

## Hart Square drives Dynamics CRM improvements at CILT

*Logistical issues are overcome to help Dynamics CRM move forward*



The Chartered Institute of Logistics and Transport in the UK – CILT(UK) – is the independent professional body for individuals associated with transport, logistics and supply chains. As the UK territorial body of CILT, which has a presence in more than 30 countries across the world, CILT(UK) offers members access to a wide range of benefits and services throughout their careers.

With the aim to be the leading global membership organisation within its sector, CILT(UK) decided to upgrade its previous CRM system to Microsoft Dynamics CRM. The new CRM went live in November 2012, but the organisation faced some challenges that were impeding progress – and decided to enlist Hart Square’s expertise to help it make the most of the system.

### Key challenges

Zane Cole, IT Manager at CILT(UK), takes up the story: “We have around 60 full- and part-time staff and 35 active CRM users. We were unsure if the challenges we were experiencing with the new CRM system were due to a lack of understanding, knowledge or training, not using it effectively or making the most of the functionality, or bugs in the system.”

He added: “Hart Square were recommended to us. One of the key reasons for bringing them in was that we had invested in Microsoft Dynamics, but didn’t have the internal resources to manage it effectively and resolve the outstanding issues we were facing. We were impressed with Hart Square’s experience of working with membership

organisations like ours. They were able to quickly come up with a flexible plan that met our aspirations and needs.”

### Project plan

Hart Square outlined a flexible project plan for CILT(UK), the overall objectives of which included:

- working with individual departments to identify outstanding issues and bottlenecks
- identifying and documenting beneficial CRM functionality not being fully utilised
- liaising with the CRM supplier to identify upgrade paths to new releases of the CRM
- providing first line support to internal customers
- providing basic training to users of the system as required.

### Key services provided

- Business process review
- Requirements gathering
- Project management
- Supplier management
- Support
- Training

“Clearing the outstanding support issues was a very important first step,” said Zane Cole. “There were a number of unresolved issues logged with the CRM supplier which Hart Square stepped in to try and troubleshoot and drive forward. Overall, these issues had led to a lack of engagement from staff and a lack of trust and confidence in the system, so we worked with Hart Square to address those challenges.”

## Skills and expertise

Hart Square began working with individuals within the organisation to maximise the CRM straight away. Zane Cole added: “Hart Square’s knowledge and expertise of Microsoft Dynamics gave us confidence that we could maximise our investment in the system by ensuring better use of it internally and delivering improved services to our members. Their project management skills and supplier management expertise, together with an independent and objective view of the situation, really helped us to improve supplier relations and move forward with the system.”

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*“Hart Square was able to reduce the issues log considerably, which improved staff satisfaction and morale.”*

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“Hart Square proposed that, in order to win staff over, get their buy-in and regain confidence in the system, some ‘quick wins’ had to be rolled out quickly. They also provided a dedicated weekly support to all CRM users to help educate staff and improve the user experience. This helped bridge the gap of knowledge and resource availability.”

## Maximising investment

Following a successful initial six-month engagement with Hart Square, CILT(UK) has recruited an internal CRM Administrator to support the system. Zane Cole said: “Thanks to Hart Square we are in a better place with the CRM system than we were before. CRM continues to be a big investment for us, both financially and in terms of time and effort. We worked closely with Hart Square to maximise the investment and potential in Dynamics CRM. They

have helped to ensure that the full benefits of the system are realised and implemented across our entire organisation.”

He concluded: “Hart Square is very professional and approachable. They are also very flexible in how they work, which helped us a lot. They are a pleasure to work with, polite and efficient, and working with them has been a worthwhile experience.”

### Key benefits

- Cleared outstanding CRM support issues
- Improved supplier relations
- Increased staff trust and confidence in the system
- Maximised investment in Dynamics CRM