# customer story

**Wine and Spirit Trade Association**

## quick read

- WSTA represents over 300 companies producing, importing, exporting, transporting and selling wines and spirits in the United Kingdom

- Technology investment was required to support their growth ambitions and enhance their online services to members

- Key objectives were to increase automation and integration, better track member recruitment and retention, create greater data integrity, and improve members' online experience

- Replaced MS Dynamics system, with oomi CRM to manage membership, events, finance and committees

- oomi Members Portal provides a secure online self-service area for members and new touchpoints with potential new members

- Integration withSendInBlue email marketing solution, the Xero finance system, and the data visualisation solution, Microsoft PowerBI

- Collaborative joint approach ensured outdated and illogical processes removed

- oomi CRM has improved data management and automated process to save hours of work

- Major design and user experience (UX) overhaul of website with new content management system (CMS)

- WSTA has now just single supplier for CRM, CMS and the website, simplifying management

> **"** *Their in-house specialists and vast amount of integration options were the key factors for us when making our final decision.*
>
> **Jessica Parker**
> Head of Membership and Events

**oomi.co.uk**

The Wine and Spirit Trade Association (WSTA) chose oomi as their member technology partner in May 2021, when they selected oomi CRM to replace their incumbent MS Dynamics CRM. The CRM went live in August 2021 and the member's portal in December 2021. Since then, oomi has worked closely with the association to provide digital services and redevelop their website.

## system change to support growth

The WSTA represents over 300 companies producing, importing, exporting, transporting and selling wines and spirits in the United Kingdom. It campaigns for a vibrant and sustainable wine and spirit industry, and members range from major retailers, brand owners and wholesalers to fine wine and spirit specialists, logistics and bottling companies, and low and no alcohol producers.

The Association realised that technology investment was required to support their growth ambitions. Their current system was not delivering what they needed and limited their ability to enhance their online services to members.

They selected oomi CRM in May 2021, with several key objectives. There was a need to increase automation and integration, so that processes and procedures could be streamlined for efficiency. They wanted to better track member recruitment and retention, and to reduce data errors and silos to create greater data integrity and output for reporting. They also wanted a secure online self-service area for members.

## a real understanding of the sector

Jessica Parker, Head of Membership and Events at the WSTA, explains why they chose oomi: *"It was clear from the initial meeting that oomi's solution would be a great fit for the WSTA and the oomi team were able to demonstrate a real understanding of the not for profit and association sector. Their team of in-house specialists and vast amount of existing integration options – plus the fact that their servers are UK-based and GDPR compliant – were the key factors for us when making our final decision."*

The new oomi CRM system went live August 2021 and is used by all 15 members of the WSTA team and supports each team's procedures and processes. It provides functional modules to support the management of membership, events, finance and committees, and the oomi members portal provides a secure online self-service area for members.

The project also required integration with a range of other key programmes, such as the SendInBlue email marketing solution and the data visualisation solution, Microsoft PowerBI.

## a challenging approach

*"We knew that we wanted to work closely with oomi to make sure that we achieved the best solution. So our team started by documenting and prioritising key features and requirements,"* explains Parker. *"This provided the oomi team with a deeper understanding of what we were looking for. It also enabled them to challenge us on our current processes and data workflows and made us think differently and more broadly. We greatly appreciated this challenging approach as it meant we left outdated and illogical processes behind, and ensured the final solution was streamlined and effective."*

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.

## delivering internal efficiencies

Since the implementation, the WSTA has experienced various improvements in internal processes, with less time taken on doing routine tasks such as subscription management and freeing up staff to concentrate on more member-focused activities.

*"So far, the new CRM has helped us streamline and better manage our data, and automated processes have saved us hours of work every month. The portal has allowed us to create a far better member's area. It also gives us a new touchpoint with potential new members - an option to sign up as a non-member and receive non-member mailings - something we've not had previously."*

> " *We greatly appreciated this challenging approach as it meant we left outdated and illogical processes behind.*

**Jessica Parker**
Head of Membership and Events

## making the website work

oomi was then asked to review and replace the existing WSTA website. The WSTA had been working for a couple of years on website improvements, trying to make it easier for the internal team to be self-sufficient in managing the website.

The oomi CRM and portal was providing a great front-end interface via the website to enable access to services and membership administration. However, the website content management system had numerous problems with plug-ins, coding, and security issues.

The WSTA website went through a major design and user experience (UX) overhaul, applying the latest design principles and ensuring that accessibility standards were met. A new content management system (CMS) was also provided. The project also required some major work on data migration, ensuring URL links were maintained and back-office workflows supported.

*"We wanted to ensure our members enjoy a great online experience and easy access to the information they needed,"* says Parker.
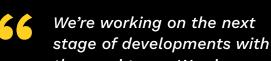
*"The oomi digital services team were very helpful and proactive from the start. They managed the whole process, and with weekly catch-up calls with the WSTA team, it ensured nothing was compromised. They could ensure everything was bug-free, from the front-end web interface right through to the back-office systems."*

*"We're really excited about the new website and set-up. We can now confidently modify and update content as well as layouts on the website, using drag and drop features and global settings, and there is so much less risk of things going wrong."*

## a true partner

"
*We're working on the next stage of developments with the oomi team. We view them as a true partner.*

**Jessica Parker**
Head of Membership and Events

Parker concludes: *"We really value the fact that we now have just one account manager to deal with for CRM, CMS and the website. Internally, it makes life so much easier. But our work with oomi is ongoing."*

*"We totally trust them and what they are doing to bring further improvements. The solution is versatile and there are more outcomes that we'd like to achieve and we're already working on the next stage of developments with the oomi team, such as fully integrating our Xero system. We view them as a true partner."*

# find out more

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

## oomi

**complete membership management
for you and your members**

📞 +44 (0) 1372 232 125

✉ hello@oomi.co.uk

🖱 oomi.co.uk

📍 Global House,
1 Ashley Avenue,
Epsom, Surrey
KT18 5AD