

customer story

Healthcare Infection Society



quick read

- The Healthcare Infection Society (HIS) supports over 1,300 healthcare professionals to prevent and control healthcare-associated infections
- Their strategic goals are to grow membership, and engage and support members, enable professional development, and collaborate with like-minded organisations
- They had a variety of disparate processes and systems that prevented a unified approach to membership management
- The complete solution included **oomi CRM** and modules and full integration with their Umbraco website
- A members' portal enables members to access a wide variety of services and information with a single log-in
- Reduced time spent on administration is now spent on member engagement
- Members are able to self-serve around renewals, events, and CPD training
- Integration with finance software, Xero, delivers benefits to finance department

“The seamless integration of our website with membership and event management has freed the team up enormously.”

The Healthcare Infection Society (HIS) selected **oomi** as its CRM partner back in 2018. Since then, **oomi's** expertise and software has helped this professional membership organisation achieve significant efficiency gains and improvements in membership services and engagement.

the challenge

The HIS's key role is supporting healthcare professionals to prevent and control healthcare-associated infections.

It has over 1,300 members, drawn from the medical profession, clinical and research scientists, and others with a demonstrable professional interest in the subject. It focuses on supporting these members to overcome the challenges they face, and advance research that underpins excellence in clinical practice. Activities include a programme of training and events, the development of resources, the production of evidence-based publications and guidance, and the allocation of research funding.

The HIS strategic plan includes goals to grow membership, and engage and support members, support professional development, and collaborate with like-minded organisations.

To realise these ambitions, the organisation recognised they needed to improve their systems and processes around membership management. They also wanted to make it easier for members to access services and information, so looked to facilitate member self-service via their website.

disparate and painful

Like many membership organisations, there was a variety of disparate processes and systems that prevented a unified approach to membership management. Many activities were outsourced, and processes were cumbersome and largely involved manual inputting of data. There was no link between the membership area of the HIS website and other systems such as the one for event registration. Members couldn't see what training they had taken or access their certificates of attendance for events and training courses.

Even the renewal process was painful, as renewal reports were manually generated and emails were sent manually each month.

It was recognised that a new highly functioning website was needed to facilitate membership self-service. But even more critical was the need for an integrated, robust back-end membership management system that could underpin and facilitate the online services, and automate key processes, support third party integrations and ensure data integrity.

a team and solution with specific membership focus

HIS commissioned **oomi**, as they recognised the specific membership focus of the system and its flexibility in terms of its ability to provide online services and integration with other key systems, such as their Xero finance software. As well as the core **oomi** contact relationship management (CRM) module, **oomi's** Membership, Events, and Committees modules were also configured to match HIS's administrative needs to support key workflows in these areas.

The project involved **oomi** working closely with HIS's website agency to create a website that included a members portal. This was enabled by **oomi's** application programming interfaces (API's) which delivered full CRM integration with the website content management system, Umbraco.

This understanding of how CRM and website need to work together, and the **oomi** team's deep membership sector experience were also key to the project success.

"The **oomi** team have been excellent," says Helen Davies, Head of Membership and Professional Development at the Society. "From collaborating with the website designers and keeping us informed at all times, to monitoring developments as the new system was bedding down."



“ The oomi team have been excellent. ”

enabling member self-service and reducing administration

The members' portal enables members, from a single log-in, to access a wide variety of services and information, enabling them to self-serve and save time spent on common requests.

These include:

- Full online access to membership status, renewal data and the option to update personal details online. If renewal payment is due, a red renewal button appears to prompt payment.
- Event bookings show event and payment details including invoices which can be downloaded and linked to make any outstanding payment.
- The event section allows the download of a Certificate of Attendance for CPD purposes.
- The Committees tab provides access to meeting data and location as well as committee papers and meeting details.

The project has also greatly improved and streamlined membership administration. This saves the HIS membership team time and frees them up to focus on direct dealings with members, providing a personal service that is essential for effective relationship management.

"The seamless integration of our website with membership and events management has freed the team up enormously from handling basic administration to looking after our members' interests," explains Davies.

"We have greater connection with our members through this personal attention. That in turn ensures a better serviced membership, greater engagement by our members and enhanced promotion of the HIS mission."

benefits of combining CRM and finance

The benefits from integration also extend to other departments, such as finance, as John Misselbrook, Chief Financial Officer, explains: "The HIS **oomi** integration with Xero has automated our transactional accounting CRM processes and financial reconciliations."

The integration provides an automated reconciliation between the bank account, PayPal and GoCardless against **oomi** transactions, enables automated and reconciled VAT reporting, as well as providing automated transaction detailed records within Xero.

"This is effectively removing input errors and saving two to three days each month on manual processing, feeds and reconciliations performed prior to this integration," states Misselbrook. "This has facilitated real time reporting and enabled a mechanism for robust financial controls."

HIS and the **oomi** team continue to work closely together. Helen Davies concludes: "They are always looking to continually advance the system and, hence, its value to us."



John Misselbrook
Chief Financial Officer

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find out more

If you want to discuss how **oomi** can help your organisation, then please contact us.

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CRM for any NFP anywhere

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oomi is a fully integrated engagement management system for the membership and not for profit sector combining CRM, website, collaboration, engagement & social media.

oomi is available anytime, on any device and truly agile for your changing organisational needs.