

Dynamics pays dividends for the CIPP

The Chartered Institute of Payroll Professionals (CIPP) is a chartered professional association in the United Kingdom, representing payroll, pensions and rewards professionals.

With more than 12,000 individuals benefiting from the CIPP's membership and education services, the Institute is dedicated to raising the profile of payroll in businesses across the UK and internationally.



Finance integration

No small challenge

Like many member organisations, CIPP found themselves with an outdated legacy database system that was no longer going to be supported by their existing provider. They were forced to find a new system that would integrate with their website, Moodle training systems, Sage finance system and their email marketing platform. This was no small challenge considering the website and finance systems were being upgraded at the same time!

" smartimpact has been so much more than a mere CRM provider in this relationship – to make these projects work, you must have a great partnership and fantastic cultural match. They had a good track record generally but especially on integration. There were lots of risks involved integrating so many systems, but smartimpact were brilliant working with us on those, especially in the finance area. "

Vickie Graham, Associate Director of Marketing, CIPP



3rd party system integration

Leading the way on integration and data migration

When CIPP approached **smartimpact** they had already identified Microsoft Dynamics for their new association management software.

Vickie Graham, Associate Director of Marketing, CIPP says:

" Dynamics has got a good reputation in the membership marketplace. It's straightforward and easy to use with lots of functionality. We also chose it because it integrates easily with other systems, "

Once the project got underway, they implemented **smartmembership**, **smartevents** and **smarteducation**. The integration with the various systems and the data migration from the old CRM to the new Dynamics platform proved to be a challenge.

" smartimpact worked with us the whole way through, making sure we had a clear understanding of what we were trying to achieve. They were also great at keeping the lines of communication clear with each provider throughout the whole project. "

Mapping the data from the old system and pushing all the finance data from the website to Sage, via Dynamics, was also complex. But the benefits now outweigh the challenges that had to be overcome. "



Complex data migration



Greater staff efficiency

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Online CPD, event booking and special interest groups

Delegates can now book online for events and training courses and their details are fed automatically into the CRM. Members can now join and renew their membership online and all the information goes into the CRM and finance system. Not only that, the CPD module is integrated so when members log their CPD online, it goes against their record.

Other new member benefits include being able to join and participate in special interest groups online.



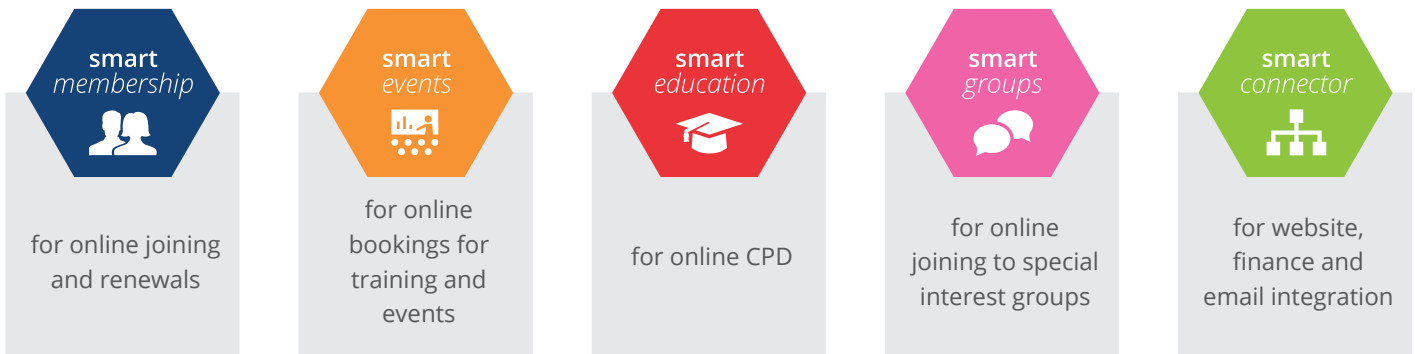
"The groups functionality was a totally separate system with a separate joining process, but now members can join and participate immediately."

"The main organisational benefit is that it saves time in processes. The old system had data in different areas that didn't talk to each other, so we had duplicated data everywhere as well as having to enter data multiple times. Now, it has improved our customer service levels (with not having to spend so much time entering data) and we can be confident of up-to-date data."



Solution summary

Implementation of Microsoft Dynamics CRM system, including the following:



And finally... users are driving the system forward

Summing up her thoughts on the technology, Vickie says:



"Microsoft Dynamics has a good reputation in the membership marketplace and it seemed relatively easy to integrate with other systems, which was key to us. It has proved to be easy to integrate and straightforward to use, with lots of capability and functionality."

"And looking to the future, we've got loads of scope for development. Users now are coming up with ways we can improve things further!"



E: info@smartimpact.co.uk

T: 0845 544 2043

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

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