# Volunteer Forum | CRM Update

**12<sup>th</sup> October, 2023** 

Paul James, Head of Membership





## **IPEM's CRM Project**

- Currently undergoing a project to upgrade our CRM, moving to a cloudbased platform
- The current CRM has been in place since 2015, with this project underway since 2021
- Target launch date of Q4 2023, with plans ongoing for future updates and releases
- Goal of the project is to create frictionless experiences for members and volunteers





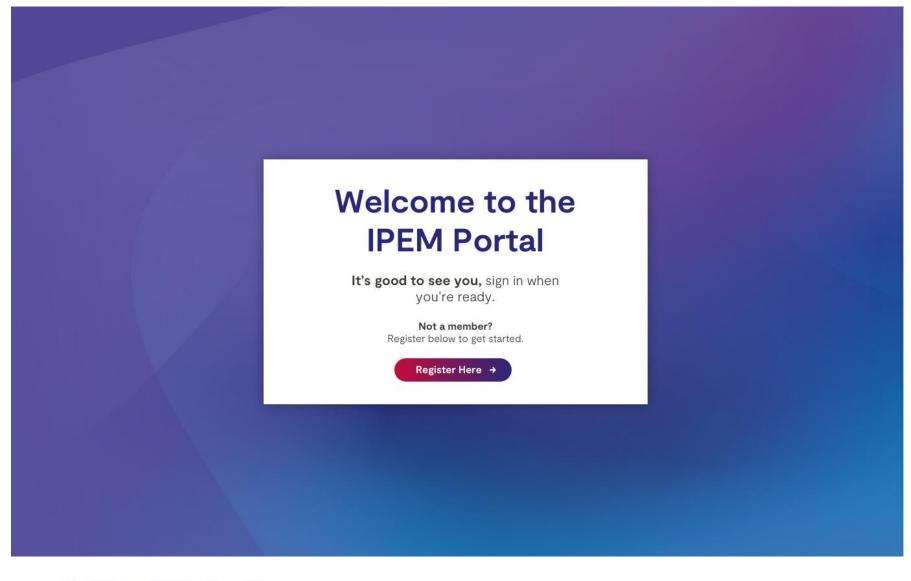


### **New Functionality for Members and Volunteers**

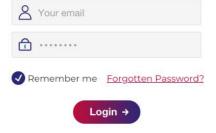
- Improved application processes, reducing time and resource required to process these
- Greater data collection in a secure, compliant manner
- Improved Committee engagement and governance
- Improved functionality for volunteers engaged with IPEM on projects and tasks







#### **User Login**



















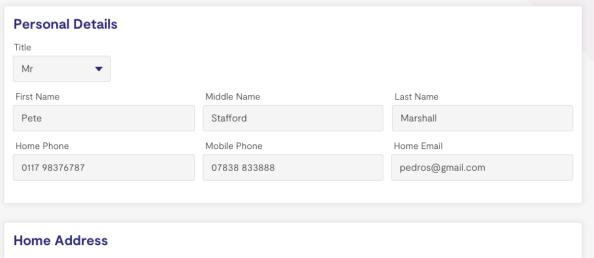


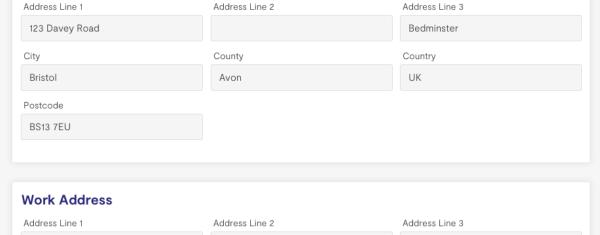


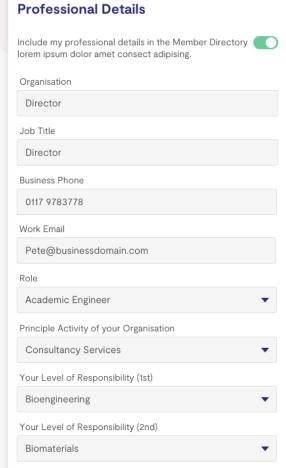


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# Thank you

**Paul James Head of Membership** 







