CRM Implementation Action Plan 2022

Belize Team:

- Venesia Neal – Manager Finance & Administration (MFA)
- Sheyvoughn Gill – Membership Program Officer (MP)) & Karyn Gill – Membership Program Administrator
- Janette Haylock – IT E-Data Specialist
- Yorshabell Cattouse – Manager Member Relations (MMR)

Strategic Objectives:	• To know our members better and be more familiar with who we serve • To measure our engagement with members • To provide a report to members upon request or at the end of the year to justify the services and value of they have obtained from the Chamber • To identify missing sectors, businesses, and geographical representation from our membership and to use this information to target potential members to join the BCCI • To track the growth and value of the Chamber's representation and services
Technical objectives:	• To work with the ITCILO to customize the CRM for the effective and efficient use by the BCCI
	• To update and to have a fully loaded and functional database
	• To train and assign roles to staff to make the CRM an integral part of our daily operations

IMPLEMENTATION PLAN

Activity	Tasks	Description	Timeline	Responsible
Pre-launch Preparation	CRM Action plan to be approved	• To prepare the Action plan • To provide copy to the ITCILO & OpenSymbol for review	July 9th, 2022	CEO, MMR, MFA, MPA, IT – EDATA Specialist

	To finalize the customizations of the CRM	• To adjust the layout and fields for the main modules • To implement the customizations for the services module	July 30th	Opensymbol IT, ITCILO & IT – EData Specialist
	Define CRM settings (User permissions)	• To identify the user access level for users (Admins, membership officers, etc….)	August 11th	CEO, MMR, MFA
	Define Reports	• To identify a list of reports needed for the system to pull	August 26th	MPA & BCCI's IT Specialist
	Final integration of CRM	• To integrate the BCCI email into the platform to send campaigns and surveys to members.	August 31st	Opensymbol IT, ITCILO, IT – EData Specialist, BCCI
	Communication on New CRM	• Communication to members to prepare them for the member profile update outreach.	September 26th	MMR
	Input membership data	• To fill the empty fields in the membership profiles of the database.	November 30th	MPA, MPO, Interns
Management & Implementation	To establish a CRM implementation procedure document	To establish a procedure policy document that includes procedure, roles & responsibilities of staff and general objectives of the CRM.	October 15th	CEO, MMR, MFA
	Training of Staff	To discuss the procedure policy document with staff and conduct trainings and test sessions.	October 29th	MMR, MPO, MFA
	CRM document hub	To establish a CRM document on the Chamber's share drive, which includes following:	October 29th	MMR

		• CRM Manual • CRM Training videos • CRM Procedure document		
Marketing	Promote the BCCI's (EBMOs) sponsored revamped CRM database to members and general public	• Press Release to members and non-members and placement on our social media pages and email notification to members.	October	BCCI's Marketing
Reporting	Monthly reports	• To review the participation of staff in inputting data in the CRM as per assigned roles	Monthly	MMR, MFA
		• Monthly feedback/reporting by Secretariat to CEO & Board on usage and support of the CRM	Monthly within 6 months implementation phase	MMR MFA
	Communication amongst partners & Maintenance of system	• Regular review meetings to maintain technical assistance and update on CRM activities	Quarterly	ITCILO/Opensymbol, BCCI & BCCI's IT Specialist