



BEAMA's membership CRM re-energised

An antiquated in-house database and an array of spreadsheets was all BEAMA had to rely on when managing their complex membership structure. When a CRM provider failed to deliver, it was **SmartImpact's** CRM 'rescue and re-launch' service that came to the rescue.

The Organisation
BEAMA

Market Sector
Membership organisation

Organisation Size
**20 staff
300 members**

Smart Rescue and Relaunch

We quickly analyse your system, find out what is wrong and identify how to correct it.



Project timeline



May 2012

BEAMA appoints **SmartImpact**

Jul 2012

Specification finalised

Sep 2012

CRM project completed

Mar 2013

Integration with Sage software completed

Ongoing

Modifications and standardising of processes

Company Overview

BEAMA provides leadership, expertise and independent influence in the areas of product safety, performance, energy efficiency and sustainability.

The association represents the entire electrotechnical supply chain with its wide range of products.

"BEAMA has a complex organisational and data structure centred around access to hundreds of committees and special interest groups globally.

In total, the organisation incorporates more than 20 associations and commercial committees with technical committees reporting into them."

Solution Summary

- Corporate membership management
- Events management
- Committees management
- Integrated website
- Group fund accounts
- Sage finance integration

*"We chose **SmartImpact** because they understand the needs of associations. During the project they were flexible and quick to react when new pieces of information came to light"*

Jo Cook, Marketing Communications Manager, BEAMA



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The Challenge

In the last decade BEAMA has absorbed several trade associations and inherited a legacy of different processes.

Jo Cook, Marketing Communications Manager of BEAMA, explains,

"BEAMA has a complex organisational and data structure centred around access to hundreds of committees and special interest groups globally. In total, the organisation incorporates more than 20 associations and commercial committees with technical committees reporting into them."

Keeping records for such a diverse membership proved challenging.

"Each member belongs to at least one group. We recorded this information using an in-house database, spreadsheets and individual staff knowledge. Information was shared informally and there was lots of working in 'silos' with various working practices. Changes in the association also meant that our data was no longer fit for purpose and another solution was required."

BEAMA's website also needed a makeover, *"We wanted to improve our website to enhance collaboration online and streamline the distribution and personalisation of the information sent to members, as many were complaining about email overload."*

Our Solution

SmartImpact's SmartMembership platform has helped BEAMA manage memberships, committees and events. The migration of BEAMA's existing data involved extensive cleansing and de-duplication, producing a smaller more accurate database.

"SmartMembership helps to keep records of our members, their contacts, which group(s) they are members of and their roles, as well as how the groups relate to each other and external groups."

"The data has been synchronised with the website to allow individual contacts to receive information relevant to their interests and groups. We also hold information on our brands and associations for our members' use to drive the website's member directory. It is useful that all tabs and fields in the CRM system can be modified to match our association's terminology too. The system has consolidated and standardised practices across the organisation."

"The event management component allows us to set up events, plan expenditure, report against forecast versus actual and link through to the website for online sign-up and payment."

BEAMA can also profile members' needs by demographic to produce targeted marketing campaigns that deliver relevant information and services to meet the different needs of members. The system also stores meeting minutes, notes and details of committees and group members in one place.

Summary

*"We chose **SmartImpact** because they understand the needs of associations," says Jo.*

"During the project they were flexible and quick to react when new pieces of information came to light."

BEAMA has found the system flexible with the changing needs of the organisation.

"We are currently expanding the system to synchronise with our finance department's Sage 200 software to improve the information available to budget holders. Before, staff had to ask someone in the finance department and manually add the figures to different spreadsheets. The new system is much more user-friendly and information-rich as the data can be analysed in a number of ways."

*"Overall, **SmartImpact** impressed because they genuinely wanted to solve our business problems and deliver a system that does just that rather than one that simply meets the spec."*

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Jo Cook, Marketing Communications Manager, BEAMA

About SmartImpact

We are experts in providing Microsoft Dynamics CRM solutions for organisations where members are central to their operations.

Our products are built using Microsoft Dynamics CRM and SharePoint to form the core solution, which we then customise to meet your full needs.

To find out how we can help you contact us on: 0845 544 2043, info@smartimpact.co.uk or visit us at www.smartimpact.co.uk

We provide a full range of services including:

- Design, configuration, implementation and support
- Failing project rescue and re-launch
- Performance tuning
- Reliable website and third party platform integration
- Quality testing and training



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