



Scope selects new technology partner with help from Hart Square

OVERVIEW

CHALLENGES

- Their current fundraising CRM had not evolved to meet the charity's needs.
- Processes were inefficient with a significant number of manual processes and workarounds which were proving very time consuming.
- There was no single source of the truth, with multiple data sources and systems that were not easy to maintain.

OUTCOMES

- Expertise on the cost and options for technology solutions.
- Aligned expectations with technology partners, on the requirements for Scope.
- Scope selects new technology partner, reassured that they can deliver a system required to meet the charity's needs and future growth ambitions.

Scope is a large disability charity dedicated to achieving equality for disabled people and their families as well as raise awareness around disability, in order to create a fairer society. Scope actively supports over 1500 disabled people at any one time through a range of practical advice and emotional support services.

To carry out their day-to-day work Scope required a new modern highly functional CRM integrated with other systems to replace their legacy CRM.

Scope set up a Digital Gateway project to overcome the following challenges:

- Their current fundraising CRM had not evolved to meet the charity's needs.
- There was a lack of personalised and targeted engagement with Scope's customers.
- There was a lack of integration between systems.
- There was a significant number of manual processes and workarounds which were proving very time consuming.
- There was no single source of the truth, with multiple data sources and systems that were not easy to maintain.

It was a strategically important project for Scope with tight deadlines. This meant a speedy delivery without compromising on the approach with core requirements that needed to be clearly documented for the technology partner.

IDENTIFYING REQUIREMENTS

Initially, Hart Square engaged with Scope to run a series of workshops with teams to identify their requirements and challenges.

Hart Square ran 18 workshops and met with 79 people from 22 different teams before presenting the findings and options back to Scope, building a business case and drawing up a roadmap for the delivery of a new modern CRM system.

Once the roadmap was approved by the Scope senior leadership team, the requirements were collated into a tender document which described Scope's background, the project objectives, and information about the data to be migrated and any third-party systems to be integrated with. The tender document was reviewed by Scope and the requirements were prioritised to identify what needed to be delivered within each phase of a two-phase project.

SELECTING THE RIGHT PARTNER

Hart Square defined and ran the partner selection process, engaging with the partners involved and facilitating the meetings between the technology partners and the Scope team. Due to the Covid pandemic, the selection process was run virtually with all partners presenting and engaging with the Scope project team remotely.

This method naturally created new challenges that each of the parties had not faced before. It was imperative to Scope that they found a partner who was the right fit for them and understood the complex needs of the charity, as well as identifying a solution which integrated with the existing systems. Additional

time was allocated to meetings and communication during the selection process to confirm and ensure everyone was comfortable and fully informed to make the decision. All sessions were recorded and shared with Scope so they could reflect on them and follow up with any further questions.

Hart Square ensured that although the decision-making meeting was also held remotely there was full discussion and consideration of each partner's performance throughout the selection process. This included a review of the engagement meeting, the partners' response to the tender document, the technical demonstration, and the final presentation. Each partner was assessed against Scope's selection criteria which had been drawn up and shared at the beginning of the process.

The Scope team were confident that their preferred partner were a good match to Scope's ways of working, would work well with their teams and would be able to integrate with their website. Additionally, the team were reassured that the partner could deliver the highly functional CRM system required to meet the charity's needs and future growth ambitions. ■



“Hart Square brought their experience, understanding of the market, and objectivity, working very collaboratively with us on such a strategically important piece of work.”

Louise Youngman
Executive Director
of People
Scope

KEY SERVICES

- Cost and Options for Technology
- Requirements Gathering
- Invitation to Tender (ITT) document
- Technology Partner Selection