



CRGroup helps National Association Enhance Member Engagement Using Microsoft Dynamics® CRM

“Thanks to the help of Corporate Renaissance Group we now use Microsoft Dynamics CRM to provide better support to our members and business partners and assist them in continuously improving the quali-

*Director of Information Management
for a Canadian National Association*

Overview

By implementing Microsoft Dynamics® CRM, a Canadian national association was able to more efficiently and effectively engage with its members and support their quality management programs. The new solution also enhanced business intelligence initiatives, allowing for more informed decision making by management and an increased capacity for association staff to plan, implement and monitor comprehensive outreach initiatives.

About CRGroup

Since 1989, Corporate Renaissance Group has been a global provider of innovative solutions that improve business management and performance. With over 4,000 customers worldwide, CRGroup has established itself with expertise in business management consulting and software development. CRGroup delivers solutions by leveraging their expertise in Microsoft Dynamics, SharePoint, business intelligence, financial and costing principles, shared services and employee performance management.

Situation

The national association communicates regularly on behalf of its members and partners, forecasting industry demand, promoting the industry and developing national standards. The Canadian national association also works very hard to keep its members and partners updated on the many programs and services provided by the organization.

“Our relationship with our members and other business colleagues have always been of paramount importance to us,” says the association’s director of information management. “We want to provide the best support possible to them. They are viewed as customers by us.”

In 2011, the association’s leaders determined the time was right to improve its customer relationship management (CRM) capabilities to more efficiently serve its community. Given the frequency of its messaging, the association hoped to automate many of the back-end processes so that it could engage with members and partners in a more streamlined, targeted and timely manner.

“It became apparent that we needed a CRM solution. We wanted to automate our communication activities and improve the access to information related to our programs. It was less about the technology and more about using the technology to provide good service to our members, partners and other audiences.”

Solution:

After a thorough evaluation, the client selected Microsoft Dynamics® CRM to manage its member information and support its engagement efforts.

“We wanted an off-the-shelf system that was commercially available – something that could be integrated with our existing systems and be customized to meet our specific needs. We looked at other systems but felt Microsoft Dynamics CRM fit our needs the best and would adapt to our business needs in the future.”

The association looked to leading Microsoft Dynamics CRM partner Corporate Renaissance Group to implement a hosted CRM solution. Since 1989 Corporate Renaissance Group has been partnering with organizations to optimize business solutions with minimal impact to client resources and day-to-day operations.

“CRGroup came in and took the time to understand our needs. They were able to show us how the system would help our organization and get us to where we wanted to be.”

Functionality for Improved Efficiency

With help from Corporate Renaissance Group, the association was able to quickly create a CRM system for superior engagement with its members and partners, optimizing the power of its information and resources.

“The new system provides a high degree of usability with minimal training required. The Microsoft Dynamics CRM solution delivered what we were looking for: simple access to information, flexibility and ease of use.”

Improved engagement and satisfaction

The association uses its new CRM to organize information related to industry quality programs, to quickly produce lists of recipients for mail-outs and to schedule events. The centralized nature of the data and automation of tasks makes Dynamics CRM an effective tool for improving customer service delivery.

“Now that we have a system that we can access in real-time, we can focus on continuously improving our programs and services. We are more efficient how we communicate with our members and partners.”

Easy Access to Information

The association elected to go with a hosted solution in a managed services environment to decrease capital costs and allow it to focus more resources on services that we provide to members.

Association staff also benefit from easy access to member information. Even when working off-site, employees are able to support all members and partners to full capacity. “Because the information is readily at hand, there is an increased capacity for staff to plan, implement and monitor comprehensive outreach initiatives.”

Flexibility through customization

“CRM provides us with flexibility through customization as our business processes and relationship information needs change. With help from Corporate Renaissance Group, we’ve been able to supplement CRM with strong client security, which is of highest importance.”

Corporate Renaissance Group created a plugin to enable auto numbering and also allow for custom and out-of-the-box entities.

Improved Data Mining & Member Analytics

Dynamics CRM provides clients with enhanced business intelligence to allow for better informed decisions. Association leaders can use the reports in CRM to analyze and improve member relations and better support the community.

“Our member data is becoming an increasingly valuable asset. We now use the reporting in our CRM to better understand the members we support. This leads to improved communications and services, and a richer experience overall.”

