

## **BOB Project Overview – PSA UK&I**

### **Project Background and Initiation**

In the summer of 2023, the PSA existing systems were increasingly strained by the need to maintain separate databases and data sources that had to be synchronised through Application Program Interfaces (API's) and services like Zapier. The existing structure was considered end of life, increasingly expensive to maintain, and a constraint for the association. PSA commissioned a thorough review of potential suppliers through our IT provider to address these challenges. The review identified five potential suppliers, which a working party of Board Members evaluated.

Presentations from the top three suppliers (SheepCRM, Eudonet, and Sport:80). SheepCRM was dropped following that review. The reasons for that decision were based on the fit with our requirements and values, and project costs. Put simply, they did not convince us that they could deliver what we needed.

A detailed analysis of the remaining two followed, including client interviews and software evaluation. Eudonet did not have the direct capability for a member portal, which would have to be developed. Their prime client base was not well matched to our association, and it was clear that future developments might be misaligned with our needs. Their pricing model required a significant up-front investment as well as a licence fee.

Sport:80 was a good fit with our requirements. While most associations they work with have sporting connections, their underlying needs strongly align with the PSA's approach. Their culture is for continuous improvement, and their values around community connection are strongly aligned. Their pricing model has low upfront costs (to cover data migration developments only) and a commitment to further development as part of their monthly licence fee structure.

Sport:80 was selected as the preferred supplier, contract negotiations took place, and full board approval was obtained. A commercially sensitive cost matrix model also informed the decision.

### **Project Timeline**

- **Q3 2023:** Project initiated with the evaluation of possible suppliers.
- **Q4 2023:** Initial presentations and review.
- **Q1 2024:** Final selection of Sport:80; board approval obtained.
- **Q2 2024:** Project initiation, specification, and delivery timeline agreed.
- **Q3 2024:** Detailed testing, feedback, and further development.
- **Q4 2024 (Phase 1):** System launch.

### **Phase 1 Objectives (Q4 2024)**

- **Direct Savings:** Over £21k in annual savings from consolidating software systems (e.g., Sheep, Mailchimp, Zapier, Eventbrite).

- **Administrative Efficiency:** Centralised administration will be reduced as members manage their accounts, allowing the association to scale with lower costs.
- **Management Information:** Improved and timely MI will be available to support the association and its regions.
- **Event Management:** Simplified event booking for members and improved information for regional presidents.

### Phase 2 (2025)

- **Speaker Finder Development:** Implementation of 'Speaker Finder,' a tool for members to view detailed profiles of Professional members and Fellows, their areas of expertise, and awards. This will help regional presidents design more targeted events and enhance member-to-member referrals.
- **Deeper Integration of Members Area:** The members' area will be available from launch, but deeper integration is planned, allowing more advanced interactions and self-service options.
- **Member development:** with the integration of training and resources and support for membership progression and access to an improved 'Speaker Hub'

### Phase 3 (2025 and Beyond)

- **Speaker Finder Refinement:** Further enhancements to 'Speaker Finder' to increase community value and streamline member engagement.
- **Virtual Membership Cards and QR Check-ins:** Enhanced member experience with QR code check-ins for events and virtual membership cards.
- **Single Sign-On:** Integration of Single Sign-On to improve user experience and streamline access to the members' area.

### Expected Benefits

- **Scalability:** A scalable system with lower marginal costs for new memberships and event bookings.
- **Cost Savings:** Direct reductions in software licensing and improved IT support from Sport:80. No additional supplier development costs as the system evolves.
- **Operational Efficiency:** Simplified workflows for central and regional teams with enhanced reporting and marketing capabilities.
- **Improved member development:** Supporting clear pathways for Associates to progress to Professional Membership and Professional Members to progress to Fellowship.
- **Improved information flow:** Getting the right information to members at the right time.
- **Better management Information:** with much clearer, more accurate and more timely information reporting.
- **Enhanced support for the regions:** Empowering regional presidents to run their region, find the best speakers and give members and visitors timely information about local events.