Case Study

CRM and Portal Working Seamlessly to Deliver Enhanced Membership Services

The British Veterinary Association (BVA) represents the UK veterinary profession, offering policy development, journal publication, professional development, events, support services, and managing the Canine Health Schemes.

With over 19,500 members, including international, BVA's membership categories are Standard, Young Vets, Concession, Joint, Student, and Group.

THE TRANSFORMATION CHALLENGE

In 2013, BVA commissioned a Dynamics CRM provider to replace its legacy system. However, ongoing issues led BVA to seek a new partner by 2019. To eliminate manual workarounds, they needed an integrated solution combining:

- CRM,
- Members portal,
- Finance System,
- Email marketing tool,
- Canine Health Scheme (CHS) portal

BVA aimed to improve efficiency, automate processes, and unify their communities (members, vets, CHS participants) into one system for easier interactions and better engagement understanding.

They sought a trustworthy, long-term partner and collaborated with HartSquare, a consultancy in the NFP sector, to validate their choice.

THE APPROACH

Bluelight assessed user requirements through a detailed Discovery program, understanding where the original Dynamics CRM project failed and aligning BVA's success aspirations with BlueCRM/Dynamics.

Teamwork was crucial, and as requirements were refined, BVA built confidence in the process, ensuring their bespoke needs were met without unexpected costs. Bluelight provided continuous guidance and reassurance, ensuring a successful Go Live.

Their expertise in identifying requirements and creating a realistic project schedule allowed BVA to sign off confidently, knowing the project's cost, timeline, scope, and quality boundaries would be maintained.

"Bluelight did such a good job of listening to our requirements, understanding them and implementing them; it was as if the scars of the old project became healed throughout the new implementation."

Andrew Shipway
Head of Technology & Data
British Veterinary Association

THE TRANSFORMATION SUCCESS

The project, initially delayed due to Covid-19, was successfully launched in June 2021 and completed by March 2022. Bluelight demonstrated flexibility and professionalism, ensuring the project met all key requirements and was delivered on time and within budget. The project included significant integrations and data migrations, providing a seamless and efficient solution for BVA.

1 Project Start and Completion: Began in June 2021, completed by March 2022.

2 Key Deliverables: Fully integrated CRM with membership, events portal, and bespoke CHS portal.

3 Data Migration: Combined data from legacy CRM and Access database into the new CRM.

4 Third-Party Integrations: Managed direct debit payments, marketing communications, and payments through the CRM.

5 Seamless Delivery: Bluelight managed third-party liaison, ensuring smooth project execution.

6 Consistent Team: The same Bluelight team supported the project from start to finish, enhancing continuity and relationship building.

THE BENEFITS

The new integrated CRM and portals have significantly enhanced BVA's operations, providing a comprehensive view of members and contacts, streamlining processes, and fostering a culture of innovation. These improvements have led to better customer service, increased efficiency, and more reliable data analysis.

COMPLETE MEMBER VIEW
Comprehensive records of interactions for targeted communications.

ENHANCED CUSTOMER SERVICE
Streamlined processes and a single data source for CHS users.

IMPROVED EFFICIENCY
Consistent and efficient business processes through workflow automation and service integration.

POSITIVE COLLABORATION
Fostered a culture of creative innovation with Bluelight, leading to continuous system improvements.

INCREASED STAFF EFFICIENCY
More resources for members due to improved automation and fewer manual processes.

RELIABLE DATA ANALYSIS
Powerful and trustworthy data analysis capabilities.

"Bluelight's version of Dynamics, BlueCRM, is so much simpler and yet still highly effective at delivering a complex solution that, moving forward, the team at BVA are so more confident of using the system on a day-to-day basis"

Andrew Shipway
Head of Technology & Data
British Veterinary Association

info@teambluelight.com

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