

## CASE STUDY

# INTEGRATED MEMBER MANAGEMENT SYSTEM (IMMS)

## Portuguese Psychologists Association

The Portuguese Psychologists Association (Ordem dos Psicólogos Portugueses), a professional association representing psychologists and responsible for regulating the practice of psychology in Portugal, decided to improve the quality of the service provided to its members by creating an integrated system to centralize and manage all the members' information.

The system supports the team that delivers the Association's services to psychologists and is

integrated with other key applications, mainly the Enterprise Resource Planning system and the website, which is the key interaction point with members. It enabled the improvement of service delivered to psychologists and to the public while streamlining processes and operations, focusing the team on quality of service delivered and untangling repetitive, data collection and validation tasks.

## Challenge

Since its creation the Portuguese Psychologists Association has aimed to dematerialize its processes. Enrollment of members has always been performed through the website, but the backoffice that followed was only prepared for registry management, leaving several gaps in the process that the team filled with other manual offline tools, like Excel files and paper based sub-processes.

Weak validation mechanisms generated data quality problems. There was no full control of the information, which led to the data being spread across several additional support programs and reduced visibility of the information. To get a clear image of the member status one would need to go through several systems and data sources, cross referencing ids and creating that

image manually, causing the team to waste a lot of time in tedious and error-prone tasks, preventing them from focusing on what is most important: member services.

Increasing membership, more services and more complex services all aligned with the restructuring of the processes; this motivated the Portuguese Psychologists Association to implement a system to centralize and manage members' information. This is sufficiently centralized to provide a prompt overview of the member status, yet flexible enough to face the challenges of a young and dynamic organization that keeps evolving and creating new and better services for its members.

## Goals

- . Gain autonomy and ability to create and launch new innovative services;
- . Allow easy access and interaction with the provided services;
- . Effectively manage members' information and processes more than just being pushed around;
- . Centralize members' information in one system, fostering collaboration and accelerating processes;
- . Increase data quality through validation and control mechanisms.

## Solution

To address all the challenges and reach the specified goals the Portuguese Psychologists Association developed a new integrated member management system that centralizes and aggregates all the information about a member. This became a one stop shop for a complete overview of all the processes that relate to a member, including information taken from other systems such as financial and payment data managed in the ERP.

Registration of new members now respects stricter validation rules, helping users to avoid errors and improving data quality. The system's

main screen allows to easily create new processes and monitor pending cases, activating necessary actions to the progress of processes. Business processes are supported by a workflow, ensuring standardization and compliance from all actors. This guarantees that the member receives a consistent response irrespective of the staff member who executes a certain task. The system also monitors deadlines and service levels, notifying the staff and escalating the processes when needed, ensuring that the Association complies with all its legal obligations.

## Results

IMMS was a remarkable success, both because of the effectiveness of the support provided to the members and in the standardization of work processes, increasing data quality and process automation. Customer service was greatly improved, becoming more fluent, without redundant internal interactions between multiple services, simplifying processes and protecting the customer from the remaining complexity.

IMMS guaranteed that the working processes meet the standards set in the Quality Management System, certified to ISO/ 9001 standard, generating all the required evidence and avoiding much of the bureaucracy that would otherwise be necessary. Process standardization was key to improving the quality of the service provided to psychologists and to the general public.

## Key Figures



- . 53 direct users;
- . 23,000 registrations;
- . 1,600 membership applications processed per year;
- . 3,700 other processes per year.

## Customer Testimonial

*"In the Portuguese Psychologists Association we are focused on improving the service quality provided to our members, particularly simplifying and increasing the efficiency of our services. Since the beginning of our activity, in 2009, we have needed to manage a large and growing amount of information. Our vision is to provide our members with even closer contact with our services, more efficiently and with better quality. In order to do this, we chose Truwind and OutSystems to partner with, developing a custom integrated and innovative solution: the Integrated Member Management System for the Portuguese Psychologists Association – IMMS. The project was conducted based on experience acquired over time, and with the involvement of the Portuguese Psychologists Association's team and Truwind's consultants."*

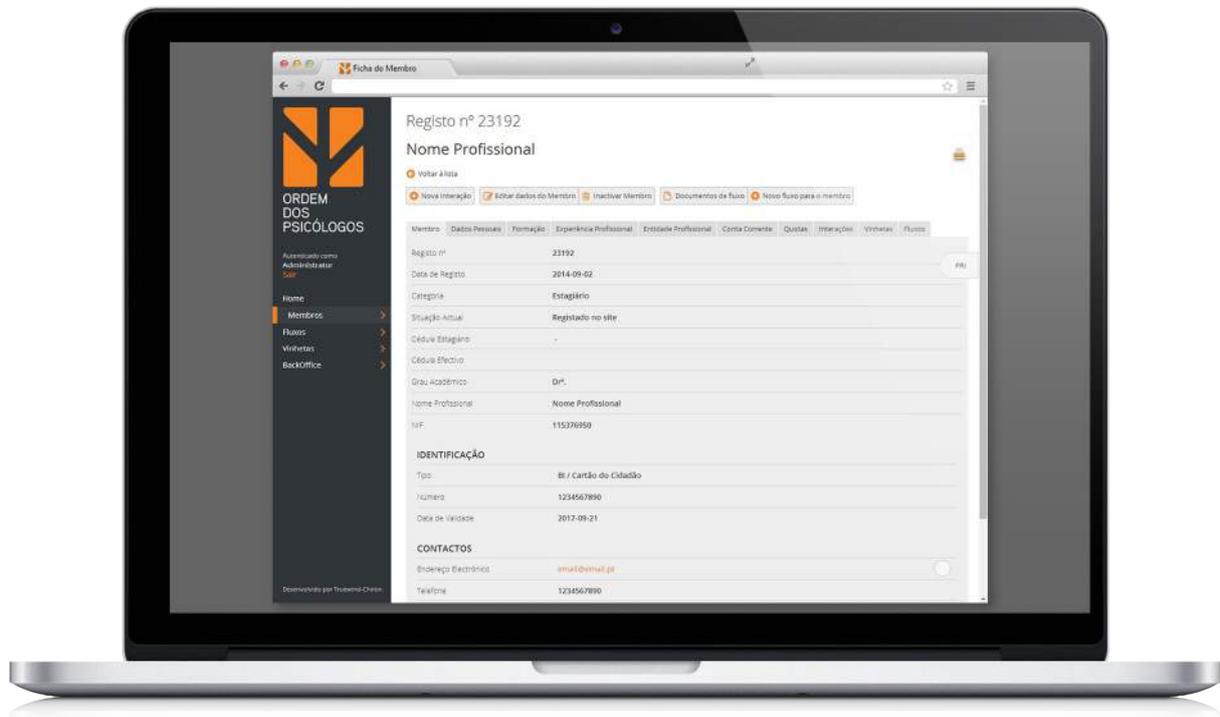
**Francisco Miranda Rodrigues**

*Executive Director, Portuguese Psychologists Association (translated from Portuguese)*

*"With SIOPP we are now able to provide a more personalized experience to our members through a centralized view of all processes and applications, all along standardizing the way we do business, with all employees executing procedures in the same way. This provides a consistent and personalized experience for each member, regardless of who is handling the requests. The standardization of processes allowed us to improve the way we do business, revealing opportunities to continuously improve our processes, especially regarding process optimization, risk management and security. Combining standardization with personalization was a big challenge and we are very satisfied with the results."*

**Sílvia Martins Rebelo**

*Information Systems Department Coordinator, Portuguese Psychologists Association (translated from Portuguese)*



## About Portuguese Psychologists Association

The Portuguese Psychologists Association (Ordem dos Psicólogos Portugueses - OPP) is the professional association representing Psychologists, created upon publication of Law No. 57/2008, on the 4th September and reviewed in conformity with 138/2015 on the 7th of September, with the aim to regulate, safeguard and promote Psychology professionals in Portugal. The use of the psychologist title and the professional practice of psychology, in any activity or sector, requires registration with the Portuguese Psychologist Association as a full member.

## About Truwind

Truwind is a consultancy, leader in providing agile software solutions to address the business challenges of its clients, operating in Portugal, Brazil and the UK. With vast experience in connecting business to technology for Health, Finance and Government organizations, Truwind holds a premium track record in delivering innovative platforms under new paradigms, such as Systems of Engagement and Corporate Performance Management.



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