

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

replacing a legacy membership system

the benefits and challenges

In a recent live webinar, Kayleigh Mapstone, Head of Operations and IT, British Mensa and Joel Trotman, Director of Sales, oomi, discussed the topic of how to best approach replacing a legacy membership (CRM) system to ensure success.

They considered the following questions:

- When should you consider replacing a legacy system?
- Why should you consider a proprietary system over a platform?
- How do you ensure your selected system and supplier are future-proof?
- What are the critical success factors to address to ensure a successful move from your legacy system?

This document gives some brief highlights from their discussion. To hear the full discussion and get deeper insight into the issues and how to address them, watch the full live webinar [here](#).



When should you consider replacing a legacy system?

Kayleigh: A key element for us was modernisation – we were unable to modernise...without huge costs implications. We could not improve and automate our processes with the current system. That was a key indicator that we needed to change.

We also did not have clear picture of our data – with multiple data silos in multiple areas of the business with no one single source of truth. That was a critical driver for us, to ensure we had oversight and insight our data, to support business decisions.

Really it's when you see costs rising!

Joel: Suppliers should be explaining what developments are coming through, what the product road map is. If that isn't happening, then you have to challenge your supplier why.

You don't want your staff drowning in administration, doing manual intervention. It becomes overwhelming.... you start losing key staff or can't recruit new staff because your systems just aren't capable of delivering what you need.

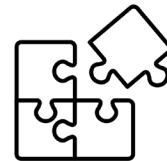
You should be supporting your members and providing better service. If your systems are not allowing you to do that...you should be having the conversation on how you solve those problems.

Why should you consider a proprietary system over a platform?

Joel: Platform systems tend to prevalent in commercial sector as they are more transactional, and B2B focussed. Proprietary systems, such as oomi, are built and created for membership organisations right from the start and can be configured to meet your needs.

Platform systems are reliant on large multi-nationals. Proprietary systems development can be influenced by customers, through user groups. It's harder to do that with platform. Our relationship with customers is very personal.

Kayleigh: The user groups support the collaboration between users and supplier, and that's been really useful to us.



How do you ensure your selected system and supplier are future-proof?

Kayleigh: Research into your supplier is critical. It was the references – insight from other organisations about the relationship they had with the supplier - that were pivotal in our decision.

Ensure there are regular updates and ongoing support, such as a user group. Build relationships from very early on, through the selection process. This relationship has been vital post-launch.

Joel: With regard to reference checks, it is important to get the right people talking to the right people, for example, a chief executive talking to a chief executive, operations talking to operations..... and even users talking to customer users.

It's important to get the contract right and, as a supplier, we need to understand what concerns the customer has, as they may be based on a bad contractual situation they had with previous supplier. We can then work constructively on something that is fair and reasonable,



What are the critical success factors to address to ensure a successful move from your legacy system?

Kayleigh: Preparation! You cannot prepare enough!

Having people involved at every stage, so they understand why we are doing it and what we are doing it for.

Communicate, communicate, communicate! To everyone, the project team, the external stakeholders ... always ensure you have oversight on your project as a whole.

Have contingency plans for your critical business functions.

You will continually have things you are changing. Never stop looking at your system, ever!

Joel: Understand 'why are we doing this, what are the objectives? Hopefully, there will be a 3 or 5 year plan ... and out of that will drop a whole set of tactical objectives.

Know where your data is! If you don't know where your data is, you can't do anything about it.

Document your requirements. Give every team, perhaps every individual, the opportunity to write down 'this is what I'm trying to do, and this is why I'm trying to do it.'

Make sure everybody knows what their responsibilities are, through the project and post go-live.



Kayleigh Mapstone
Head of IT and Operations
British Mensa

Kayleigh has been in the membership sector for over 12 years, always responsible for change and ongoing continuous development in the various membership bodies she has worked for.

She joined British Mensa for a large-scale transformation programme which started with CRM and website change. The need for change was recognised in April 2021 as they were last user of legacy system OMnet. After a selection process, they selected oomi as partner in April 2022, with initial go live in November 2022 with minimum viable product MVP, as the old system was being switched off in December. They are already seeing significant benefits from insights into data, helping them making better business decisions, and staff are enjoying the ease of use and increased automation of processes.



Joel Trotman
Director of Sales
oomi

Joel has been involved in the sector for over 20 years, firstly in project management and delivery of new systems, and then latterly more commercial side, to ensure customers get the results they need. He has worked with oomi for over 3 years and has played pivotal role in over 20 membership organisations selecting oomi for their new membership system.

"As far as our experience at oomi, we operate with a wide range of types and sizes of organisations," explained Joel. "We have moved people from away a number of legacy systems, including platform based systems such as CiviCRM, MS Dynamics, and true legacy systems such as OpenEngage (formerly Integra).



**find
out
more**

You can get access to more resources, including webinars and customer stories, on our website www.oomi.co.uk

If you would like to discuss your technology challenges related to membership management, we would love to hear from you.



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