

NHS Providers in **tip top shape** for the future

NHS Providers is the membership organisation and trade association for NHS Trusts for acute, ambulance, community and mental health services that treat patients and service users in the NHS. All trusts in the UK are members, collectively accounting for £87bn of annual expenditure and employing more than one million staff.

Its purpose is to help those trusts to deliver high-quality, patient-focused care by enabling them to learn from each other, acting as their public voice and helping shape the system in which they operate by influencing health policy on their behalf.



*" Why smartimpact?
Microsoft Dynamics
365, future-proofing,
smartengagement module
and we liked the company and
its people..."*

*There was a good feeling of
general rapport from the
outset whenever we met
smartimpact "*

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



Gather member intelligence



Online self-service portal



Future-proofed platform

Systems in need of an overhaul

As their old CRM system was no longer meeting their needs and the event system was completely broken, NHS Providers needed a robust CRM system that was not only integrated with their other systems, such as mass e-mailing and finance systems, but one that enabled them to track and monitor key member information.

They had faith in Dynamics, and required a partner that was able to listen carefully to their needs, be flexible and provide plenty of support during the project and beyond.

What prompted their need to transform?

NHSP staff had lost faith in their Dynamics supplier, the way the system had been built was unreliable and it was not fit for purpose. In addition, the data in the system was out of date, of really poor quality, some seemed to disappear, and staff so could not trust that it was accurate. As a result, they had largely stopped using it,

NHS Providers wanted an organisation-wide system that their staff trusted and valued as a single source of member truth. They wanted:

- A robust CRM system that we understood and that would help us gather and maintain member intelligence
- An online self-service portal to give members more control of their preferences
- A CRM platform that was future proof and would continue to support the organisation as it evolved.

Preparing for and driving digital change

Over the course of 12 months, **smartimpact** implemented a new CRM membership and events system based on Microsoft Dynamics 365, which was fully integrated with their existing website and with their new e-mailing system.

Members now have a better experience through a self-service preference centre for managing:

- Marketing and communication preferences, in line with GDPR requirements
- Updates to their personal details
- Their areas of interest, committees, networks and groups
- Personalised web content

smartimpact worked closely with the NHS Providers project team, including their internal project board, project sponsor and staff, to achieve success.

Regular internal meetings were held to go through progress reports, discuss key milestones and make critical decisions, as well as to keep staff regularly updated and on board.




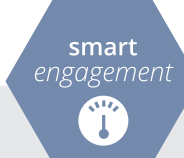
The **smartimpact** project team stayed very close during the course of the project and were always on hand with solutions, support and advice.

*“ **smartimpact** were clearly experts in their field and proved to be the solution focused partner we were looking for.*

*When we did the workshops with **smartimpact** it was clear they really listened to us. ”*










Sandra Marshall

Solution summary

 <p>to manage member details, new members and new membership schemes, subscriptions and renewals</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 and monitoring levels of member engagement</p>
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What can they do now that they couldn't do before?

Their staff now have:

 <p>A platform which works and is integrated properly</p>	 <p>A platform upon which they can drive member engagement</p>	 <p>Better communications and analytics, and improved member intelligence</p>
 <p>Capability to seamlessly deliver their membership and marketing objectives</p>	 <p>Improved segmentation, reporting and insight for events, programmes and marketing activities</p>	 <p>Streamlined processes to reduce the administrative burden</p>
 <p>Reduced ongoing cost of running the system</p>	 <p><i>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</i></p> 	

Sandra Marshall