



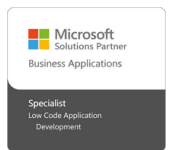
*Our integrated CRM and CMS have already begun to improve processes and engagement, both for staff and our members.*



Derek Jamieson  
Head of Membership  
Chartered IIA



## Chartered IIA delivers personalised digital experiences with an integrated CRM, website & member portal



### The Chartered Voice for Over 10,000 Internal Auditors in the UK and Ireland

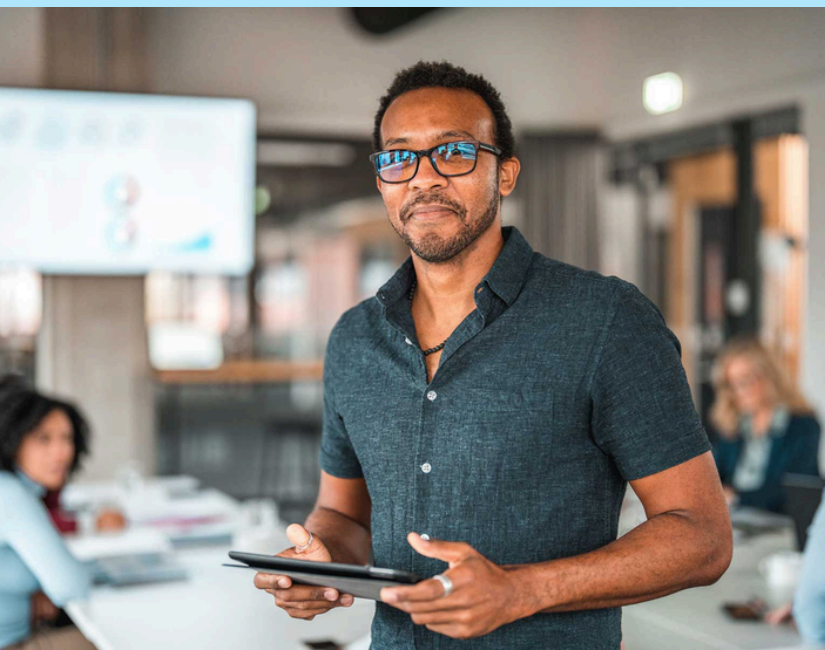
Since 1948, the **Chartered IIA** has championed the internal audit profession, supporting members across all sectors with learning and career development. It holds a unique global position as the only internal audit body with a Royal Charter, giving it the authority to award chartered status.

### Overhauling a dated and disjointed digital system

Like many membership organisations, the Chartered IIA had developed a range of disconnected systems over time. Its dated website and portal operated separately to the ageing CRM, making day-to-day management difficult and introducing the risk of data discrepancies.

These limitations also made it harder for the communications team to deliver timely, relevant content to members. With expectations rising, the Chartered IIA knew it needed to deliver more personalised journeys sharing role-specific content, courses, and events that would add real value for each member. Internally, it wanted a system that was easier for staff to manage, delivered measurable efficiencies, and could scale alongside membership growth and an expanding service offer.

The transformation would coincide with an overdue rebrand and align with the annual membership renewals cycle to ensure clear timelines and maximise impact.



# A connected platform: Microsoft Dynamics 365 and Umbraco CMS

## A Unified System for Member Engagement

The Chartered IIA's new platform connects Dynamics 365 CRM with Umbraco CMS, allowing real-time updates. When members update their details, the CRM reflects it instantly and feeds personalised content via the CMS, creating a joined-up experience for members and simpler processes for staff.

## A Website Built for Personalisation and Ease of Use

Bluelight delivered a fully branded site and portal using Umbraco CMS, selected for its flexibility. CRM data drives conditional content containers, and staff can make updates quickly, no developer needed.

## CRM That Powers Meaningful Journeys

Dynamics 365 supports automated, tailored journeys using real-time data. Relevant alerts and content appear when needed, driving engagement and reducing manual workload.

# Poised for future scale-up

The Chartered IIA shows what's possible when CRM and CMS work in harmony. With streamlined communication and time saved, the team can deliver a modern, responsive service.

A secure single source of truth also ensures data protection and supports compliance with confidence. By partnering with Bluelight to build a digital setup tailored for membership organisations, the institute is now equipped to scale sustainably.

Broadening services is easier to manage, and as data volumes grow, the Chartered IIA can access and apply insights more effectively, benefiting members, staff, and the internal audit profession as a whole.

## Get in touch

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*With Bluelight's support,  
we've built a foundation  
that we believe can flex  
and grow as our  
organisation evolves.*

**Nigel Shattock**  
Director of Communications  
Chartered IIA

