CRM system key to information and communications management

Business North Harbour has operated the Zoho One Customer Relationship Management (CRM) system since 2016, including apps with features ranging from surveys to social media.

The Albany-based business association's CRM maestro Kate Thorpe talked us through the versatility of the high-end system.

"Zoho One has many apps that link in to the CRM and we use seven of them," she said.

Backstage	events
Campaigns	EDMs and other marketing/survey emails
Social	social media posting
Survey	create and share surveys
Forms	electronic forms can be embedded on the website
Meeting	(a tool similar in functionality to Zoom and Teams)
Sales Inbox	combines CRM and email information

The characteristics of business association membership are well served by the CRM.

"We have separate 'layouts' that can be differentiated so we can report on our registered members (BID members), associate members, property owners and non-members," Kate said.

Changes to privacy laws were reflected in the BID's information gathering.

"We changed our process when registering businesses as members of Business North Harbour," Kate said.

"We added an additional opted-in step where we required our members to respond to an automated email accepting that they wanted to be members of BNH. This adds a layer of protection but also means that if our ambassadors* don't speak to the decision-maker when they visit a business, the decision-maker has the final say before we make them active members."

- **For more about the community engagement/data gathering work of BNH's ambassadors, Sandra Craze and Jessica Huang,** read this article.

The CRM is a key communications platform, linking as it does to the commercial precinct's various communications and marketing channels.

"Our emails are linked into our CRM and show up within the contact profiles. All the apps are connected, and the information is linked and visible within each app," Kate said.

Business North Harbour recently conducted its annual member survey, utilising Zoho's Survey function.

In line with commercial best practice, Business North Harbour has cybersecurity protections in place to safeguard member information.

"At the moment we have our data centre in the US. As for security and privacy, Zoho uses the same processes and have the same certifications and compliance in both countries."

We asked Kate what advice she would give to other business associations who may be looking to commission a new CRM system.

"Automation is essential," she replied.

"With a large membership base, it is imperative that the systems can be automated to save time and to maintain up-to-date data. Zoho One is excellent for this as all the apps are linked and work together, therefore all our information is accessible in one place."

- Kate has recently taken representatives from fellow BIDs, Rosebank and Central Park-Henderson, through the system to help them to decide on their new CRMs.