

The Society of Operations Engineers see online success with Advanced NFP's OpenEngage

The system has become an integral part of day-to-day tasks and is now in use by every department in the organisation.



With more than 13,000 members, the Society of Operations Engineers (SOE) needed a membership management system designed to process large volumes of data and manage complex relationships, integrated to their website. Advanced NFP's OpenEngage has become an essential part of the SOE's day-to-day work, moving many processes online and creating a more collaborative working environment.

The Society of Operations Engineers (SOE) is a membership organisation for engineering professionals in the road transport, plant and engineer surveying industries.

Formed in 2000 by the merger of the Institute of Road Transport Engineers (IRTE) and the Institution of Plant Engineers (IPlantE), the SOE supports the professional development of its members through training and qualifications, registration with the Engineering Council, access to industry-leading magazines, exclusive members-only content, and invitations to technical events.

The need to accurately capture more data

The SOE originally had a bespoke membership management system which was costly and time consuming, and was not integrated to their website.

Cheryl Carroll, Database Co-ordinator for the SOE explains, "We were missing out on opportunities to capture small but useful pieces of information, such as communication preferences. We also lacked an online payment system so members had to call us or post details to pay for memberships and renewals."

Manual inputting of data was time-consuming and led to inaccuracies. At peak times, temporary staff were required to handle the volume of data.

Cheryl continues, "Information could be incorrect, due to human error or the inability to decipher handwriting, or data could be entered into the wrong field. This led to people losing confidence in the system."

Inaccurate data and the fact it was not easy to segment was hampering the SOE's communications. Duplicate records meant some members received multiple letters and incorrect names and addresses led to mail not arriving at all.

The system was used solely by the SOE'S Membership and finance departments, which meant there was no information sharing company-wide, creating silos of data.

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Creating a membership management system database and improving communications.

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Improving information management

What the SOE was looking for in its new system was better access to a central repository of information, and greater integration with the website, so that facilities such as online payments could be offered to members. They needed it to be robust enough to be used across the whole organisation, with the capacity to process multiple tasks.

Cheryl explains, "We wanted a system that was easy to use and that our entire organisation had confidence in. We also wanted it to integrate with the website, run email marketing campaigns and give us the ability to run our renewals."

The SOE's tender process included a number of contenders; however Advanced NFP's OpenEngage solution was the clear choice for them. The society saw it as the best fit both in terms of a membership management system and a CRM system. OpenEngage was geared to how the organisation wanted to progress in the future and the SOE was able to see how their longterm vision could be achieved through using it.

Achieving organisation-wide buy-in

Opting for OpenEngage, the SOE invested in the core relationship management system, along with the Events, Finance, Membership Management and Web modules. The project has been rolled out in phases, the first of which was the back-office CRM system. Phase two of the project focused on deploying the online tools that link the database to the SOE website.

Right from the start the SOE wanted to ensure buy-in to the project from all staff. A core team of 'ambassadors' was appointed, which included representatives from each department. The ambassadors attended training courses and presentations carried out by the Advanced NFP implementation team. Everyone in the society

had access to the training system throughout the process.

Cheryl explains the reasons behind this approach, "One of the main problems with our old system was under-utilisation. As a result, when we chose OpenEngage it was important that the adoption process worked really well. Right from the start we appointed OpenEngage 'ambassadors' as super-users who were trained to use the solution and then filtered their knowledge throughout the rest of the organisation. We also ran quizzes where staff could compete on their knowledge of the system and we offered workshops, extra training and held parties for key milestones, involving the whole organisation."

More than just a membership database

One of the objectives of the new membership system was to make staff work 'smarter' and more effectively; this has been achieved organisation-wide. The SOE now has a single-view of all contacts, whether they are an individual or organisation, a member or non-member, and the system is in day-to-day use in every department, including the CEO.

Cheryl explains, "We don't just use OpenEngage as a membership database, we use it as an organisational tool. So it's not just for members and non-members but for our independent technician licensing scheme, magazine subscriptions, committees and our corporate member organisations too."

Online integration

Another primary objective of implementing OpenEngage was to achieve website integration, allowing online payments and a move away from paper-based processes. The move online means daily functions, such as registering

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and processing new members, are much less time-consuming and no longer involve the cost of employing temporary staff. The processed information can now be seen by each department too, so there is a more cohesive approach to these daily tasks.

Cheryl explains, "There's more collaboration between departments as a result of OpenEngage. People are able to see where in the process a prospective member is, this allows departments to work more collaboratively and means processes happen in the right order and in a fraction of the time they did previously."

Previously, the SOE had noted a lack of confidence in their membership management system, largely due to poor data integrity. By integrating OpenEngage to the website, data has become much more accurate as processes are automated and no longer paper-based. The risk of human error when inputting data has been reduced and members are able to update their own information online.

Using data stored in OpenEngage, the SOE has been able to create committee-only areas on their website. This means those who are part of a committee are able to access and download documents and information, such as meeting minutes and agendas. Previously these requests would have been dealt with by manually posting or emailing the documents.

Improved communications

The new found accuracy of data enables SOE to easily segment and profile audiences within OpenEngage. Additional information such as communication preferences, mean much improved engagement rates.

Cheryl explains, "As an umbrella organisation for three professional sectors, our members work in

a variety of different industries. Now, rather than sending out one generic message, we are able to finely target communications by industry, role, location or topic. This is quite a step from where we were before, sending generic letters, often duplicated and frequently to old addresses or with misspelt names."

Modernisation of services

The SOE has fully embraced all aspects of OpenEngage, utilising all mobile platforms and add-ons available, including Accounting Office for their accounts team. To date, the

SOE and Advanced NFP have rolled out four of the agreed six online stages; registration, payments, events and online joining. In addition, members can now access a secure personal area on the website.

Feedback from both members and employees has been positive and the modernisation of services afforded by OpenEngage has been a huge step forward for the SOE.

Cheryl explains, "The use of OpenEngage has exploded and the solution is now integral to the way that the organisation works."

Measuring targeted communications

A key focus going forward will be a methodical approach to measuring engagement levels, as well as the impact of new marketing programmes. Utilising the tools within the solution, the SOE plan to target members in a more tailored way and monitor the effectiveness of campaigns more closely.

The SOE still has two phases of the OpenEngage implementation left to go, which cover online

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documents and online directories. These will add further dimensions and member benefits to their website.

Cheryl concludes, "OpenEngage has already made a huge impact on the Society of Operations Engineers and we're looking forward to completing the final two stages of the project. Both the online documents and directories modules will add more value to our website, offering members and nonmembers useful links and contacts."

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