

Downtown Seattle Association unifies constituent management system with Microsoft Dynamics CRM

Downtown Seattle Association

Industry

Member association

Location

Seattle, Washington

System

Microsoft Dynamics CRM

Challenge

The Downtown Seattle Association (DSA) was facing serious challenges from inefficiencies in managing its constituent records and communications across its three divisions.

Solution

NexTec Group designed a constituent management solution for DSA based on the robust Microsoft Dynamics CRM platform.

Results

- Simplified tracking of revenue and taxes.
- Constituent self-service portal boosts service levels.
- Automated marketing streamlines campaign management.

The Downtown Seattle Association (DSA) was facing serious challenges from inefficiencies in managing its constituent records and communications across its three divisions. DSA provides services and communications to thousands of constituents, drawing upon a database which is comprised of individuals, businesses and buildings. Each division in the organization was operating independently with vital information spread across disparate database systems and spreadsheets. This made it extremely difficult to manage and track the relationships, revenues and profiles of its constituents.

The lack of integration between its existing systems, SugarCRM, Microsoft Excel, QuickBooks and MailChimp, caused the DSA great concern. Accessing or transferring information between systems was done manually and resulted in extensive duplicate entry. Accomplishing tasks was time-consuming and subject to human error and inaccurate data.

DSA was looking for an easy-to-use database management solution that would consolidate and track information across its divisions, automate manual processes, improve communications and eliminate redundant data entry.

“NexTec was honored to help the DSA simplify a very complex set of challenges with a comprehensive and automated solution that helped the organization better meet the needs of its constituents.”

Russ Harper, Vice President, NexTec Group

Streamlined constituent management system

NexTec Group was chosen to perform the first phase of the project, comprised of an on-site analysis of its existing systems and processes, and a scope document that outlined the new system design and deployment plan.



Success Story: Downtown Seattle Association



After several weeks of meetings and interviews with DSA's leadership, NexTec's consultants designed a custom database management solution based on the Microsoft Dynamics CRM platform. The solution was designed to meet all of the organization's core requirements while providing the much-needed flexibility to accommodate future growth. Ultimately, NexTec was awarded the work order for the second phase of the project.

Within three months, NexTec had configured and implemented a tailored Microsoft Dynamics CRM solution that delivered numerous improvements across the entire organization.

Self-service web portal

DSA now has a full suite of tools to simplify the entire management process from the setting up and categorizing of new constituents to the tracking of renewals. It also allows constituents to easily update their contact information, select the types of communications they wish to receive and register for any of DSA's events. All the information is then automatically updated in the CRM system, saving DSA time and resources while improving data accuracy.

Centralized data management

DSA had been struggling with disconnected data across its three divisions. NexTec cleaned and connected the data into a single data source saving time through administrative efficiencies. The newly centralized data also gives the organization a complete picture of its constituents and makes it easier for the organization's divisions to collaborate and synchronize the various lines of business and constituent services.

Revenue and tax tracking

DSA can more easily and accurately track revenue and property-owner assessments with new capabilities, such as Geographic Information System (GIS) locating of its constituents and their buildings, importing tax parcel information using templates and improved forecasting of constituent revenues and tax revenues.

Automated marketing

NexTec integrated the ClickDimensions marketing automation platform with Microsoft Dynamics CRM giving the DSA the ability to effectively track, manage and automate multiple campaigns all in one system. Through this utility, the organization is able to segment its audiences and send targeted messages to specific groups based on a number of variables, including demographics, renewal dates and committee participation.

On-demand analytics

DSA is no longer challenged by incomplete data from disconnected spreadsheets. New Business Intelligence (BI) tools now provide the organization's leadership with point-and-click access to valuable custom reports replete with supporting analytics and visual renderings that help drive more effective decisions.

Easy search capabilities

DSA's employees can now conduct a search in mere seconds on any information in its system, including constituent records, activities, event registrations and renewals.

Plus, tight integration with Microsoft Outlook gives staff one-click access to view, search and track all messages, appointments, notes and meetings.

Exceeds expectations

DSA's staff and stakeholders have been extremely pleased with the improvements gained through a complete update to its database system. The organization was pleased with the selection of Microsoft Dynamics CRM, as well as with the expertise of the NexTec services team.

Productivity improvements resulting from the solution have exceeded expectations. As a result the delivery of services to its constituents is now more timely and accurate helping DSA meet and exceed the requirements and demands of its constituents.

About NexTec Group

NexTec Group is a leading business solutions provider, delivering comprehensive Enterprise Resource Planning (ERP), Customer Relationship Management (CRM) and Business Intelligence (BI) solutions targeted to the unique needs of our clients.



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