standard sales, service and marketing, to specifically fit HFMA's needs.

Originally HFMA partnered with another Dynamics partner, but soon realised they lacked support for their long term development plans. *"We felt they were out of their depth when it came to the customisation and system architecture of Dynamics CRM Online, which is why we widened our search and ultimately came to Gap Consulting".* HFMA also wanted to work with a company with specific experience working with event management, and could work flexibly with them to meet their changing goals and needs. *"We talked to a number of companies but Gap stood out for their professionalism, and the way we felt they would be able to come in and contribute to the project. This has ultimately proved to be the case".*

"Having a partner that can work flexibly with us and who can help us evolve Dynamics to meet our changing goals and needs is very important. We felt Gap ultimately ticked all of those boxes."

IMPROVING THE WAY HFMA MANAGES MEMBERSHIP

Microsoft Dynamics CRM Online has transformed how HFMA manage their members alongside Microsoft Office 365 and Azure web portals. HFMA membership database is now within Microsoft Dynamics CRM Online, and is integrated with their website. New members can join HFMA online using an Adxstudio portal which is powered by Microsoft Dynamics CRM Online. The underlying CRM platform also generates invoices, automates emails and drives their renewal process.

The implementation of a brand new, automated renewals process has been hugely beneficial to the organisation. Gone are the manually intensive renewal processes which were managed over a period of months. Instead, the Microsoft Dynamics CRM Online solution automatically manages the renewal notification process via a series of emails. This provides a more convenient and slick service to customers, and frees up HFMA employee time to focus on other activities.

VISIBILITY ACROSS THE ORGANISATION

Microsoft Dynamics CRM Online has enabled the organisation to understand exactly what their members and potential members are interested in, and provide staff with succinct information at the right time. *"People come to us for different reasons and with different areas of interest. We do a lot as an organisation and therefore we don't want to bombard people with too much information about everything we offer. By having a better understanding of what our members have previously done with us, we can better understand what they are interested in going forward".* Microsoft Dynamics CRM Online gives HFMA visibility of their members and improved intelligence which means

they can better serve their diverse needs. *"Fundamentally it should make us smarter as an organisation allowing us to understand our members' needs and respond appropriately."*

One of the key challenges HFMA has faced in the past has been keeping track of communications and understanding individuals changing roles, particularly within the NHS where there is a lot of movement. *"We can see in the past we have missed opportunities because we have not had knowledge that is easily accessible and centralised across the organisation. Dynamics gives us a space that knowledge is easily available and as more people use it this will make Dynamics even more beneficial to us".*

Microsoft Dynamics CRM Online allows HFMA to meet the obligations required by the Data Protection Act. By having one central place to manage data they can ensure that member information is kept up to date and accurate. *"We want to be a friendly and supportive organisation to our members so having the information we need about them to hand at the time we are dealing with them is obviously a big part of that. However, satisfying all legislative requirements is clearly also a focus".*

A FUTURE PROOF SOLUTION

There is an ongoing high level of Microsoft investment and research in Microsoft Dynamics CRM Online and the complementary Microsoft stack, and this was a key driver for HFMA in their selection process. *"If we had gone for a niche solution we felt there would have been more challenges. The expectation with Microsoft is that they can respond to the changes in the way people want to work quickly,"* explains James.

HFMA is already looking to the future and a long term partnership with Gap Consulting. This was originally a three phase project to implement Microsoft Dynamics CRM Online – first stage being membership, second stage being events and third stage getting all of their sales, ecommerce and purchases on to Microsoft Dynamics CRM Online. *"Gap Consulting works flexibly with us and helps us evolve Dynamics to meet our changing goals and needs. They ticked all of the boxes".*



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