

COMPANY CASE STUDY

# THE DRAPERS' COMPANY



## COMPANY BACKGROUND

The Drapers' Company is one of the 110 livery companies in the City of London. As a philanthropic institution, interests vary across a range of charitable areas, with a particular focus on education, prisoner rehabilitation and older people's care. The organisation also encourages volunteering opportunities where possible.



### CHALLENGES

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- › The Drapers' Company was previously using Microsoft Access, a legacy database that has evolved over the years and was no longer fit-for-purpose
- › The organisation faced challenges around data visibility and access to information, duplicated work and laborious manual processes, time-consuming tasks around member engagement, and limited event management capabilities



### SOLUTION

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- › Designed and implemented a bespoke Membership Management solution, built on Microsoft Dynamics 365
- › Functionality was implemented to manage all member information and corresponding data
- › Ability to track all correspondence with members
- › Implemented Dynamics 365 dashboards
- › Implemented functionality to send mass templated



### BENEFITS

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- › Increased productivity and efficiency
- › Business continuity
- › Connected systems
- › Increased professionalism

## CHALLENGES



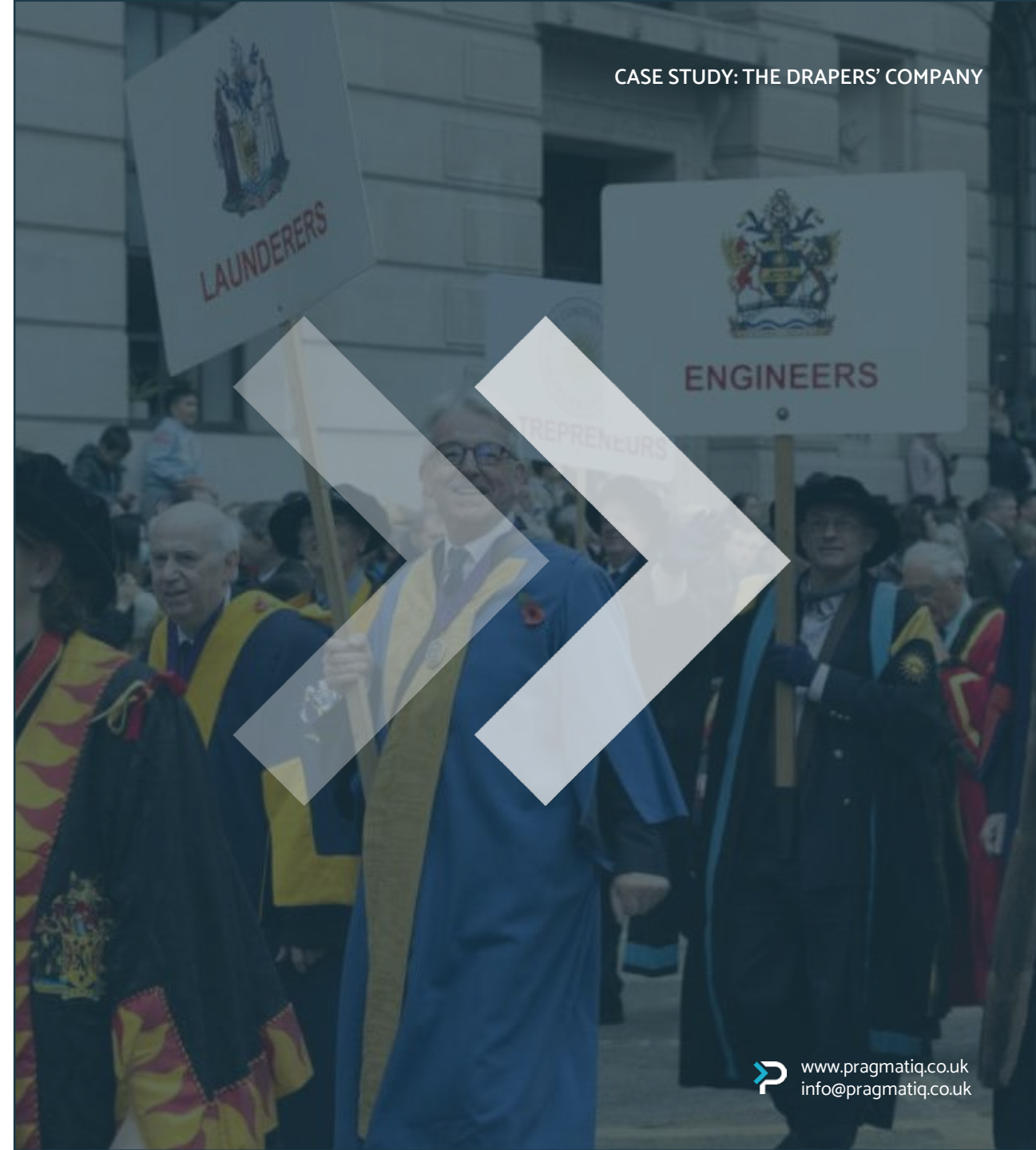
The Drapers' Company was previously using Microsoft Access, a legacy database that has evolved over the years and was no longer fit-for-purpose. Due to the nature of the system setup, challenges arose when a growing number of staff members required access to the system, which was exaggerated during the lockdown in 2020.

Multiple systems were previously used to manage various elements of the organisation and there was very limited automation throughout such as to the website and event planning software. This caused inefficiencies through duplicated work and time wasted, as data must be entered separately into various applications. Additionally, due to disparate systems, there was also no search functionality across business-wide data.

One of the common challenges faced by The Drapers' Company previously was the lack of visibility and access to information, enabling employees to do their jobs effectively. As not all member correspondence was tracked due to the lack of centralised solution, the challenges the organisation faced around data visibility were more prominent.

On top of this, member engagement and interaction were previously laborious and time-consuming tasks, with an emphasis on sending emails and manual letters. These activities were not tracked and relied on manual segmentation of data, which further presented challenges around marketing capabilities, such as email targeting.

Finally, The Drapers' Company faced limitations around event management capabilities, which was a problem as regular events are hosted. The previous database was not connected to the website, where events were posted, and this disconnected setup relied on staff to manually transfer information between systems.





## SOLUTION



To overcome the challenges The Drapers' Company faced, Pragmatiq designed and implemented a Membership Management solution, built on Microsoft Dynamics 365. This cloud-based system meant that all information could be stored and accessed by those who need it, without relying on certain individuals in the business.

By leveraging Dynamics 365, the solution was tailored to fit around the unique way of categorising members and the corresponding data, enabling improvements to be made around user experience, access to information, and overall efficiency.

Functionality was implemented to manage all member data; staff can create new members, select from multiple member types to segment data effectively, dynamically show and hide information so the user can only see what is relevant to them, capture personal information, career information, employment data, etc. Functionality also supported varying levels of engagement with The Drapers' Company, around committees, governorships, and volunteering roles. Additionally, all correspondence with members can now be tracked including notes, activities, and emails.

For event management, the previous database had no way to track and manage events. Functionality within the new system means that event plans, invites, guest lists, and the booking process can all be managed from one integrated setup through the CRM and members area on the website. This then allows the adequate information to be passed over to the team who manage the table plans.

To support the event management process, Dynamics 365 dashboards were also implemented to allow staff to get an overview of the event, who has accepted, unable to attend, and other key information at a glance.

To achieve the marketing goals, we implemented functionality to send mass templated emails, enabling the organisation to send communications to their member base, invites to specific events, and target particular member groups. The Microsoft Outlook integration was leveraged, supporting the process of sending and tracking emails.



"We commissioned Pragmatiq to develop Microsoft Dynamics into a Bespoke CRM System for managing our membership database and providing an efficient events management system. I was impressed from the outset at the time and focus that Jamie took in understanding our business, with all its quirks, in order to provide an easy to use and intuitive CRM which now attends to all our needs. I am impressed by their efficient use of time and always working to schedule, yet understanding of our restrictions when implementing a system during lockdown. The after service has been brilliant with the Pragmatiq helpdesk portal, quick to respond and deal with any issues that arose after the system was implemented."

GILLIAN CROXFORD - ASSISTANT CLERK (MEMBERSHIP) AT THE DRAPERS' COMPANY

## BENEFITS



Through the implementation of our solution, the following benefits were realised:

- > **Increased productivity and efficiency** – Across The Drapers' Company, there is no longer the need to switch between disparate applications. Data is stored centrally, and more functionality is available to users, so they can access the information they need more quickly and increase productivity as a result.
- > **Business continuity** – By implementing a more secure and scalable cloud-based solution, the business is no longer reliant on a legacy database and multiple systems. Knowledge of the system is not reliant on limited members of staff and the platform can grow as the organisation does.
- > **Connected systems** – Dynamics 365 seamlessly integrates with other applications within the Microsoft eco-system, as well as integration options for websites and other third-party systems. This allows The Drapers' Company to expand where necessary, without the need for multiple disparate systems.
- > **Increased professionalism** – As admin processes are now much quicker and automation is in place, the journey for a member is now quicker and ensures that staff have everything they need in one place, enhancing the professionalism of the organisation throughout the engagement with their members.



“This project demonstrates the benefits that can be realised when moving a customer away from outdated technology such as Microsoft Access over to the Microsoft Power Platform. The Drapers' Company could instantly leverage capabilities of the platform, such as the Outlook integration for tracking emails, complex querying across the member base and sending out communications to members via templated emails. Overall, the system has increased the professionalism of The Drapers' Company to their member base and made employees more efficient across the organisation.”

JAMIE EVANS – TECHNICAL DIRECTOR AT PRAGMATIQ



### CAN WE HELP YOUR ORGANISATION?

Pragmatiq are a Microsoft Partner, specialising in building bespoke technology solutions that solve real problems and make a difference.

If you want to learn more, please get in touch...

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- > **Phone** – 01908 038110
- > **Website** – [www.pragmatiq.co.uk](http://www.pragmatiq.co.uk)