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Their core services include the provision of Training Courses, Quality Assurance, Partners in Excellence Scheme, Advice and Guidance and the Aarhus Convention Check.

*“The overall interface is easier to navigate and flows more naturally - so much quicker to use”* - Martin Roach - tCI

## Background

tCI had been using GoldMine CRM system for over 12 years to support their sales management, membership and marketing functions, however GoldMine's limitations were significantly constraining tCI's business and the decision was made to migrate to Microsoft Dynamics CRM.

As they already utilised other 365 components, the ability to integrate Dynamics 365 with other components was a key factor.

The GoldMine system was becoming unreliable and difficult to use. The reporting requirements could not be met from within the database so a number of separate spreadsheets had started to be used – resulting in fragmented and duplicate data and no one central repository.

Having previously been GoldMine partners, the team at CRM Dynamics Limited were an ideal company to work with in both the design of the new Dynamics CRM solution and the management of the complex migration of the data from GoldMine to Dynamics CRM.

*“For the first time we can see the purchase history of an organisation from a single screen”*

Rhidian Jones – Special Advisor to tCI

## Implementation

The users' perspective of their own requirements was largely constrained by what they were used to with GoldMine. The new system design was kept as simple as possible initially to allow a fast implementation of the core system. This was then evolved as the users started working with the system.

*“The system is very flexible and allows for specific tailoring for our requirements, and is easy to adjust later for specific user requirements.”*

Martin Roach

The implementation was split into key areas ...

- Core business to business functionality
- Sales Pipeline management
- Membership Management
- Course Management

Each phase was developed, tested and the relevant data migrated from GoldMine to the new environment.

Once the system was ready, the final data transfer took place in parallel with the User training so they were ready to Go Live immediately following the training.

*“We strongly appreciate the flexibility of the system. In particular we find the ongoing customisation work by CRM Dynamics Ltd to be excellent in terms of responsiveness, quality and speed.”* - Rhidian Jones

## Results

The implementation of Dynamics CRM has resulted in a system that is easy to navigate, information is better laid out and easier to digest and the built in charts will be helpful for ease of reporting, doing away with separate spreadsheets.

The users love the familiar Microsoft approach, the integration with Outlook and other 365 packages and the ability to access the system from anywhere they have an internet connection.

All in all, the time savings gained from implementing Microsoft Dynamics CRM will enable the staff to spend more time developing the business.