

# SOE **future-proof** their own operations

The Society of Operations Engineers (SOE) serves over 16,000 individual and corporate members who work to implement smarter ways of working, improve maintenance and inspection processes, and embed environmentally friendly and sustainable engineering practice. SOE actively champions the next generation of engineers, and is passionate about making a global difference.

With an out of date legacy CRM, clunky web site, poor integration and very little online member engagement, SOE struggled to understand their members well and how to target new members to drive growth.



*“ We were very worried about project costs overrunning as we had heard horror stories about CRM projects in the past.*

*However, smartimpact took care of everything, delivering what was required, on time and to the penny ”.*

SOE

After undergoing a robust vendor selection process, SOE appointed **smartimpact**, a Microsoft Dynamics provider who specialise in the membership sector.

## Delivering exceptional member value on time and on budget

SOE was determined to have a single source of data upon which to drive exceptional member service and growth.

- The main limitations of their current systems were:
- Lack of integration between their systems
- Lack of flexibility in configuration, and validation
- Inability to achieve the 360-degree view of audiences

This resulted in the inability to drive opportunities, increase collaboration, and improve member services.

After a nervous start, it was evident that SOE would require a lot of support from the smartimpact project team.

## Key project objectives:



### Service

Drive growth, retention, customer service and user experience. Enhance the quality of member engagement at every touch point, and provide consistent, high-quality interfaces



### Connect

Build lifetime relationships between SOE and those involved in the sector so that members and stakeholders contribute to the knowledge pool more than they consume



### Efficiency

Improve integration with suite of online systems. Capture, record, and report data more effectively. Drive and streamline business processes through workflows



### Flexibility

Provide staff with appropriate tools to deliver effective, high-quality services and support to members



### Sales

Support aims and objectives around marketing, identification of new opportunities, central database, and ease of access to key member information.



### Compliance

Easier compliance with Data Protection, Direct Debit rules, audit trails and email marketing guidelines



## Solution summary

The solution delivered an enhanced member experience through the MySOE self-service portal and also efficiencies for internal staff.

smart membership



to manage and monitor member activity and subscriptions

smart connector



for integration with the website, marketing and finance systems

smart events



to manage their events registrations

smart education



for delivering qualifications and CPD schemes



Workflows - enhanced automation, especially Direct Debit administration

*“smartimpact provided strong project management and customer care above and beyond the call of duty”.*

SOE

## And finally... SOE engineers a better future

Staff efficiencies have improved and it is now easier for them to find and access the right information, to better understand where members are in their journey and therefore identify areas for improving the member experience.

With their fully integrated system, members can now be segmented by area, geography, local committees and areas of interest,

We improved several of our core business and financial processes, including reducing 5 different accreditation processes down to 1.

