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

integrating membership systems

the benefits and challenges

Managing the wide range of interactions and services that you provide to members often involves the use of multiple applications and systems.

In many cases, this leads to data silos and disjointed processes resulting in poor service and frustrated members.

The benefits of integration are significant.

Having a 360-degree view of all your member interactions and being able to seamlessly manage processes that require data from multiple systems results in improved service levels, greater member insight, and ultimately increased member satisfaction and retention.

However, integrating disparate systems and sharing data is a challenge. You not only have to overcome technical challenges, but also departmental and cultural issues, related to consent and data ownership.

In a recent live webinar, we discussed the challenges and benefits of integration, between core membership management CRM and other key business systems, such as finance, webinar programmes, learning management systems, and email management systems.

oomi Director of Sales, **Joel Trotman**, was joined by:

Richard Hayward, Head of PR and Communications, at the **Chartered Institute of Trade Mark Attorneys**

Jon Miles, Head of Tech, **Titus Learning,** providers of learning management systems, and

Ian Jarvis, FCA, MBA, of **Vertis Accounting**

This article gives just a few snippets from their insightful discussion where they shared their experience of integratio projects.

You can watch the full recorded webinar on our website.

What do we mean by integration?

Richard, CITMA: For us, it means a seamless end-user experience. We want users to not notice what tech there is in the background. Things like self-service with a single login, the same look throughout even though they're different systems.

Jon, Titus Learning: When we talk to customers we talk about 'swivel chairing'. If they're having to swivel to another application or another screen to get more data that suggests that there's integration required.

Ian, **Vertis Accounting**: It's about efficiency. You need to keep the integrity of the data, by joining those systems up and having the efficiency of not doing things twice.

Joel, **oomi**: It's hopefully reducing the number of systems that the organisation is using to manage the plethora of information, some of which is perhaps only important to a certain department.

with thanks to

CITMA The Chartered Institute of Trade Mark Attorneys

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What are the challenges and benefits of integrating membership CRM with other systems?

Jon: Data has a life cycle. When you map out the life cycle of data you can start to see where there's handoffs between different different systems or humans and that's where there is the opportunity to really understand how to integrate. It's also thinking about the user journey, the outputs you want to share, and making sure that the interconnectivity is there and the systems are doing what they need to do.

Richard: As a membership association, we want to be delivering a joined up experience that works for our members. We now have an integrated end-to-end platform where that just feels seamless for the user.

Joel: The challenges arise in building new processes to support that integration and this is where data silos and cultural issues arise - getting the departments to talk to each other or share data.

Richard: The thing that we did was making sure we involved the events team throughout, and that's really important because if they're involved with building and designing it then they've got far more buy-in to it.

Ian: I suppose the biggest departmental thing is between the accountancy role and the membership management role - where do they meet and how does integration support that?

Joel: It's got to be the business-led units that are driving the change, not the technical side.

Jon: The principle of avoiding cost of development is to use something that's already pre-built. If there's a product out there that's trusted and proven, then my advice would always be to work with with those experts and use that product because, as part of that, you get all of the benefit of a product which would be supported, it'll be maintained, it'll be secure, it'll be performing. Partnership now is really really important in solutions.

what are the best ways to start approaching integration?

Joel: Go where the knowledge is. Membership and trade associations are very, very complex. So go where the knowledge and the expertise lies, and make those individuals or organisations accountable if there are issues with integration.

Jon: My advice would be to look at the whole architecture and really understand all of the different tools and systems involved. Where I've seen integration go wrong is where there is quite a narrow overview, and only, say, look at the sales team and the product team or the sales team and the finance team.

Richard: Trying to understand what we wanted the end result to be was really important.

Jon: It does really start with understanding the various different personas within the organisation and using user stories to really understand what the outcome needs to be. It becomes quite clear where your bottlenecks are, where your handoff points are, where your points of contention are, and that will then help to drive the integration requirements.

Ian: Consider the time factor. If people have got a day job to do, they don't have the time to devote to the project and then clearly you're going to need some external resource.

Joel: We've started talking about the concept of 'data scaping', understanding where all of that data is, why that department is holding that data, where that is coming from, what it would be used for, and what are the outputs of that.
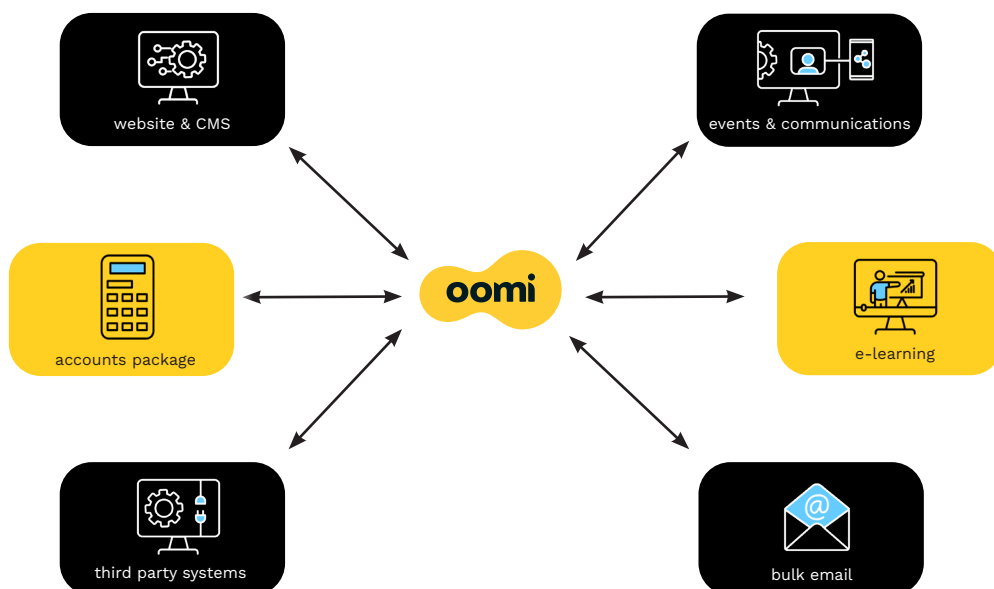
find out more

You can get access to more resources, 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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