

AIMA invests in delivering member excellence.

With more than 1,900 corporate members in over 60 countries, The Alternative Investment Management Association (AIMA) membership collectively manages more than \$2 trillion in hedge fund and private credit assets globally.

As a global association, AIMA has a wide footprint and therefore member expectations are very different in different locations. It had become clear to them that their legacy CRM system couldn't provide the functionality and flexibility required to meet their members' growing needs.

AIMA started the search for a modern system in order to support their diverse groups of users and members.



AIMA



"Despite a lot of the users having different requirements, I was impressed with how easily they accepted this project."

Kirk Taylor,
Chief Administrative Officer



Multiple currency invoicing



3rd party system integration



Member engagement analysis

Multi-currency and integration were key elements

AIMA chose **smartimpact** as their Microsoft Dynamics technology partner. The implementation of their new membership CRM began, which included a membership fee platform that allows AIMA to invoice their members in multiple currencies.

*"The project went smoothly, particularly moving the data and users across. **smartimpact** managed our expectations well and the migration of our systems was near seamless."*

Kirk Taylor, Chief Administrative Officer

An important innovation included the integration of Assets Under Management (AUM) data from a third-party provider. This removed a lot of the time-consuming manual cross-referencing that AIMA previously had to do, as well as reducing the number of errors.

Like many **smartimpact** projects, the system has continued to evolve to match AIMA's evolving business strategy. Another key component was integrating the CRM events registration process with the website. Event registration had previously been done manually and thus data was not in a single location.

This and other web integration allows AIMA to see how active their members are. For example, using **smartengagement**, member activity on the website can now be recorded in the CRM for engagement analysis and reaction.

The results speak for themselves

AIMA are very pleased with their ongoing digital transformation, especially how the rollout of the new CRM system was received internally – not just from their HQ in London, but globally. It was viewed as a massive achievement – they went from having six users to twenty, meaning half the organisation were actively using it from the go-live date.

*"The **smartimpact** CRM system has helped make the membership renewal experience much friendlier for our members, more efficient for us and contributed to ensuring we maintain our annual renewal rates at 90% and higher."*

Kirk Taylor, Chief Administrative Officer, AIMA

Solution summary

smart membership



to manage all member details and the finances involved including multiple currency payments

smart connector



for easier integration with other systems including their website and bulk emailing systems

smart events



to project manage event marketing, locations, speakers and registrations

smart GDPR



compliance and making it easy to deal with subject access requests

And finally... the journey continues

Going forward, **smartimpact** have worked with Higher Logic who provide AIMA's online community forum. This is where members can have in-depth conversations and other interactions on topics of specific interest.

The Higher Logic forum is integrated with **smartmembership** CRM, along with data from their website, event attendance, finances, committees and working group participation - so AIMA have a 360 view of all the organisations and people they represent.

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*“We were keen to work with **smartimpact** because they have similar values to us, and, as we were going to be an important part of each other's business on a long-term basis, it was important to us that we'd understand each other's ways of working and culture.*

In hindsight, we chose well.”

Kirk Taylor, Chief Administrative Officer

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