



Challenge

Membership management is fundamental to the Dublin Chamber of Commerce; however the process was not as efficient as it could be. Disconnected systems made it difficult to get a complete view of interactions that occur across a number of channels.

Solution

Sage CRM delivers a single and comprehensive view of all customer engagements, from lead generation to invoicing, from first contact to a complete record of subsequent interactions. CRM Event Manager, from Enbu Consulting, takes all the main concepts of Event Management and Membership maintenance and delivers a pragmatic and highly effective management tool that is installed on top of the Sage CRM platform.

Results

Dublin Chamber of Commerce has made Sage CRM a unifying contact system that integrates every interaction with members and prospective members across the organisation's various channels of communication.

CUSTOMER:
Dublin Chamber of Commerce

INDUSTRY:
Membership Organisation

LOCATION:
Dublin, Ireland

SOLUTION:
Sage CRM with CRM Event Manager

Dublin Chamber of Commerce

The Business Challenge

The Dublin Chamber of Commerce has represented the interests of businesses across the Greater Dublin Area for more than 200 years. Today, it provides members with business assistance and wide-ranging services, from learning and leadership support to the practicalities of issuing export documents and helping facilitate overseas trade. As an exemplar to the business community, Dublin Chamber has always embraced cutting-edge technology and was embarking on a project to integrate a web platform with its backend financials. The missing piece of the jigsaw was an effective CRM solution to help employees maximise the use of their time.

The organisation had been running an ageing CRM system that was difficult to integrate and struggling to keep up with the Chamber's plans. It ran independently of its Sage accounts system. "Every month we had to import creditor information from the CRM system into our Sage 50 accounts package," said Michelle Berry, Financial Manager. "We wanted to avoid the human error that comes with manual entry and the need for double-checking."

With a membership of 1,100 companies as well as 6,500 prospects on its database, two standalone systems were inefficient. The Chamber was looking for a fully integrated software suite where all information could be centralised. Because the finance department used Sage and liked the intuitive feel of the software, there was an obvious next step. "In order to move to a fully integrated system, Sage CRM with CRM Event Manager seemed the ideal solution," said Berry.

The Solution

Sage Business Partner Enbu helped deploy Sage CRM and CRM Event Manager, issuing 25 licenses of Sage CRM and running it off a SQL server in the organisation's Dublin office. At the same time the decision was taken to upgrade from Sage 50 Accounts to Sage 200, the Sage business management software solution that had features and functionality that would embellish the customer management strategy and enable the Chamber to get more out of Sage CRM.

There were three stages to the CRM project: upgrade Sage 50 to Sage 200, integrate CRM with accounts, and integrate everything with the web where the membership community can access a range of services. The changeover from Sage 50 to 200 went very smoothly and was very straightforward. The integration piece was more complex. Enbu built a membership web portal, accessed from the Dublin Chamber website that facilitates online transactions for renewals and event bookings. "There had been a disconnect between the online community and their membership system," explained Fran Meggs, Managing Director of Enbu. "We had to re-engineer the backend architecture to make it real time and web-service driven." Revenue streams from membership subscription, export documentation and events, all now use Sage CRM as a master database that is integrated with Sage 200 for invoicing.

Sage CRM has the features and functionality to help the Chamber improve customer billing and track member communications more effectively. It provides a single view of all member activity. Screens can quickly be pulled up to show what's happening within each member company in terms of events they are attending and their general level of interaction with the Chamber. The forecasting component gives a better view of the membership recruitment pipeline and a clearer understanding of where leads are coming from. A section on opportunities provides a list of targeted companies and how far along they are in the recruitment process.

The Benefits

Sage CRM has provided a single view across all the points of interaction between members and the different Chamber departments — membership, events, and export services. "The tracking of interactions and communications with our members is a lot more efficient; we can see all their activities with the click of a button," explained Berry. Month-end accounts are produced more quickly with all financial transactions seamlessly input into Sage CRM. This had made the office more productive. "We've cut a couple of steps out of processes which free us up to focus on other projects," said Berry.

The system gives much better visibility of revenue streams from export services and events as well as member subscriptions. More expansive monthly reports can be pulled up easily, giving accurate and real-time insight into Chamber business. In an economic climate where member organisations struggle to recruit, the Dublin Chamber has done well to hold its numbers, a feat achieved by concentrating on membership retention. Sage CRM has played a significant role in this and helped achieve a 2 per cent improvement in the first year.

The strategy is to engage with members before they receive a renewal invoice, a process made easier by an inactivity report module that was built into Sage CRM. For the first time the Chamber has access to information on members who are no longer taking advantage of its services. "By giving us a snapshot of inactive companies it's definitely helping with retention," said Berry. Going forward, Sage CRM with CRM Event Manager and Sage 200 provide a platform for continuous improvement. A customised Sage 200 module for batch invoicing of member subscription invoices was recently added and the membership department is looking at more functionality in CRM to target new companies. Enbu's Fran Meggs sums up: "The Chamber now has a fully connected system where all the information is accurate and up to date. Sage CRM shows that organisations like the Dublin Chamber don't need massive amounts of staff and labour to have efficient systems."

About Enbu Consulting

Enbu Consulting is an expert in Sage CRM software. Since 2004, companies all over the world have been choosing Enbu to deliver CRM based solutions, to address key business processes, including sales, marketing and customer service.

We combine leading technologies with in-depth technical and business process expertise, to deliver company specific solutions, that deliver real business benefits.

Visit the Enbu Consulting website at www.enbu.ie for more information.