

Hart Square educates ASCL on the choice of a new CRM

How a leading educational institution called on Hart Square's expertise and market knowledge to select a new CRM solution

Educational leadership

The Association of School and College Leaders (ASCL) www.ascl.org.uk is the professional association and trade union in the UK for secondary school and college leaders. It represents nearly 17,000 members, including secondary heads, deputy and assistant heads, bursars and business managers, college principals and vice-principals.

ASCL is also a major provider of training courses and consultancy. With this consultancy approach, it is perhaps not surprising that, when ASCL decided to review the Iris Integra Customer Relationship Management (CRM) system it uses to manage its membership, the organisation sought the help of Hart Square, specialists in CRM for membership and not-for-profit (NFP) organisations.

CRM at the core

"CRM is really at the core of our organisation," explained Sara Gadzik, Communications Director at ASCL. "We had been using Integra for about three years to manage our membership and events. When Iris wanted us to upgrade to the latest release, IntegraNG, this would have been a significant project for us in time and cost, so we decided to invite Hart Square to review our CRM processes and advise us on the best way forward."

She added: "We wanted real CRM specialists with membership experience. When we talked to Hart Square it quickly became apparent that they knew and understood the market very well and had a grasp of all the key vendors and their solutions. They also seemed really easy to talk to and work with."

CRM review

Hart Square's specialists undertook a complete review of ASCL's CRM requirements: "Hart Square talked with each of our departments and spent a lot of time putting together specifications for the new CRM," said Sara Gadzik. "The intention was for that review to be turned into an Invitation to Tender (ITT) document that they could use to solicit bids from various CRM vendors."

Hart Square's review highlighted the following key areas of core functionality for the CRM system:

- Contact Management – the new CRM solution had to serve as the master contact list for all of ASCL's members, stakeholders and event attendees.
- Membership Management - ASCL has 17,000 members and an average of 1,500 new applications and 1,200 lapses annually. The new CRM needed business logic and workflows to support these changes.

- Event Management - with an annual conference, 12-30 regional conferences and over 130 short courses per year, the CRM needed to help ASCL manage all aspects of organising events, from identifying topics, through to booking venues and delegate registration.
- Consultancy Management - the new CRM needed to allow ASCL to maintain contact details and specialisms for its consultants, manage appointments and help facilitate invoicing and payments.
- Financial Management - the new CRM needed to support a three-tier accounting model within Sage to allow full cost/income analysis for each event.

Key benefits

With Hart Square's CRM solution knowledge and vendor selection expertise, ASCL will have a CRM solution that will better manage its 17,000 members. Key benefits will include:

- Institute-wide access to centrally-stored knowledge on members, their interactions and relationships with ASCL
- Intelligence relating to individual members in one place
- Streamlined business processes, including event and conference management, consultancy and training.

Stock Control and Sales Order Processing was also required to manage products such as books and CDs.

- **Hotline Management** - ASCL provides a hotline service for members and can receive up to 100 calls a day. The CRM needed to allow staff to easily access a caller's record, enter any advice given and refer or escalate issues as appropriate.
- **Case Management** – ASCL's legal department supports members with expert legal assistance. The CRM needed to allow full recording of an issue associated with the central member contact record, and full processing of the case through to resolution.

Website integration

As well as addressing this core functionality, a separate project to re-develop the ASCL website was underway which would eventually allow registered visitors to update their own details and make online payments for services. "We wanted Hart Square to take this into account in its review of our core CRM requirements," added Sara Gadzik.

The ASCL website has three levels of access: public, registered user and member. However their plan involves increasing this and developing more granular security within the members' area to deliver content based on a member's role or alternate characteristics, driven by information stored in the CRM.

Sara Gadzik said: "Hart Square said we should be open to a CRM solution that either provides APIs or web services which allow

web developers to read from, and write back to the CRM, or which enables online forms and functionality that can be integrated into our website."

Data migration

The migration of data was a concern to ASCL. "The data quality in our Integra system was not good, and there was a significant number of duplicate records," said Sara Gadzik. "Hart Square proposed we look at data cleansing and de-duplication prior to the migration to the new CRM."

Decision process

With Hart Square's extensive review concluded in a relatively short amount of time, the project moved on quickly to the next stage. "We set up a stakeholder group of myself and our membership and IT managers," said Sara Gadzik. "Hart Square turned their excellent review into an ITT document and solicited bids from a number of CRM vendors. They guided us through the responses, and using their expertise we narrowed the choice down to four vendors.

"Hart Square invited each of them to present to us, and debriefed us on each presentation. In the end, we decided to look more closely at an MS Dynamics CRM-based solution, and Hart Square arranged for the vendor to do a workshop for us."

She added: "We looked further at how the new solution would fit in with our requirements. But after further discussions with Hart Square we decided to look again at one of the other vendors. We are now working

with Hart Square to make our final decision."

The plan is to implement the new CRM by summer 2013. "Hart Square have really gone beyond the contract that we signed with them," said Sara Gadzik. "They are very flexible, easy to work with and they see us at short notice if we want their advice. That's really appreciated."

She added: "Technically they really know their stuff. They held workshops to understand our processes, and pointed out better ways of doing things, which is brilliant. They're very knowledgeable and work as part of our team. We're very confident in their abilities."

Key services provided

- Business process review and documentation
- Organisation-wide requirements gathering
- CRM review and recommendations
- ITT for new CRM system
- Vendor shortlisting and selection
- Website integration plan
- Customised Training.