



Case Study

Delivering Successful CRM & Digital Projects

A model that really works for
The Chartered Institute of Building
(CIOB)

CIOB



Customer Background

Established in 1834, the CIOB is the leading international professional body for those working in and leading the construction industry, with 49,000 members in more than 100 countries consisting of both individuals and organisations.

Its mission is to drive up professional standards, push forward innovation, influence political decisions and strengthen talent across the CIOB global community.

CIOB services include membership, professional development, qualifications and resources.



The Challenge

In 2023 the CIOB realised that it was unable to grow its operations with its existing IT capability and infrastructure because so many of its business systems and processes were not performing efficiently, having been designed around business needs that had been superseded, and labour-intensive manual interventions and workarounds were increasingly required.

As well as inhibiting growth around retention of current members and the acquisition of new members and the ability to personalise the all-important member experience, the under performance of the CIOB's infrastructure was driving up operating costs and delivering a poor member and customer experience.

Not having the right systems and processes in place meant that internal and external user experience was poor, resulting in a negative impact on the CIOB's ability to deliver high-quality member services.

The CIOB was aware that to overcome the challenges it faced, there was a need to implement a potentially complex technology solution, which included a new CRM system - and integrated member portal. A new data warehouse was also needed alongside a review and rationalisation of the CIOB's data to avoid unnecessary hosting costs and improve data quality.

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The CIOB's CRM system was approaching end of life and while an upgrade path was available, it would have been a complex and costly process to a solution that no longer aligned with immediate needs and strategic objectives,” explained Joanna Quirk, Chief Operating Officer for the CIOB.

The Challenge...continued

“Importantly, the new CRM, member portal and data warehouse had to seamlessly integrate with multiple third-party providers such as the finance system and marketing automation tools,” said Joanna.

The CIOB recognised the risks associated with managing multiple providers in a project with a relatively short deadline - to run its annual renewals process the project had to be live by October 2024 - so it was key that the CIOB could effectively manage the technology partners working on the project.

Due to a negative experience when working with a previous CRM provider, the confidence of the CIOB’s employees had been seriously impacted. It was crucial that the CIOB would be able to support users and project team members to rebuild their confidence in the new solution.

It was, therefore, crucial that technology partners collaborated successfully to ensure the smooth running of the project, preventing the project from falling behind schedule, or failing.

The CIOB leadership understood that the skills, experience and capacity to deliver the project successfully and in a challenging timeframe could not be fully met in house, and that it would be difficult to fully leverage the potential efficiency gains the new platform could support, without external support and expertise.

The Solution

Having provided some advice to the CIOB during its vendor selection process, after which Intercloud9 partners Bluelight and Pixl8 were chosen as providers of the CRM and web portal solutions respectively, and following a recommendation from an existing client, the CIOB appointed Intercloud9 as its independent technology and change management partner to help with overall project delivery and business process optimisation.

The CIOB understood the value of Intercloud9’s multi-skilled team and its extensive experience gained from working both vendor side and within membership organisations.

“The expertise across Intercloud9’s team allows it to bridge the gap between business and technology, enabling us to align, optimise and maximise the value of our people, processes, partners and platforms,” added Joanna

The project was initiated with the mobilisation of the CIOB project delivery team, supported by Intercloud9 who supported development of the project delivery framework covering project initiation, detailed project planning, resource assignments, risk management plan and technology partner engagement.

Moving into the delivery phase, Intercloud9 supported both the CIOB project team and its partners by reviewing the solution design, involvement in discovery workshops and solution validation.

Intercloud9 trained the CIOB’s business readiness team on how to write test plans and scripts to ensure the solution was properly tested and that acceptance management was embedded, so that all stakeholders were clear about what ‘success’ would look like. It also trained the team on business process optimisation techniques to enable the CIOB to design new, efficient processes, underpinned by the new platform.

The Solution...continued

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Where issues arose between the CIOB, and its partners, Intercloud9 was able to help both overcome the challenges they faced and quickly and easily resolve the problems. By chairing the monthly Project Board meetings, Intercloud9 ensured that all stakeholders were kept fully informed and able to accurately monitor progress,” stated Joanna.

At the closure of the project Intercloud9 facilitated a lessons learnt review, incorporating a survey of key stakeholders, to provide reflective information that would benefit all those involved in the delivery of future projects.



The Business Benefits Delivered

Intercloud9's ability to successfully support the different elements and disciplines of the project included data migration, CRM implementation and web implementation. This was combined with expertise in supporting and advising on the complex change management challenges that surround these types of transformational projects, which was invaluable to the CIOB.

“There is little doubt that having worked inside membership organisations and within technology partners, Intercloud9 has a unique insight into anticipating challenges from both sides of the fence,” said Joanna.

The ability to deliver support across all areas of the project, which could be accessed as and when it was required, negated the need for the CIOB to pay for multiple, potentially costly, contract staff.

Working closely with the CIOB project team around business process improvement, Intercloud9 embedded the skills within the CIOB team enabling them to own and drive continuous improvement, eliminating manual workarounds and waste work.

The detailed data review conducted by Intercloud9 enabled its team to develop a new retention policy and, supported by the CIOB's IT team and PTR, the data warehouse provider, extracted and cleansed data, derisking and reducing the complexity of the data migration.

This review significantly reduced the target data set for migration which in turn significantly reduced the CIOB's storage costs and the complexity for its technology partners.

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The Intercloud9's team extensive technical and change management experience was crucial in helping ensure that the project was delivered on time and on budget,” said Joanna.



About Intercloud9

Intercloud9 helps organisations achieve their full potential through independent, technology and change management expertise by 'Transforming your Vision into Reality'.

An independent technology expert and change management partner, Intercloud9 bridges the gap between business and technology to align, optimise and maximise value from your people, processes, partners and platforms.

The Intercloud9 team is a blend of change consultants and technology experts with unique experience and insight from working both inside and alongside non-profit organisations. The team will support you to achieve successful transformation by putting people at the heart of change management, helping to reduce risk and maximise impact to create a lasting change for your organisation.



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