

Hart Square gives Project Assurance to SOE

Society of Engineers delivers CRM and CMS project



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Cheryl Carroll,
CRMS Manager, SOE

The Society of Operations Engineers (SOE) is the professional home for around 16,000 members working to inspect, maintain and manage the equipment and machinery which keeps people and businesses safe on a daily basis.

SOE is a Professional Engineering Institution and registered charity, and its members work to implement smarter ways of working, improve maintenance and inspection processes, and embed environmentally friendly and sustainable engineering practice.

The Society's '2025 Vision' links strategic goals with operational plans to ensure it remains at the forefront of supporting its members. Indeed, SOE is investing in new technology to reach its objectives of:

- **Seeing a year on year improvement in member satisfaction**
- **Offering a streamlined joining service to encourage new members**
- **Reaching a target of 20,000 members**

New CRM and CMS

With these objectives in mind, in 2018 SOE felt it needed a brand and content refresh for its website, as well as replace its website CMS (Content Management System) and CRM (Customer Relationship Management) system.

SOE had worked with Hart Square for some time and decided to bring them in on both projects. Hart Square undertook a thorough business process review, and put together Invitations to Tender (ITTs) for both the CRM and CMS systems and supported SOE through the entire vendor selection process.

In the end, SOE selected MS Dynamics from Smart Impact as the new CRM, and the Preside CMS from Pixl8. Cheryl Carroll, CRMS Manager, SOE explained: “With the selection of these new systems we were in a good place to increase member conversions and engagements, create a more user-friendly and personalised member service and increase volunteer collaboration.”



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CRMS Manager, SOE

Independent Project Assurance

Hart Square was subsequently invited to work with SOE as part of the implementation team for the website and CRM launch, scheduled for 2019. “The fact that we had worked with Hart Square on the business process review and vendor selection meant we had confidence in their expertise and ability to guide us through the implementation process,” said Cheryl Carroll.

SOE had a full-time project manager in place, but also wanted a senior consultant from Hart Square to work alongside that person in a Project Assurance role. “We wanted to ensure that we had the right level of objective and independent governance and control for the project,” added Cheryl Carroll.

Hart Square worked as an integral part of the project team, reviewing all of the detailed functional specifications for the CRM and CMS, providing insights and feedback as required.

“They were also advising us on due diligence, ensuring that we were keeping to the right path and helping us set and meet the key milestones for the project,” said Cheryl Carroll. “Hart Square also provided support for Sprint planning, enabling people to collaborate across the project.”

Key benefits

- Expertise on CRM and CMS vendors
- Management of vendor selection process
- Solutions meet SOE’s deadlines and member growth objectives
- SOE now has better membership personalisation and engagement
- SOE members can take advantage of self-service
- SOE on target to grow to 20,000 members

Key services

- Business Process Review
- Requirements gathering for CRM and CMS
- Invitations to Tender for CRM and CMS
- Managing vendor selection process for CRM and CMS
- Implementation of CRM and CMS
- Project Assurance throughout implementation process

Liaising with suppliers

It was also a requirement as part of the Project Assurance activities to liaise with suppliers and arrange and manage meetings. “I think the fact that Hart Square knew the suppliers well and had worked with them during the vendor selection process, as well as on previous projects, meant they were able to provide us with great support in managing our needs and expectations,” added Cheryl Carroll.

One of the key challenges faced during the implementation project was data integration and migration. “Hart Square brought in an external data expert and this really smoothed the whole process, which I think would have been much more difficult if did not have this expertise in place,” said Cheryl Carroll.

She added: “Through Hart Square’s in-depth Project Assurance and support we were able to go live with both the CRM and website in May 2019. I think without their skills, advice and expertise we would not have achieved this goal.”

She concluded: “Having Hart Square’s Project Assurance enabled us to deliver successfully on our goals to promote member self-service, ensure better online member engagement and grow our membership, especially in other sectors that we are not currently serving.”