RICOH
imagine. change.

World leading sustainability body recovers lost revenue, improves services with Ricoh BI solution

IEMA, the world's largest professional body for Environment and Sustainability Professionals, has used a Ricoh business intelligence solution to improve data access and deliver better quality information.

The organisation is set to recover lost fee revenue, enhance services and improve the customer experience for its members.

Executive summary

Name: IEMA
Location: Lincoln, Lincolnshire
Size: 35 staff, 14,000 members
Activity: Membership organisation for environmental and sustainability activities

Challenges

- Legacy silo systems made information access slow and difficult
- Unreliable business data leading to revenue loss
- Hindered ability to provide good-quality services to members

Solution

- Ricoh BI Reporting
- Ricoh ITS Business Solutions Group

Benefits

- Delivers a clear, accurate, single view of membership information
- Recovery of lost fee revenue
- Improves customer experience for members with better, targeted services
- Detailed, accurate reporting in near real-time instead of weekly or monthly
- Better sales and marketing intelligence set to increase revenue, expand membership

Challenges

IEMA is the worldwide alliance of environmental and sustainability practitioners, who either work within organisations or as independent consultants. It sets sustainability standards by developing and offering professional development support, training courses, advice and resources, to help members enhance skills and expertise. It has 14,000 members, mainly in the UK, but also across 100 other countries. It is the largest professional body of its kind in the world and was a key player in developing the ISO 14001 Environmental Management Systems standard.

IEMA recently embarked upon a major organisational change to make its internal operations and systems more efficient and better able to meet its members' needs. One of IEMA's main challenges was access to, and the management of, key business data; especially data relating to members.

This was often held in different systems and handled manually, which made it difficult and slow to access information and therefore respond to members' needs quickly and efficiently. Management reports took time to produce and were susceptible to inaccuracies.

IEMA has a broad yet defined membership structure, including individuals, small and large business, consultancies and universities, as well as different grades based on role and position, degree of qualification and expertise. Each of these has its own fee structure, sometimes comprising two or three different elements.

The objective was to find the best way to centralise business data, but also make it easier to analyse and manipulate, so that management could get a more accurate view of its membership and be able to serve them faster and more efficiently. IEMA described it as enabling a 'single version of the truth'.

Neil Fray, former Finance and Performance Director at IEMA, says, "IEMA had a number of significant challenges related to membership information. Historically, we'd built up different systems and were getting conflicting data from them, so it was difficult to get a true and accurate picture of our membership. Income didn't match up to number of members and we were aware that over a three-year period we had lost undetected fee income. We knew there was a problem, but didn't have the in-house expertise to pin-point the problem or do something about it."

IEMA was already working with Ricoh to help deliver a business and operational transformation programme using a Ricoh Workplace Services solution. As part of this initiative, IEMA decided to look at how it could improve data management and business intelligence, and engaged with the Business Solutions Group in Ricoh IT Services to help find a solution.

Solution

IEMA has implemented a Ricoh BI Reporting solution built around the Microsoft Power BI suite of business analytics tools. A dynamic CRM data warehouse and database draws data from several different sources across the business to provide a single, real-time view of membership information.

Tools within the Power BI suite allows IEMA to interrogate data in multiple ways and then present information in several, easy-to-digest formats, using graphics to communicate complex information and business intelligence. An ETL (Extract, Transform and Load) process automates data extraction from different data sources, removes the need for manual preparation and ensures data integrity.

Ricoh developed and deployed the BI Reporting solution in a virtual server environment and customised Power BI to fit IEMA's data needs. Ricoh also worked with IEMA's management to create several reporting processes and templates based on the type of business information the organisation needed on a regular basis. Working jointly with IEMA meant Ricoh could train and pass on expertise to the IEMA team, who could use, develop and refine the solution going forward.

Fray says, "We were impressed with Ricoh's Business Solutions team because of its expertise and wealth of experience. But it was also the softer things, like being very responsive and open to any issues we raised, being able to speak directly with senior people, and its commitment to us as a relatively small organisation, that made the project and working relationship so positive."

RICOH
imagine. change.

Benefits

Very shortly after the Ricoh BI Reporting solution went live, IEMA started to realise some significant benefits. The organisation immediately gained a much clearer and accurate view of its membership base, aligning detailed information about member demographics, professional accreditations and development with membership level, status, renewal schedules and revenue history.

Fray says, "The Ricoh business intelligence solution has had an immediate and significant impact on IEMA the organisation and its operations, but also our members, who are now seeing an improved experience. Where once it was slow and difficult to get the data we needed, now it's reliable, accurate and delivered in real-time. It's turned silos of data into valuable information, so decision making is quick and effective and helps us deliver a better service to our members."

IEMA has also been able to use Ricoh BI Reporting to improve visibility of membership numbers, grade breakdowns, a prospect pipeline and the renewal process in an accurate and integrated way. As a result, IEMA was able to recover around £22,000 in fee revenue almost immediately.

Previously, because of the time and effort involved, IEMA was producing reports manually and only on a weekly and monthly basis. Management can now access information, in multiple ways, in real-time. The system has also been set up to run automated processing overnight to provide a series of detailed, customised information reports.

As well as improving information for IEMA itself, the Ricoh solution is also helping to improve services for members. Because information is joined up and provides IEMA with a clear and accurate picture of the membership, IEMA is able to tailor and personalise services to groups or even individuals.

The Ricoh solution is also starting to have an impact on revenue and the expansion of the membership base, since IEMA can now analyse marketing data to understand audiences better and use this to fine-tune sales activity and target prospects accurately.

Having repaired and improved information management, IEMA is now looking at how it can use the Ricoh solution to develop business intelligence in a more proactive way. For example, it is starting to analyse membership data to refine existing services and develop new ones that meet member needs and wants accurately and in a more personalised way.

Ricoh Solution/Products

- Microsoft Power BI
- Microsoft SQL Server 2014
- Microsoft Dynamics CRM
- Microsoft Analysis Services Tabular

"The Ricoh business intelligence solution has had an immediate and significant impact on IEMA the organisation and its operations, but also our members, who are now seeing an improved experience. Where once it was slow and difficult to get the data we needed, now it's reliable, accurate and delivered in real-time. It's turned silos of data into valuable information, so decision making is quick and effective and helps us deliver a better service to our members."

Neil Fray, Former Finance and Performance Director, IEMA

IEMA
Transforming the world
to sustainability

RICOH
imagine. change.