

FROM SYSTEM FRICTION TO CONFIDENT TRANSFORMATION



THE IMPACT

The British Dietetic Association now has an integrated CRM, more reliable data and a stronger digital foundation.

Core member processes are managed more consistently, giving staff greater confidence and creating a better experience for members.

“The team guided us through a complex programme, from discovery and root cause analysis through to procurement and implementation. Their support covered our website upgrade, new CRM, data migration and system integrations.

Membership organisations need clear technical and legal advice when managing multiple suppliers. The team gave us practical, personalised support throughout, and we would highly recommend them”

Louise Pritchard, Chief Operating Officer

THE PROBLEM

The existing CRM was no longer meeting the organisation’s needs. Rising costs, limited functionality and integration issues had reduced confidence in the system and its data.

Staff relied on complex workarounds to complete basic tasks, and the member experience was being affected. When more than 1,000 memberships were cancelled by the system, the need for change became urgent.



THE VALUE

We helped the British Dietetic Association define a clear vision, understand the root causes of the issues and set requirements for a replacement CRM.

We led the independent procurement process and supported the implementation of the CRM, website platform, member portal, data migration and marketing integration.

Working across suppliers and internal teams, we kept the programme on time and within budget. Today, the organisation has stronger systems, better data and the capability to keep improving.

