



Bringing CRM to LIFE

The Organisation
LIFE

Market Sector
Membership organisation

Organisation Size
12 staff, 850 members

SmartMembership

Powered by Microsoft Dynamics, **SmartMembership** combines the latest technology with industry best practice to drive your organisational strategy and deliver the optimum membership experience.

Project timeline



June (2014)

July

August

September

December

February 2015

SmartImpact appointed

Plan approved / commenced

Specification completed

Testing

CRM system build completed

Go live

Company Overview

Lebanese International Finance Executives (LIFE) is a worldwide not for profit membership organisation. It aims to channel the influence of Lebanese finance executives worldwide in order to: connect members, nurture the next generation of Lebanese in finance and promote economic growth and job creation in Lebanon and in the diaspora.

Activities include networking & events, business introductions; nurture through scholarships, mentoring & coaching; fundraising and charitable activities; and promoting and supporting entrepreneurialism.



LIFE currently boasts over 850 members globally with chapters in Dubai, Geneva, Hong Kong, London, Montreal, New York, Paris and Singapore and has a senior committee in Beirut.

Solution Summary

Development and implementation of Microsoft Dynamics CRM system, including:

- Integration with other systems inc. Preside CMS, Mailchimp and SagePay
- Membership management via **SmartMembership** framework configured to manage multiple currency payments, events & mentoring activity and online membership applications

*“What’s good about **SmartMembership** is that there is a clear architecture and a lot of functionality that supports the main business processes of a membership organisation. It has a relatively light footprint - you can easily tailor it to the differences each organisation has. It is more adaptable than many other systems and exploits the benefits of CRM.”*

Frédérique Chemali,
Head of Membership LIFE



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The Challenge

"LIFE had a website and database in place that didn't really support the way in which the organisation was evolving," says Paola Barbarino, CEO LIFE.

"It could not be tailored. LIFE is a global organisation with 'chapters' around the world. It provides a network for established executives and also provides scholarships for young Lebanese wanting to start out, mentoring for people at the start of their career or in career transition, and looks to help support people looking for jobs & internships as well as help promote Lebanese entrepreneurs. We needed a new integrated system to help achieve all of this, now and well into the future."

LIFE was originally looking for a single out-of-the-box integrated solution - one supplier with a complete website & CRM solution that would meet all these requirements but it became clear during the tender process that it would be wiser to select two vendors with expertise in website and CRM respectively.

The organisation already liked Microsoft Dynamics, *"It's familiar to non-sophisticated users, extremely flexible and could be tailored. We were also looking for a solution that's easy to use through browsers - cloud based - which Dynamics is. Dynamics is also particularly good at being able to cope with, and adapt to, changing requirements."*

With all this in mind, LIFE chose **SmartImpact** for their CRM.

Our Solution

"The biggest issue for our small team was nailing down what the user requirements were because we didn't have much

expertise in specifying those. However, Charbel was very helpful, combining a very good technical understanding of CRM with a very good understanding of how a membership business operates," continues Head of Membership Frédérique.

Once the specification was agreed, **SmartImpact** adapted their **SmartMembership** framework, addressing key issues such as developing a data migration plan that could transform all the disparate data into a 360° view of the members; finding a solution to accepting multiple currency payments; and integrating the whole system with a brand new website, which was being built concurrently.

The decision was taken to go live with the CRM system first so LIFE employees could get used to it and then go live with the website and CRM integration afterwards.

"We planned to put both systems in together but quickly realised that it wouldn't work so the CRM went in first and the website followed in the July," remembers Frédérique.

Whilst LIFE members helped with testing the website functionality, the CRM testing was completed by LIFE employees. *"They quickly liked the look of it despite there being much more to learn than with a traditional database system."*

Summary

Paola sums up the project, saying, *"What we've now got is a great platform which will take the organisation through the next ten years. We've got online payment of membership for different grading structures in multiple currencies and via different payment methods;*

online event bookings from the complex to the simple; online membership and scholarship applications; online job posting and applications; plus all the information that describes what's going on in the organisation. It allows LIFE members to Connect, Nurture and Promote much more easily."

Talking specifically about the **SmartMembership** framework, Frédérique says, *"What's nice about SmartMembership is that there is a clear architecture and a lot of functionality that supports the main business processes of a membership organisation. It has a relatively light footprint - you can tailor it relatively easily to the differences an organisation has. It is more adaptable than other systems and exploits the benefits of CRM."*

Looking to the future the organisation plans to develop the system further, *"It's very easy to add new things into the system like auctions at events and fundraising for different purposes, using features existing in the CRM. Going forward we plan to get into blogging via the system, start managing membership groups with it and expand our fundraising, scholarship and mentoring aspects further. There's lots of scope to expand in the future both administratively and meeting members needs within the current systems capabilities,"* concludes Frédérique.

Asked to sum up the project, Frédérique reckons, *"We now have a very rich and sophisticated system. I think it's a fantastic platform for the future for the organisation. SmartImpact... was a solid choice for LIFE. SmartImpact is an easy and flexible organisation to work with who understands our needs and meets the changing needs as they arise; they are a very good choice of supplier."*

About SmartImpact

We are experts in providing Microsoft Dynamics CRM solutions for organisations where members are central to their operations.

Our products are built using Microsoft Dynamics CRM and SharePoint to form the core solution, which we then customise to meet your full needs.

To find out how we can help you contact us on: 0845 544 2043, info@smartimpact.co.uk or visit us at www.smartimpact.co.uk

We provide a full range of services including:

- Design, configuration, implementation and support
- Failing project rescue and re-launch
- Performance tuning
- Reliable website and third party platform integration
- Quality testing and training



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