

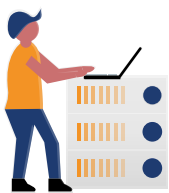
The Association for Financial Markets in Europe invests in its future

The Association for Financial Markets in Europe (AFME) is the voice of Europe's wholesale financial markets, representing leading banks and capital market players, providing expertise across a broad range of regulatory and capital markets issues. The Association's core activities consist of advocacy, policy development, communication and coordination across Europe and beyond.



"If the hallmark of a successful IT implementation is that nobody complains about anything at all, then I think smartimpact has achieved a resounding success."

Lizzie Goodburn,
Chief of Staff, AFME



Extensive data migration and synchronisation

The challenge – integration in a changing environment

When AFME first approached **smartimpact**, their infrastructure, systems and data were managed by the three separate suppliers, all based in the US. As AFME is UK-based, they decided that they needed UK-based support and systems to increase efficiencies, improve communications and drive coordination between the Association and its members.

After undergoing an extensive and robust procurement process, AFME selected **smartimpact** as their technology partner. Lizzie Goodburn, Chief of staff said:

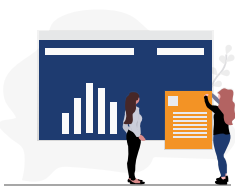
"We selected smartimpact based on their approach as we felt the team would give us the level of support we would need through the entire process".

Implementing a new system can be complicated enough, but this project had some additional challenges. In AFME's case, the new system needed to separate and synchronise shared data across the three partner organisations. Another issue was that some parts of the legacy system were 15 years old and were in various states of flux throughout the project.

smartimpact worked alongside the AFME Foreign Exchange team, identifying what was US-owned data, UK-owned data and what was shared. The data then had to be migrated and synchronised accordingly.

“ **smartimpact** dealt with the challenge admirably ”

Lizzie Goodburn, Chief of Staff, AFME



Equipping staff with the skills and confidence to use the system

Managing change – from managed services to self-service





Undoubtedly, however, it was **smartimpact's** change management support that made this implementation project really stand out. The team at **smartimpact** worked very closely with AFME throughout, advising and guiding on the inevitable change in mindset required when moving from outsourced IT managed services to internal ownership and management.

smartimpact helped AFME to develop new business processes, make decisions on which technologies to employ and to equip staff with the skills & confidence required.



Solution summary

The **smartimpact** team replaced AFME's existing legacy CRM with a brand new Microsoft Dynamics CRM system including:

 <p>smart membership</p> <p>to manage and monitor member activity and payments</p>	 <p>smart events</p> <p>to manage their events and registrations</p>	 <p>smart groups</p> <p>for advanced group management</p>	 <p>smart connector</p> <p>for complex integration with legacy systems, email marketing, website and finance system</p>
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Fully integrated systems

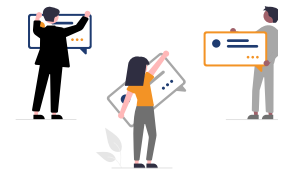
And finally... global collaboration

AFME has now successfully migrated from several disconnected applications to owning and running fewer, fully-integrated and streamlined systems.

There is no more moving data between platforms and all the risks that brought – the organisation is now far more efficient and independent than ever before.

The new fully-integrated system allows members from different geographical areas to manage their own data, documentation and communications autonomously. Groups can work more effectively with the barriers to collaboration removed.

The relationship has gone from strength to strength – **smartimpact** has overseen AFME's upgrade from Dynamics 2016 to Dynamics 365, as well as continuing to explore ideas for further efficiencies.



Groups can collaborate effectively



Autonomously manage own data, documentation and communications



Clear Dynamics upgrade path