



**BC SOCCER**

# **Customer Relationship Management System Project Update**

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## Project Objective

BC Soccer's ultimate goal with this project is to improve and ease the process for submitting and approving BC Soccer forms (all forms), by moving them to an online environment. This is where the membership in its widest sense will really start to see the value and benefits in this project.

It is planned (in Phase 2) to enable individuals to complete forms online and have automatic notifications to identified individuals for appropriate online approvals. It will eliminate the need for printing, physically signing and scanning of BC Soccer forms. The whole process will be managed completely online. Overall this will improve the speed of service, with more accurate information, all while improving BC Soccer and member operational efficiency.

In order for BC Soccer to be able to achieve online form management, we must first have appropriate data/information in the system to work from (Phase 1).

## Project Update

BC Soccer has been working on a Customer Relationship Management (CRM) system as a direct result of the association's need to improve the overall effectiveness in managing/support our members, while also ensuring we streamline efficiencies for increased quality and accuracy of information/data. Based on this, BC Soccer's 2012-2015 Strategic Plan, specifically in the two Strategic Directions of Support of Membership and Financial & Organizational Management, there are objectives that are directly linked to this project/system.

The definition of a CRM is "...a model for managing a company's interactions with current and future customers. It involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support." In the case of the system that BC Soccer is working to development with Pulse, the IT Company who supported BC Soccer to deliver the association's new website (launched first quarter 2013), it would be better described as a Member Relationship Management System (MRM).

The membership and wider soccer community are aware of the challenges BC Soccer faced with the previous Member Service Management System project. We have learned from that experience and are not looking to replicate the previous system's very broad functionality by any means. The system that is being designed for BC Soccer is neither an end user registration system (registration) nor a tool that will interact with any other online registration platform. It will not drastically change the process that we are working in, but rather help us ensure compliance across a number of areas in a more coordinated and consistent manor, while supporting the association as a whole on reporting of information. It will enhance processes by streamlining them and have all the information in one central location.

The implementation of the system is being broken down into two phases, with the first being the setting up of members with each having the ability to upload information (i.e. registration) with the

second phase, being the introduction of online form management for everything from player transfers to tournament sanctioning.

Phase one will directly benefit BC Soccer by providing us with a centralized database of our members, including the board members for each organization/association. Further it will allow us to merge all the registration data that each member submits to us, much more easily create the required reports for the Canadian Soccer Association and various Government agencies whom we need to report to and enable us to manage all registration data in a more effective manner.

Within this phase, each member (Youth District Soccer Association and Adult League) will have secure access to their own area of the system, where they will be able to complete various tasks including updating their board members & AGM date, upload finance/discipline/registration reporting in line with respective rules and regulations, query / product reports based on uploaded data and create e-mail distribution lists for their membership. It is important to note that the required registration reporting format (excel) is planned to stay the same; with the only difference being the member organization having the ability to upload directly to this new system, if they choose.

Further, the information that BC Soccer requires, and specifically the format in which we request it, is for very good reason. The reporting requirements BC Soccer has to the Canadian Soccer Association and the various Government Agencies requires data to be submitted in the format we have requested it from our membership. Therefore the new system will ensure compliance in this area.

As mentioned, phase 2 will be the introduction of online form management for everything from player transfers to tournament sanctioning. This is where the membership in its widest sense will really start to see the value and benefits in this new system. Although this portion of the system is still being designed, it is planned to enable individuals to complete forms online, use the information that is in the system (Phase 1) and have automatic notifications to identified individuals for appropriate online approvals. It will eliminate the need for printing, physically signing and scanning of BC Soccer forms. The whole process will be managed completely online. Overall the objective is to improve the speed of service, with more accurate information, all while improving BC Soccer and member operational efficiency.

Overall, the introduction and implementation of BC Soccer Member Relations Management system will assist BC Soccer in the widest sense to provide a more consistent and coordinated approach to core member services.

## **System / Project General Timelines (future dates are subject to change)**

### **Phase 1**

- November 1, 2013 through December 31, 2013 - Drafted Requirements (Pulse & BC Soccer)
- February 1, 2014 through May 31, 2014 - Development (Pulse)

- June 1, 2014 through September 30, 2014 - Testing (BC Soccer/Member Organization) & Continued Development (Pulse)
- October 1, 2014 onwards - Implementation / Roll out (BC Soccer/Member Organizations)

## Phase 2

- May 1, 2014 through June 30, 2014 - Draft Requirements (Pulse & BC Soccer)
- July 1, 2014 through November 30, 2014 - Development (Pulse)
- December 1, 2014 through February 28, 2015 - Testing (BC Soccer/Member Organization) & Continued Development (Pulse)
- March 1, 2015 onwards - Implementation / Roll out (BC Soccer/Member Organizations)

## Link to BC Soccer Strategic Plan

### Strategic Direction – Support of Membership

#### Objective

3. To improve BC Soccer and member operational efficiency by introducing on-line forms for most major member service and governance needs
4. To increase the proportion of members submitting administrative and financial information on time
6. To introduce on-line reporting of members' players

### Strategic Direction – Financial & Organizational Management

#### Objective

7. For BC Soccer to accomplish all administrative, regulatory and reporting functions within specified timelines e.g. grant applications, Provincial Govt. reporting

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