California Hospital Association

The California Hospital Association manages a portfolio of over 400-member hospital organizations throughout the state. Through a series of regional associations, the statewide Association represents the interests of California hospitals and health systems with the Legislature, administration and regulatory agencies. To improve patient safety and quality care for all Californians, and to accelerate the rate of improvement, the Association manages a deep network of relationships to key CxO's and board members that serve within one or more of the hospitals or systems.

CALIFORNIA HOSPITAL ASSOCIATION

Given the need to manage a deep network of relationships, CHA needed a member management system that could capture the unique and complex relationships between hospitals, and the individuals that manage them. With a modern CRM system, the objective was to create a single source of truth for hospital membership data that supports contact list management, analytics, and detailed tracking of information about that member.

The Need for a Member Management System

The Association's legacy system was developed in-house and was used for nearly 17 years. However, it did not have the advanced role relationship tracking that they needed. As a result, staff relied increasingly upon stand-alone spreadsheets to manage contact lists, undermining the integrity of the contact and business data in the core system.

The Member Management Solution

CHA's Member Management Solution, built on Dynamics 365, EasyTerritory, and ClickDimensions, utilizes a customized relationship model that allows users to capture the role an individual plays across multiple organizations.

Enables geocoding of addresses to track assembly, Senate, and US district representatives.

Performs bulk data imports of annual licensed hospital data from OSHPD.

Utilized MS Dynamics 365 to create one source of truth for the entire organization.

Provides centralized list management with advanced analytics.

Allows users to quickly search for a member and learn what matters to them.

System is maintained internally, and will meet agency needs for years to come.

Benefits of the Member Management Solution

Increased Ease of Use – Standardized view of hospital membership across systems, membership types, and related individuals.

Improved Understanding of Individuals' Role(s) within Member Hospitals – Addition and tracking of an individual's role to one or more organizations. This allows CRM to track a unique person, and the role they play for two different entities.

Increase in Data Integrity – With robust auditing and review of all changes to member data, users can safely manage changes to member information.
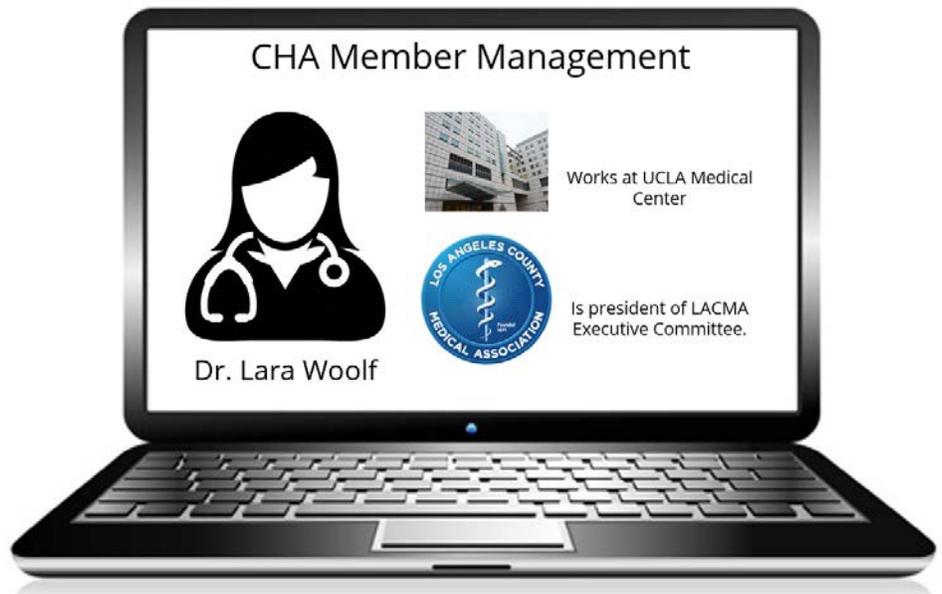
Easier Distribution List Management – Automated list management and distribution improves processing speed and maintenance of distribution lists.

Improved Support for Publications – Export of data in a preformatted file to support publication of the membership directory dramatically reduced manual data cleanup tasks.

The CRM preserves the complexities present in each individuals' network. Especially in instances like this example, where a doctor has professional affiliations with multiple organizations.

CHA Member Management

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Trinity Technology Group

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