

THE INSTITUTE OF CHARTERED ACCOUNTANTS AUSTRALIA (ICAA) TO SAVE \$\$\$, IMPROVE SERVICES WITH ONYX CRM SOLUTION

CASE STUDY

The Institute of Chartered Accountants in Australia (ICAA) is targeting annual savings of \$1 million from an Onyx customer relationship management (CRM) implementation that will also provide the foundation for its major push into e-commerce.

The ICAA is the pre-eminent professional society for those working in the field of accounting and finance, and represents the interests of 34,000 members and 9,000 students. It is responsible for maintaining standards and the integrity of the profession.

The ICAA believes the Onyx CRM solution will dramatically streamline administrative processes while improving access to information about its members and their interests, enabling more personalised marketing of its products and services via the Internet.

“We’re spending up to \$3 million to implement the Onyx CRM suite across our organisation, and anticipate a three to four year payback on our investment,” says ICAA Deputy Chief Executive, Allen Blewitt.

“The ICAA’s mission is to be the organisation of choice for leading business, finance and knowledge management professionals.

“We already set ourselves apart with more demanding standards for Membership, but we recognised the need to move from being a regulator/administrative organisation to being a service-obsessed organisation. CRM is very much a part of that shift in focus,” he says.

“We have 34,000 loyal members with a five per cent growth rate and virtually zero per cent attrition, But, as people become more demanding, we have to do more than just treat our members as

customers. They’re clients, stakeholders and board members. The Onyx CRM solution will allow us to track their individual level of participation as well as their quality of input to assist us in better managing how to involve them in ICAA projects and activities,” he says.

“Not only will the new Onyx CRM system enable huge efficiencies in the way we communicate with members, but it will also improve management of our substantial education and training business and allow us to automate transactions like payments for subscriptions and professional development services.”

Allen Blewitt
ICAA
Deputy Chief Executive



The ICAA will also use the CRM project to eliminate a number of legacy systems that have become expensive to maintain, as well as centralising all customer data onto a single, powerful platform.

“Apart from the ability to realise a previously unattainable level of integration, the Onyx implementation provides an enormous opportunity and motivation to re-engineer existing business processes,” says Mr Blewitt.

“In terms of our key criteria - functionality, support, ability to execute, vision and price, Onyx was strong across the board. We organised a number of site visits to existing Onyx customers to confirm its ability to deliver and implement. We were surprised at the high level of satisfaction we encountered, particularly since we chose the companies we wanted to interview ourselves.”

John Woodward,
Cap Gemini Ernst & Young

“Onyx was very responsive to requests for information and diligent in spending time with our people in a bid to understand our business and be able to respond on the basis of knowing who we were and what we needed. For me, that hallmarked them as a quality organisation.”

John Blewitt,
ICAA, Deputy Chief Executive

“We’re essentially a very paper-driven organisation and, while paper will always be with us, we are looking to Onyx to help us streamline and manage those processes better. It will also allow us to introduce an element of self-service via our Web site to allow members to handle certain tasks such as updating their contact details or accessing various information products.”

As a professional body, the Institute produces and distributes an enormous amount of information in the form of papers, books, workshops and courseware, with annual retail sales of \$3 million in books alone. The Onyx Customer Portal will enable the ICAA to establish an online retail outlet, automating both the ordering and payment process as well as the dissemination of published material.

The ICAA worked with external consultants, Cap Gemini Ernst & Young, to identify the right CRM solution for its needs from a field of 15 different companies.

Consultant, John Woodward, says Cap Gemini Ernst & Young provided the selection methodology, criteria and weighting model for the selection. They also provided the framework for a detailed business case, identifying both costs and benefits of the Onyx solution.

Mr Blewitt affirms Cap Gemini Ernst & Young’s methodology, saying Onyx impressed him as a highly professional organisation.

“We also considered the size of Onyx as a publicly-listed company in the US with a substantial investment in R&D. We knew this was a company that would continue to invest in product enhancements and that we would benefit from that, which gave us an additional level of comfort in choosing Onyx as our software supplier and implementation partner,” he says.

The Institute is currently in the final stages of scoping its requirements for the CRM project and will perform a phased implementation over the next 12 months. A joint project team comprising IT specialists and business analysts from both Onyx and the ICAA is responsible for the rollout.

“The first stage of the implementation will focus on the student part of the system, since that is a smaller group with fewer attributes, and once we’ve bedded that down successfully, we’ll move on to the larger group,” Mr Blewitt says.

“Ultimately we will integrate our financial system with Onyx to enable online transactions. We’re also planning to implement a new event management solution and will choose our suppliers on the basis of functionality and ability to integrate with the CRM system.”

“We anticipate a strong increase in member satisfaction key performance indicators as Onyx enables us to provide a better quality of service which is far more personalised to their individual needs and interests,” Mr Blewitt concludes.

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