



**complete membership management  
for you and your members**

# selecting the right CRM that works for you

## improve membership services and engagement

Contact relationship management (CRM) or membership relationship management (MRM) software should be at the heart of any membership-based organisation's operations.

It should work for your members, and provide them a modern and personalised service experience, both online and in the real world. It should work for your staff, and make it easier for them to serve those members and ensure they work efficiently and effectively.

Embarking on CRM change, or digital transformation is challenging, not least as it is something you rarely do in your working life. There are too many stories about technology investments failing to deliver what they were supposed to.

That's not good for anyone. So, as a supplier for over 30 years to the membership sector, we've collated our thoughts on what we think you should consider when selecting a CRM to ensure that your investment in CRM pays off.

This short paper is for those in membership management who are facing their first major CRM or technology-change project.

It will help you understand what to focus on when you look to modernise your approach to technology and deliver continuous improvement to your membership services and engagement.

## what do we mean by CRM?

There are plenty of applications and software that are labelled CRM - the central information store or database. But CRM is more than just one piece of software or one application. It is a joined-up approach to data and workflow management that requires various software and technologies to work together. It also requires clear processes and involvement from the users - your people and your members. Without all these things working together, you won't have a CRM system.

## a CRM needs to work for those who use it

Selecting the right CRM that works for you demands that you consider the other applications and technologies you use, the processes and workflow you have in place to manage your services, and the people involved in using the services based on the CRM- and that means your own staff and also your members, and possibly event partners and affiliates.

A CRM that works for your organisation needs to work for both your members and your staff. Your raison d'être is your members. They need to see the benefit from your CRM investment. For this to happen, your staff need to enjoy the experience of using the CRM.

Your CRM system needs to provide value and streamline processes. Importantly, it needs to be flexible to respond to changes, to be able to support the changes in member needs and your organisational needs, either driven by internal changes or external drivers in the external environment. All these factors are essential to enable you to realise the full benefits of your CRM investment.

## a CRM that works for your members

You must remember that your members are also consumers. They are living in the modern world - with mobile devices and multiple applications that can provide them access to information and services conveniently, anytime and anywhere. So they will expect a similar experience with you, their membership body.

So when selecting your CRM, make sure that it facilitates member self-service. You may not want to open up all your services online immediately, but you must recognise that is the way the world and your membership is moving.

### Value-driven experience

Members, like all consumers, are looking for value. So your key methods of engagement must provide them just that - or else they will not use your service. There are various ways your CRM can support this.

### Engaging and personal content

When they log on to your website, it should provide them with engaging personalised content. This will be based on the information they have given you and their previous interactions with you. They expect you to know about this and give them an experience that is relevant to them. This information should be stored in your CRM.

### Self-service websites

And of course, you want to give them faster and easier ways to get information and interact with you, whether it is to pay their subscription, book an event, use a training course, or download their CPD or qualification certificate.

Your CRM needs to facilitate this, and work seamlessly with your website, content management system, event management, learning system, and online shop and e-commerce platform.

### Social interaction with other members

Social media is now an integral part of our lives. We are used to connecting and sharing with others. Your members will want to connect and share with other members, so why let others facilitate this? Increasingly members are looking for a secure and safe way to share often confidential information with others, rather than use the major platforms. Your CRM should enable social interaction with other members - through online events and community forums.

### Mobile compatibility

You must support the ways your members want to engage with you. So your CRM should be accessible anytime and anywhere. That means it needs to run on and support all the modern devices, be it smartphone, tablets and whatever the next innovation is. Your selected CRM needs to have mobile compatibility.

## a CRM that works for your organisation

### Defragmentation

Any new CRM implementation should help reduce the number of applications that you use. This is not to say that your CRM will be your ONLY application - far from it. You will definitely need your CRM to work with other applications. But you should be able to make some applications redundant. Look at it as defragmenting your existing systems. Your focus here should be applications that store information about your members or their transactions, and that often duplicate the same information. Consider if your selected CRM can handle a wider range of functionality. Removing applications will help you start eliminating those dangerous data silos that can build up when different people or departments are using separate systems. It will also reduce the costs of maintaining numerous systems.

### Maximum Integration Potential

Integration is the key here. Your new CRM needs to provide the ability to work with and share key information with your other critical applications - your website, ecommerce platform, elearning, finance, email, partners systems. Here you are looking for API's - application programming interfaces that enable different applications from different organisations to connect and share information. You should ask existing system providers to talk with a new potential CRM vendor and get both parties to verify their APIs are compatible.

### Eliminate Data Silos

Having APIs maximises the integration potential of your CRM, ensuring data silos do not develop and everyone is seeing one single truth of the data, one that gives a 360-degree view of each and every member. Make sure your selected CRM delivers the information and the reports you need to better understand and serve your members.

### Extensive Automation

A CRM system should help streamline key processes and workflow. Here you should be looking for your CRM and the integrations to support extensive automation. This means facilitating alerts and triggers, and providing seamless workflows between one step of a process to another. For example, creating membership renewal reminders and invoices, managing complex event bookings or creating personalised CPD or qualification documents.

### Website Integration

There is often confusion about what the role of the CRM is in supporting the website and online membership services. Here it is important to understand the difference between a CRM, a content management system (CMS) and a portal. Your CRM is at the heart of your organisation. It provides the single version of the truth. A Members Portal provides members with the convenience of online service such as member renewals, online event bookings, online member resources. It should ideally be provided by your CRM provider, or at the very least deeply integrated so that data is not duplicated. The CMS is the system to manage your website and its content. The design and look may be cascaded down to the portal to ensure a seamless user journey, but remember, it should not be duplicating data or functionality managed by the CRM or portal.

### Flexibility

You need to recognise that a CRM system will never be static. There will always be new technology, applications, unexpected external drivers, changing membership needs, new competition, not to mention the new improved services and products that your organisation will want to develop and offer.

You need to select a CRM that provides you with flexibility. This means a core CRM that is able to respond to changes in needs, technology and the business environment. A system that is also able to grow at your pace. You will not be able to change everything in one go - digital transformation (an overused term in our opinion!) is a continuous process, not a big bang.

So, make sure your selected CRM is modular, so you can add functionality as and when you need it. Look for a development road map so it is keeping up with changes in technologies. And of course, ensure it will continue to offer API and integration potential for new applications that come on the market. This means you will have a choice of future options and will not be restricted to additional applications from your supplier.

### Future proof

Finally, software applications are moving to what the techies are calling 'low code'. This means that functionality will be able to be added and managed by you, the user, rather than requiring software developers to create a lot of code. This results in a more agile system and of course greatly reduces costs - the expense and time needed to implement system enhancements. So check if your selected CRM is future proof - and that any existing or planned modules are not bespoke or require extra development to meet your specific needs.

## a CRM that works for your organisation

When choosing your CRM system, it is important that you don't overlook that you are also buying into

a relationship with the CRM supplier, one that will hopefully last years.

### Trusted partnership with the supplier

You and your staff will spend a lot of time with your supplier's team. Not just the sales person or account manager, but also the back-office staff - the technical staff, developers, and customer support team.

Relationships are key here. You need to trust them, and they need to understand your sector, your organisation and your culture. You both need to speak the same language.

So when you select your CRM, make sure you take time to select the supplier too! Involve the supplier's people early on in the process. This means in the procurement process, before you even decide on your chosen supplier.

Ensure that you also involve your own people right from the start, especially the key users of the CRM system. And remember this could include key member representatives. Get them to meet the suppliers. This helps you work out if the chemistry between the teams is going to work, both in the challenging implementation stage and afterwards, in the longer term. You and your supplier need to become partners, and work as one team.

Involving a range of people from your organisation is also essential to get that critical buy-in from all involved in and affected by the project. In fact, creating this inclusive discussion around system change can really help break down internal barriers in an organisation, and deliver lasting cultural change for the better.

### the critical crm selection checklist



#### For your CRM to work for you, consider if it enables:

- self-service websites
- engaging and personal content
- a value-driven experience
- social interaction with other members
- defragmentation of existing systems
- maximum integration potential
- elimination of data silos
- extensive automation
- website Integration
- mobile compatibility
- flexibility
- future proofing
- trusted partnership with the supplier



### find out more

You can get more information about selecting the right CRM, including webinars and customer stories, on our website [www.oomi.co.uk](http://www.oomi.co.uk)

If you would like to discuss your technology challenges related to membership management, we would love to hear from you.



complete membership management  
for you and your members

+44 (0) 1372 232 125

hello@oomi.co.uk

oomi.co.uk

Global House,  
1 Ashley Avenue,  
Epsom, Surrey  
KT18 5AD