Single Cloud-based Platform Gives Base for Growth for an Institute of Directors



Microsoft Dynamics Deployment Case Study

The Mauritius Institute of Directors (MIoD) needed to improve business processes in order to underpin its plan to boost membership and the number of training and education events, while also improving services. The MIoD therefore decided to replace its paper-based administrative systems and ad-hoc collection of software with an up-to-date customer relationship management (CRM) system, a cloud-based Microsoft Dynamics CRM, implemented and hosted by a local Microsoft partner, Geddion.

Expectations

* Support growth with existing resources
* Integrate operations
* Improve data handling
* Improve services for members
* Boost on-line presence and image

Industry

Membership Organizations

Country or Region

Mauritius

Customer Size

6 employees

Number of Users

900+ members

Connect with MIoD

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“Strategically it was right to move to a strong CRM, and it was probably the most cost-effective choice for us.”

Jane Valls, Chief Executive Officer, Mauritius Institute of Directors

Mauritius may sound like an island paradise, where lounging on the beach is the main activity, but doing business is pretty popular there also, at least judging by the number of registered directorships – about 125,000 of them. The Mauritius Institute of Directors (MIoD) is also working hard, primarily to sign up more members. It was only formed early in 2008, but by the end of 2013 had more than 900 members.

Apart from tackling topics such as corporate governance and sustainability, the MIoD runs numerous training and education events for members and non-members. In 2013 it ran 43 public workshops for an average of 25 people each, and many other training courses.

However, until recently the ambition to boost membership to at least 1,500 by the end of 2015 was hindered by the dependence on a lot of paper-based systems, as well as a variety of open-source and proprietary software solutions used by the MIoD.

For example, it used a Vtiger customer relationship management (CRM) solution. “It served us really well when we started and had no resources,” says Jane Valls, the Chief Executive Officer of the Mauritius Institute of Directors. However, there were few digital links between the MIoD’s various activities and the members were unable to manage their MIoD activities or membership on-line. Also, the MIoD’s planned growth looked likely to strain the resources of its team.

## Through Innovation to New Members

The MIoD therefore decided to build a new website and portal. “Our website was old and really needed updating, and that was our key priority when we started the project at the beginning of 2013,” says Valls. “One of the reasons for implementing this project was to sustain growth.”

However, when the solution evaluation and tender procedure began, they realized that the more extensive and integrated front-end to back-end approach, proposed by the local Microsoft partner Geddion, would support growth better without extra resources.

Jane Valls

Chief Executive Officer, Mauritius Institute of Directors

Jane Valls holds a BA Hons in French and Italian from Birmingham University, UK. She is the Chief Executive Officer of the Mauritius Institute of Directors (MIoD) and an accredited trainer with the Global Corporate Governance Forum (GCGF) and the Ethics Institute of South Africa.

Before joining the MIOD, she has held senior positions and directorships in a wide range of business sectors in Mauritius and overseas with leading companies including British Airways, Sun International and The Rogers Group and more recently running her own management and training consultancy.

Jane is a member of Soroptimist International (an international women’s association) and the current National Coordinator of Women in Networking (WIN).

Connect with Jane Valls

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The MIoD wants to attract younger members, who expect to interact on-line. “We want to encourage the younger generation to join, because they are the next generation of directors,” says Valls. “And they want these new tools and technologies.”

Giving tech-savvy members on-line access would also free up the MIoD to give more attention to anyone less keen on using IT. Valls stresses that, although the MIoD had the IT knowledge and experience to evaluate any potential investment technically, it primarily wanted business benefits, in order to sustain future growth. The Institute therefore chose a cloud-based system; an Umbraco open-source ASP.NET content management system and Microsoft Dynamics CRM 2011 hosted by Geddion, which significantly reduced the investment.

Valls says that the MIoD achieved about 90% of its aims at the start of the nine-month project, with Geddion offering a very good price: “The two key drivers were going to be efficiency and cost.” The package now underpins the majority of MIoD’s operations, including managing the portal and website, membership applications and events and bookings, while allowing members to access their accounts and services online. “Strategically it was right to move to a strong CRM, and it was the most cost-effective choice for us,” concludes Valls.

## Improved Services with the Move to Online

The system benefits soon became clear, primarily thanks to the switch from paper-based to electronic event bookings: “We are now much more interactive, and have really gone paperless,” emphasizes Valls.

Rizwana Eathally, the MIoD’s Membership and Marketing Officer, says that members have welcomed the online features. “It’s much easier and less time-consuming to update profiles on-line, and we have had much positive feedback from our members,” she says.

The MIoD team now has time for more high-value work, like improving the Institute’s database of about 3,000 people. “One of the things that we really want to do with this system is much more targeted and strategic marketing in a way that we couldn’t have done before,” says Valls. “Before, we were spending a lot of time inputting. Now we hope will be able to spend more time analyzing,” she adds.

A further benefit is a significant cost-saving from no longer printing thousands of pages of membership application and event booking forms. “That has also helped us to reduce our ecological footprint, which is a definite bonus,” says Valls.

## More Potential for Growth

The Institute has also already mapped out the next phases of its IT strategy, including more functionalities and more services for users. “The future will be about more interactivity in terms of what members can do,” says Valls.

In the financial year starting in July 2014 the MIoD has also planned a modest investment focused on improving document management. That should include allowing personnel or training managers in companies to more easily manage the documents they need for their in house records including statistics, training levies and refunds and Continuing Professional Development Points.

Because Mauritian organizations can claim refunds for employees who attend registered training courses, and in order to control their training costs, personnel or training managers typically control training bookings. The Institute has therefore rolled out a “super-user” status to ease their work. It has planned a similar approach for membership, taking into account data protection laws. The new system already allows members to check on-line their personal training record and CPD points earned on all past MIoD courses.

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Jane Valls, Chief Executive Officer, Mauritius Institute of Directors

# Next Steps

* [Connect with Microsoft Dynamics](http://www.microsoft.com/en-us/dynamics/contact-us.aspx)
* [Become a Dynamic Business](http://www.microsoft.com/en-us/dynamics/about.aspx)
* [Learn about partner solutions available in the Microsoft Dynamics Marketplace](http://dynamics.pinpoint.microsoft.com/en-US/home)

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For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)