zentso

Digital maturity: How to evolve to get greater value from your CRM

...and how to keep evolving.

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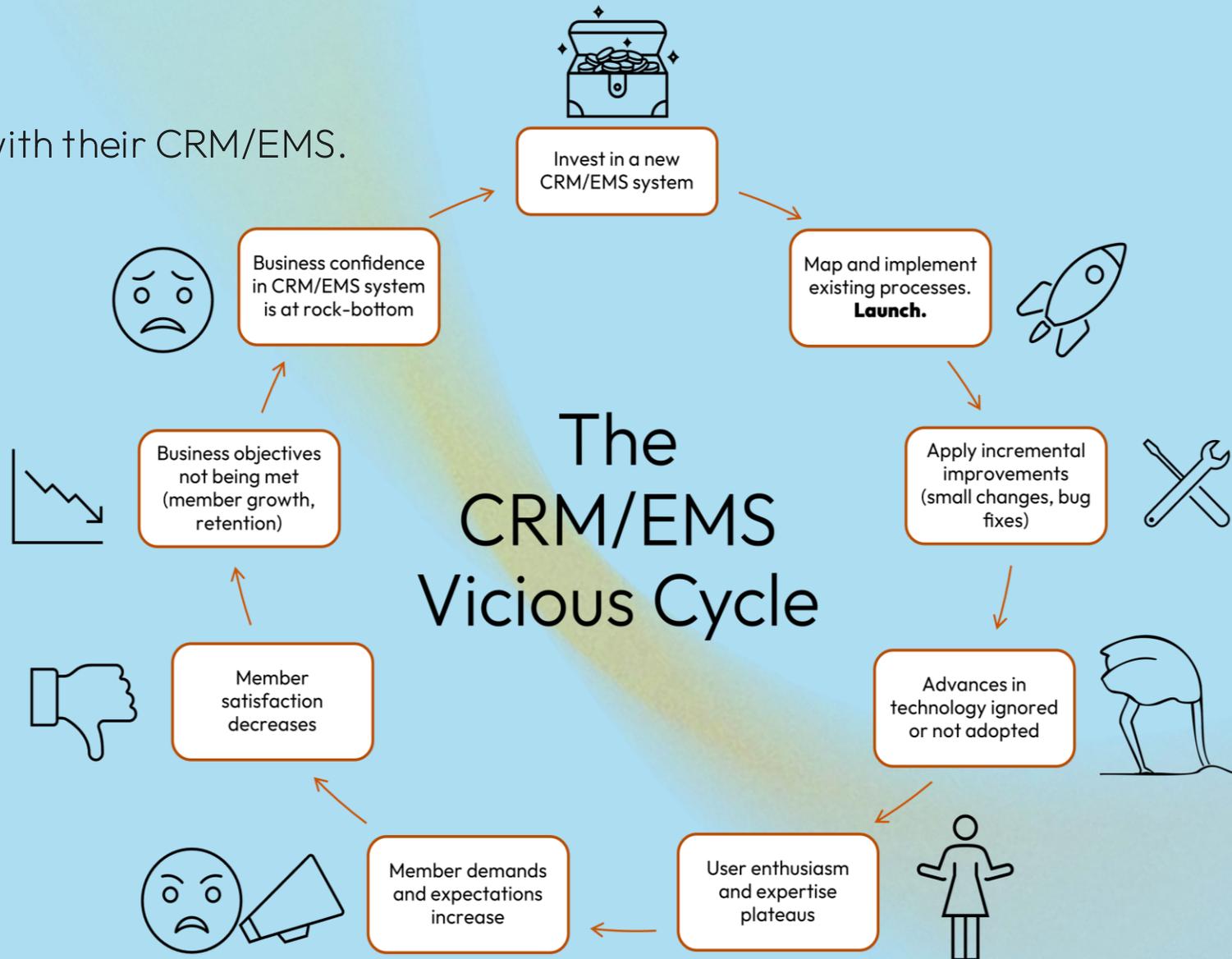
Introduction >

Many organisations get stuck in a loop with their CRM/EMS.

They implement a new solution and move their existing processes over, making small changes and fixing any issues.

Often organisations stop there. They fail to adopt new features in updates; they fix issues rather than future-proofing. Enthusiasm decreases, and software rather than adoption is blamed. The team feel it no longer helps them achieve business goals.

So, what happens? They look to invest in a new solution. And the cycle starts again...

What if there was a process that broke this cycle?

The CRM/EMS Vicious Cycle

Invest in a new CRM/EMS system

Map and implement existing processes. **Launch.**

Apply incremental improvements (small changes, bug fixes)

Advances in technology ignored or not adopted

User enthusiasm and expertise plateaus

Member demands and expectations increase

Member satisfaction decreases

Business objectives not being met (member growth, retention)

Business confidence in CRM/EMS system is at rock-bottom

Digital Maturity

considers how well organisations currently use their available technology.

Digital maturity is a spectrum along which organisations evolve over time; the initial level being a **chaotic** approach where organisations struggle to derive any real value from their systems. These organisations spend too many resources on fixing errors. Their systems don't provide a truly beneficial experience for their staff or members.

On the other end of the scale, highly mature organisations are **predictive** and focus on how their CRM/EMS can support changing strategic goals. They actively seek improvements to their processes and system usage. They use their system sustainably and adapt to changes quickly.

Organisations that invest in their digital evolution derive greater value from their CRM. They move away from costly fixes towards having a solution that constantly underpins their strategic business goals and makes them agile.

In this guide, we explore the concept of digital maturity. We'll share seven key areas for organisations to consider, helping achieve digital maturity regardless of the level they're on now.

Let's get started!

Take the test to compare your organisation to top-performing, proactive organisations
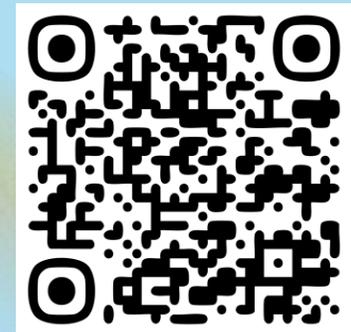
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1. Strategy Alignment

Membership-based organisations are forged by a **long-term strategic purpose or mission which drives their strategic goals.**

The first step to getting maximum value from a CRM system is to ensure it is underpinning the achievement of these organisational goals.

To do this, an organisation needs a technology strategy that aligns with the organisational strategy, i.e. the technology that is being implemented is done so specifically to achieve organisational strategic goals.

A focussed technology strategy will reduce costs, prioritise projects, empower staff in the right areas and free up resources to focus on key goals.

CRM is a tool that is deployed and developed using action plans derived from the technology strategy. It is often the core "hub" system that glues other systems together and is the key system for data insight and learning.
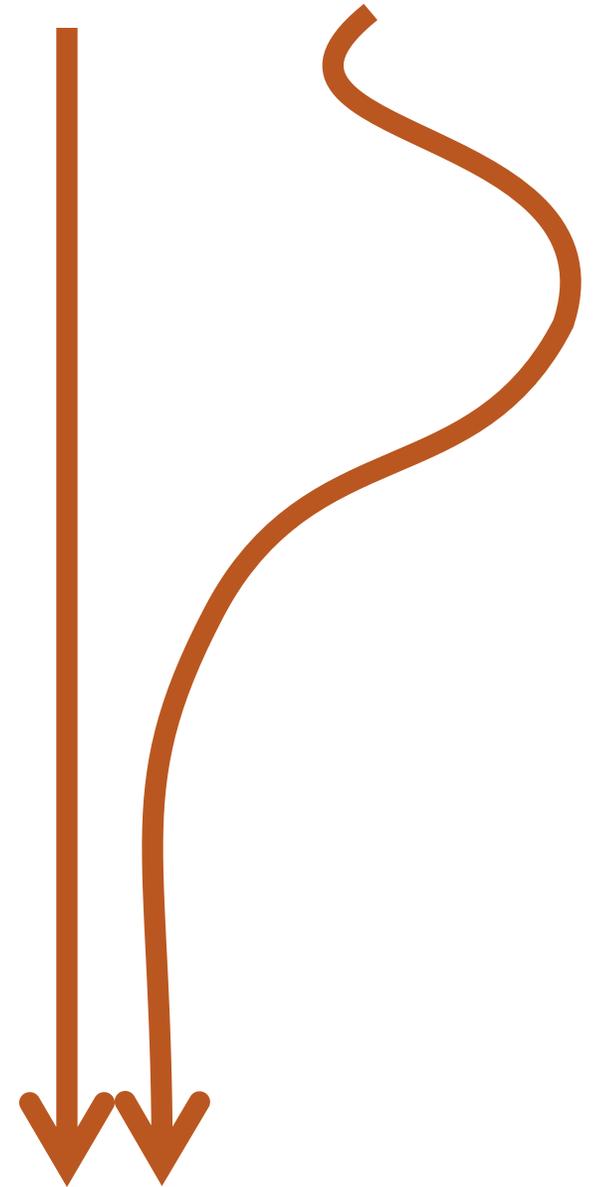
Define organisational goals

In successful organisations, all team efforts align with top-level organisational goals.
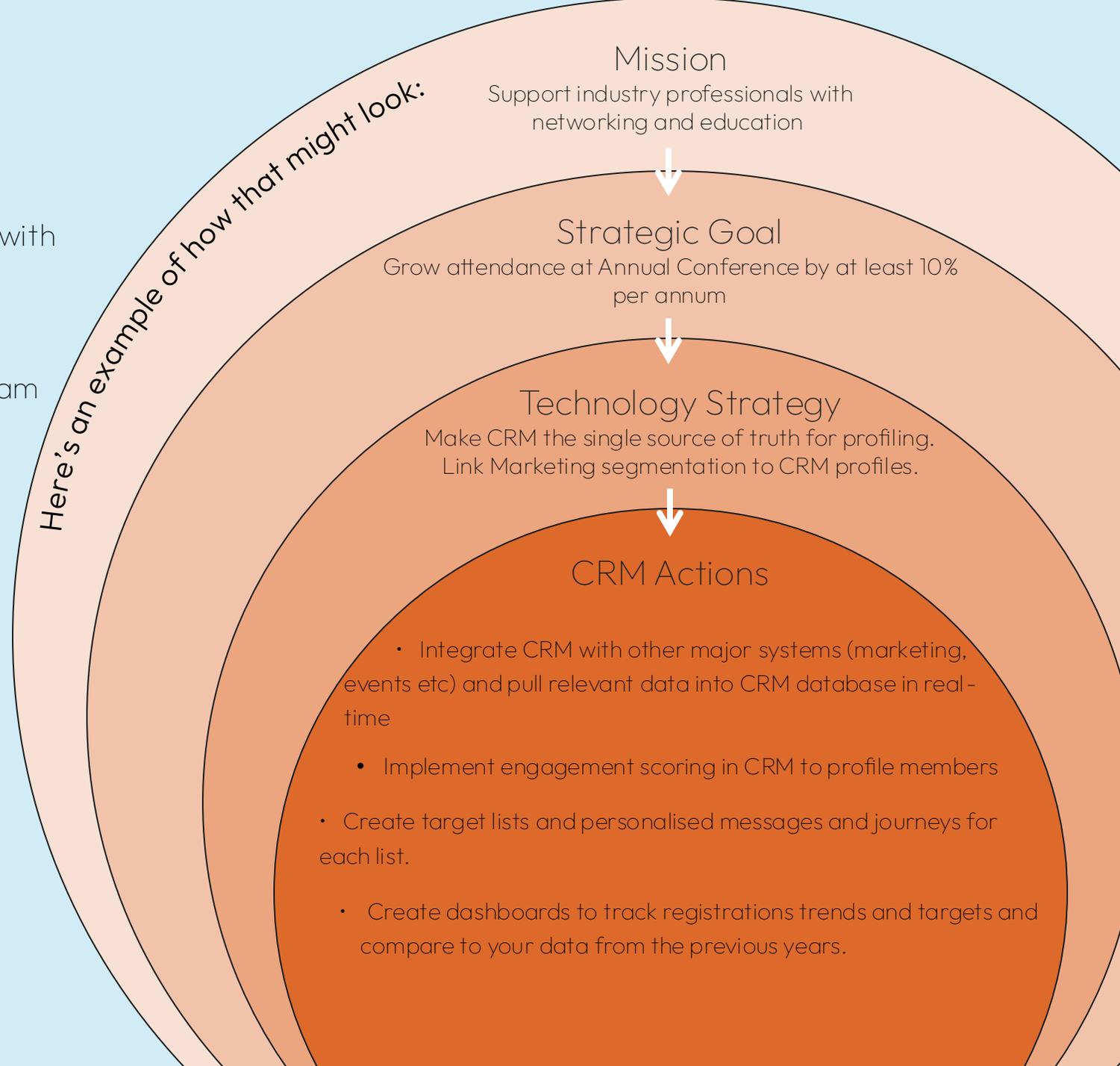
The most effective organisations ensure there is executive-level involvement and support at all team levels, driving alignment of effort.

CRMs show measurable results for both staff and members.

Example strategic goals include:

- Reducing operational costs
- Increasing revenue
- Growing membership/attendance
- Making systems more robust/resilient

Here's an example of how that might look:

Mission
Support industry professionals with networking and education

Strategic Goal
Grow attendance at Annual Conference by at least 10% per annum

Technology Strategy
Make CRM the single source of truth for profiling. Link Marketing segmentation to CRM profiles.

CRM Actions

- Integrate CRM with other major systems (marketing, events etc) and pull relevant data into CRM database in real-time
- Implement engagement scoring in CRM to profile members
- Create target lists and personalised messages and journeys for each list.
- Create dashboards to track registrations trends and targets and compare to your data from the previous years.

Key takeaway

1. Think of the mission as the '*why*'– the purpose behind what the organisation does. Strategic goals as the '*what*'– the outcomes the organisation is aiming for. The actions and measures (KPI's) are the '*how*'– the approach taken to achieve those goals and measure the achievement of them.

2. Organisations with a CRM system can maximise their technology value by aligning technology strategy and actions closely with organisational goals and strategic priorities.

2. Continuous Learning

Once strategic goals and technological actions are set, organisations must execute them efficiently to drive **their success.**

As with any strategic plan, there is a need to **monitor** progress and **assess** if any tweaks need to be made.

Regular **strategic progress reviews** are important to keep the organisation on track, make necessary adjustments, and identify the next steps to ensure strategic goals are successfully achieved.

You cannot improve what you cannot measure - hence measurement is a key part of organisational learning. High performing organisations constantly monitor their operations and analyse what could be improved.

Regularly reviewing processes, systems and activities is key to becoming more efficient and improving what you do.

We often start by considering what staff and members find most frustrating.

You can think of this in 3 steps:

1. What are members/staff spending an unnecessary amount of time on?

2. How would members/staff like the process to work instead?

3. Is there better technology or processes that can help your organisation achieve this?

For example:

Challenge	Ideal process	Technology solution
Staff are spending 40 hrs/week helping members answer problems which can be found on the member portal	Members can quickly and easily find information on the website.	Making the website search driven to easily find answers. Introducing AI-powered agents to answer common questions.

Reactive → Proactive

It's easy to only make changes when something goes wrong, but this leads to a fire-fighting mentality, which does not support strategic growth. So, it's important to shift everyone's mindset and approach to being proactive.

A key part of any organisational strategy should be to continuously ask: "what can we do better?"

This is an important step towards digital maturity.

Proactive organisations continuously measure and analyse how they're currently using their CRM/EMS and what can be improved. They have objective and actionable goals defined, and targets are constantly adjusted based on data-informed learning.

By measuring your progress and creating actions based on learning, your organisation will save money and time in achieving strategic outcomes.

Key takeaways

1. Continuous learning means reviewing processes and systems regularly to see how they are progressing relative to strategic goals.

2. A proactive strategic approach shifts the focus from simply putting energy into fixing problems to focussing on improving strategically valuable systems and processes.

3. Data Accuracy

How much does data inform your decision-making?

For an organisation to get value from its data, it must ensure that it is:

Clean – no duplicates, data is spelt and formatted correctly.

Easy to segment – able to group into patterns and view trends

Regularly reviewed – data has a tendency to become corrupted/dirty over time

Accurate – updated as close to real-time as possible

In one place – even if third-party systems are used, have a single source of truth

Accurate data is essential for informed decision making. If reporting is currently a challenge, improving data quality can be an excellent starting point as an organisational goal.

Decision makers need easy access to consolidated data and data visualisations. Leading CRM systems provide easy-to-use dashboards and reports that are updated in real-time.

When analysing data there are two common branches to consider.

2. Demographic or Static data

This type of data informs us who the member is. It is often more static in nature and may relate to where they live, what their current role is, what membership products or benefits they currently hold or what their mailing preferences or interests are.

A good strategy for keeping this data clean and accurate is to put it online in an accessible way for members to be able to regularly see and adjust if necessary.

Having a 360° view of members is essential to help improve engagement (for more on this, watch our webinar 'how to measure digital engagement').

2. Behavioural data

This data refers to what members do – e.g. attend events, click on emails or visit certain parts of the website. Datasets are often larger in nature and require tools like engagement scoring engines (of which Zentso has several) or data snapshots to consolidate and aggregate them into useful scores and measures.

Proactive organisations aren't just measuring their data. They are analysing it, comparing it, tracking it, and using it to decide what actions to take next. Teams are aware of key metrics to measure and track against set goals.

Key takeaways

1. Data needs to be clean and easy to report on to be valuable.

2. A CRM should provide easy-to-use and accurate reports of demographic and behavioural data to facilitate data-informed decision making.

4. Integrated Systems

Today there is an explosion of best-of-breed third-party tools and apps to manage tasks. For example, MailChimp to manage member communications or Moodle for e-learning. No single CRM can provide every function you need.

Wherever possible, use solutions created using your CRM platform, as this will minimize the need for complex data integrations (even if the solution is not as pretty as some other apps)

Having data in multiple places increases the risk of data security or privacy issues and increases integration costs and risks

Being tied to a single developer/supplier to support a bespoke integration is a significant business risk. Maintaining large amounts of custom code is similarly risky.

Single Source of Truth

When using third-party tools is unavoidable, it's essential to ensure they're seamlessly integrated into the CRM to have a Single Source of Truth (SSOT).

SSOT means that all data is pulled into one centralised location, automatically in near real time. Check out our article on this for more information.

Having an SSOT, well-integrated system means:

- More accurate and easier reporting
- Better member insights and targeting
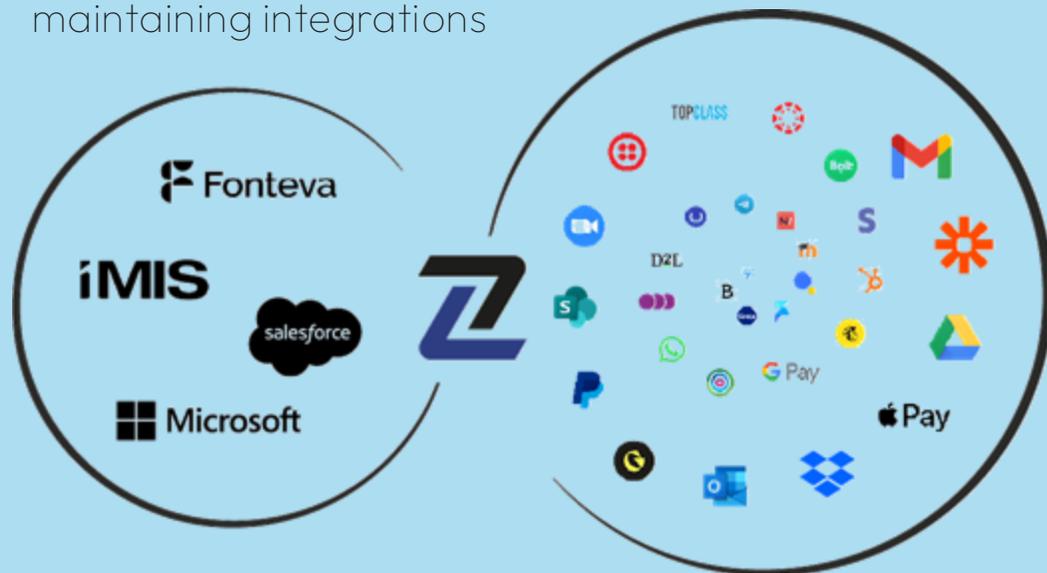- Better organisational agility
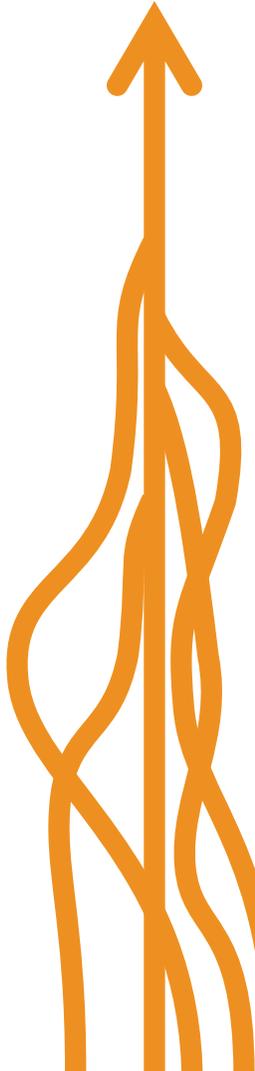
How to integrate

Integrations should ideally be made via API and should not require manual uploads of data.

It's important that data is synced promptly (either in real-time or overnight).

The less custom code needed for integrations, the less risk and cost the organisation is exposed to in maintaining integrations

cloudtoolz

Cloudtoolz, brings together your membership system and all your third-party software using one easy-to-use platform.

Create integrations with clicks, not code; minimise risk and reduce costs. Quickly create new apps to achieve business goals.

It's an affordable solution to power your digital success and built for membership organisations.

Reliably brings together your system's single-source of truth, with best-of-breed software.

Key takeaway

1. If using third-party solutions is unavoidable, ensure all your data feeds into your CRM single source of truth.

2. This ensures data accuracy, reduces data security risks, and saves staff time on reporting.

3. <u>Cloudtoolz</u> offers an effortless, affordable solution to integration issues.

5. Defined processes

Defined processes ensure staff perform tasks as expected.

This will improve data accuracy, reduce errors, and free up staff time to focus on high value objectives. It's important to regularly review processes and documentation to ensure they're still accurate. Documentation should be clear and easy to access.

Examples of processes to define:

- How do members submit queries?
- How are renewals run each year?
- What is the process to run the annual seminar?
- How do staff handle cash payments?
- What is the member offboarding process?
- How do we reinstate members?
- How are qualifications granted?

reviewed and improved over time as technology and environments change.

By starting off with a clearly defined process, it gets all staff doing the same thing, and then if that process needs to be improved, it can be done across the organisation.

Clear process documentation with version control and timestamps can aid in the review and improved process rollout.

Having defined processes helps:

- improve your data accuracy ☑
- reduce errors ☑
- Review and improve processes ☑

Key takeaways

1. Defined processes help to set clear expectations for staff and members.

2. Processes should be regularly reviewed and updated. Having them defined and documented will help this immensely.

6. System knowledge

Digital evolution requires getting the whole team to use digital tools effectively, not just the tech team. Here are 5 ways to support staff with this knowledge:

1.Make training and information accessible

This should include how to access technical support or online training materials. When choosing a supplier and implementer, ask what training they provide.

2.Encourage staff to complete a certification

This helps build knowledge and confidence. To assist with this, add the use of CRM or system knowledge to training plans.

3.Have a CRM champion

Someone who takes ownership of understanding the CRM and sharing the benefits. This can help drive projects forward and encourage staff to engage.

It's still important to have documentation and other staff trained, so if the champion leaves, they don't take all the knowledge with them!

4.Involve your CRM team

Whatever you're trying to achieve, keep staff well informed and part of future solutions. If they feel neglected, they are likely to push back on change.

5. Invest in new feature adoption

With every software update, understand new features being offered that can improve processes and empower staff to adopt them. Don't allow your organisation to lag behind on updates.

Key takeaways

1. Training resources should be readily available to all staff using the CRM.

2. System knowledge should be prioritised for the whole team.

3. Keep adopting new features in a timely way.

7. Website Maturity

Beyond the CRM/EMS functionality, digital maturity also depends on how well CMS and website tools are used, particularly for member portals.

- Successful membership organisations put members first, and technology should strengthen that commitment.

- Your website and member portal need to be tailored to members' individual needs based on CRM data, whilst being visually appealing and easy to navigate.

- Members should be able to manage their membership, amend their details, book onto courses and events, access resources, and network with peers via forums or groups – all with as little staff intervention as possible.
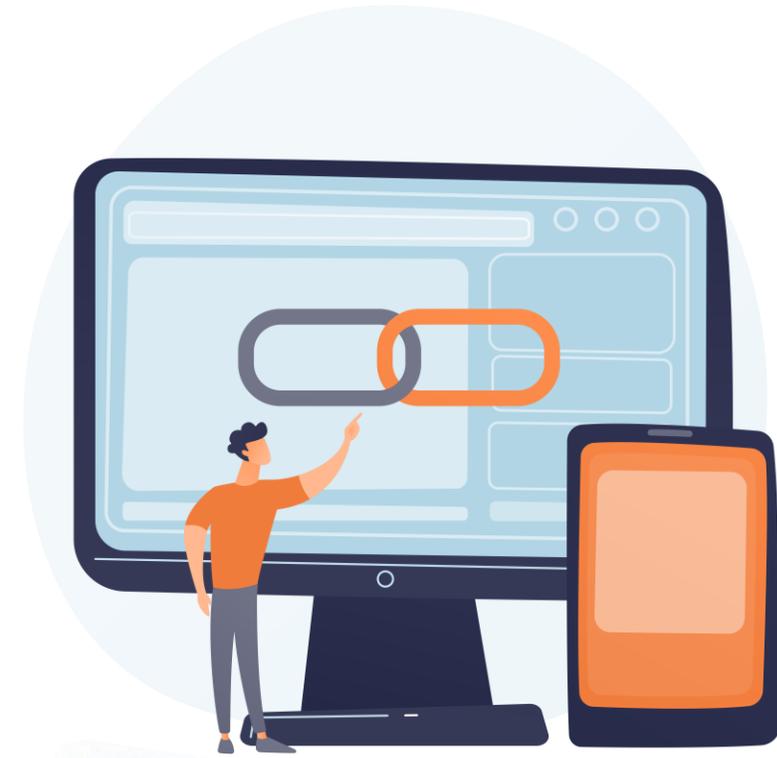
- Online member recruitment should be simple, with minimal steps and easy payments to reduce drop-offs. Onboarding processes need to flow automatically from captured data.

- A single sign-on experience means a member doesn't need different logins for different systems. For example, if a member has logged into their member portal, they should be seamlessly signed into their learning management system.

Key takeaway

1. Proactive organisations have a website and member portal that encourages member engagement and reads/writes directly from their core database.

2. The member experience is ideally seen as an extension of your single database with all online interactions captured immediately in your Single Source of Truth.
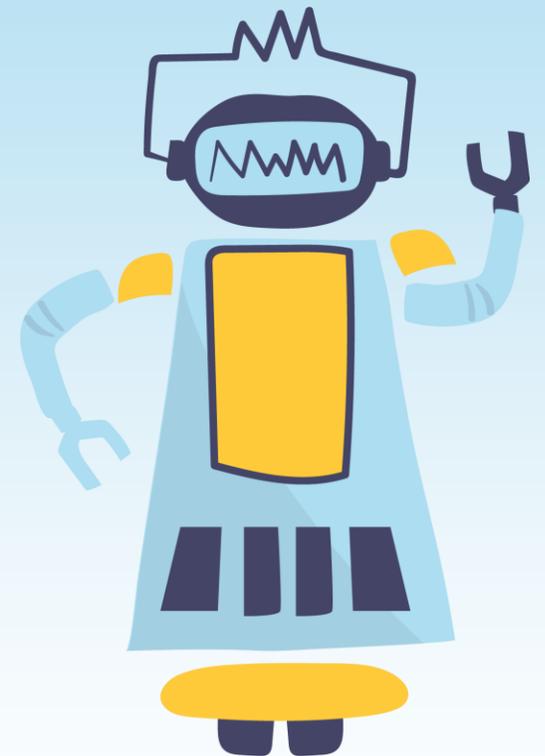
8. AI Maturity

AI is a fast developing, yet highly disruptive technology. This means its use and regulation is likely to change considerably in the foreseeable future. However, good AI always relies on good data. It's important to understand your AI data readiness and how to keep your data safe when using AI.

Then identify **what AI tools can be used to automate or streamline which tasks**. For example, member onboarding can be a good process to streamline with AI agents. Prioritise initially based on ease of implementation, so you can learn before tackling the complex stuff.

Many systems have automated tools for communications creation or have built-in agents. Off-the-shelf solutions are always preferable to the time and money required to build bespoke. It pays to understand and try the AI tools currently available before looking to implement bespoke solutions.

Digitally mature organisations use AI software to augment staff and member processes and continually review and learn from their use.

3 steps to AI maturity:
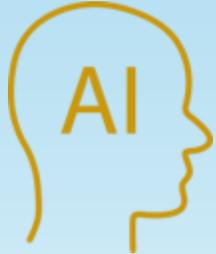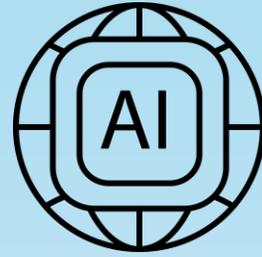
Stage 1 – Building Your Base
Ensure your data is AI ready. Document and understand your processes and identify where high levels of manual effort could be easily replaced

Stage 2 – Adding Gen AI and Bots
AI bots can answer members' common questions in plain language. Generative AI can draft communications accurately without having to maintain complex mail-merge templates.

Stage 3 - Deploying AI Agents
Actionable, personalised AI assistance helps members get information and act. Mature organisations have multiple agents across their different organisational domains which can interact with each other for optimised member experiences.

It's also important to consider creating an AI and data ethics policy. This includes outlining what staff can/cannot use AI for and making sure they aren't exposing sensitive data to AI tools.

Key takeaways

- Start experimenting with using AI, looking for simple opportunities to streamline and automate processes.

- Be prepared to iterate and adapt as technology changes.

- Ensure staff have access to support, documentation and training.

Conclusion

1 Digital maturity considers the strength of an organisation's use of technology. Achieving digital maturity isn't a quick process; it takes dedication and enthusiasm from the whole team to make it a worthwhile journey.

2 As discussed in this guide, it's important to consider multiple areas to understand how well you are using your CRM. Only by understanding the current stage of digital maturity can organisations identify what to do to improve.

3 A CRM should be providing staff and members with the resources they need to achieve their goals. By making incremental changes, your organisation can get true value from your CRM.

Ready to take the next step?

Take our 7-question Digital Maturity Assessment to see how you compare to top performing organisations. We'll email your results immediately.
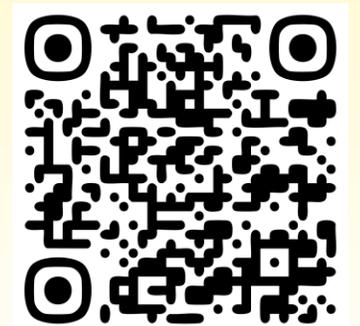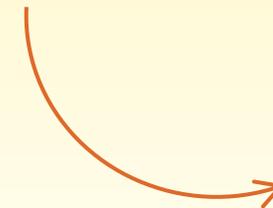
Digital Success by Zentso

Forward thinking, future proofing.

We want you to get continued value out of your tech investment, giving value for money through being proactive, agile and constantly evolving.

Digital Success is our subscription service that ensures your tech stays fully aligned with your strategic goals, saving you money and futureproofing your investment.

Our dedicated analysts will meet with you regularly to prioritise and align work, creating an organisational success plan and helping you evolve along the path of digital maturity.

Find out more

About Zentso

We *are* membership CRM

We help membership organisations, associations and unions to get value from their tech and continuously evolve to be more successful.

If you're stuck in a cycle of reactive support, spending too much time and money maintaining bespoke solutions that aren't future-proofed, Zentso has answers.

Our local, straight-talking specialists are always available to build and support your tech solutions and ensure your organisational progress.

We are implementation and development partners for iMIS, Fonteva and Salesforce. Our vast library of award-winning Apps help you achieve your goals with clicks-not-code.

We care about our clients as much as they care about their members.

About Jyoti

Jyoti is Co-Founder and Chief Revenue Officer of Zentso. He has worked in the not-for-profit sector for three decades and is passionate about holistic thinking – both for organisations and individuals.

If you want to be challenged on your tech strategy or your social impact – ask Jyoti.

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