

ASCL launches their first-class Dynamics CRM

The Association of School and College Leaders (ASCL) is a leading professional body representing more than 18,000 school and college leaders across the UK. They work to shape national education policy, provide advice and support to members, and deliver professional development across the sector.

With members in more than 90% of secondary schools and colleges, ASCL is responsible for the education of more than 4 million young people.



Access on the go

Top 3 requirements from the new system

ASCL's existing legacy CRM system had limitations and was coming to the end of its shelf life. They knew that they had to make a decision to either upgrade or move to a new system and therefore took the opportunity to see what else was out there.

Their current proprietary system wasn't flexible enough to meet their growing needs:

1. With half their staff field-based, on-the-go access was vital
2. ASCL wanted a more seamless integration with the website
3. The ability to customise the system, as you can with Dynamics, was a big appeal

Having done their research, ASCL knew that Microsoft Dynamics was the system for them.



Seamless website integration



"The nice thing about Dynamics is that it does much more than our previous system and with a much more solid integration to the website. The case management side is better too, and it is much easier to use on the go. It is intuitive – the Microsoft familiarity helps and the integration with Outlook is really useful,"

Sara Gadzik, Communications Director



System customisation

Lessons learned the first, and second time around

Finding the right Dynamics partner was the first hurdle for the organisation.



"Twice we selected a provider and started doing some scoping with them and both times we decided the provider couldn't deliver what we wanted.

*We talked to some people who knew about the membership software market, and they recommended we should work with **smartimpact**. Immediately, we found them very helpful, accommodating and willing to work with us to achieve the system we wanted."*

Sara Gadzik, Communications Director





"The finance integration has allowed our teams to be more hands on with the financial aspects, such as raising purchase orders without having to go through the finance team. This has spread the workload more effectively,"

"As staff become more familiar with the system and we continue to automate processes, like producing reports and letters, the biggest gains will be in efficiencies within the organisation,"

"The system is bringing in more time saving factors in the back-end, allowing us to better maintain our level of member service with less strain on the organisation."

Sara Gadzik,
Communications Director

Solution summary

ASCL decided to phase the implementation of the CRM. Phase one involved implementing a new case management system and then replacing the existing Integra system.

Phase two included integration with the Sage finance system.

Phase three included the launch of online membership applications and online direct debit payments, which has brought a huge benefit to members.

Implementation of the Microsoft Dynamics CRM system, included:

- Migration of data from old Integra CRM system
- Integration with their website CMS and Sage 200 finance system
- Case management
- Online direct debit payments and membership renewal
- Upgrading the Dynamics CRM from 2011 to 2015 and now to Dynamics 365

And finally... top marks to the entire ASCL team

Phase four has seen **smartimpact** replace the old website with a modern responsive Kentico CMS, fully integrated with their smartmembership module on Dynamics.

And phase five has seen the introduction of **smartimpact's** mobile app which drives member engagement through newsfeeds and a great in-event experience.

ASCL's CRM plans don't stop there, however. Now that the system is established, they want to build on it going forward.



"The potential that it gives us going forward is fantastic. We now have a system that can grow with the organisation. The nuts and bolts are in place and now we are starting to add the bells and whistles."

"We're looking at increasing the automation and achieving more integration with Outlook; further developing the use of the website and mobile membership app to really engage and inform our members. We are also getting our heads around the reporting tools, as there is so much more data we can access."



Sara Gadzik, Communications Director



E: info@smartimpact.co.uk

T: 0845 544 2043

First Floor, 29 Queen Anne's Gate,
London, SW1H 9BU,
United Kingdom.

We know this got you thinking about your own transformation project

Get in touch if you'd like to discuss new ideas and ways of working.

Wherever you are in your digital transformation, sign up for a free 2-hour consultation with our Transformation Consultants.