



Hart Square shows its metal for IOM3 CRM selection

New solution will help provide better service to members



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Director of
Communications
at IOM3

The Institute of Materials, Minerals and Mining (IOM3) is a major UK engineering institution whose activities encompass the whole materials cycle, from exploration and extraction, through characterisation, processing, forming, finishing and application, to product recycling and land reuse.

In 2019, IOM3 celebrated 150 years since the formation of the Iron and Steel Institute. It now has a membership of over 18,000, and represents a combination of scientific, technical and human resources which links industry, government, education, research and the academic world.

Members benefit from the Institute’s many networking activities, publications and conferences and from access to its Information Services, as well as training, professional qualifications and career support.

Outdated legacy system
Managing member services and interactions was becoming difficult due to an outdated legacy CRM (Customer Relationship Management) system. Nuna Staniaszek, Director of Communications at IOM3, takes up the story:
“We wanted to increase engagement with

our members on a more personalised level, but our current disparate systems would not allow us to have a single view of members. Also, the current CRM system would no longer be supported beyond January 2020, so we had to consider options for a replacement.”

In addition, the existing CRM system did not allow for integrated email marketing or renewal management and did not meet GDPR requirements. IOM3 also had to use a number of workarounds on the system to meet day-to-day member requirements. Business-critical decision

“Finding a new CRM was a business-critical decision,” said Nuna Staniaszek. “All vendors say they can give you a great system, but without any experience of CRM vendor selection, this was a daunting prospect for us. I had heard a lot of horror stories about organisations trying to implement new CRM systems. I definitely wanted to avoid that.”

An initial meeting with Hart Square towards the end of 2018 seemed to provide a solution. Nuna Staniaszek added: “Hart Square are system-independent, so there was an opportunity to bring them in to work with us through the whole CRM selection process and provide us with a structured means of getting to where we wanted to be. That really appealed to us.”

Key services

- Requirements gathering for new CRM
- Invitations to Tender for new CRM system
- Managing vendor selection process for CRM Project Management

All about chemistry

In early 2019, IOM3 decided to go ahead with Hart Square, who outlined a process which could be shared with the organisation’s trustee board. This exercise basically involved scoping out what was required and outlining a plan to find a new CRM supplier.





The Institute of Materials, Minerals and Mining

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Hart Square were invited in to meet a senior team of six directors at IOM3 to discuss the key issues and capture what the requirements were for the new CRM. “Hart Square captured very well what we wanted to achieve,” said Nuna Staniaszek. “The chemistry between us was very good as well, they really seemed to understand our organisation. And it was encouraging that they had the knowledge and experience of dealing with problems experienced by similar organisations and leading them to successful project outcomes.”

Requirements gathered for ITT

With the scoping exercise approved by the board of trustees, Hart Square organised nine workshops with IOM3 teams and gathered more detailed requirements, which formed the basis of an Invitation to Tender (ITT) to send out to CRM vendors.

“This was the first time we had ever captured what we actually do in all our different activities – it had never been documented before, so that in itself was very useful to us,” said Nuna Staniaszek.

Key benefits

- Expert guidance on replacing existing CRM
- Expertise on CRM vendors
- Management of vendor selection process
- Solutions met business objectives and aggressive timescales
- Members will have better access to online services

She added: “We started with a list of eight potential CRM vendors, which was reduced to four, who were invited to tender, after some further discussions with Hart Square about the suitability of each of the solutions for our specific needs.”

What followed was a rigorous series of meetings with the four vendors, including initial and final demos of their products, and a review of written responses from each vendor to questions and queries. The senior team and other heads of activities were consulted before a final decision was made, and the board of trustees was also kept informed.

“Hart Square project managed the entire vendor selection process. They were really helpful, very structured and very thorough indeed. It meant we were able to make a properly informed decision,” said Nuna Staniaszek.

Solution selection

IOM3 selected Microsoft Dynamics CRM from Bluelight. “At first we didn’t think that MS Dynamics would be within our budget,” explained Nuna Staniaszek, “but when Hart Square helped us evaluate the costs of the different solutions, they were all much the same. We decided MS Dynamics would be more flexible, and that we could grow with it.”

IOM3 is confident it will move from the previous CRM to the new one within the aggressive deadline of the end of January 2020. “We’re now working with Hart Square on the implementation of a minimum viable product which we will build on for the next phase. They are helping us with data migration and testing, as well as training,” said Nuna Staniaszek.

She added: “We are very pleased with Hart Square, their project manager has interacted with everyone here very well. She has been very good to work with in terms of organising us to do what we needed to do.”

She concluded: “Hart Square have really lived up to expectations. I don’t know how we would have got through this process without their help and guidance. It’s a massive thing to replace a CRM as it involves all aspects of the organisation. Hart Square’s experience and guidance has been invaluable.”