

# How a 15-year software development partnership enabled IIRSM's growth

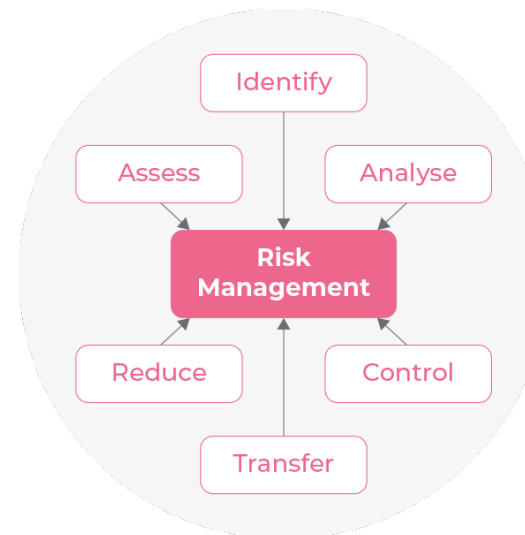
“You don't just want technical knowledge from your IT provider, you want people who truly understand your business and challenge your thinking. You want a partnership.”

That's according to Damodar Acharya, Director of Finance and Operations at IIRSM.

Established in 1975, the International Institute of Risk and Safety Management (IIRSM) is a non-profit organisation. Run by members for members, it champions enterprise risk management, educating organisations and their employees to drive positive change.

Across 90 countries, 8,000 members include those in health and safety, environmental management, internal audit, security, and quality management.

With such widespread activity, data management has been crucial to IIRSM's success.



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# The manual input challenge

Damodar has worked with Tom and Nathan since before Redox existed.

*"12 years ago, we relied on Business Fusion to manage our data. This software was originally developed by Cromwell, where I first met Tom and Nathan. Clearly, technology has moved on since then.*

*Whilst we could manually manage our data in Business Fusion, it required excessive human intervention daily and couldn't provide sophisticated reports. Back then, we had four people in the membership team using the system,"* said Damodar.

Business Fusion wasn't automated. It also didn't integrate with other technology in the organisation. Instead, the team manually completed repetitive tasks, leaving the door open for errors. Plus, IIRSM couldn't include certain information in the database. Business Fusion was no longer effective or cost-efficient.

Soon after Tom and Nathan formed Redox, IIRSM asked them to design a new piece of CRM software. Back then, the few off-the-shelf CRM options were basic with limited functionality. The obvious choice was therefore a bespoke system. It was aptly called Vision.

## Introducing Vision – automated and integrated CRM

*"We knew effective software must enable our growth,"* said Damodar. *"It wasn't just about keeping records, the system had to help implement our entire business strategy."*

With their grand plan front and centre, IIRSM worked closely with Redox to create Vision.

Redox designed the bespoke CRM system to integrate with Outlook, the website, IIRSM's email platform, gift aid system, and bank direct debit processing.

Automation ensures recurring membership sales happen seamlessly, as do tasks such as membership subscription reminders and invoice processing.

Damodar explained: *"Vision has lots of functionality to record our member activity. And importantly, it's synced to our eCommerce website. On a real-time basis, data on sales activity such as membership subscriptions and purchases, automatically passes through to Vision. We've never recorded financial transactions in our database before – this is a huge transformation for us.*

*We record email communication in Vision too, whether we email a member, or they contact us. Vision automatically logs everything against their personal record.*

*Importantly, Vision data is secure and automatically compliant with GDPR. That's really important to us and our membership."*





We could also trust our data now. It was accurate and more secure.



## Saving £200,000 over five years

Such a significant step forward delivered many benefits – some quantifiable, others less so. But equally important for the organisation's growth.

*“Fundamentally, we achieved significant economies of scale when we launched Vision. Eliminating so much human intervention, four staff became two as daily tasks were automated. That meant a labour saving of £40,000 a year.*

*We could also trust our data now. It was accurate and more secure. This meant our reports were more consistent and we could extract data in the format we required.*

*Meanwhile, forecasting and budgeting became more accurate. Senior managers and the board could make more informed decisions,”* said Damodar.

Of course, being a bespoke built CRM system meant Vision could also evolve over time.

Always developing to meet IIRSM's needs. This prevented the typical five-year cycle many CRMs have. It's why Vision still powers IIRSM after 12 years.

Damodar explained how Vision has scaled with them: *“We've added our training data to Vision now. So, when a member books training or events, the information goes straight into their record on the database. The same has been done for CPD. We kept adding new functionality to collect further data about our products.*

*As for reporting, I've recently added a bank reconciliation report. Every time I ask Tom for a new report, he just creates it.”*

It's one thing having the data, it's another being able to use it. With Vision, IIRSM has both, and can continue to evolve its functionality going forward.



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# “A wealth of IT resources within Redox.”

According to Damodar, this transformation wouldn't have been possible without such a productive partnership with Redox.

*“We've worked with them for over 15 years now and they have a very clear understanding of how our membership works. This isn't just an organisation and supplier relationship, it's a long-standing partnership that's proved an asset to IIRSM.”*

*There's a wealth of IT resources within Redox. They're very intelligent and can resolve any problem we've got with our CRM system. There's nothing Tom would say 'sorry, no' to – he just gets on and develops it,”* said Damodar.

He also highlighted the wider IT skills and experience Redox brought to IIRSM.

*“Redox wears a business analyst hat as well as a developer hat – it's really helpful. I can (and do) talk to Tom about anything IT related. For example, I recently wrote our digital transformation strategy and sent it to Tom for his thoughts. He came back with some solid feedback.”*

*Whatever I ask, they always challenge me – they ask what I want to achieve. It makes me think, which is great.*

*Redox and IIRSM is more of a working partnership. So much comes down to the people and how well they understand your business,”* he said.

IIRSM is not the first client to describe Redox in this way. Others have described their Redox-built software as ‘the glue’ that brings other systems together. And smaller organisations, without in-house IT teams, welcome having someone to lean on when it comes to general IT strategy and security.





# The next phase of Vision

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True to form with bespoke software, Vision is set to evolve yet further for IIRSM.

*“We’re working to add our Corporate Partnerships to Vision soon,” said Damodar. “These include a package of products such as webinars, training, and event sponsorship. They can range from £1,000 to £10,000. Currently, we add the data manually and it’s not proving very accurate.”*

A priority for Damodar is hosting Vision on the cloud as a web app. 12 years ago, this wasn’t important, but now it is.

Thankfully, most of the .NET platform is backwards compatible so Redox can use large amounts of existing code to achieve this. There’s no going back to the drawing board.

*“I’m going to talk to Tom about this next,” said Damodar.*

The return on investment from Vision is clear, both in financial savings and business enablement. Yet it’s clear IIRSM gets far more than an effective CRM system from Redox.

The institute has instant access to a trusted IT team with a helicopter view of its system. People who know where it’s struggled and how to take the technology forward to ensure it achieves future business goals.