

## Success story

# A Sage CRM success story - New Brunswick Medical Society.



### The challenge

Before customization, member inquiries at the New Brunswick Medical Society were handled by just a few employees, with information scattered across six databases and a filing cabinet, making access and calculations cumbersome.



### The solution

It was ultimately decided to implement Sage CRM, which would help New Brunswick Medical Society overcome their business challenges.



### The result

The New Brunswick Medical Society improved member service and productivity by centralizing member information in a CRM, eliminating manual calculations and scattered data across six databases, removing 16 filing cabinets to create workspace for eight employees, reducing redundant data entry, and streamlining processes like membership renewals and claim processing with automated CRM and ERP integration.

“We are truly impressed with the caliber of work we have received from the BAASS team Zainab Salihi, Leo Hwang and Andrew Liu.”

#### Organization

New Brunswick Medical Society

#### Location

HQ - Fredericton, New Brunswick

#### Industry

Professional Association

#### Sage Partner

BAASS Business Solutions



#### New Brunswick Medical Society

The New Brunswick Medical Society is the professional association for doctors in the province of New Brunswick. They are a membership-based organization, which administer a number of member programs within their offices for the doctors of New Brunswick as well as have an annual membership renewal campaign.





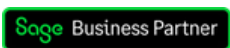
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**Problem They Were Facing:**

Prior to the customization, when member inquiries regarding membership and programs had to funnel through one or two people. These employees were the only ones in the office who had the knowledge of where the information was stored (whether it was in one of 6 databases or in a paper filing cabinet), then once the information was gathered, these same employees knew the various calculations that needed to be performed on the information in order to answer the member's inquiries.

**BAASS Customizations:**

- Better serve our members. All member information is now stored in a central database – our CRM. Once a staff member is trained on how to look up a member (which is very easy), they can answer members inquiries immediately and no longer need to transfer the member to another Department.
- Be more productive. Our CRM not only stores historical information, but is able to perform payment calculations as well, so staff time is no longer required to search out information and perform manual calculations.
- Use office space more wisely and cost effective. Through the use of CRM, we were able to remove 16 paper filing cabinets from our workspace. The floor space these cabinets took up has since been converted into work spaces for 8 employees.
- Reduce redundant inputting of key information into databases. Prior to Sage CRM and Sage ERP integration, when a member's address changed, it had to be updated in a minimum of 5 places. Not only was this time consuming, but by inputting the address multiple times, you increase the chances of a keying error. We are now able to update the address once and the information is pushed through to AR and AP in ERP with no rekeying required.
- Rely on one source of truth. Our CRM has become the one place where all staff members can go to find up-to-date information on our members.
- Have more complete information. With the use of our central CRM, we are able to have all five departments feeding information into one central location, whereas previously this information would have been stored in separate databases and spreadsheets.
- Reduce time spent on processes. Previously days and hours that would have been spent on membership renewals and claim processing, have been reduced to hours and sometimes minutes with customized programming that looks at our data and calculates who should receive an invoice for membership renewal or who is eligible for funding for a claim they submitted. Once these calculations are completed in CRM, the information is pushed through to ERP for processing with no external importing or rekeying required.





**NB Medical Society Review:**

“CRM is easy to use, whether you are an administrator or a general user. The screens are easy to read and maneuver through.

We are truly impressed with the caliber of work we have received from our BAASS team which include Zainab Salihi, Leo Hwang and Andrew Liu. Prior to starting this project with the NB Medical Society, they had no knowledge of the work we did, however, they had a wealth of knowledge in best practice solutions, and SAGE products. They were able to quickly translate our day to day business operations into Sequel programming language, which in turn produces the easy to read screens we see in our SAGE CRM product.

As a testament to our BAASS teams ability to transfer knowledge and skills, during our project the CRM Consultant, who left BAASS to pursue another career opportunity. Stacy had worked closely with the NB Medical Society staff during the Solution Design stage, we worried whether other BAASS employees would be able to keep up with the momentum that had been started with Stacy and “get our business” the way he did. The team never missed a beat, both Zainab and Leo impressed NB Medical Society staff with their dedication to the project, they never missed a deadline and delivered a product that has more than met our expectations.”

