



Hart Square provides CRM counselling to The College of Occupational Therapists

The CRM specialists bring an Integra project back on track and enable organisation-wide rollout

The College of Occupational Therapists (COT) is a wholly owned subsidiary of The British Association of Occupational Therapists (BAOT), the professional body for all occupational therapy staff in the UK.

COT decided to replace its membership database in early 2011 with the Integra CRM (Customer Relationship Management) system. Hart Square, the CRM specialists, assisted the College during this initial phase, which was intended to improve both back-office functionality and membership application processing.

Following the initial implementation phase, COT lost some momentum on the project and asked Hart Square to continue to work with them to evaluate and recommend an approach for the future rollout of the CRM.

Moving the project forward

“Hart Square basically came in to help us move our CRM project forward,” said Beryl Steeden, Head of Membership and External Affairs. “We had done some work already but we felt the



need to get some more expertise from Hart Square, who are well known as experts in Integra.”

Hart Square engaged with all of COT’s departments, talking to staff and capturing key requirements. In April 2011 they produced a detailed plan that outlined how the Integra system could be used and expanded in order to:

- Provide a more personalised service to COT’s 29,000 members
- Improve internal management of member and stakeholder interactions and communications
- Reduce process-intensive administrative functions by

promoting self-profiling and updating.

Key benefits

- With Hart Square’s extensive knowledge of Integra, COT now has a system that enables it to better manage its 29,000 members. Key benefits include:
- Organisation-wide access to centrally-stored knowledge on members, their interactions and relationships with COT
- Intelligence relating to individual members in one place
- Streamlined business processes, including event and conference management, consultancy and training



Based on these objectives, Hart Square identified a number of specific areas where the Integra system could be developed, including: internal rollout to other COT departments; events and delegate management, and the capture of non-member contact information for marketing purposes.

“Addressing all of these areas would enable us to maximise the potential and use of Integra as a central, organisation-wide system for managing our members and stakeholders,” said Beryl Steeden. “Furthermore, events and delegate management would also leverage the functionality of our new Content Management System.”

Programme approach

In terms of implementation Hart Square recommended that the future development of the Integra CRM system be constituted as a ‘Programme’, incorporating a series of ‘Projects’ managed through a single structure. “This would ensure the coordination of activities

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across multiple projects, the maximisation of learning and benefits from all projects, as well as consistency and standardisation within the full programme,” said Beryl Steeden. “Hart Square also offered to manage this programme on our behalf, scoping and managing individual projects as required.”

She added: “By implementing ‘best practice’ procedures across the entire organisation, we would ensure that new teams would be using the system and adding data in a consistent manner. If the roll out to each of our departments was treated as part of one

Key services

- Organisation-wide requirements gathering
- Business Process Review and documentation
- Integra CRM review and recommendations
- Implementation of Integra modules (including Events)
- Organisation-wide customised training

programme, from a technical point of view, it would eliminate the need for any re-work and thereby reduce our costs.”

Recommended projects

Hart Square recommended the following projects and desired outcomes:

- **Events and delegate management**

Implementing the Integra Events module alongside the core system would allow all event details and delegate booking information to be collected, stored and managed through one central Integra system. This could also be extended to the website so that both members and non-members could make their bookings online, as well as pay for their places. This information would be automatically updated in the back office system and enable all pre-event and onsite documentation to be produced.





- **Internal rollout to other COT departments**

To maximise the full potential of the CRM, the College wanted to extend access to and use of the Integra system to all departments, not just Membership. While each department could be rolled out and trained one at a time, the entire process would require overall coordination and management as the core information being stored in Integra would be relevant to all teams.

In addition, extending the current Integra system to capture and store details of individuals and organisations who were not active members of BAOT/COT would produce a vast source of marketing information.

“This would give us an opportunity to interact and communicate with all our stakeholders, promote the benefits of membership and identify new audiences and/or new membership offerings,” added Beryl Steeden. “Capturing this data and storing it in one place would allow detailed profiling of potential members and prospects and distinct

segmentation of individuals and organisations.”

Mitigating risk

While the College was keen to maximise the benefits from its investment in an integrated CRM strategy for all engagements with members and stakeholders, it was also aware of the risks involved in trying to do too much, too soon.

“This is where Hart Square’s expertise and experience really came to the fore,” said Beryl Steeden. “They identified the risks of placing unrealistic demands on key staff in terms of time and resource, as the roll out of these projects would be in addition to their day-to-day jobs. This was therefore, at the front of our minds as we moved forward with this project.”

Training and support

With the expansion of Integra across COT, training of the College’s 70-plus staff became a key requirement. “As the project unfolded it became clear that we needed additional help and expertise from Hart Square in

terms of the training our staff,” said Beryl Steeden. “In fact, they are still working with us on an on-going basis to ensure that we all maximise the benefits of the CRM.” She added: “Hart Square has in-depth understanding of CRM, and experience of working with organisations like ours. They are a great sounding board for us in terms of what Integra can do, and they have helped us to project plan more effectively. They know Integra technically, inside out and have helped us to cut timeframes and costs for this project. In terms of next steps, we’re talking to them about what we need in terms of additional integration, email newsletters and so on.”

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She concluded: “Hart Square is very easy to work with and very professional. The project was delivered on time and within budget.”