WATTLE

Demystifying Digital Technology for Membership

WHY ARE WE HERE?

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1 EXPLORE

Key technology challenges facing us according to MemberWise.

2 UNDERSTAND

Business-critical systems underpinning our organisations – CRM, Website CMS, Member Portal.

3 REVIEW

The technology stacks available to ensure compatibility and integration.

4 DEFINE

The optimal mix of technology suppliers to ensure ongoing success.

DAVID ABRAHAM

CHIEF EXECUTIVE OFFICER

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OUR CHALLENGES

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- Only 1 in 5 of us are happy with our websites.
- Only 26% of us are likely to stay on our current CRM system.
- Our websites don’t talk to our CRM systems and vice versa.
- Personalising the member experience is a major challenge.
- We struggle to measure member engagement.
- We can’t access the data we need to make informed decisions.
- We’re not automating enough of our manual tasks.

SYSTEMS INTEGRATION

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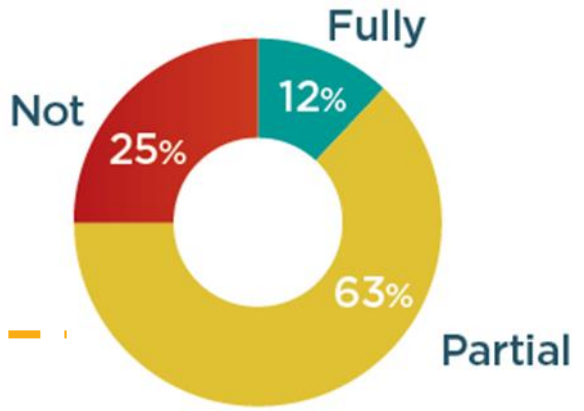
What's the problem?

- The lack of integration between our business-critical systems is the No. 1 challenge facing our sector.
- Only 12% of us have fully integrated systems.
- Systems incompatibility is driving this.



What's a business-critical system?

- Website CMS
- CRM
- Member Portal
- Learning Management System
- Finance system
- Email Marketing Platform

But why?

- Time and cost
- Incompatibility between Website and CRM
- Poor quality Website CMS
- Poor quality CRM
- Unsure which supplier(s) to use

WHAT IS THE SOLUTION?

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Suppliers

Systems

Technology Stacks

SUPPLIERS

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The appointment of suppliers is often made based upon scoring systems that sit holistically across multiple platforms and disciplines.

Just because your bricklayer can lay bricks does not mean that they can also handle the electrics.

- CRM Supplier
- Web Agency
- Design Agency
- Branding Agency
- Finance Systems Supplier
- Email Marketing Platform Supplier
- LMS Supplier

SYSTEMS

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With a better understanding of the systems involved, you can make more informed decisions about your own technology needs.

Website CMS

Member Portal

Member Facing Systems

CRM

Internal Systems

Finance System

Learning Management System

Email Marketing Platform

TECHNOLOGY STACKS

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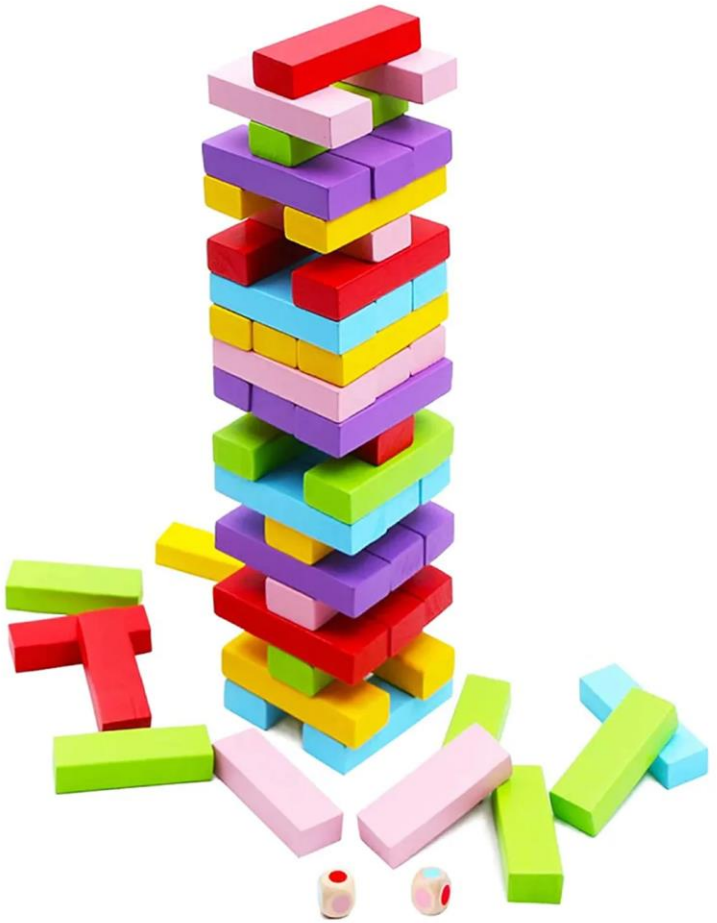
- A technology stack is a combination of languages, frameworks and tools that are used to develop software.
- You do not have to use the same technology stack for each part of your system – but it is often better that you do!



BRINGING EVERYTHING TOGETHER

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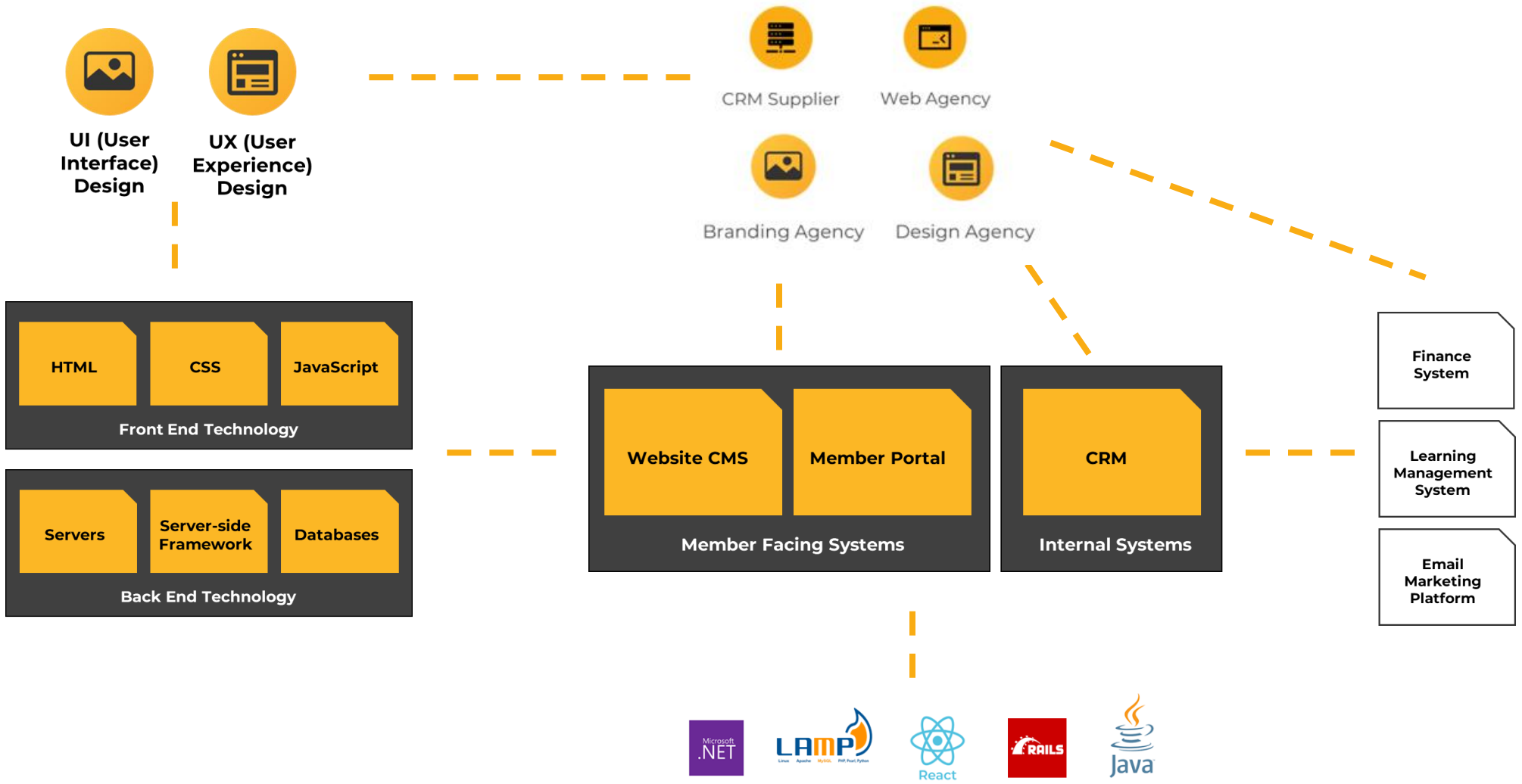

TECHNOLOGY STACK

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Microsoft .NET

LAMP
Linux Apache MySQL PHP, Pearl, Python

React

RAILS

Java

WHAT TECHNOLOGY STACKS?

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- Microsoft .NET
- LAMP – Linux, Apache Webs Server, MySQL, and PHP
- REACT
- Ruby on Rails
- Java

EXAMPLE TECHNOLOGY STACK

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Microsoft .NET

CRM

Microsoft Dynamics 365

Website CMS

Umbraco

Member Portal

Microsoft Web App

BRINGING EVERYTHING TOGETHER

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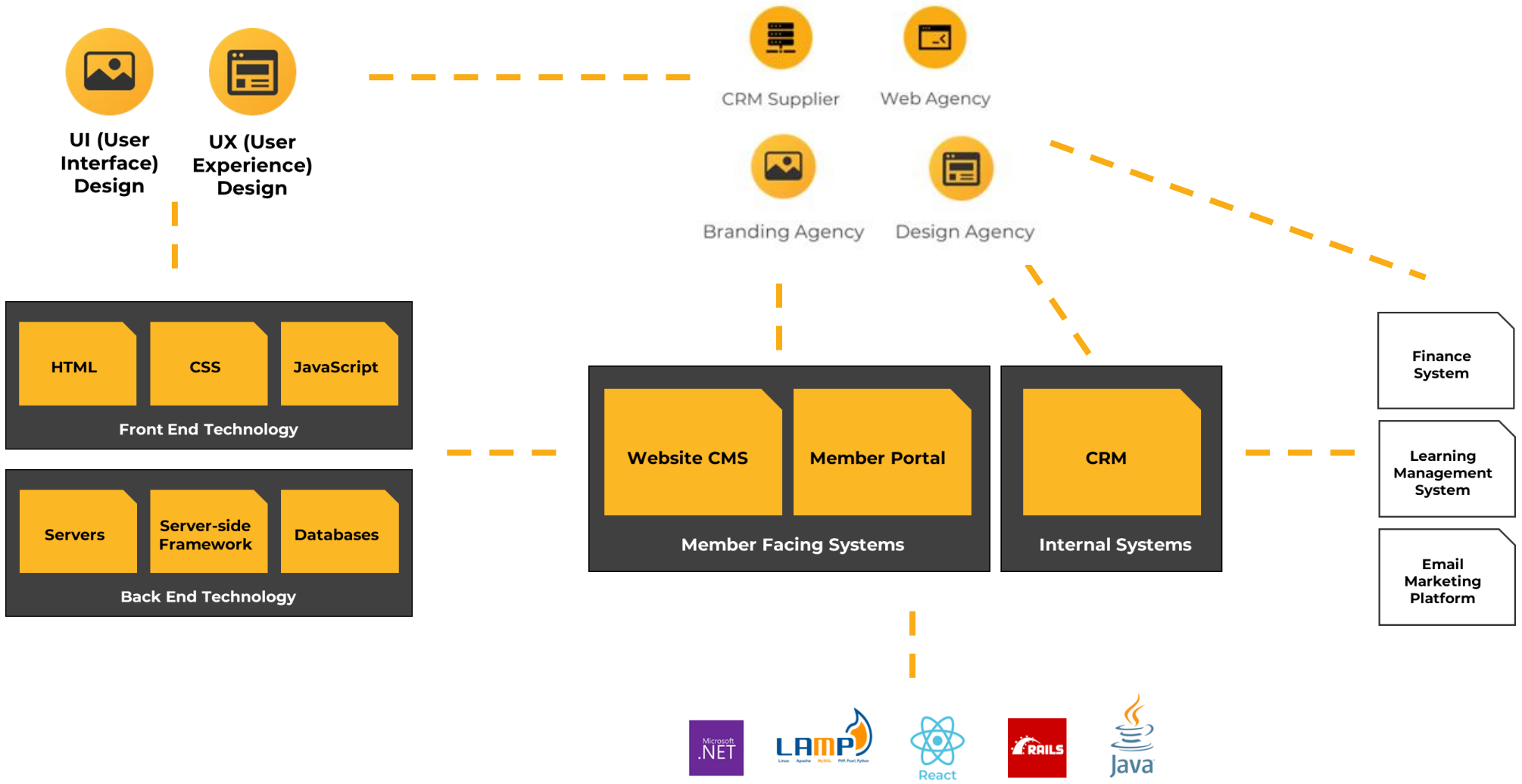
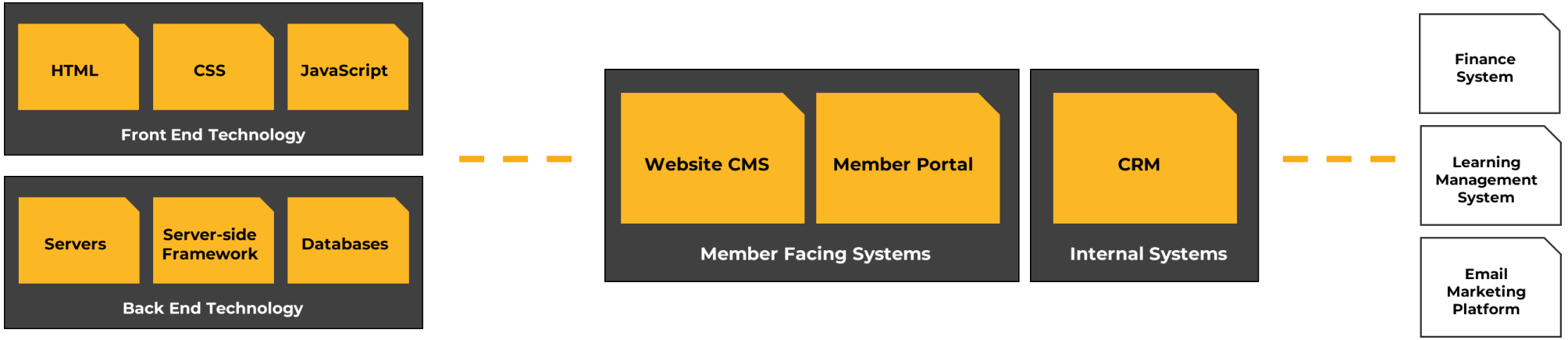
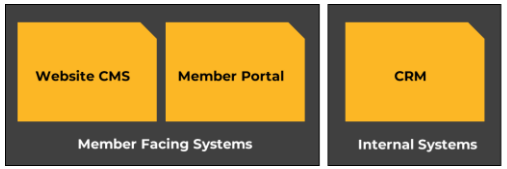


SYSTEMS

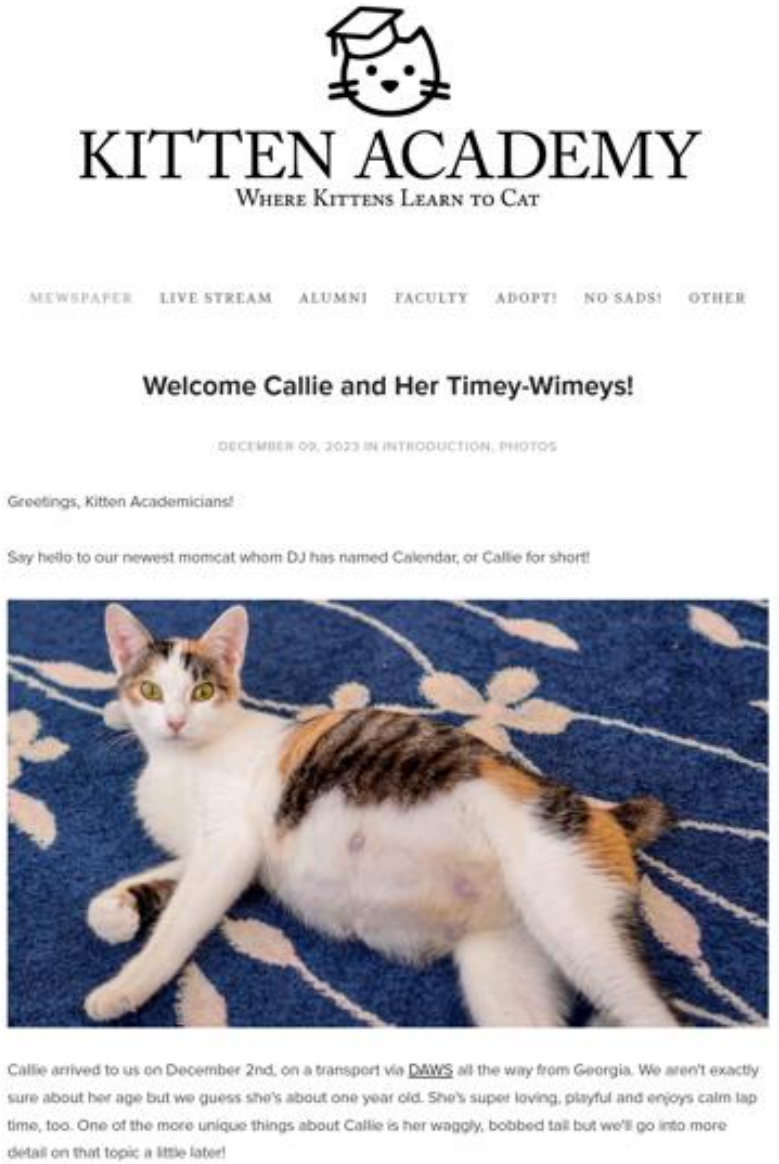
WATTLE



Website Example



A website that has no integration or content management needs could use HTML, CSS, and JavaScript as its selected technology stack to create a web page about kittens.



KITTEN ACADEMY

Where Kittens Learn to Cat

NEWSPAPER LIVE STREAM ALUMNI FACULTY ADOPT! NO SADS! OTHER

Welcome Callie and Her Timey-Wimeys!

DECEMBER 09, 2023 IN INTRODUCTION, PHOTOS

Greetings, Kitten Academicians!

Say hello to our newest momcat whom DJ has named Calendar, or Callie for short!

Callie arrived to us on December 2nd, on a transport via DAWS all the way from Georgia. We aren't exactly sure about her age but we guess she's about one year old. She's super loving, playful and enjoys calm lap time, too. One of the more unique things about Callie is her waggly, bobbed tail but we'll go into more detail on that topic a little later!

MEMBER FACING SYSTEMS

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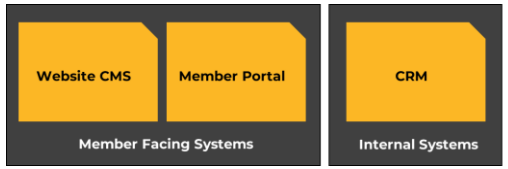
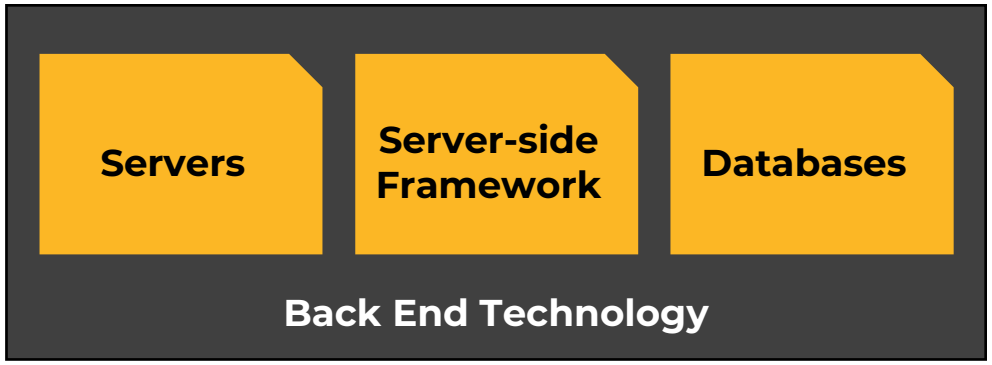
Website Example





A website will have the above front-end technology.

If content control and editing are required, the website will need a CMS with associated back-end technology.

BRINGING EVERYTHING TOGETHER

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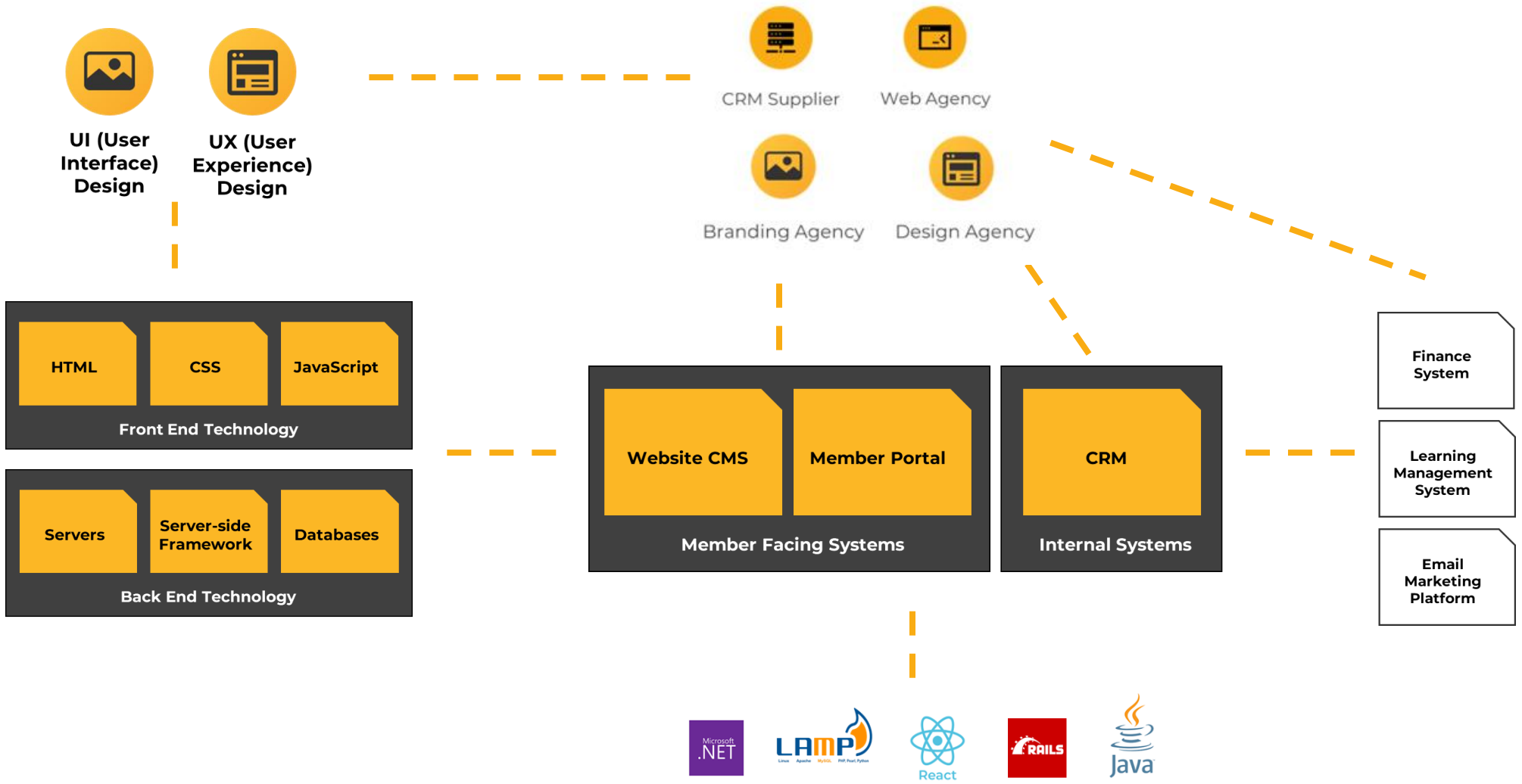
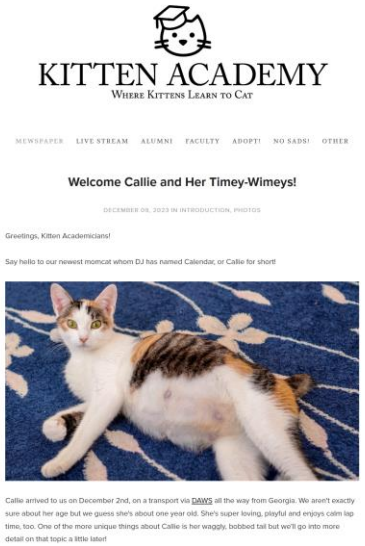


UI (User Interface) Design
UX (User Experience) Design
HTML
CSS
JavaScript
Front End Technology

Design

We have the technology, but we do not have a physical design for how all that technology should look and feel.

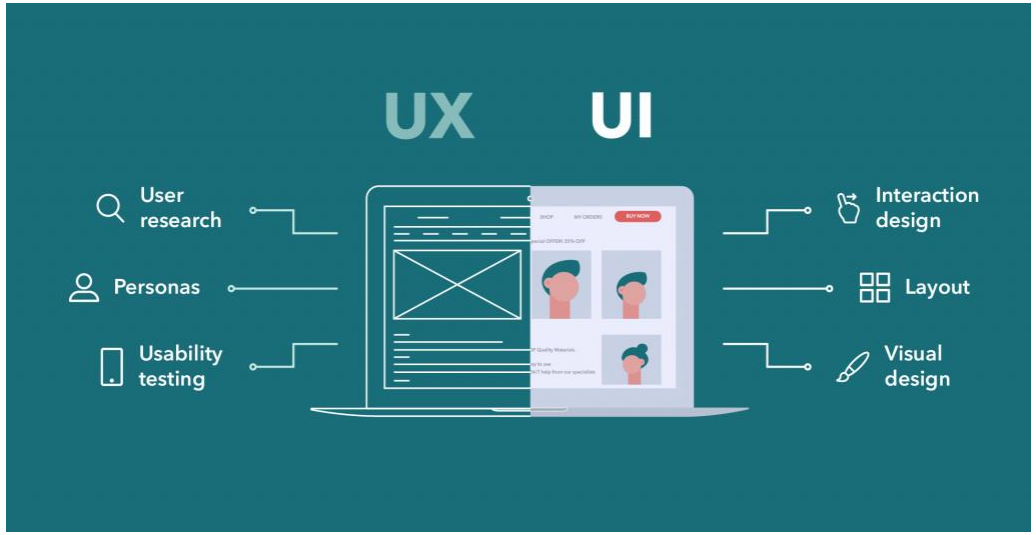
We need to transition from this - - - - - - - - - - To this



UI / UX & Creative Design

A multidisciplinary field that focuses on creating digital products (such as websites, mobile apps, software applications, etc.) that are both aesthetically pleasing and user-friendly.

UX (User Experience) Design



UI (User Interface) Design

BRINGING EVERYTHING TOGETHER

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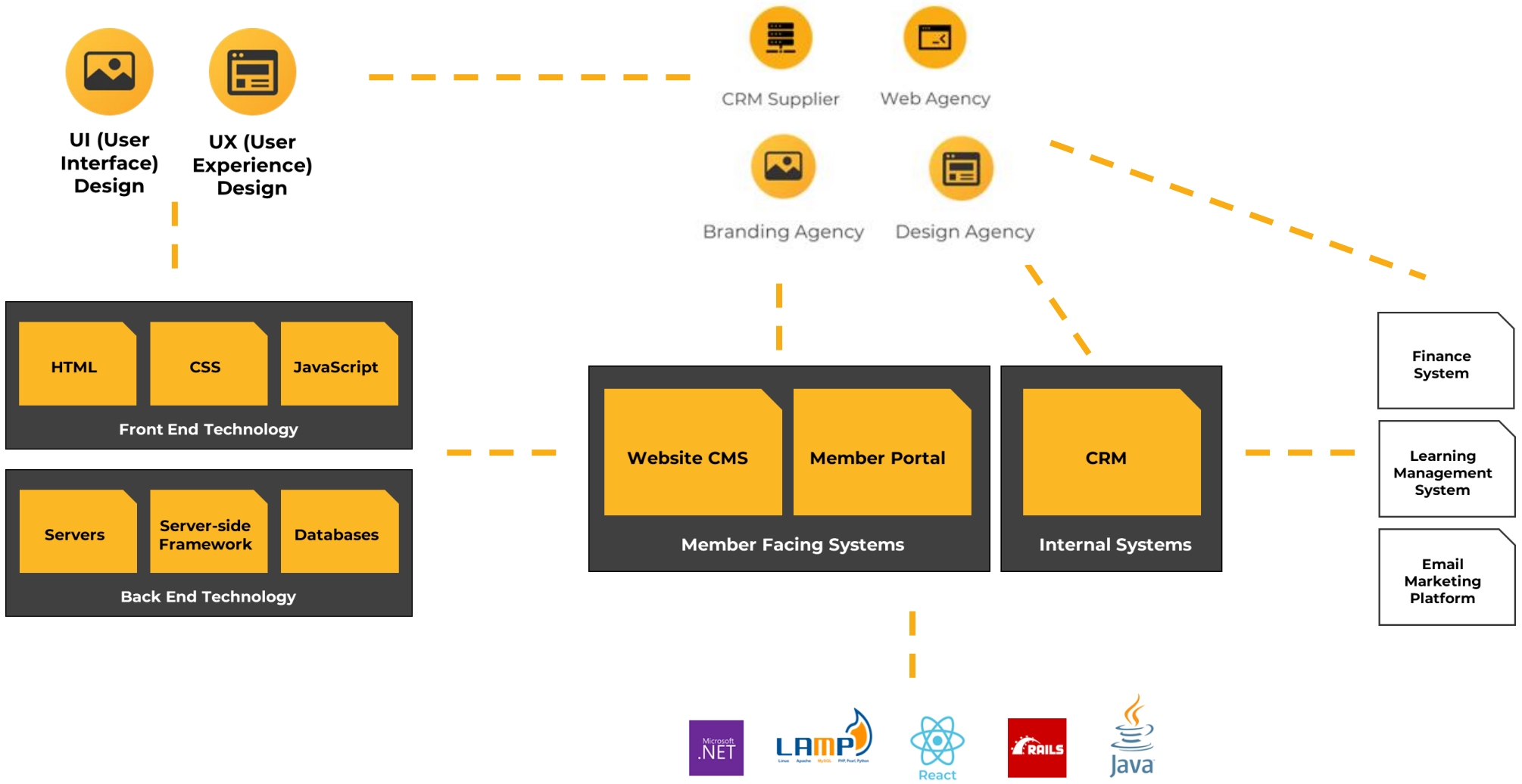

INTERNAL SYSTEMS

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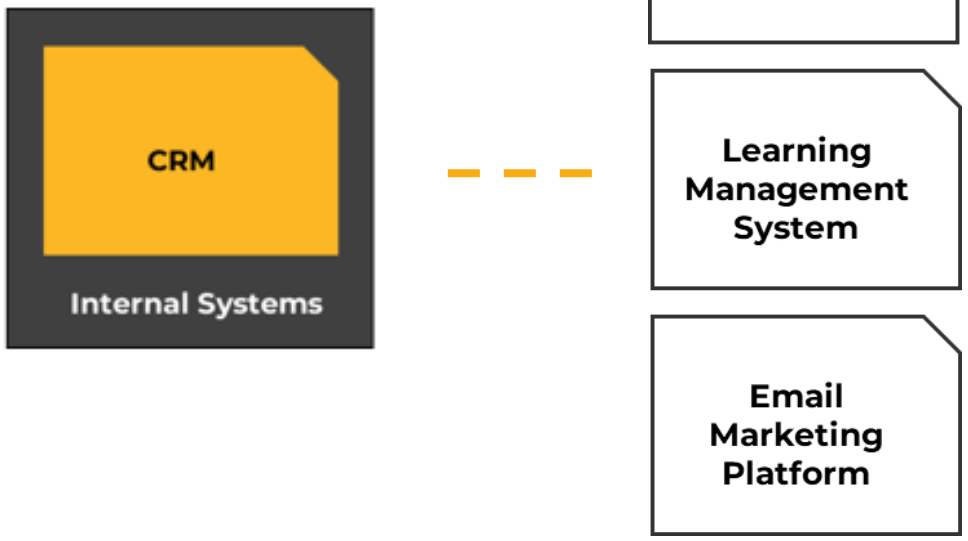

INTERNAL SYSTEMS

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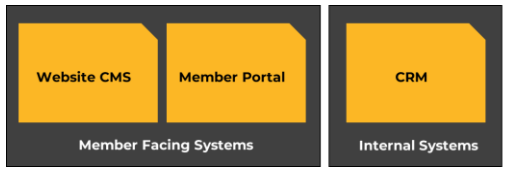
CRM



Your CRM system is another key piece of the puzzle.

As a rule, we should be leveraging mainstream vendors over bespoke proprietary solutions.

Dynamics 365

salesforce

are viable solutions

Platform	Sector Average	Small	Medium	Large
Microsoft Dynamics	28%	17%	31%	38%
Salesforce	12%	10%	24%	18%

BRINGING EVERYTHING TOGETHER

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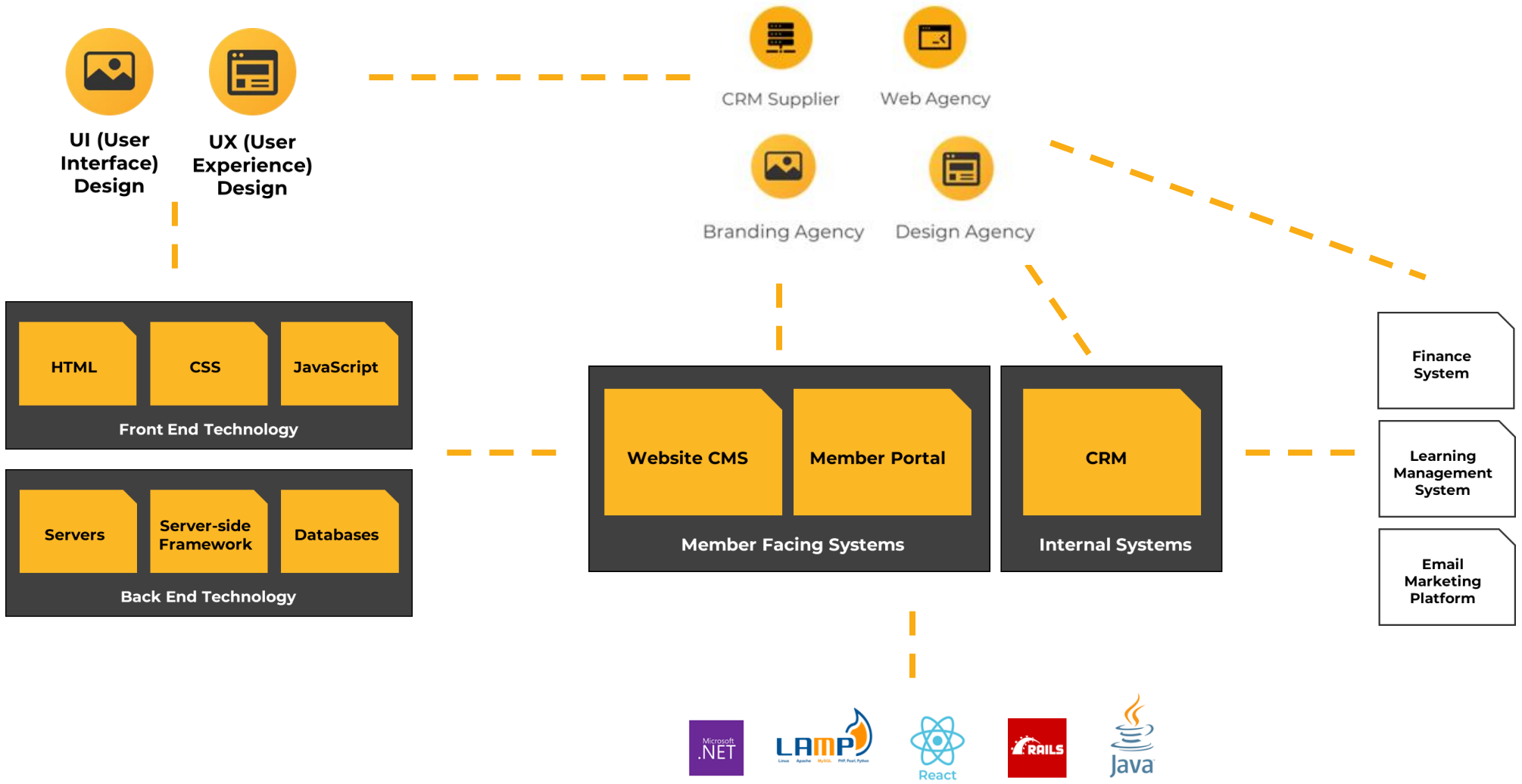

SYSTEMS INTEGRATION

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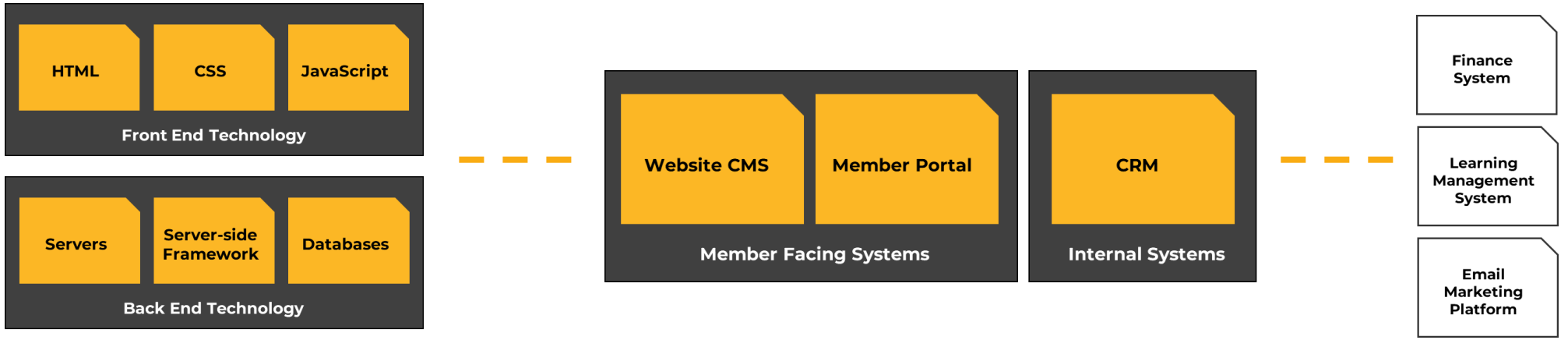

HOW DO ALL THESE SYSTEMS INTEGRATE?

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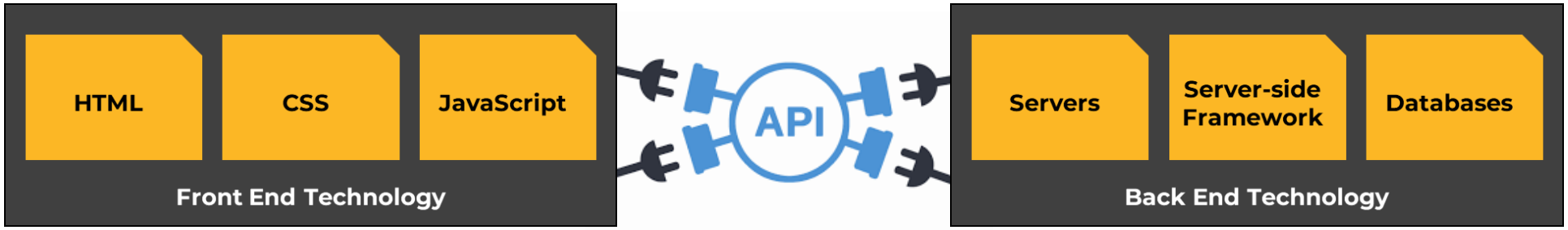
API

Via an Application Programming Interface
connecting the front and back end of a website.



BRINGING EVERYTHING TOGETHER

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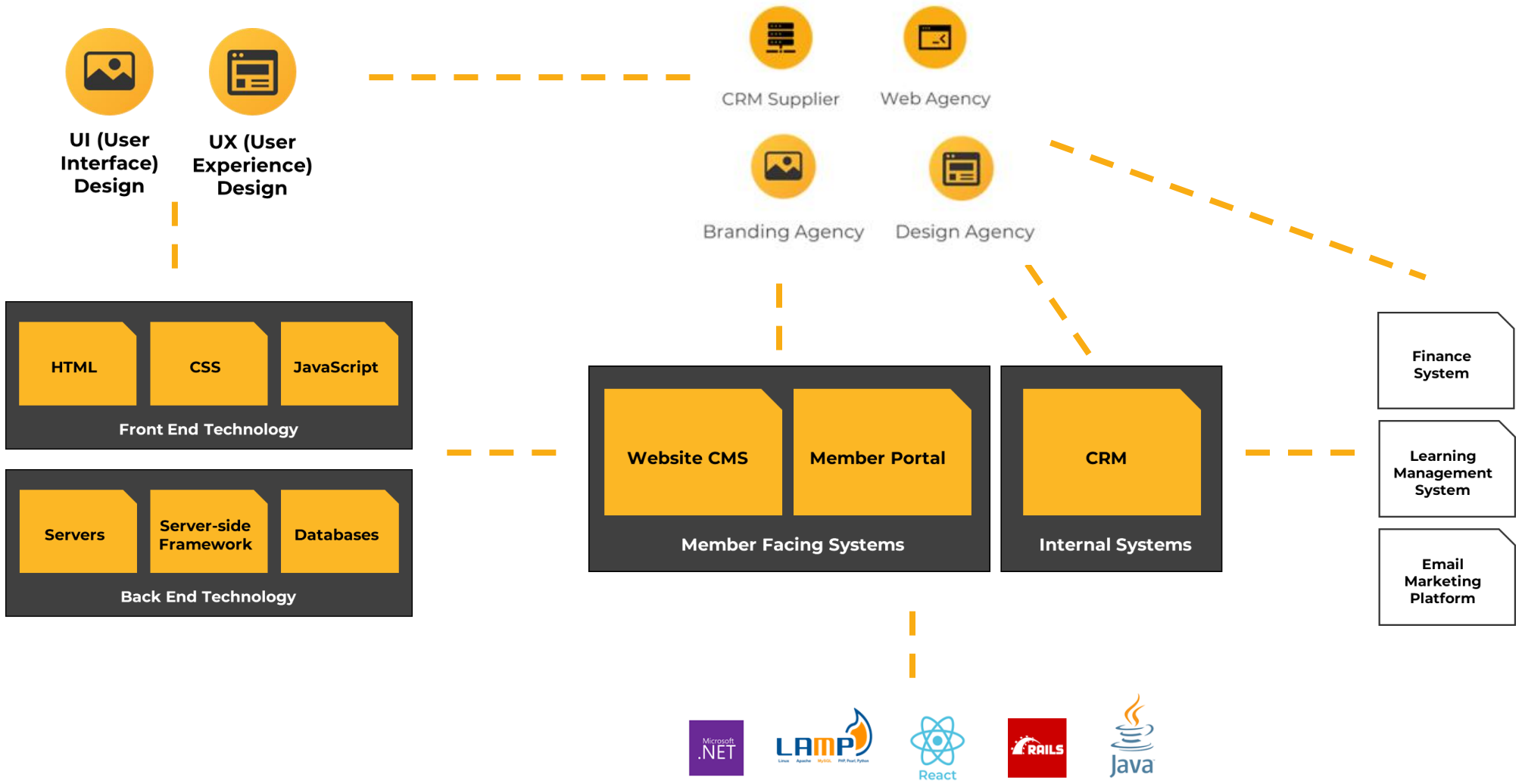

SUPPLIERS

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CRM Supplier

Web Agency

Branding Agency

Design Agency

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Supplier Collaboration

A specialist and multidisciplined supplier team.

Internal Systems

Finance Systems Supplier

Email Marketing Platform Supplier

CRM Supplier

Member Facing Systems

Web Agency

LMS Supplier

Design Agency

Branding Agency

MULTIPLE SUPPLIERS

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Your front-end and back-end technology, along with design, do not need to sit with the same supplier. In fact, on occasion, it is better they do not.

Remember! A bricklayer does not often make a great electrician.

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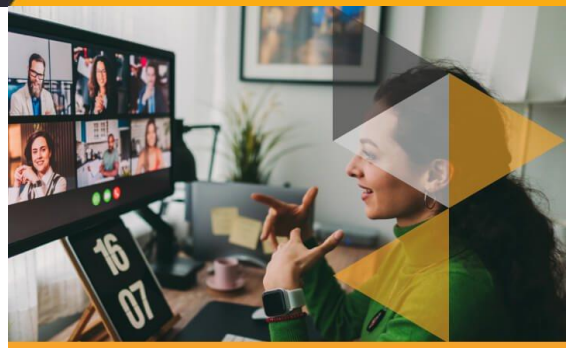
GRANITE5
CANTARUS
FlexRM
element78
C2
smartimpact
PIXL8 Group
arkom creative technology
oomi
silverbear
Fonteva
NetXtra
ClearCourse
blue_light org
Trillium experience matters
EY Pythagoras Digital Integration
FELINE SOFT IMAGINE · THINK · BUILD
ReadyMembership
MILLERTECH

Supplier Challenge

- Your challenge is having to coordinate multiple suppliers with multiple differing disciplines.
- Keeping track of which supplier you're paying and for what.
- Figuring out who is responsible for what if your systems go down or stop working properly.

- This is why many membership organisations opt for one supplier who can offer all the required disciplines under one roof.
- Rather than being just a bricklayer, these suppliers are like general building contractors with all the skills to build an entire house.



Website Example

- When assessing and scoring potential suppliers you might prefer an individual supplier's superior feature / function capabilities but not be overly impressed with their creative design.
- What should you do?
- Give a weighting to each discipline.
- As a rule, the aesthetics of a website (the front-end) are more readily replaced than the underlying technology (the back-end).
- In this scenario you may opt to work with a supplier (Web Agency) to build the website and a second supplier (Design Agency) to design the front-end.

Member Facing Systems

Web Agency

Design Agency

BRINGING EVERYTHING TOGETHER AGAIN

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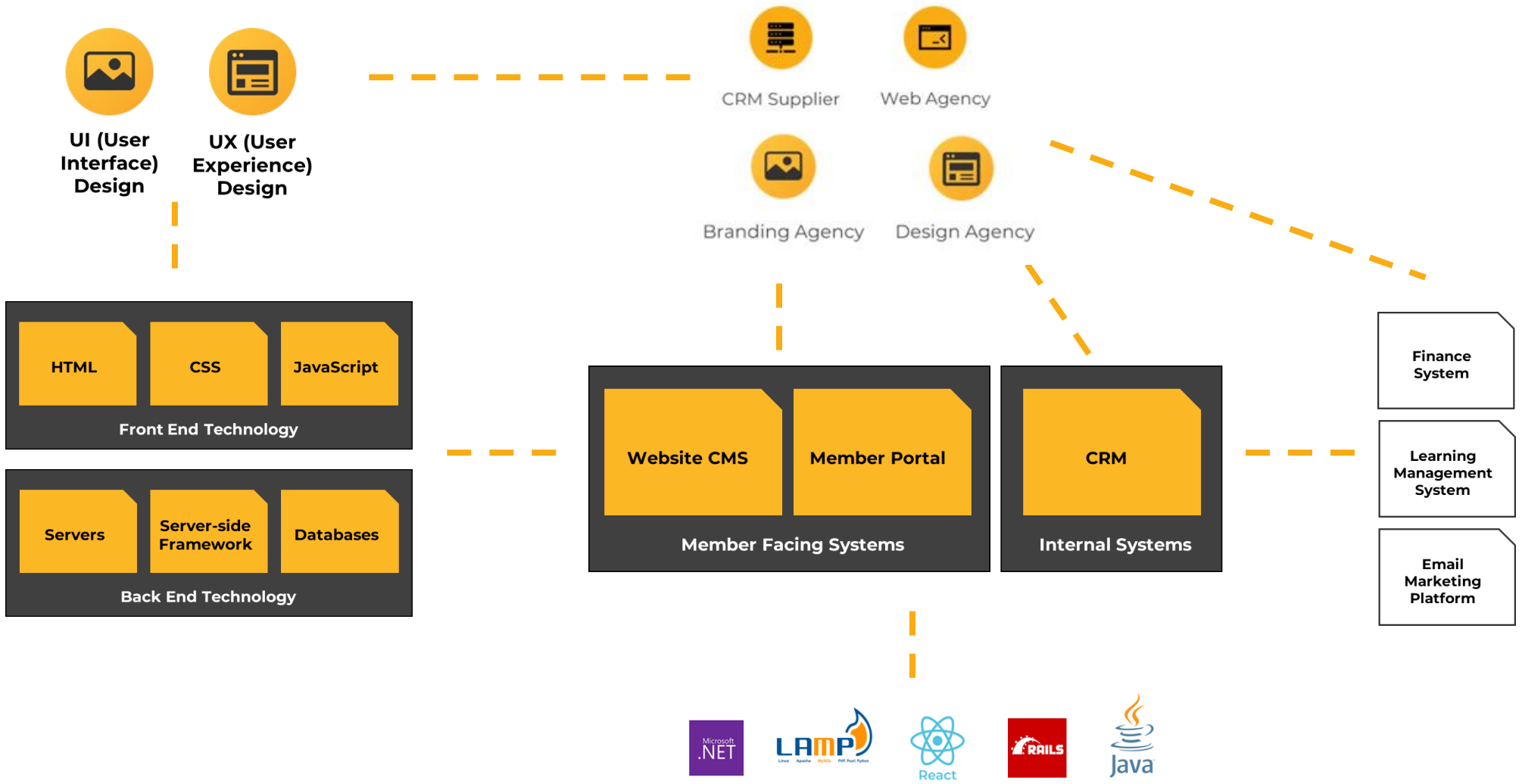

REMEMBER THESE?

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- Our websites don’t talk to our CRM systems and vice versa.
- Personalising the member experience is a major challenge.
- We struggle to measure member engagement.
- We can’t access the data we need to make informed decisions.
- We’re not automating enough of our manual tasks.

KEY TAKEAWAYS

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What is the optimal approach to decide upon new suppliers and systems?

- Define your business requirements
- Ensure prospective suppliers demonstrate their technology

1. Focus on feature / function first
2. Factor in systems integration second – are the systems compatible?
3. Then consider UI / UX capabilities as these define the member experience
4. Finally, review creative design capabilities