

Hart Square counsels BACP with Business Case Roadmap

Roadmap helps British Association for Counselling and Psychotherapy to select and implement a new CRM

Formed nearly 40 years ago, the British Association for Counselling and Psychotherapy (BACP) has 44,000 members. Over the last 12 months it has been embarking on a new strategic direction that marks the beginning of a journey of improvement. Under the banner 'Counselling Changes Lives', one of the association's new 'strategic intents' is to 'commit to the highest standards of customer service and public and membership engagement'.

Part of that engagement has involved a review of its existing Customer Relationship Management (CRM) system, used to manage a number of different aspects of its business, and enable integration with its website CMS (Content Management Software) technology.

Cristian Holmes, Deputy CEO of BACP, takes up the story: "Our processes and our infrastructure had become out of step, creating workarounds. It was really preventing us from achieving our strategic objectives. We knew what we would like to achieve, but were unsure on how to get there."

BACP came up with three possible approaches to solving its CRM problems:

- Review its skillsets internally
- Research and review CRM software vendors through a selection process

- Get an independent view of the available systems, over and above the suppliers' pitching.

"We reviewed all three options in detail," said Cristian Holmes. "It is a complicated and complex market. We met both CRM and CMS vendors, but concluded that we needed some independent help with the project."

New way of thinking

A member of BACP's staff had attended a number of events at which Hart Square had been speaking. "Hart Square was on our radar for a while. What really caught our attention was that the company was talking about CRM and CMS as business processes, rather than ICT projects. This struck a chord with us. What attracted us to Hart Square was this new way of thinking."

Following initial meetings to discuss the services that Hart Square could provide, BACP took out informal references. "We were satisfied with Hart Square's business approach, and enough people were saying enough good things about them to support their credentials. We decided to dip our toes in to find out what they were made of."

BACP commissioned a Strategic Business Case document from Hart Square, which recognised

BACP's current position and the challenges it faced in replacing its existing CRM. Hart Square's outlined approach included:

- A three-year roadmap for all projects, including decision points, timescales, resourcing, budgets and suppliers
- A strategy for the replacement of its existing CRM, including implications, options, costs, risks and recommendations
- Strategies for website improvements and integration with the new CRM
- A strategy for integration between the new CRM and BACP's finance system
- A strategy for integration with the association's email marketing system.

Board commitment

"Hart Square clearly set out what we could expect from the project and the likely costs in finite detail," said Cristian Holmes. "Our Board expected this level of scrutiny and detail to be able to commit to the project. Hart Square's experience was invaluable in getting us to a position where we could commit to the project in full. Anecdotally we were aware of the risks attached to such projects succeeding or failing in the marketplace."

Cristian Holmes described the initial roadmap provided by Hart Square as "incredible value

for money.” He added: “The roadmap effectively outlined and documented what we were trying to achieve, how we should benefit and it became our governance document for the project. It was signed off by the Board and it’s a document to which we are held accountable.”

Change management

The next stage was for Hart Square to help BACP undertake a series of ‘discovery workshops’ with staff, essentially to get their input and buy-in to the project. “It was a very cathartic process allowing teams to articulate their processes and where they felt improvements could be made.”

He added: “However, among the frustration, it was clear that people really wanted to work more smartly and do great things. They enjoyed talking to Hart Square, who effectively helped us to start our own internal change management process.”

Vendor selection

Armed with this feedback, Hart Square helped BACP with an independent review of the CRM software market and made recommendations for solutions that would best fit the association’s needs. “We were confident in their expertise and knowledge of the market and their ability to manage the technical process between us and the vendors. In the end they helped select our new partner who had not even been on our radar when we first started looking for a solution. Hart Square ensured that it was the right fit for us, technically and culturally.”

He added: “Hart Square are very technically competent and knowledgeable. They were able to give solid reasons – at high and granular levels – for vendor long and short listing, or why some technologies might be better suited to meet our needs.”

Added value

In terms of the value provided by Hart Square, Cristian Holmes is clear: “Hart Square helped us to become educated consumers. We felt we had someone on the team who could understand what suppliers were saying to us.”

He added: “Hart Square effectively acted as an extension of our own teams, and gave us the opportunity to be more expansive in our thinking and our roles. They have managed our expectations very well. It has been very much a partnership, but we are always in the driving seat. They’re not pushy at all.”

Benefits

Cristian Holmes is clear about the benefits of working with Hart Square: “They are helping us to facilitate the meeting of our strategic objectives, and deliver an infrastructure that will enable us to serve members and stakeholders in a contemporary way. We are committed to putting members and clients at the heart of what we do, and we simply can’t do that unless we have the technology infrastructure and delivery mechanisms in place.”

He concluded: “We only do these projects once, so I need to bring in expertise to mitigate the risks. The investment in Hart Square

ensures that we have a better chance of making our project a success. I would wholeheartedly recommend them as a company, as well as for the project work they have done for us.”

Key services provided

- Strategic Business Case review and document
- Project Roadmap
- Discovery workshops
- Change management
- CRM vendor review and selection
- CRM solution selection

Key benefits

- Facilitate the meeting of BACP’s strategic objectives
- Helping to deliver an infrastructure to better serve members and stakeholders
- Providing expertise to mitigate risks
- Ensuring BACP has a better chance of making its project a success