

Triangulation: One connected system for CRM, website and member portal



INTEGRATED CRM, WEBSITE & MEMBER PORTAL



"System dashboards and real-time information now help us prioritise tasks and make more informed decisions."

Darrell Smart
Operations Director
Chartered ICES

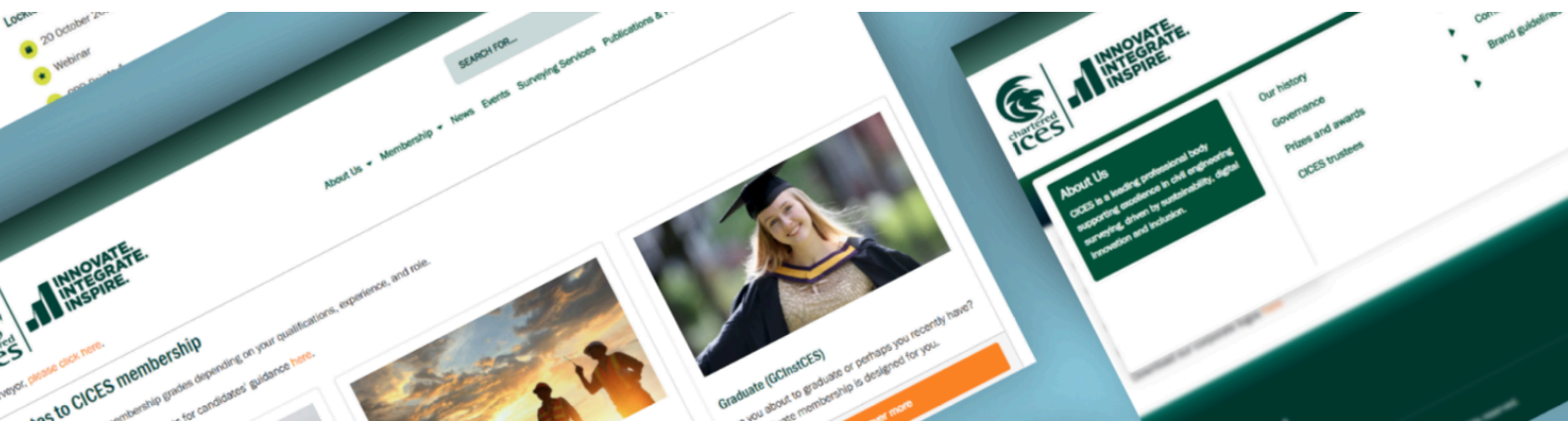


Where ICES started

The Chartered Institution of Civil Engineering Surveyors (ICES) sets and upholds professional standards, awards qualifications and chartership, and supports members throughout their careers. Its disciplines sit at the heart of how infrastructure is measured, mapped and managed, giving the institution responsibilities to both the profession and the public.

Getting there depended as much on organisational alignment and shared understanding as it did on technology.

The institution wanted its CRM, website and member portal to work as one ecosystem. Reaching an agreed direction meant aligning the needs of staff, leadership and other stakeholders, while making a technical programme understandable to the people who would use it every day.



A connected, discovery-led approach

Bluelight treated the CRM, website and portal as one piece of work. Discovery established the objectives, scope, risks, assumptions, benefits, success criteria, responsibilities and governance, giving both teams a shared reference point for delivery.

Consultation and stakeholder sessions were followed by regular playbacks, sandbox reviews and portal demonstrations. This allowed ICES to see how decisions would translate into the system, respond as the platform developed and sign off the work with a clear understanding of what was being built.

What Changed?

A central CRM

Microsoft Dynamics 365, configured with BlueCRM modules and functionality, gives CICES one reliable place to manage its organisational data and processes.

Website and Portal

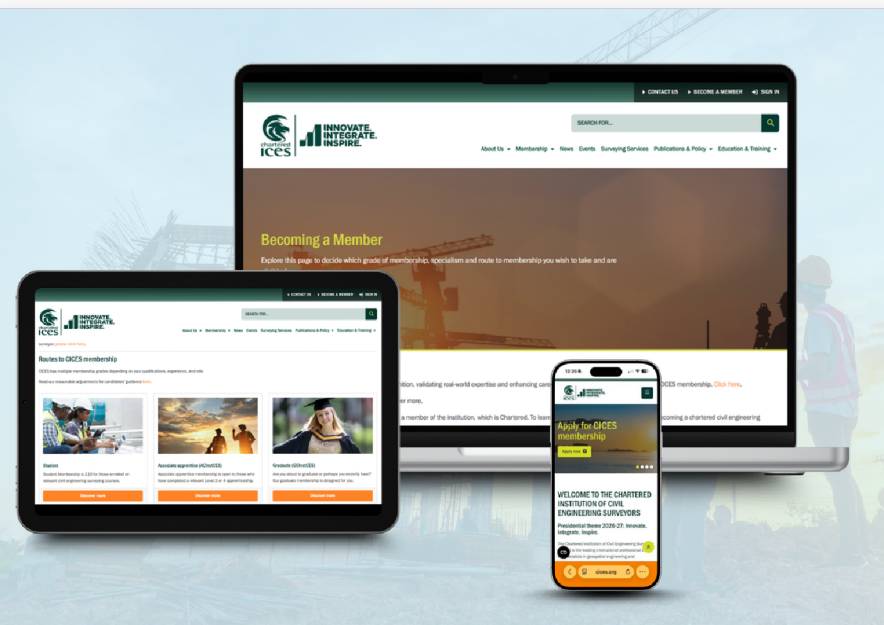
The website and member portal work directly with CRM data and workflows, giving members a joined-up experience and CICES one connected system to manage.

Shared operational view

Dashboards and real-time information give teams a clearer view of membership activity and the membership pipeline.

A clean migration

Existing data was migrated into the new Dynamics 365 environment, allowing CICES to move into the platform with its history intact.



"We wanted to build a long-term relationship with a vendor, and our experience throughout this project has reinforced that decision."

Darrell Smart
Operations Director
Chartered ICES



What this means for CICES

CICES now has a delivered, fully specified platform: Dynamics 365 CRM, an integrated website and member portal, a defined migration path and a single specification agreed by stakeholders and delivery teams. It also moved forward with a shared understanding of what was being built and why.

Formal performance metrics will follow as the platform beds in. The foundation already gives CICES one connected environment and a clearer shared view of membership activity.

A foundation to build on

A more intuitive member experience

CICES has received positive member feedback following the introduction of the new, fully integrated website. The streamlined design makes it easier for members to find information and use the site.

Room for continued development

The platform gives CICES a stronger foundation for further development and continued process improvement, including a future integrated marketing and communications platform within BlueCRM.