



Case Study

Retail Digital Transformation | BRC Revamps CRM, Portal & Finance

ABOUT BRC

As the trade association for retail businesses, the British Retail Consortium (BRC) aims to make a positive impact on the retail industry and its customers, both now and in the future.

Its membership includes over 170 major retailers that operate physical stores, multichannel, and pureplay online, as well as thousands of smaller, independent retailers through various niche retail trade associations that are members of the BRC.

THE CHALLENGE

Increasingly, staff felt the original Dynamics 365 CRM couldn't support core business functions or provide a futureproof CRM platform. The relationship with the CRM provider was suboptimal, with expensive and slow initiatives eroding BRC's confidence. This led to numerous workarounds and a heavily customised, unstructured solution.

BRC relied heavily on scarce technical resources, with only one person fully understanding the complex CRM structure. The original Website/Portal integration was also problematic.

To support its members and stakeholders effectively, BRC needed a significant overhaul.

Key challenges included:

- Significant hurdles for members to log on to the portal.
- Manual workarounds to ensure data interacted with the CRM.

"Bluelight's detail orientated, and super-organised way of working meant that we could rely on them to keep everything on track. Not having to manage a traditional Client/Supplier relationship freed us up to focus on collaboration and our key objectives."

Fraser Tant | Membership Director
British Retail Consortium

THE APPROACH

The CRM was central to the transformation, with two satellite projects running simultaneously:

1. Moving the Finance platform to Business Central
2. Replacing the existing Portal to manage Membership, Preferences, and Events.

Bluelight collaborated with BRC to scope and explore the new CRM requirements. By focusing on future capabilities rather than current problems, Bluelight Business Analysts captured and verified the complete requirements across teams, including Membership, Events, Learning, Finance, Marketing, Partnership, and Communities.

During the **Data Migration planning**, it became evident that traditional data delivery methods would add risk. A more guided approach was needed. Bluelight provided a tailored support package, relieving BRC of much of the data management burden. Testing was structured to ensure an achievable output for BRC.

Key points:

- CRM transformation included Finance and Portal projects.
- Bluelight's forward-thinking approach captured comprehensive requirements.
- Guided data migration reduced project risk and burden on BRC.

CRM IMPLEMENTATION

Scoping and Requirements

Bluelight collaborated with BRC to scope and explore new CRM requirements, focusing on future capabilities.

They captured and verified requirements across teams, including:

Membership, Events, Learning, Finance, Marketing, Partnership, and Communities.

Project Timeline and Challenges

The six-month implementation phase required sourcing suppliers for the new Finance System and Portal.

Bluelight supported BRC in all aspects of the implementation and with all partners.

Regular Reviews and Familiarisation

BRC regularly reviewed the CRM during implementation to input into technical and functional development.

This ensured familiarity with the interface and system structure by the time of end-to-end UAT.

COLLABORATION

During the Data Migration planning, it became clear that traditional data delivery methods would add risk due to resource limitations and loss of key expertise. Bluelight provided a tailored support package, reducing BRC's data management burden and structuring testing for achievable outcomes.

Collaboration was key once technology partners for Finance, Portal, and Email Campaigns were appointed. BRC appointed an external Project Manager to align all organisations with the Bluelight timeline. Bluelight led all areas in managing the complex UAT and pre-Go Live phase.

Challenges were understood from the outset. Detailed planning and open communication ensured complexities were absorbed, with weekly check-ins aligning deliverables for end-to-end UAT testing.

THE OUTCOME

By taking a highly collaborative approach, the project was delivered successfully, on time, and on budget, and it went live in November 2021.

The core elements of the project were:

- Detailed analysis of business requirements
- Dynamics CRM implementation
- Data migration from legacy CRM and associated systems
- Launch of a new web portal allowing login, registration, profile and comms preference updates as well as online payments and event bookings
- Launch of new Finance system, Business Central, ahead of integration with BlueCRM

CRM BENEFITS

Unified User Insights

The new CRM provides BRC with a unified 360° view of users, consolidating all information in one place. This allows BRC to gain insights and deliver better value.

The CRM is embedded into BRC's processes, ensuring all staff have access to necessary information.

Enhanced Member Engagement

The CRM increases member engagement through targeted communication based on interests and historical activity. All staff have an overview of contacts and their activity, preventing information silos, ensuring relevant and engaging communication for members.

Improved Efficiency & Data Analysis

The CRM improves efficiency by reducing manual processes and enhancing automation, freeing up resources to better serve members

It also enables powerful data analysis using trusted data, providing reliable insights for decision-making and strategy.

“Bluelight were abreast of all elements of the wider project. They provided a valuable leadership role across the whole delivery enabling the entire project, not just the CRM, to Go Live together.”

Fraser Tant

Membership Director

British Retail Consortium