



Canada's largest veteran support organization streamlines & automates its membership registration and renewal process by partnering with CRGroup to enhance the use of **Microsoft® Dynamics™ CRM**

CRGROUP CLIENT:

Royal Canadian Legion

INDUSTRY:

Non-Profit

IN THIS CASE STUDY:

- Membership Management
- COVID-19
- Payment Processing
- Membership Self-Service

CRGroup Helps the Royal Canadian Legion Enhance its Digital Membership Management Experience & Grow Online Member Registrations & Renewals

Overview:

With a membership base of a quarter-million, The Royal Canadian Legion needed a member registration and renewal process that was easy, reliable, and would support the growing demand for online services. To accomplish this, The Legion contacted CRGroup to improve the setup of Microsoft® Dynamics™ CRM and offer enhancement services for the solution and other third-party products. CRGroup completed the configuration and launch of the solution in 2020 without downtime or impact to the Legion's operations. During the first eight weeks of go-live, the Royal Canadian Legion saw a in increase in online renewals and a 149% increase in new online membership registrations.

Canada's Largest Veteran Support & Community Services Organization

Founded in 1925, The Royal Canadian Legion advocates for the care and benefits for all who served Canada. Membership includes individuals who have served as military, Royal Canadian Mounted Police, provincial and municipal police, Royal Canadian Air, Army and Sea Cadets, direct relatives of members, affiliated members, and is now open to the general public. The Legion helps thousands of veterans and individuals make positive changes to their life and seeks to recognize past sacrifices and acknowledge the courage of those who served and still serve today.

The Legion has **1,350 branches across Canada and 250,000 members**, whose commitments help the organization achieve its community goals. It has one of the largest bases of volunteers nationally.



SITUATION

The Legion's existing member management platform and approach posed several challenges and hindered the organization's ability to meet its objectives and deliver a modern experience to its large membership base:

CHALLENGES:

- Lack of fully automated and accessible member registration and renewal process.
- Existing online environment not usable on iOS (Apple)
- Glitches causing membership applications to become 'stuck'
- A long 7-step tedious process for registration
- Time spent processing annual call-in renewals
- Time spent on payment processing data entry

GOALS:

- Create a modern online membership experience.
- Integrate member registration and renewal processes
- Automate the annual renewal process for existing members that provide their credit card
- Ensure online self-service access across all devices and in both English & French
- Reduce the number of steps necessary to register & reduce # of member phone calls
- Automate registration and renewal confirmations

SOLUTIONS:

- The Portal Connector™
- Microsoft® Dynamics™ CRM
- Payment gateway

With such a large membership base, it is crucial that The Royal Canadian Legion offer a superb user registration and renewal process for both members and the internal customer service management team. The Legion offers registration and renewal in-person, by phone, and online but wanted to promote and encourage online registration to reduce backlogs and staff workloads and provide members with better self-service options. Beyond this, the Legion was struggling with members experiencing system glitches that would halt their registration and an existing system setup that could not accommodate iOS devices. To streamline registration and renewal and provide a positive and straightforward membership experience, the Legion decided to emphasize an organization-wide 'digital-first strategy.

The Legion had initially started its [Dynamics CRM](#) implementation with another Partner, but after the services agreement ended, sought the services of solution provider, CRGroup, to enhance the solution and continue to support the organization's goals. Having previously worked with CRGroup for the setup and support of Dynamics GP, the Legion was confident CRGroup could deliver on its vision. CRGroup worked to understand the Legion's needs and the existing system setup, ensure all systems were stabilized and upgraded, and then enhance branch location and self-service member registration, payment, and renewals.

Approach:

Step 1: Stabilize and update the existing Dynamics CRM and The Portal Connector environments.

CRGroup worked closely with the Legion to understand the existing solution setup and the client's priorities and needs. CRGroup started by ensuring the existing solution environments were stable and updated with the current product versions. CRGroup upgraded Dynamics CRM and The Portal Connector, which solved the iOS access issues that members had previously experienced.

Step 2: Customize and enhance online member registration and renewal process to meet the client's needs.



Improved Branch Locator

To ensure intuitive member self-service could become a reality, CRGroup leveraged and automated the Legion's branch locator tool, making it easier for members to find the appropriate branch to associate their online membership.



Streamline the Registration Process

The largest overhaul to the system was streamlining the online registration process. CRGroup was able to reduce the number of steps a new prospective member had to click through to join the Legion as well as all the text on the various pages. In addition, CRGroup was able to isolate the special membership categories to facilitate the unique processing of these members.

Step 3: Build a payment gateway for automated registration and renewal dues processing.

To enhance the member registration and renewal processes, CRGroup also developed functionality to give Legion members the option to renew and pay annual dues online automatically. Before this solution, members only had the option to call into the Customer Service center and have an agent manually process the renewal or pay directly at the branch. With the new process, renewals can be processed quickly and efficiently online if a member chooses.

"CRGroup offered professional advice, skillful execution, and ongoing responsiveness in addition to superior flexibility while meeting our delivery deadlines."

*- Randy Hayley, Deputy Director, Member Services
The Royal Canadian Legion*

Results:

Prepared for the Unexpected

The Royal Canadian Legion knew that automating their systems would make a significant impact but did not know at the start of the project just how crucial it would soon become. Towards the final phases of the system development, the **COVID-19 pandemic** disrupted the entire world. While other non-profits and associations rushed towards digital transformation, the Legion was fortunately on track to improve its online portal functionality to its members and went live in the fall of 2020.

"Like many organizations, we were not entirely prepared for the demands of the all-digital world that resulted overnight due to COVID-19. But thanks to our project team and CRGroup, we were already on track to deliver an accessible online experience to our team and valuable members."

Increase in Member Registrations and Renewals

During the first eight weeks of launch, The Legion experienced an increase in online membership compared to the same period the previous year. The Legion also saw a rise in year-over-year online renewals and new memberships.

186% increase in year-over-year online renewals

149% increase in new membership registrations

Better Member Self-Service Experience

By improving the member portal user interface and ensuring access across all devices, CRGroup reduced the number of steps needed for the Legion member registration and renewal process and improved the overall member self-service experience.

Significant Time Savings for Staff

The Legion customer services staff no longer need to dedicate as much time to manual renewal processes, resolving stuck membership applications, or manually entering payment processing data. Now, they can use this time in critical areas of business, aiding in growth.

"We have realized efficiencies as the new processes allow for increased online business transactions and reducing calls to our Contact Centre. These efficiencies will allow us to refocus our staffing efforts on other key pillars of our business."
Continued Randy.

With this success in mind, the Legion plans to continue modernizing more aspects of their membership experience and to find additional opportunities to migrate other areas of the business online with their partner, CRGroup.

"CRGroup has proven to be a highly experienced and reliable partner who provided the correct CRM solution for our requirements resulting in immediate success. They continue to provide highly respected advice and responsive service."

Gold
**Microsoft
Partner**


Are you looking to deliver a superior online membership experience to your valuable community? [Contact us](#) to get started. crg@crgroup.com