

# How a personalised digital experience is delivering measurable results for 10,000+ internal auditor members.



Chartered Institute of Internal Auditors

INTEGRATED CRM, WEBSITE & MEMBER PORTAL



*We came from a long way back. We had three separate websites, a legacy CRM we couldn't get good data out of and no real self-service for members.*

**Andrea James**  
Head of Marketing and Digital  
Chartered IIA



## Where the Chartered IIA started

The Chartered Institute of Internal Auditors is the professional body for over 10,000 internal audit professionals in the UK and Ireland. With a Royal Charter and a global network behind it, the Chartered IIA offers certifications, training, technical guidance and member support across every sector.

*Before working with Bluelight, the institute was running three separate websites on different versions of Umbraco, a legacy CRM that couldn't deliver reliable reporting, and a brand that hadn't been updated since before it received chartered status in 2010. There was no online joining, no mobile responsiveness, no accessibility compliance and over 2,000 pages of unmanaged content.*

Members couldn't see their membership status, couldn't renew online, and couldn't easily find the technical guidance they needed. Communications were one-size-fits-all because the CRM couldn't segment data effectively.

**10%**

INCREASE IN ORGANIC TRAFFIC

**100%**

INCREASE IN AVERAGE ENGAGEMENT TIME

**2000**

PAGES CURATED AND MIGRATED

## A big bang approach

The Chartered IIA chose to tackle everything at once: new CRM, new website, new brand, new domain. All going live on the same day. The window was tight. The annual conference in October couldn't be disrupted, and membership renewals start in late December. That left a narrow launch window in November.

Bluelight delivered an integrated platform connecting Microsoft Dynamics 365 CRM with Umbraco CMS, supported by DotDigital for email marketing and Power BI for dashboards. The Chartered IIA chose Bluelight for its sector knowledge, the familiarity of the Umbraco platform, and the stability of the Microsoft ecosystem.

## What's Changed?

### Genuine self-service

Members can log in, renew, join, view training history, and access special interest groups

### Behaviour tracking

Identify disengaged members and reach out with targeted communications

### Conditional content

Segment by type, qualification and location. Showing tailored content to each group

### Data access for all

Every department can access dashboards and real-time membership data

*BlueCRM has changed our access to data and information massively. Everybody can access dashboards and get that snapshot of where things are.*

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Head of Marketing  
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## What surprised us

### Harder than expected

- Account migration comms needed to be sharper.
- Over-tagging diluted content discovery.
- User testing was squeezed out by timelines.

### Better than expected

- Segmentation was up and running within weeks.
- Umbraco's safeguards prevented broken links across 2,000+ pages.
- Brand cohesion across all channels.

## What's next

### Content hub UX testing

Understanding how members search for technical guidance.

### Wider Umbraco access

Extending CMS beyond marketing so departments own their content.

### Engagement Scoring

Measuring and responding to member engagement across the platform.

### Exploring AI

Investigating how AI tools can support content discovery, member communications and internal workflows

*"If zero is where we started and 100 is the endpoint, we're at about 50. We were definitely at zero. But now we want to move from good to great."*

**Andrea James**  
Head of Marketing and Digital  
Chartered IIA