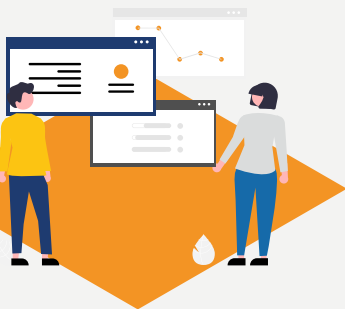


The NHS Confederation have their finger on the pulse of their members

NHS Confederation

Do smart membership



The NHS Confederation is a membership body for organisations that plan, commission and provide NHS services.

With more than 550 members from every part of the health and care system, their 200+ staff operate across five sites - London, Leeds, Cardiff, Belfast and Brussels.

The Confederation has three key roles:

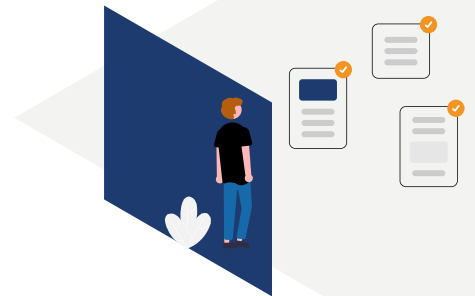
1. To be an influential system leader
2. To represent their members with parliament, national bodies, trade unions and in Europe
3. To support their members to continually improve care for patients and the public



Having already made the move to the cloud in 2018, they now required a single, central CRM system to replace the wide range of disparate databases that were spread across various parts of the organisation.

The Confederation also identified the need to change their business model to better support the wider changes happening within the health and care system. Hence, they set out to invest in several strategic projects to ensure their new model succeeded.

Having identified that Microsoft Dynamics 365 was the right core platform for their future plans, the next step was to find the right partner to help them to implement their vision.



Getting off on the right foot with robust planning and resourcing

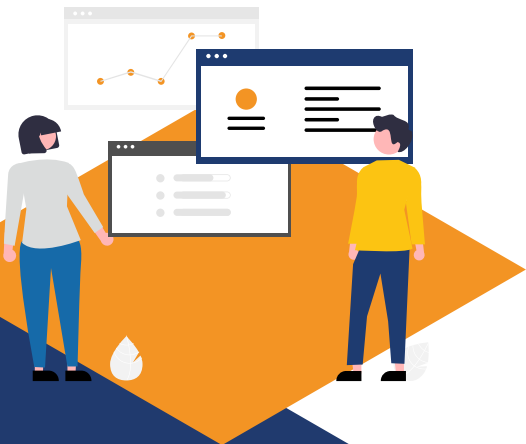
Recognising that they had little in-house technical or CRM expertise, The Confederation was looking for a partner that would be proactively engaged in the project, challenge their thinking and deliver a solution that really works – all this whilst finding the right balance between maximising ‘out of the box’ product functionality and bespoke customisations.

smartimpact was soon appointed as the preferred partner due to our vast experience with membership bodies, including [NHS Providers](#), our technology is built on Microsoft Dynamics 365, and our project best practices.

The Confederation then set to work establishing their project team, project plan and a steering group. These factors played a key part in ensuring their staff were engaged in the project and ensuring high levels of user adoption.

smartimpact were really supportive throughout the project. The Confederation's needs were complex and perhaps unusual for an organisation of our type and their team was skilled at drawing out our detailed requirements

Senior CRM & Member Operations Officer,
The NHS Confederation



Improving intelligence and insights

Most of The Confederation's working practices and business processes had been shaped by the limitations of their old systems.

- Mailchimp and Excel spreadsheets were often used as the default CRM.
- There was no single view of their members. It was impossible to track and monitor member engagement and interactions, including event attendance, meeting attendance and participation, campaigns, policy work and communications.
- Staff members across multiple teams had different relationships with members, but there was little or no coordination of activities in this area.

Therefore, a key success criterion was to significantly enhance the intelligence and insights about members and how they engage with The Confederation's activities.

Centralised data gives us a better overview of membership satisfaction (which helps with renewals)

Senior CRM & Member Operations Officer, NHS Confederation

Driving greater, meaningful member engagement



Member growth - Build stronger, long-term relationships with individuals, even as they move to new organisations



Member retention - Understand membership activity across each year and provide an annual statement of benefits



Member insights - Enhanced intelligence and insights to identify new services and diversify The Confederation's offering to members, non-members and potential members



Optimised engagement - Better oversight of all membership and non-membership activity, hence driving greater participation in events and local networking activities



Personalised communications - Integration with Outlook and bulk mailing tools so emails can be tailored for relevance and interests, plus in-Dynamics analysis of open/click/action



Self-service - Ability for members and non-members to register for events



Efficiency - Reduction of mundane tasks and duplication of effort via automation and process improvement, enabling staff to focus on servicing the needs of members



The development of the smartengagement module has helped us deliver better member intelligence and insight.

Membership Operations Manager, NHS Confederation

The reporting and dashboards have enabled the organisation to produce effective and timely reports for external stakeholders. The added bonus is the amount of staff time it saves!

Membership Operations Manager, NHS Confederation

Solution summary



smart membership

To manage member details, new members and new membership schemes, subscriptions and renewals.



smart connector

For easier integration with the website, Sage finance system and Dotdigital email marketing system.



smart events

To manage annual conference, event marketing, pricing packages, discounts, bookings, multiple payment methods, locations and speakers.



smart engagement

For measuring and monitoring levels of member engagement.



And finally... taking forward some lessons learnt for future projects

The project presented a great opportunity for The Confederation to challenge and optimise their existing ways of working.

The result? Staff time was freed up, allowing them to focus on getting a better understanding of their members and putting steps in place to continually drive satisfaction upwards.

Three key lessons learned...

Make sure there is a buy-in from senior management before the project even begins

We, as an organisation, could have been better resourced and more organised in identifying the correct people to involve in the project

Although the data migration went very smoothly due to smartimpact's expertise and know how, we could have ensured our data was cleansed in readiness for migration

Senior CRM & Member Operations Officer,
NHS Confederation

Has 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.

[Book a free consultation](#)



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