



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

combining your crm with a modern finance system

improve membership services and engagement

Modern software now offers much better options for integration. Many have APIs (application programming interfaces) that enable direct integration and data sharing with other systems.

But what does this mean for membership organisations looking at CRM or finance system change?

We got Amy Swain, Director of Member and Stakeholder Engagement of the Association of Foreign Banks, and Ian Jarvis, of Vertis Accounting, together with our own Joel Trotman and Rob Barr, to discuss the issues around integrating membership CRM with finance accounting systems.

In a roundtable discussion, they looked at the following questions:

- What do we mean by integration?
- What are the benefits to the finance and membership departments, and your members?
- How to best approach integration?

what do we mean by integration?

- Providing one point of access to data. Every membership organisation will have a range of systems to support a variety of activities and services. All of these will hold data. “It’s about allowing non-finance staff to get access to the information they need without having to enter the accounting system.”

- Recognising that it is the organisation’s information not just a particular department’s. “It’s about breaking down barriers and understanding how that data can be used for the benefit of the organisation.”

- Not having to duplicate functionality. “Beware of trying to recreate complex functionality in finance software - as many have tried with much pain, when their membership CRM is incapable of handling it.”

what are the benefits to the finance and membership departments, and your members?

- The organisation gets ‘one version of truth’. “This provides confidence in the business that everyone is talking about, and decisions are made using, the same numbers.”
- Being able to remotely access the data, wherever you are. “This reduces the need for printing and the amount of paper being carried around.”
- Enable membership staff to focus on their core tasks. “We looked at staff spending a lot of time chasing up invoices, and wanted to spend that time on member engagement.”
- Removes the reliance on one person for financial reporting. “With integration, anyone can go and check on financial reporting, saving time and improving efficiency.”
- Improves accuracy and delivers efficiency gains. “Savings can be massive – equivalent to a senior person for half a year in some cases.”

how to best approach integration?

- Approach projects with an open mind and knowledge of what modern systems can do. “In the few years since the last implementation, things have changed enormously and much more is now possible.”
- Take your people with you, get them involved and excited about the project. “Unless you have people who are going to embrace the change, and input the right data, it’s going to be utterly useless.”
- Decide where you put financial processing within your organisation whether it is centralised or decentralised. “For example, when organising events: is the event organisers responsible for invoicing, or does that go to the finance team?”
- Agree on and be very clear about your requirements and what your outcomes should be. “Involve the finance team early. If you don’t, it can cause problems later in implementation.”



**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

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



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