



IHEEM

Building a True Paperless
Direct Debit Operation



Enhancing Member Experience and Efficiency

The Institute of Healthcare Engineering and Estate Management (IHEEM) is a professional body with 3,500 members. It offers a variety of membership packages and collects annual fees by Direct Debit.

Tania Davies, Chief Operating Officer at IHEEM, has overseen a major transformation of financial and operational processes. IHEEM has outsourced management of Direct Debits to the Bottomline Managed Service as part of a cloud first strategy.

A Better Way of Managing Direct Debits

IHEEM previously used an on-premise Direct Debit solution. Tania comments, "We were manually processing paper mandates and cancellations, chasing for updates and responding to changes, all of which was time consuming."

"The Bottomline PTX Managed Service offered us the opportunity to radically change how we manage the end to end Direct Debit lifecycle. It was a fairly straightforward decision to switch and it has since proved to be a very successful decision."

IHEEM also moved its existing SUN account to Metro Bank at the same time as migrating to PTX. Bottomline sponsor Metro Bank customers onto the Bacs scheme which meant it had prior experience of working with the bank which was helpful during this project.

Phenomenally Quick Migration

The move to PTX was trouble free, as Tania explains: "As a membership organisation, we need to be able to collect our fees efficiently. The Direct Debit project was completed in just six weeks with Bottomline and Metro Bank's help. We simply provided customer details from our CRM system to the



CUSTOMER OVERVIEW

Founded in 1943, the Institute of Healthcare Engineering and Estate Management (IHEEM) is an International Professional Engineering Institute, a specialist Institute for the Healthcare Estates Sector. IHEEM's primary purpose, as a professional development organisation, is to keep members up to date with developing technology and changing regulations.

BENEFITS



Move to 100% paperless
Direct Debit mandates



Eliminate time consuming
manual processing



Ensure GDPR compliance
for sensitive banking data



Provide smoother sign up process
for enhanced member experience



Improve visibility
and reporting

Bottomline Account Manager who did everything else for us in terms of getting us set up on PTX. This made for a smooth transition and we quickly caught up on outstanding collections.

There is one collection run each month and the entire process is streamlined. All we have to do now is upload a personal reference number for each individual, the relevant fee according to membership status and the collection date, and the Managed Service takes care of the rest.

We no longer store any customer bank details on our CRM system as this sensitive information is securely stored by the managed service. This helps with our GDPR compliance and eliminates the risk of a security breach affecting our reputation."

Transforming The Member Experience

A key part of the transformation at IHEEM has been the introduction of Paperless Direct Debit mandates. Tania comments, "The Bottomline solution is fantastic. Setting up a new Direct Debit over the phone with a member takes a few minutes. All of the details are verified and validated by PTX to ensure the bank account and sort code are correct. This reduces the risk of a collection failure."

When a new Direct Debit has been set up, PTX automatically sends an email confirmation to both the new member and IHEEM. Tania explains:

"This makes it simple for us to keep our CRM system up to date because PTX is doing everything in the background for us, including sending all communications directly to members. The reporting capabilities are far superior and give us instant visibility over payees, collections, failures etc.

PTX automatically generates the necessary communications if a member cancels or renews. This is a massive timesaver for us as we no longer have to worry about getting new mandates signed. If a collection fails PTX sends both IHEEM and the member an email explaining the reason. We can then proactively contact the member and resolve the issue."

Paperless Direct Debits

PTX has been successful for IHEEM, as Tania says, "There is a cost saving element to using the Managed Service but the major benefit comes from the move to Paperless Direct Debits. It enables a better user experience for our members and supports greater efficiency in how we make our collections."

"My favourite feature of PTX is the sheer simplicity it brings to accurate and timely Direct Debit collections. This contributes to saving a significant amount of time that would normally have been spent on administration. The use of PTX is brilliant and the automated notifications save us even more time."

Amazingly Helpful

Tania has been pleased with the Bottomline service and says, "The support from our Account Manager has been exceptional, she has been an amazing resource and literally could not have been more helpful throughout the entire process. This has made such a difference and any queries are quickly dealt with. Overall we've had a fantastic experience since switching to Bottomline's outsourced service."

IHEEM plans to add a link to a hosted version of the Direct Debit sign up form in a secure area of its website. Members will be able to set up their own Direct Debits online. This will save further time and give members an efficient way to self-service.

"PTX delivers and 'does what it says on the tin'. It gives us so much more than I was getting as a Direct Submitter that I would advise anyone offering payment by Direct Debit to seriously look at the Bottomline Managed Service. It makes my life easier and as a Direct Debit solution, it is far, far better than anything that I have used before," concludes Tania.

Learn more about: *Why businesses turn to Direct Debit*

[Read Here](#)

How Does PTX work?

[Watch Video](#)



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