



The Renewals **MONSTER**

TAME THE BEAST(s)

Who am I, and who are jaam?

- Consulting and systems integrator firm
- Specializing in automation solutions

Mission:

- Streamline organizations' operations
- Enhance efficiency
- Improve through innovative technology



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The logo features the year '2024' in large yellow block letters on the left, positioned above a large, stylized 'DX' in red, orange, yellow, and purple. Below the 'DX' is the text 'DIGITAL EXCELLENCE' in white capital letters. The background of the logo is a dark space with colorful, glowing, geometric shapes resembling a star or a network.

16th May, 2024
Novotel London West

Poll

Question: How would you describe your current membership renewal process?

- A. Excellent – flows well and doesn't take up too much time
- B. Quite good – takes a little time and effort, but works
- C. OK – takes lots of time and member questions, but we get there
- D. Not good – it's an admin nightmare and isn't easy for members

Judgement free zone



Member Renewals

Keeping you up at night?



The DATA MONSTER

Challenges

1 Legacy Systems and Integration

- ❖ Data management

2 Data quality

- ❖ Accuracy
- ❖ Completeness
- ❖ Consistency
- ❖ Timelines
- ❖ Relevance
- ❖ Validity

3 Lack of Reporting and Analytics

- ❖ Gaining clear actionable insights



The PROCESS **MONSTER**

Challenges

4

Manual Process and Integration

- ❖ Productivity
- ❖ Operational costs
- ❖ Risk of errors
- ❖ Lack scalability



The PAYMENT **MONSTER**

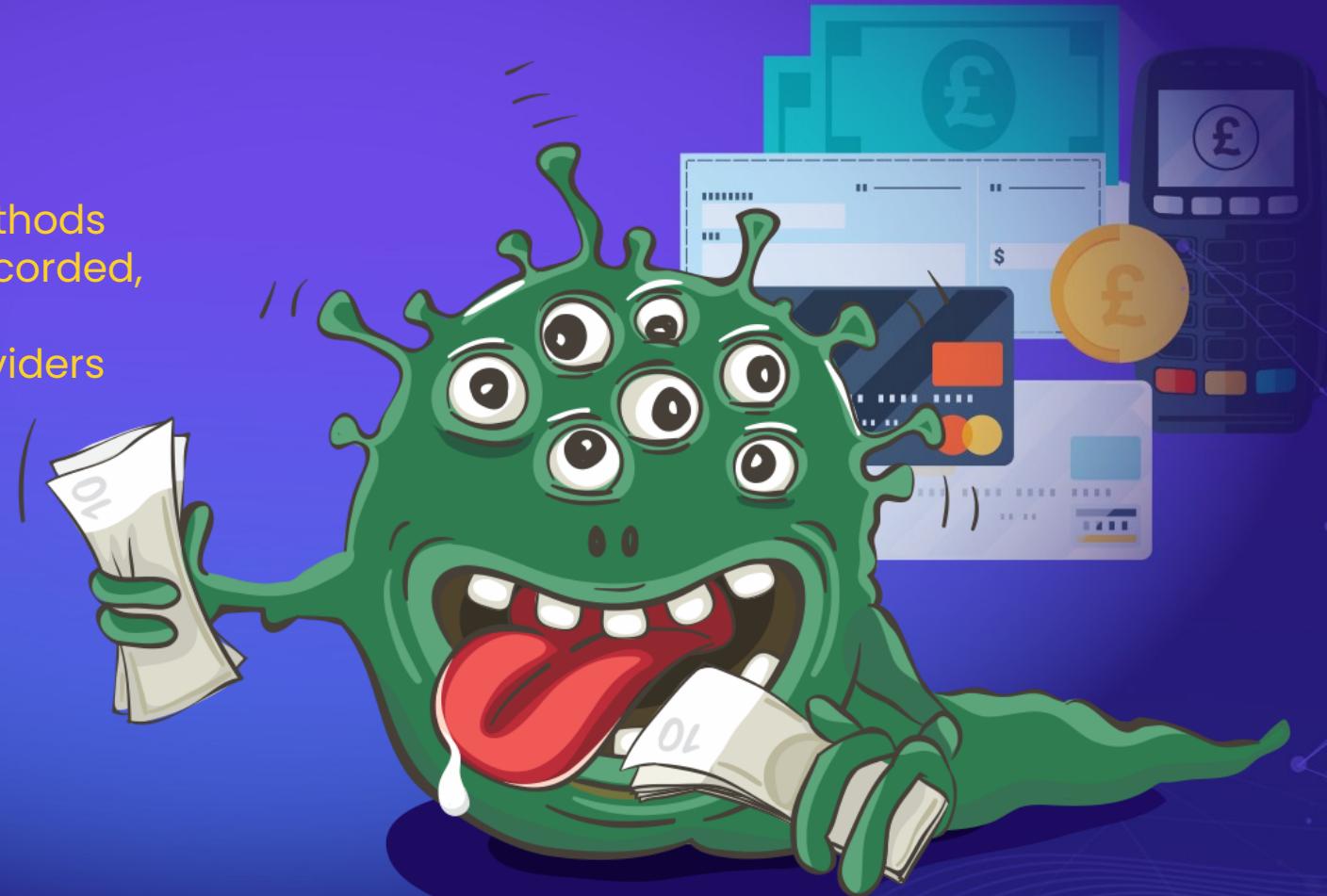
Challenges

5 Diverse Payment Providers

- ❖ Outdated payment methods
- ❖ Manually processed, recorded, and reconciled
- ❖ Managing multiple providers

6 Move to subscription

- ❖ Subscription models
- ❖ Renewals
- ❖ Payment method
- ❖ Cashflow



The PRODUCT **MONSTER**

Challenges

7 Diverse Membership Offerings

- ❖ Complicated renewals process
- ❖ segmenting members into distinct groups
- ❖ Complex Renewal calculations and rates





The

BEAST

SO HOW DO YOU TAME A BEAST?

- 1 Understanding the Beast**
- 2 Breaking It Down**
- 3 Containing the Aspects**
- 4 Changing Its Character**



The Challenge: Scattered Data Silos

The Challenge: Scattered Data Silos

- Data scattered across various systems and platforms
- Silos created barriers to accessing, analyzing, and utilizing data
- Lack of clarity on the right data and its location

The Transformation Process

Aggregation of data:

- Documenting data sources and relevance
- Identifying relevant data

Creation of a common data model:

- Facilitating extraction, transformation, and loading of disparate data

Central data repository:

- Cohesive, accessible, and actionable resource
- Offers insights across the organization
- Accessible to systems and users who need it

Our Weapon of Choice: iPaaS

- Leveraging an advanced Integration Platform as a Service (iPaaS)
- Creating data warehouses
- Establishing flows to push and pull data from various systems
- Transforming data into a rich dataset
- Making the dataset accessible to all who need it

The Outcome: A Data Ally

- Data management evolved from a challenge to a strategic benefit
- Enhanced decision-making processes
- Improved operational efficiency
- New opportunities for member involvement and customisation
- Better understanding of members
- More efficient service delivery

The Challenge: Fragmented and Manual

The Challenge: Fragmented and Manual Processes

- Fragmentation and manual nature of renewal operations
- Increasing manual steps with each renewal cycle
- Growing inefficiencies and staffing requirements to cover the process

The Transformation Process

- Built member-facing forms
- Integrated workflows with payment providers
- Implemented data exchange with the CRM system
- Provided members with a seamless renewal journey
- Utilized drag-and-drop designer for quick and easy development
- Reduced manual work burden for multiple teams
- Addressed data quality issues

Our Weapon of Choice: Nintex

- Utilization of Nintex
- Low-code workflow automation tool
- enables users to design, automate, and optimize business processes
- It offers drag-and-drop functionality for creating workflows
- Users can monitor and analyze workflows in real-time using Nintex Analytics

The Outcome: Unified and Efficient Renewals

- Renewals became efficient and accurate
- Cohesive process achieved
- Unified renewal process
- Reduced errors and saved time
- Enhanced member experience

The Challenge: Complex and Fragmented Payment Processes

The Challenge: Complex and Fragmented Payment Processes

- Managing multiple payment methods and platforms
- Cumbersome and error-prone process
- Barrier to timely renewals

The Transformation Process

- Improved ease in managing subscriptions
- Increased efficiency in processing card payments
- Simplified handling of direct debits
- Rich data and events from Stripe and GoCardless connected to internal systems
- Payment data synced with the CRM for visibility and usage across other systems

Our Weapon of Choice: Integrated Payment Platforms

- Stripe for card payments
- Go Cardless for Direct Debits
- Integration with iPaaS platform
- Unified and simplified payment process
- Consolidated subscriptions, card payments, and direct debits under a single system

The Outcome: A Streamlined Payment Experience

- Tasks streamlined, with most processed automatically
- Minimal member engagement required for processing
- Fewer missed or late payments
- Reduced administrative burden
- Significant decrease in payment processing errors
- Convenience and flexibility in payment interactions
- Increased trust in financial interactions with the organization

The Challenge: Complex Products and Compliance Maze

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- Ensuring organization-wide understanding and maintaining product lists
- Pricing management becomes increasingly massive with an expanding array of offerings

The Transformation Process

- Defined steps, responsibilities, and compliance checkpoints for each product and service
- Ensured a standardized approach across the organization
- Architected a centralized data structure
- Unified information related to products, memberships, and transactions
- Ensured accessibility and compliance with regulatory standards

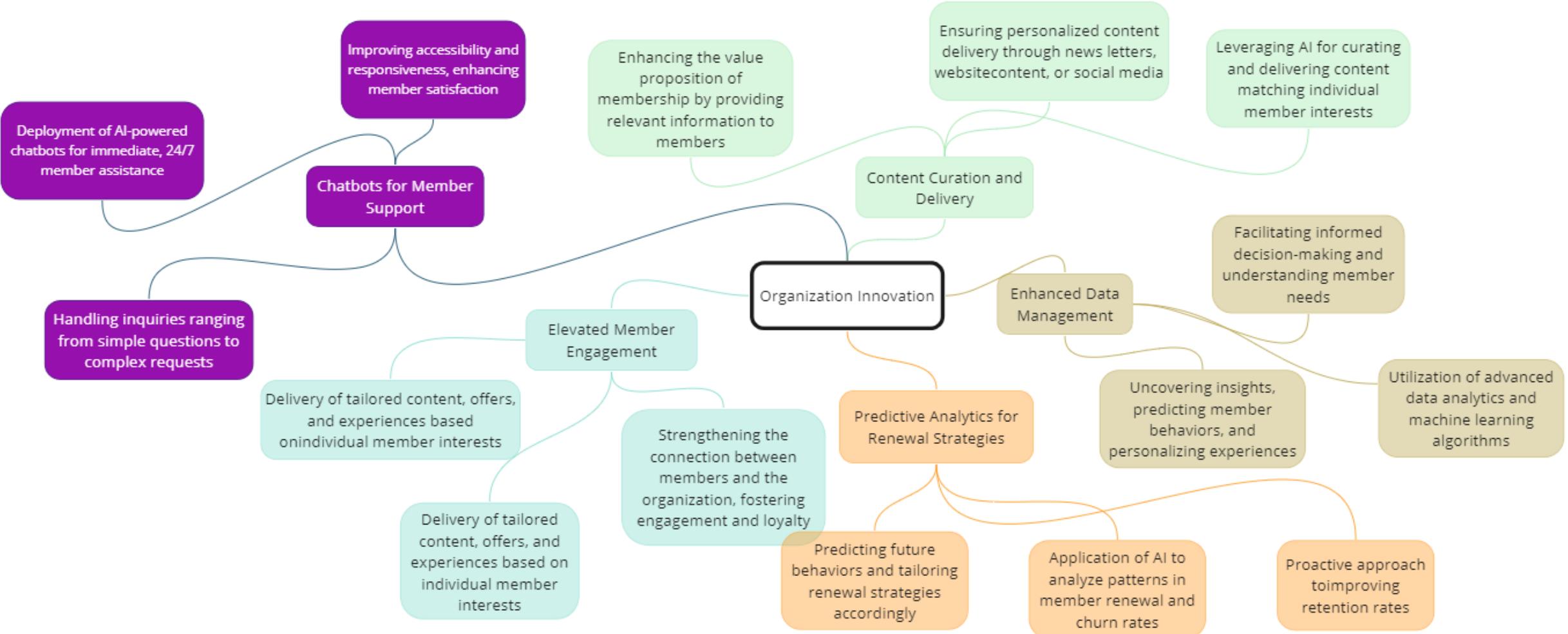
Our Strategy: Process and Data Modelling

- Utilization of Nintex Process Manager
- Strategic application of process and data modeling
- Mapping out the landscape of product offerings and data flows
- Creating a clear and comprehensible model for organization-wide understanding and adherence

The Outcome: A Unified Approach to Products and Pricing

- Ensured compliance and fostered shared understanding
- Eliminated silos
- Streamlined operations
- Enabled easy access to information for every team member

So much more to automate...



How do you tame the beast(s)?

We understand it. Then we break it down. Then we contain. And finally, we change its character...



Poll

Question: Based on what we've discussed today, which area of automation and AI are you most excited to explore or implement within your organization?

- A. Integration Platform
- B. Automated Workflow, Forms, and Tasking
- C. Data Analytics and AI
- D. All of the above

Q&A

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