



Microsoft Partner

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CRM and the foundations for
digital transformation for CIM
(Chartered Institute of Marketing)

White Paper

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About the Client

With members in more than 100 countries, CIM supports, develops and represents marketers, organisations and the profession all over the world.

CIM's ability to award Chartered Marketer status under its Royal Charter recognises a marketer's commitment to staying current and abiding by a professional Code of Conduct. With 130 CIM study centres, in 36 countries, delivering world-renowned qualifications and over 90 training courses, CIM is uniquely able to improve marketing capability at an individual and business level.

Challenge

CIM originally embarked on a strategic digital transformation journey to initiate a Microsoft Dynamics-powered CRM (Customer Relationship Management) system to enhance membership management.

This marked the beginning of an ongoing evolution, with Unify Technologies becoming a key partner in adapting and optimising the system to meet CIM's evolving needs.

Before this initiative, CIM relied on a combination of systems - both manual and computer-based - for handling membership setup, renewals and member communications.

Integration and streamlining

The transition to the new CRM system was intended to integrate and streamline many of these processes. The aim was to foster closer relationships with members and better support CIM's complex membership, awards, and continuing professional development (CPD) processes.

Following the initial implementation of the CRM system, the next step was to make further refinements to ensure that it fully aligned with CIM's specific business needs and objectives.

A renewed focus was brought to bear by the management team to meticulously tailor the system to address the unique interdependencies of CIM's operations. This would assure a solution that was both precise and purpose-built, enabling the CRM project to move forward successfully.

Solution

CIM embarked on a renewed effort to complete what was now an extended CRM project, appointing an interim CIO to oversee the initiative. Recognising the need for highly specialised expertise, CIM also brought in Daniel Suresh, a Microsoft Dynamics 365 Sales (CRM) technical expert and founder and CEO of Unify Technologies. Daniel's role was to stabilise, refine and develop the system to unlock its potential to transform CIM's membership operations.

An expert examination

The first task was to conduct a thorough review of the CRM system, assessing its structure and functionality against CIM's business requirements. At a detailed level, this involved ensuring the system's coding and configuration adhered to best practices.

Following the examination and resolution of the most pressing issues faced by CIM, it was determined that the impending upgrade of all cloud environments to D365 v9 would essentially take the system offline.

To facilitate stabilisation and avoid any unforeseen issues with the existing system, Daniel recommended temporarily transitioning the CRM system from cloud-based to on-premises. This approach provided the control necessary to make immediate adjustments and lay the groundwork for further stabilisation with no immediate time pressure, while minimising any potential risks.

System stabilisation and rebuild

Once stabilised, the focus shifted to targeted redevelopment and the careful management of existing customisations. These efforts aimed to ensure reliability and adaptability while keeping the system aligned with CIM's operational needs.

Ultimately, CIM entrusted Daniel as part of Unify Technologies with the task of the continued evolution and optimisation of the CRM system.

This partnership was founded on the understanding that CRM systems require ongoing evolution to remain effective, especially in a rapidly changing technological environment.

Unify Technologies were able to address numerous challenges, these included inheriting incomplete work and navigating conflicting components within the system, all while working within a tight schedule.

The platform was stabilised and, in a position, where the work required to meet the various business needs could proceed in a controlled and compliant manner.

Results

By successfully transitioning the Customer Experience department back to the cloud, CIM, with Unify's ongoing support, established a flexible and scalable foundation. This enables continuous adaptation to meet future organisational goals and technological advancements.

In addition, CIM had previously implemented Microsoft Dynamics NAV as a basic ledger system. Mindful that Microsoft were now heading towards end-of-life support for NAV, it was prudent to upgrade to its successor – Microsoft Dynamics 365 Business Central. Ultimately, this would bring improved functionality for Financial Management and the ability to move this into the Cloud.

As highlighted, all of this would be a key factor moving forward: it signposted the road to full integration of CIM's financial operations and its membership data with its CRM-related activities.

According to Ben Pettifer, Head of IT Delivery: *"Unify Technologies were instrumental in helping us stabilise the CRM platform and get us back to a place where it was running more efficient and compliant code. Daniel's knowledge of Microsoft best practice was invaluable and of enormous help to our internal CRM team - and continues to be."*

The successful stabilisation and optimisation of the CRM system was not a one-time project, but rather the creation of a strong partnership, that allows CIM to continue to improve their systems. This partnership allows CIM to be confident that their CRM system will continue to evolve in line with their needs and the technology available.

With the immediate triage work complete, CIM and Unify Technologies were able to focus on the ongoing development and evolution of improved functionality, detailed in our CIM case study part 2.

Who We Are

Unify Technologies Limited are a Microsoft Dynamics Partner providing specialist technical and functional services, solutions, and applications.

With over 30 years of ERP, CRM and data solutions experience, our project implementations cover all sizes of business from new start-ups, through SMBs to Enterprise level organisations.

Contact us today to talk about what we can do for you

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