



## The leading non-profit organization for digestive health - UEG - services its contacts with SugarCRM

The United European Gastroenterology (UEG) uses SugarCRM to provide its newsletter subscribers, website users, and committees with information relevant to their target groups, further training opportunities and the possibility to network and collaborate. It thus helps over 50,000 experts to expand their knowledge, exchange experiences and promote progress in the field of gastroenterology.

### The initial challenge of the UEG

Since its foundation in 1992, UEG has dedicated itself to the prevention and treatment of digestive diseases throughout Europe. It works tirelessly to support research, promote first-class training, and develop clinical standards. Since then, the number of healthcare professionals using UEG services has grown to a staggering 50,000 experts engaged in a lively exchange.

Managing so many people poses a major challenge in terms of data management. In addition, UEG's data management requirements had expanded considerably in recent years. The organization wanted to use its data more comprehensively and efficiently than before and use it for data analysis purposes and targeting target groups. The options for managing company contacts and events were also to be expanded. Access for all website users was to be simplified with a central UEG ID with access rights controlled by the CRM.

Another key requirement was the ability to administer the CRM in-house and expand it flexibly, which would not have been possible with the CRM system previously used.

### The solution approach at UEG

It was time to implement a solution that would offer UEG's customers added value with modern functions and make the job of the UEG team easier. The new platform should optimize the use of resources and fulfill the following functions:

- facilitate contact management
- improve data management and reporting
- provide a flexible data model that can be customized by the UEG team
- automate and simplify event planning and associated mailings
- provide a strong connection to the UEG website (customer login area)

### Project implementation with LOGIN

After thorough research and discussions with several providers, the choice fell on the CRM solution SUGAR and its implementation by LOGIN Software: the chemistry was right and the many years of Login's expertise as well as the "one-stop-shop portfolio" offered convinced UEG that it had the right partner at its side. The following procedure was agreed upon: If UEG is satisfied with the implementation of the 1st milestone, the next one would be commissioned.



#### Project step 1:

### **LOGIN proves its expertise in contact management**

First, an 8-member project team was set up: 4 UEG experts provided the 4 LOGIN team members with all the information required for the future software solution, suitable for everyday use. Together, they set about defining the specific needs, mapping the processes, formulating the milestones, and implementing them:

#### **1. MILESTONE: Contact logic**

The first project phase had to fulfill the following content and implementation steps:

- Smooth integration of historical data.
- Data quality & format definitions including automated data reconciliation → keyword: avoid duplicates!
- User management: Roles & rights of accessing website users (basic users & associates) via a central IDM (Auth0) as well as the option to manage UEG-relevant committees.
- Online data management: Logic for the integration & management of data processed via the website → Examples: Profile updates by users, account & event registrations,
- as well as the provision of congress content in an online library, etc.
- Finally: absolute GDPR compliance.

#### Project step 2:

### **2<sup>nd</sup> MILESTONE: Member modules**

Following the successful implementation of the first milestone, LOGIN was given the go-ahead to

implement the other milestones. First came the implementation of the modules for managing memberships in various professional societies and committees: Members, Societies, Officers etc. The essential core element here was the standardization of the rules and ensuring the subsequent data transfer would run smoothly across all processes and structures in everyday life.

*"We chose LOGIN because we were presented with a solution that goes far beyond pure CRM functionality and offers the required flexibility (the data model can be adapted by the UEG team themselves).*

*We quickly gained the confidence that the LOGIN team had the necessary expertise to competently implement our detailed requirements, and that we would get a platform for managing our data and maintaining our contacts that would adapt to our requirements and processes - and not the other way around."*



### 3<sup>rd</sup> MILESTONE: Event module

An important part of the UEG's offering is its **event expertise**. The continuing education courses and congresses on offer enable intensive, personal exchange. They are an **integral part of promoting research and supporting the daily work of doctors, specialists, and industry representatives in improving digestive health within the EU**.

SugarCRM not only reduces the workload of the UEG team in organizing events, but members also benefit from faster registration processing and download functions, for example for participation certificates and event documents. This ensures up-to-date event planning and processing.

### 4<sup>th</sup> MILESTONE: Campaign management

UEG now uses Sugar MARKET for comprehensive communication with its newsletter subscribers: it is the "marketing automation" software solution that **automates the sending of newsletters and campaigns** and thus supports the target group-oriented flow of information to subscribers. This saves the UEG team time in administration and allows them to concentrate more on the content-related dialog with their customers.

### Conclusion: Goal achieved! 7 months implementation time - everything "in time" & "in budget"

The course of the project confirmed another reason why UEG had chosen LOGIN as its integration partner: LOGIN's planning expertise. Both the schedule and the budget were adhered to exactly.

However, the core element of this successful project implementation was undoubtedly the wonderful atmosphere that the UEG team created for effective collaboration!

*„Dear LOGIN-Team,  
on behalf of our team, I would like  
to thank you very much for the excellent  
cooperation. You implemented  
a fairly complex project with and  
for us and were always efficient,  
helpful and friendly. We are delighted to  
have found a reliable partner in you  
and look forward to continue  
working with you in the future.“*

*Thomas Baumgartner  
Web & IT Management UEG*