

Hart Square helps WFA to fast-track selection of a new CRM solution

Membership sector knowledge and CRM expertise proves a ‘win-win’ for global marketing organisation

In a fast-changing global marketing landscape, marketers recognise the importance and value of sharing knowledge and benchmarking best practice. The World Federation of Advertisers (WFA), headquartered in Brussels, Belgium, enables that for its members. It is the only global organisation representing the common interests of around 70 of the world’s biggest global marketers who represent approximately 90 percent of global marketing communications spend - almost US\$700 billion annually.

With a key objective of helping its members to improve the

effectiveness and efficiency of their marketing communications through knowledge sharing and benchmarking, WFA utilises CRM (Customer Relationship Management) technology. Steve Lightfoot, Senior Manager, Global Marketing Procurement at WFA, explained: “At WFA we recognise the value of CRM to help us interact with our members effectively in an increasingly digital world. However, we realised that we had outgrown our existing CRM system it was too labour intensive and it wasn’t helping us meet our members’ needs, or supporting our ambitions for global growth and outreach.”

Key objectives

He outlined the WFA’s key objectives as being:

- generating more value for members by improving profiling and supporting the delivery of more targeted services, such as a knowledge portal
- increased understanding of members’ needs and interests through being better informed about their trends and statistics
- growing membership, especially outside Europe and the United States.



In seeking to replace its existing Integra CRM with a new solution, WFA realised it needed some independent expert guidance. “After doing some research, we found Hart Square. It was clear that they had extensive knowledge and experience of both the membership sector and the CRM marketplace,” said Steve Lightfoot.

An initial meeting with Hart Square, the independent CRM consultants, was arranged. Steve Lightfoot explained: “They immediately demonstrated an understanding of our business requirements, as well as our existing membership management system. We felt confident that they could help us make a decision about potential new CRM suppliers.”

In addition, Hart Square’s in-depth knowledge and experience of working with Integra helped them understand WFA’s requirements better, made selecting a new supplier easier and helped to fast-track the project.

Key benefits

- Hart Square adapted its usual approach to fit in with WFA’s requirements, without compromising the process
- Hart Square defined and understood WFA’s requirements, advised on meeting and interviewing suppliers and ensured that due diligence was carried out
- Hart Square added a lot of weight to WFA’s decisions, so they were better prepared to present a case to senior executives

Initial proposal

Based on a clear understanding of WFA’s business, and projects undertaken with similar global organisations, Hart Square’s initial proposal incorporated the key areas WFA needed to consider when replacing its CRM. Hart Square proposed that the new system should:

- reflect and be responsive to the global membership market
- cater for the different types of member relationships, including companies and individuals
- provide an online (Web-based) platform
- support multiple languages and currencies
- enable all staff to use it.

In addition, the CRM had to allow WFA to easily log and track all activities, capture member engagement, provide an easy-to-use events and booking system, and enable seamless integration with the WFA website. Easily accessible, on-demand management reports were also required.

Steve Lightfoot added: “At WFA we have a lean team and it was vital for us to reduce the burden of administrative tasks. With the new CRM solution, we wanted to be able to automate and simplify time-consuming membership and events processes, freeing up the team to provide personalised bespoke services as and when required.”

“Hart Square was able to adapt its usual approach to fit in with our requirements, without compromising the process.”

Fast track selection

Steve Lightfoot explained that he wanted an ‘informal’ approach in terms of budget, timescales and the process of vendor selection.

“They still ensured that they defined and understood our requirements, advised on meeting and interviewing suppliers and ensured that due diligence was carried out.”

With an outline understanding of WFA’s business processes and functional requirements for a new CRM solution, Hart Square was able to fast-track the selection process to the next stage. “They briefed us in preparation for meetings with potential suppliers and provided us with a checklist and framework for conducting the meetings to ensure that we derived the most value from them,” explained Steve Lightfoot. “Hart Square also outlined the differences between the various solutions, and helped us verify cost proposals in line with market best practice.”

He added: “We provided feedback to Hart Square following the initial (mainly online) supplier

discussions and they helped us to evaluate the options. We were then in better shape for a shortlisted supplier selection meeting. They also suggested further steps and approaches for the project. Then they stepped back and allowed us to make the final decision.”

WFA finally selected Microsoft Dynamics as its new CRM system.

“Hart Square added a lot of weight to our decisions, which means we were better prepared to present our case to senior executives at WFA,” said Steve Lightfoot. “In addition, their process management was very clear and transparent. Hart Square effectively de-risked the vendor selection by validating our requirements and widening the CRM options available, putting us in touch with suppliers that otherwise would not be known to us.”

He added: “Being independent and vendor agnostic, Hart Square can engage with a wide range of suppliers on the market, so we knew that the shortlist would be based on our business needs and requirements and not just on technology. They allowed us to select our preferred supplier more easily and quickly by validating our decision making and providing a positive ‘sounding board’ throughout the process.”

Key services provided

- Replacement of Integra CRM system
- Business Requirements Review
- Advice on and framework for vendor selection
- Advice on approach to project

The new CRM, once live, will be used by around 18 people at WFA in key areas including:

- organising and managing events
- managing member engagement and interactions
- assisting the flow of information to members
- storing and tracking member assets, such as papers
- reporting on membership value.

Steve Lightfoot concluded: “The combination of Hart Square’s experience of working with professional membership organisations and their in-depth CRM market knowledge was a real ‘win-win’ for us. With their help, we felt much better informed and more confident about our solution and supplier choice.”