



TRANSFORMING BUSINESS
THROUGH **TECHNOLOGY**

G-Cloud

Service Description



Overview

Dynamics and Membership Services and Support

A CRM built for the Membership Industry and leveraging the power of Dynamics 365 and the Power Platform.

Core's CRM for Membership extends Microsoft's Dynamics 365 CRM applications using pre-built extensions for Membership specific CRM use tailored to industry specific use cases using standard out of the box Dynamics 365 and Power Platform technology. This reduces development overhead and accelerates progress towards a CRM that meets all your requirements.

Core has been delivering CRM solutions for almost 20 years, starting with the on-premises Microsoft CRM and remaining in step with Microsoft's movement to cloud based platforms and the emergence of Dynamics 365 Online and the Power Platform.

The highly versatile nature of Microsoft business applications (including Dynamics 365) enables us to build data models, applications, and business logic that support the business critical processes and functionality required of your CRM solution, with minimal reliance on code. This helps to reduce complexity, which in turn reduces cost of development in the short term, and support in the long term.

As part of our extensive experience working with Membership organisations and delivering CRM project and support services, we have built an in depth understanding of the processes Membership organisations typically require in a CRM. We have built and maintained functionality that can be quickly deployed and simplify the design, implementation, and adoption of a tailored Dynamics 365 CRM solution.

Core work very closely with the Membership and wider non-profit and charity industries, as well as the industry-aligned Microsoft account and technical teams. This means that we have the latest information on what Microsoft are offering to drive adoption of industry specific solutions, while reducing risk and achieving faster impact at a lower cost.

Microsoft offer incentives to both partners and customers, which we can leverage in the delivery of solutions, but also in the ongoing cost of licensing.

Core are therefore an ideal supplier for organisations seeking a CRM built for Membership.

Key Benefits

There are a number of key benefits to our CRM and Membership Offering;

- Extensive experience with the Dynamics CRM and 365 platform
- Solutions delivered for claims and case management, digitisation of manual services (license applications, etc)
- CoreMem provides an all in one box solution for Professional Membership Organisations which allows CRM, membership fee collection, information sharing and campaign management
- Ongoing SLA backed support options to ensure that the engine of your business remains up to date, secure and available.

CRM for Membership Platform

Core's CRM for Membership Platform combines the power and flexibility of Dynamics 365 and the Power Platform, with industry specific extensions built by Core to accelerate the build of a CRM platform that meets the needs of your organisation.

The CRM for Membership platform is built on the foundation of Microsoft Power Platform and Dynamics 365 CRM applications.

Dynamics 365 is inextricably linked to the Power Platform, which is a selection of several low-code/no-code solutions which allow end-users to create apps, automate processes, build integrations, create external websites, deploy chatbots, and deliver insights through data visualisations in reports and dashboards. From this starting point of an out of the box environment and no configuration, Core can deploy the CRM for Membership extensions to utilise existing functionality to accelerate the design and build of a tailored solution.

The CRM for Membership platform consists of custom tables, business logic, workflows, model driven applications, and other components, which facilitate processes and tasks that are typically undertaken by membership organisations in the delivery of their services and day to day operations.

These scenarios include:

- Membership/Subscription Management
- Member Journeys
- Event Management
- Course/Education Management
- Committee Management
- Payment Processing
- Gift Aid Claims.

Core use the features available in Dynamics 365 CRM applications and the wider Power Platform in CRM for membership implementations, to build engaging and user friendly apps, automate processes, integrate with other systems, visualise data, and more.

In addition to the CRM for Membership functionality, the following products and services are found in standard Dynamics 365 CRM applications and the Power Platform, and are often considered/included as part of a CRM solution deployment.

- Case Management
- Lead, Opportunity, and Sales Management
- Email Tracking
- Inbound/Outbound Marketing
- Campaign Management
- Insights and Reporting
- Knowledge Base Articles
- Products and Discounts
- Portals
- Document Management.

Most CRM implementations using Dynamics 365 will involve a degree of customisation to ensure that it is suitable for the organisations unique requirements. However, accommodating this within low-code/no-

code/out of the box functionality is always preferred and helps to reduce effort associated with the development and ongoing support of custom built solutions and code.

All customisations done by Core (whether simple, or more complex), will be 'supported' customisations, which means they will continue to work through application upgrades of the underlying Software as a Service platforms. E.g. Dynamics 365, Power Pages.

The following software products and services are used in the Core CRM for Membership:

Software Component	Summary
CRM for Membership	Core IP which extends Dynamics 365 and Dataverse out of the box to create a CRM for Membership specific use cases. Includes custom tables, relationships, business logic, apps, and workflows to run processes including subscription renewals, event management, course/qualification enrolment, gift aid. Etc.
Dataverse Database	Dataverse is the tabular relational database upon which key concepts in Dynamics 365 CRM such as accounts, contacts, and relationships depend. From this foundation, business applications can securely leverage the same consistent data structures.
Dynamics 365 Customer Engagement (CRM) Apps	Dynamics 365 Customer Relationship Management consists of a collection of business applications which support key customer driven processes, such as lead generation, selling, case resolution, customer service, marketing, and customer insights.
Power Platform Environment	A Power Platform environment is a dedicated space where you can store, manage, organise, and share various solutions and services that exist within the Power Platform ecosystem. In the context of a Dynamics 365 CRM implementation, a Power Platform environment is required to provision and store the Dataverse database, D365 applications, solutions, workflows, portals, chatbots, and more.
Power Apps	Apps built using Power Apps provide rich business logic and workflow capabilities to transform your manual business operations into digital, automated processes. What's more, apps built using Power Apps have a responsive design and can run seamlessly in browser and on mobile devices (phone or tablet).
Power Automate	Power Automate is a powerful Microsoft cloud-based service designed automate repetitive and time-consuming tasks, streamline workflows, improve productivity, and free up time. With Power Automate, users can create automated workflows between various apps and services. By using pre-built connectors, you can build time-saving workflows that range from individual tasks to large-scale systems, all with seamless integrations.

Software as a Service (SaaS)

The Core CRM for Membership utilises Software as a Service (SaaS) applications, meaning cloud based and hosted by a 3rd party provider (in this case Microsoft), with the customer having responsibility for less of the overhead and maintenance. So there is no infrastructure to be deployed, updated, or supported by the customer, as Microsoft do this themselves.

As a SaaS product within the Microsoft Power Platform, the underlying solution and technologies on which the platform is built and runs will be subject to twice annual release waves, which are groupings of capabilities, performance improvements, and other updates issued by Microsoft. All out of the box functionality, will continue to work with these updates.

As a cloud based SaaS, you are engaging in a subscription model service whereupon Microsoft may retire or deprecate a feature and replace it with another product. This may require work to ensure parts of your solution continue to function following that deprecation/retirement.

However, Microsoft provide warnings of at least 12-18 months for an impending change of this type. During the project we will also consult any announcements from Microsoft to ensure we are not using products/services subject to deprecation notices.

Data Migration

Migration of data from the current source database to the new CRM is almost always part of the scope for an implementation of a Dynamics 365 Membership management solution.

Core have a wealth of experience in successfully migrating data from a range of source databases and solutions to Dynamics 365.

Membership organisations are heavily dependent upon the quality of their data, and a CRM is only as good as the integrity and reliability of its data. A successful data migration is therefore the basis on which a project like this succeeds or fails.

Furthermore, user buy in is in no small part dependent upon the faith they have in the system. And without good data, faith in the system can be quickly eroded.

Member Portal

Alongside the CRM for Membership platform, Core can also deliver a Portal to provide external facing websites whereupon users can sign up/register and login to interact with business processes and engage in your organisations online services.

Core utilise Microsoft Power Pages to build Member Portals, further capitalising on the low-code/no-code philosophy of the Power Platform. Power Pages connects directly to the same Dataverse database that is used by Dynamics 365, removing the need for data to pass from Dataverse to a 3rd party CMS/Portal database.

The Portal can be designed to provide a consistent look and feel in line with organisation branding and existing website/CMS platforms in use. Members will be able to engage with the organisation and manage their own data without the direct involvement of a member of society staff in certain cases. This could include being able to join and renew their memberships, update personal details, make payments, raise and review cases, and more.

Power Pages uses forms defined within Dynamics 365 to control the data which is displayed, editable, and mandatory within the portal. These forms are edited and deployed using the same tools and processes as for the forms used within Dynamics 365. Web roles can be defined for permissions a certain user persona may have on your website, and these roles can be allocated at the point of sign up. This will prevent users from seeing data they are not meant to see, in particular data related to another user.

Integration with Other Business Systems

Most organisations require the capability to read and write data between their Dynamics 365 CRM database, 'Dataverse', and databases used by other business systems.

Dataverse is a tabular relational database which stores data in a consistent structure and state, allowing a range of business applications with different purposes to securely leverage the same consistent data structures, removing the need to plan custom integrations for applications and services relying on a database where the data is structured differently.

Though business applications can present and query data from Dataverse and remove the need for integrations to pass data to be stored in a separate database, there are use cases where data must be sent securely to another business systems database.

When sending data from Dynamics 365 to a 3rd party database, data needs to be passed back to Dynamics 365 to ensure the primary data record remains up to date. This is because a CRM should be the authoritative source of information your organisation holds on customers, members, students. Etc.

Microsoft solutions such as Azure AD, Active Directory On-Prem, Office 365, D365 HR, Power BI and Dynamics NAV/Business Central are either part of M365, Dataverse, Power Platform or utilise Azure infrastructure to host data. This makes integration between Dynamics 365/Dataverse and the above solutions straightforward.

Core recommend an approach to integration using Power Automate, which is a part of the Power Platform. To establish connections between two platforms, Power Platform has connectors. Power Platform connectors are proxies around an API to allow an underlying service to communicate with Power Platform, including Power Automate and Power Apps.

Using the low-code, no-code approach, Power Automate can use connectors to other business systems as part of a workflow with triggers and actions defined within a workflow prompted at scheduled times, based on a trigger action (e.g. a new record being created in either system), or manually by the user.

Examples of popular connectors within a vast library of other Software as a Service (SaaS) solutions include Salesforce, Office 365, Twitter, Dropbox, Google services, and more.

For those business applications which do not have a connector, or where the logic required in the integration is more complex than can be supported in Power Automate, Core have extensive experience integrating third-party platforms into Dynamics 365 and facilitating an exchange of data in a controlled way, to ensure that users have the necessary data they are entitled to and can undertake their work effectively and efficiently.

In addition to the standard Dynamics 365 API, Core has our own documented and supported Web API which can sit between the Dynamics 365 API and a Third Party API and perform actions such as push or pull data from platforms, as well as performing checks on the data for duplication, missing data, incorrect formatted data, and also security concerns. This can provide an additional layer of logic, security, and integrity between a 3rd party solution/database and your CRM.

Microsoft's versatile and ubiquitous products and services allows for the CRM for Membership platform to be extended and integrated with a range of Microsoft third party platforms in a supportable and intuitive way.

Licensing

There is no ongoing cost for using the features within CoreMem, as we grant access for organisations to use this in perpetuity.

The only ongoing cost is the licensing of the Microsoft Cloud services on which the platform runs. These are typically only one or a combination of the Dynamics 365 CRM applications (Sales, Customer Service, Customer Insights).

Core is a Tier 1 CSP Partner providing access to cloud subscriptions for a wide range of Microsoft Products.

Core can resell Microsoft cloud subscriptions in your Microsoft 365 tenant, including Microsoft 365 Business and Enterprise Plans (I.e. M365 Business Premium, M365 E3. Etc), Dynamics 365 plans, Power Platform, Defender, Copilot, and more. We can also operate as a CSP reseller for your Azure subscriptions, including products and services such as compute infrastructure, data storage, back-ups, and more.

Ongoing Support

For business critical systems such as a CRM, organisations will benefit from a level of support which typically depends on the capacity and skillset of internal teams.

Core have a modular support catalogue enabling us to provide customers with a service that provides the scope and expertise you need, without also purchasing skills and expertise already available within your internal teams or existing suppliers.

This allows us to build a support service which provides the right expertise for each customers specific needs. However, by following a repeatable structure, every customer can be confident that their support service is resilient, efficient, and effective.

There is also no barrier to supporting a solution internally, as we can make available detailed documentation which will enable your teams to support the solution and further extend it.

Project Delivery

Project Managers are the key drivers of successful migrations, implementations, deployments and transformations. They are the fabric through which effective communications, coordination and collaboration come together to create positive change, and Core's Project Management team have the experience and expertise to lead that change.

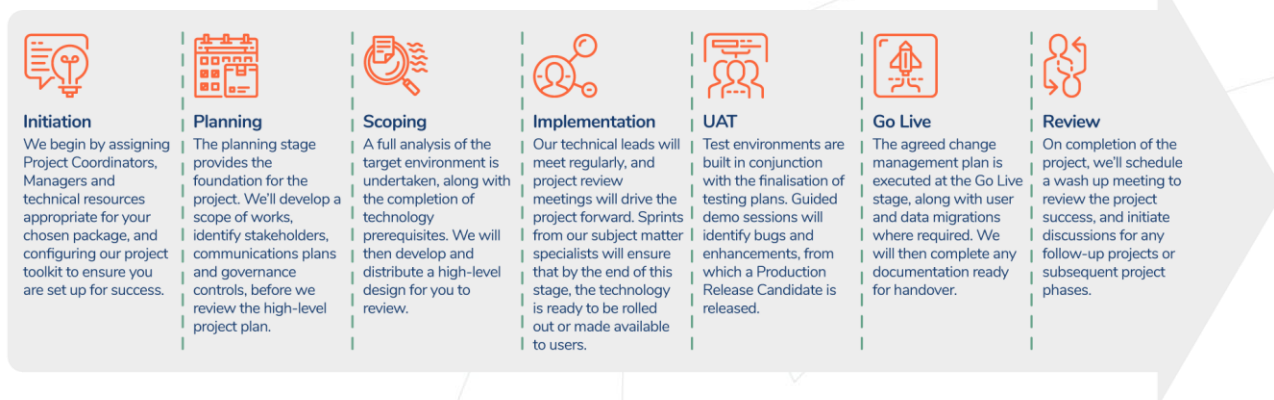
Delivering innovative, business transformation through technology and solutions can often create complex challenges. Effective planning, coordination and communication are key factors in any successful project, and our Project Management services have been developed to drive that success for you, so you can do focus on what you do best.

Whether we are managing small projects or complete programs, our experienced project managers and coordinators bring their extensive knowledge, skills, and tried and tested methodologies to the team, ensuring your project is delivered on time, within budget, and to specification.

For a true professional services engagement, we have a tried and tested approach that we have developed over 30 years to ensure we deliver consistent high value outcomes. Our approach is rooted in the Agile development method; and leverages rapid low-code development techniques to provide working automation solutions up to 78% faster* than conventional development methods.

How our Project Management works

Regardless of which Project Management package you choose, our team will deliver your project with the passion, energy, and expertise our customers have come to recognise as Core's professional and responsive culture.



Project Management by Core – Benefits

- Core's Project Management team are experienced in driving positive change through technology
- Our project methodology combines the stringent coordination of PRINCE2 with the fluidity of Agile practices
- Our Project Management team works with specialists across the technology spectrum every day, and understand the challenges associated within each function; and
- With three levels of Project Management to choose from, you can be sure Core can deliver the level of management your project requires.

Our packages

- Project Coordination

Project Coordination provides a basic level of governance designed for short term engagements, to ensure clear communications and successful management of project risk. Our coordination approach provides the minimum set of controls necessary to achieve a successful implementation across the project.

- Project Management

Our dedicated Project Manager will collaboratively lead the planning and production of the project deliverables, whilst reporting regularly to key stakeholders on the project health, scope, schedule and the status of key risks, issues, dependencies and decisions.

- Custom Project Management

Designed to support programs of work, and projects that are large, complex, high risk, contain multiple streams, or are conducted in regulated industries. Custom Project Management extends our standard project management offering with additional controls to manage risks and a more robust communications framework.

Once a customer decides to progress with this service, we will follow the model described below to ensure that we provide a consistent deliverable outcome;

Project Initiation Meeting

We will hold a project initiation meeting over Microsoft Teams to introduce the delivery team, confirm the scope and proposed timeline, required stakeholder from the customer organization, and .

Discovery and Design

We will undertake detailed discovery and design to ensure that all technical and service requirements are captured, understood and catered for in the architectural design of the new solution.

A High Level design will be created and shared with the customer for initial review and approval prior to completing a low level design document.

A low level design document will be created and shared with the customer for review and final approvals to commence build or configuration activities.

Build / Configuration

Infrastructure will then be built to meet the details provided in the low level design. Testing will be completed on each component, then integrated components, to ensure that the infrastructure is ready for accepting the web site applications and components.

Application Deployment / Migration Support

We will then support the deployment of your features / applications and components or the migration of users from the existing application to the M365 solution. .

Testing

Once the configuration, build or migration is complete, we will support the testing of the new service prior to migrating any users. We will ensure that the new service will provide a secure, stable and responsive user experience, in line with the customer requirements, prior to promoting the new service to live.

Switch Over

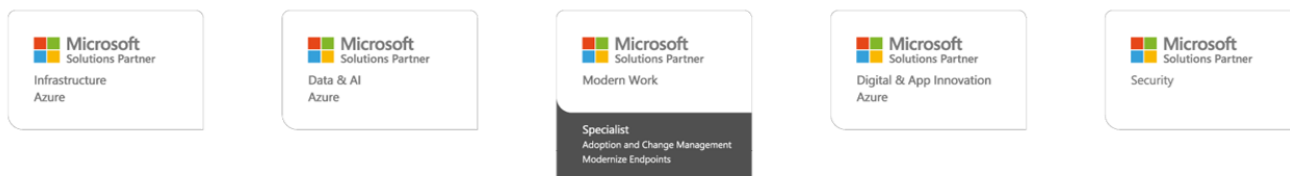
Once all testing is completed and the customer has approved the switch over of services to the new hosting solution, we will work with all parties to arrange and complete the switchover of users.

Where appropriate, we will follow and support any change management processes that the customer requires to govern the changeover.

About Core

We have a long and distinguished record of supporting organisations with cloud first strategies, implementing successful, efficient, and safe migrations to the Cloud, driving value, productivity and security.

As a Microsoft Solutions Partner with more than three decades of experience delivering Microsoft solutions, we understand how to unleash potential and unlock value for our customers who have invested in Microsoft technology. We help improve the transition from E3 to E5 licensing, enabling enhanced security and mobility capabilities for our customers, without the need for third-party solutions.



Your organisation deserves reliable, trustworthy, and responsive expert IT support so you can focus on what you do best. With our 35-year history, your business is in capable and experienced hands. In 2001, Core deployed the first installation of SharePoint in the UK and have continued to deliver and support Microsoft products and solutions, leading businesses to superior levels of productivity, security, and growth. From the early operating systems and intranet solutions to the advanced productivity and security tools that organisations adopt to seek efficiencies, Microsoft solutions now touch tens of millions of lives daily; and Core helps to optimise solutions for your desired outcomes.

Core is a Microsoft Advanced Partner and has been delivering Microsoft solutions for nearly three decades; transforming, enabling, and securing our customers with the evolution of Microsoft business technologies across the UK. Our focused expertise and experience, along with our long-standing relationship with Microsoft, means that when our customers invest in world-class transformation products, they are delivered by our team of leading experts, and managed personally, with competence.



Customers

We put our customers first, taking responsibility for our actions.



One Core

We recruit, develop, and retain the best talent in a supportive environment to best serve our customers.



Responsiveness

We are flexible, approachable, and responsive to our customers' needs.



Expertise

We are professional and constantly strive to achieve excellence for our customers, peers, and partners.

Core works in a spirit of partnership. We find that this helps us achieve the best outcomes for our customers, which supports our target of building long term, positive and trusting relationships with our customers. This includes offering as much value as possible and finding new way to maximise on your investment. We are proud to be:

- Winner of CRN MSP of the Year 2023. 2023 and 2024 Best Company to Work For (sub £100m) – CRN
- Cyber Essentials Plus and ISO 27001 Certified.



WINNER
CSP of the Year

**CRN
SALES
AND
MARKETING
AWARDS 2023**

WINNER

Best Company
to Work For
(Sub £100m turnover)

**CRN
SALES
AND
MARKETING
AWARDS 2024**

WINNER

Best Company
to Work For
(Sub £100m turnover)



Crown
Commercial
Service
Supplier