

MEMBERSHIP SECTOR  
Dynamics CRM partner Ebook

Trillium   
Experience Matters

# Frustrated with Microsoft Dynamics CRM?

You don't need a new CRM,  
you need a new partner.



As someone in the membership sector, are you frustrated by your Microsoft Dynamics CRM Platform, despite having invested lots of time, budget and resources into it?



A CRM that does not support your organisation well will have a detrimental impact on its performance. From losing user engagement by providing a poor experience to having a stressed IT team and dissatisfied marketers, the CRM issues will affect both internal and external stakeholders.

## PROBLEMS WITH DYNAMICS 365

Before partnering with us, many of our clients were frustrated by having to deal with what felt like an unreliable platform that had continual performance limitations.



Performance issues can be caused by a large number of things including large datasets, customisations, client computers, the browser of choice, cooperating networks, problems at the ISP, problems within the Dynamics network and problems within Dynamics.

The biggest problem with fighting performance issues is availability of time; you have to prepare yourself that without a partner, finding the cause can and will consume a large amount of time and resources.

## THESE ARE 3 OF THE MAIN ISSUES WE'RE TOLD ABOUT REGULARLY:

### 1 IT'S INEFFICIENT

Slow and inconsistent responsiveness and processing times, over-complicated processes and workflow, and a high volume of manual input is required, with limited automation.

You're also unable to get a single member view due to weak or non-existent integration, and there's no way to thoroughly and flexibly analyse the data collectively.

### 2 IT HAS POOR TRACKING

Poor tracking and measurement make it hard to measure success and understand poor performance.

This, combined with clumsy marketing tools means having to export data to then use it in another system to send emails, rather than just being able to click a button and have it synchronise and send.

Ending up with untargeted and untailed communications as the relevant data and tools aren't available to provide the right support at the right time.

### 3 THERE'S A LOT OF RISK

Poor data management alongside an over-reliance on a few "CRM gatekeepers" who understand the bespoke and complicated steps needed to deliver tasks, creates vulnerability and makes it difficult to improve and contain, risking a breach of data laws, e.g. GDPR.

## WHY DOES DYNAMICS 365 HAVE THESE PROBLEMS?

Nearly all of these problems are caused by a CRM that has been built with bad structure and bad architectural decisions leading to cul-de-sacs of development that gets cumulatively worse as the demands increase.

Dynamics 365 is an out of the box solution (stronger and more reliable in the long term for being so), but it needs to be set up for your organisation by a partner who thoroughly understands how its capabilities can be properly matched with your organisation's objectives, processes and resources.

Issues are also caused by poor integration and often a weakness in the relationship between technical partners.

As an example, if Dynamics is poorly architected between partners from the out-set, the processes can be difficult to evolve to support a changing business. If any data enrichment has to be entered manually, you get inconsistent entry and a lack of insight from having clean, rich data. As a result, you get lower levels of member support leading to decreasing renewals.

**A good Dynamics partner should proactively take responsibility for resolving all CRM issues like these, even if that involves working closely with another supplier who is resistant to the relationship.**

So we can see that a partner absolutely needs to have an excellent technical knowledge.

Ultimately, however, if they don't understand who you are and why you are trying to achieve your organisational goals, the CRM won't work. This is where picking the right partner becomes so important.

## IS YOUR DYNAMICS CRM PARTNER RIGHT FOR YOU?

Getting your CRM system right can transform your company's member-facing operations, embedding a culture of information sharing across all departments and putting service at the core of everything you do. Dynamics can do wonders for how your business gathers, distributes and uses intelligence about sales, making everything you do more efficient and flexible. Without the right support from your partner, however, you can be left with a broken system.



“ Our previous CRM support supplier, who were really big, would just say ‘the performance is poor. It’s probably on your database.’ We asked them for help, and they said they didn’t have the necessary expertise. ”

*Justin Turner, Head of IT, CIEH*

**So how can you judge if your current (or future) Dynamics CRM partner is right for you and your organisation? They must, of course, have an outstanding technical knowledge and experience.**

## QUESTIONS TO ASK A PROSPECTIVE PARTNER

If your goal is to implement a Dynamics CRM platform, relying less on bespoke platforms and centralise around the member experience, it's important to ask your prospective partners the right questions.

### DO YOU UNDERSTAND OUR CURRENT SYSTEMS?

A partner should understand your current business areas, processes, business calendar and overall objectives, and be able to give appropriate recommendations based on this.

### WHAT KIND OF SCOPE DO YOU HAVE?

They should be able to future-proof your plan and break down the deliverables, phasing, dependencies and prioritisation, giving you appropriate budget expectations and a high-level project plan.

### HOW WILL YOU DESIGN OUR SOLUTION?

As part of your detailed project plan, your partner should utilise your required objectives and detailed business discussions, implementing them as part of the design process.

### HOW WOULD YOU IMPLEMENT OUR SOLUTION?

A good supplier would focus on specific business areas for sprint releases initially focused on quicker wins and resolving unknowns. Later sprints would be kept for data migration and portal integration.

### HOW WILL YOU ENSURE YOUR SOLUTION WILL MEET USER EXPECTATIONS?

Partners should implement thorough testing of the solution and resolve issues based on employee feedback combined with appropriate training and incremental reviews.

### WHAT HAPPENS WHEN IT GOES LIVE?

A partner should support the business when critical issues arise, providing training and an onsite presence.

## WHY WE ARE THE BEST CRM DYNAMICS 365 PARTNER FOR MEMBERSHIP ORGANISATIONS

Many of our clients came to us because they were frustrated with Dynamics and we have completely transformed their experience and positively impacted their organisation and its stakeholder's performance (Read our client [case studies](#) to find out more).



“ The key thing for me was that Trillium spent a lot of time with our teams, understanding what it is we do and for whom, and how they use CRM. Trillium didn't just focus on the IT elements, as many suppliers do, but on the importance of taking our internal users on the journey with them.

Trillium understand us and can quickly and efficiently review, digest and deliver solutions that encompass all challenges and empower internal users. ” *Deborah Jarvis, Operations Director, LCCI*

Our CRM consultants and architects have over 150 years of combined Dynamics experience. We focus on understanding your business and your current position and then translating your requirements into a path that leads away from frustration into happiness.

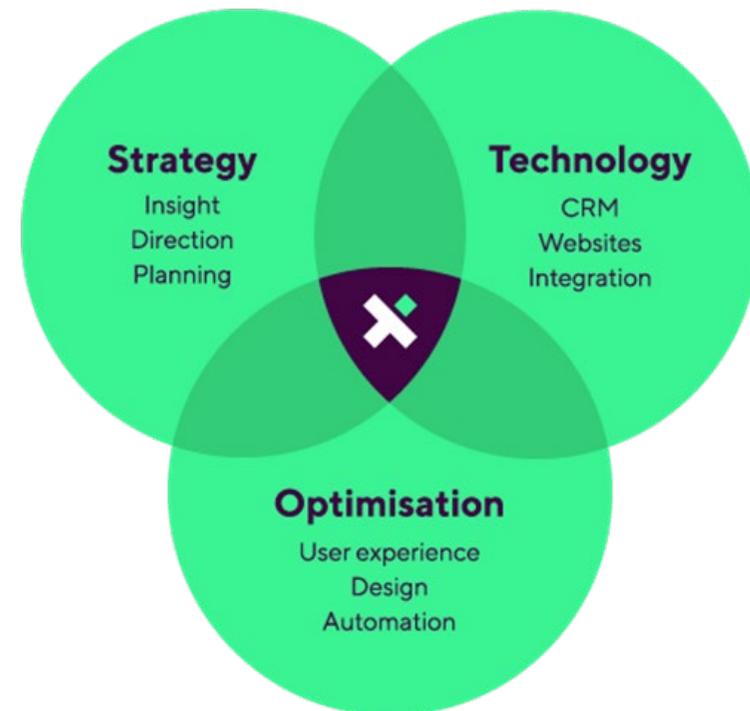
## THE TRILLIUM PROCESS

At Trillium we always follow our proven 'Power of 3' approach to get to the core of your business objectives and transform your organisation.

Our belief and expertise in the Power of 3 (Digital, Strategy and Systems), enables us to support our clients through their end to end digital transformation, or with an individual element of it.

Your members are always at the heart of all of our solutions and combined with the Power of 3; we will not only deliver exceptional results but ensure your experience of the project process is positive.

Over the past seven years, we have evolved this project approach to ensure success that is respectful of your organisation and responds to your objectives, focusing on delivering value.



We challenge your processes to test their durability, offering new insights that you should expect from an experienced partner by using agile methodologies where applicable, taking a common-sense approach.

As no two projects are the same, it would be foolish to assume that one project approach will work all the time, adapting where we need to but staying true to the the Power of 3 and what we know works. Just ask our clients...



**“ I spoke to several existing Trillium clients who were all very impressed. A common theme was that Trillium was ‘riding to the rescue’ for these companies: rescuing them from old or poorly implemented technology and sometimes even rescuing an organisation from itself! ”**

*Jomelle Caburian, Head of IT, AOP*

If you would like a free, no commitment CRM therapy session contact us at

[happiness@trillium.net](mailto:happiness@trillium.net)

020 3176 5380  
[www.trillium.net](http://www.trillium.net)

8 The Leathermarket  
Weston Street  
London SE1 3ER

 @Trilliumx

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