

Case Study



Client Profile

Organization

Association for healthcare professionals

Size

Over 80 employees, around 36,000 members

Industry

Healthcare/professional associations

The client is a large Canadian professional association that manages the regulation of certain key healthcare professions throughout British Columbia.

It ensures that people in these professions are competent and ethical. It does so by setting standards and helping members meet these standards.

ASSOCIATION MEMBERSHIP MANAGEMENT

Business Needs

The client was facing multiple challenges with managing its membership (as well as its finances and documentation). These challenges resulted from:

- Complex, hard to maintain IT systems, not aligned with organizational needs
- Inefficient processes, relying on hard-copy documentation
- Workarounds creating data quality issues and inefficiencies

Solution

Knowledgetech deployed an Association Membership Management system, featuring elements of several Microsoft technologies, including Dynamics CRM, Dynamics GP Financial and SharePoint. This system was designed to help the association collect and leverage any member data it would need in order to efficiently provide services to members, throughout their careers – from registration, until retirement.

Benefits

- Facilitated efficient delivery of targeted member communications
- Streamlined the registration, inquiry and discipline processes
- Significantly increased the transparency of policy and quality assurance procedures
- Improved workflows and automated common tasks
- Adopted electronic document management systems to speed data retrieval



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