



## Hart Square advises on member management at the Pensions Management Institute

### Hart Square performs a CRM 'health check', implements event management and enhances professional standards scheme management

#### Shaping the future of UK pensions

The Pensions Management Institute (PMI) [www.pensions-pmi.org.uk](http://www.pensions-pmi.org.uk) is a professional body which supports and develops the experts who run the UK's pension schemes. Around £1 trillion is invested in UK pensions, so the PMI's 6,000 members – who work as consultants, professional pensions managers and administrators – have a vital role to play in shaping the nation's financial future.

In addition to membership and the granting of qualifications, the PMI offers a range of support services for on-going personal development, including publications, an events programme, a network of regional groups and an online careers service.

#### Membership database

The institute had implemented the Iris Integra Customer Relationship Management (CRM) system in 2009 as a tool for managing its membership activities. The purpose of the CRM was to support:

- membership data and communications with PMI members
- PMI events
- qualifications and personal development schemes.

However, with the CRM being a largely out-of-the-box solution, the PMI found that it needed additional expertise to maximise the use of the

solution. So in 2010, it decided to engage Hart Square, independent CRM experts for not-for-profit (NFP) organisations, to advise and work on improving the reports that could be extracted from the CRM database. Hart Square's experience of the Integra CRM, their independent and highly personable approach and in-depth technical expertise were all key factors in the decision.

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*“The key benefit for us was Hart Square's willingness to understand what we were trying to achieve in a business sense and use their knowledge of the database to help us achieve our aims within the resources we had,” said Steven Slater. “PMI had invested a significant amount of money in our IT systems in the recent past and this work was about maximising the return on that investment.”*

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When Steven Slater, the PMI's new Head of Membership and IT, joined in early 2011 he recognised that there were additional improvements that could be made to the CRM, and

asked Hart Square to advise and help. He explained: “Discussions with Hart Square helped us to conclude that the CRM database needed to be taken a stage further to maximise the value to PMI from its investment. They helped us to focus on three key areas of concern: there were limited transactional capabilities for direct debits and credit card payments; two CRM modules, for events and Continuing Professional Development, needed additional configuration and the staff trained, and there were too many manual processes.”

Steven Slater gave an example of the latter: “Twice a year we provide certificates to around 450 members, and each one was being typed out

#### Key benefits

With Hart Square's NFP and technical expertise, the PMI now has detailed information on around 6,000 members and trustees. Key benefits include:

- Instant, institute-wide access to centrally-stored knowledge on members, their relationships and other intelligence
- Tracking of contacts with complex, multiple relationships, with all intelligence relating to an individual contact in one place
- Streamlined business processes (e.g. events management and Continuing Professional Development recording)
- Increased confidence in organisational intelligence.

manually. That was something we needed to automate within the CRM.”

## Events management review

In September 2011, PMI engaged Hart Square to look at the events management module of the Integra CRM. Steven Slater explained: “We organise around 12 events a year which are very important to the institute. Bookings had been largely paper-based, and because we had no transactional functionality in the CRM, no-one could pay to attend an event by credit card. We asked Hart Square to eliminate the paper and set up the CRM for the efficient management of the events.”

Hart Square’s specialists produced an event management review which identified current processes and how they could be improved. Four key areas were addressed:

1. Event delegate rates and discount structures - how the events module could be utilised to handle multiple rates, as well as early booking and group booking discounts.
2. CRM integration with financial software (Accounting Office and Sage) - how the PMI could reduce manual handling of membership financial transactions and exams charges, and integrate transactions with the CRM.
3. Implementation of the events module – how the module should be implemented to manage all events run by the PMI.
4. Use of the core member/contact management system – how to move from a single view to a full view of the PMI’s members, enabling one-to-many relationships.

## Health check

The review process by Hart Square finished on time and on budget and led to the CRM specialists being asked to conduct a broader ‘health check’ of the CRM.

“We gave Hart Square some examples of our manual processes, such as producing certificates, and they gave us advice on how to improve those processes using the CRM,” explained Steve Slater. “They also helped configure parts of the system to more closely match our needs, remove other manual processes and provided some enhanced reporting to allow us to get sight of the information we required.”

## CPD module

Another important aspect of the PMI’s operations is its Continuing Professional Development (CPD) scheme, which is available for all qualified members and ensures the maintenance of professional standards.

“Recording CPD demonstrates that members are working to ensure their knowledge and skills are up to date,” said Steven Slater. “But it is also mission-critical to those members, who risk losing professional designation if the process is not handled correctly. We wanted to implement a new, easy-to-use CPD recording system as part of the CRM, and earlier this year we leveraged Hart Square’s technical expertise to enable members to record their CPD online, with integration to our CRM database.”

He added: “Members now have a much clearer user interface, entering information is much more straightforward and we are getting much better data reporting out of it.”

## Working with Hart Square

Steven Slater cited Hart Square’s services as “excellent.” He added: “They are a very helpful company. They recognised that, as a small organisation, we didn’t have the CRM expertise we needed in-house. They worked very closely with us, listening carefully and ‘teasing out’ the information they needed to get the job done. Their in-depth understanding of our processes and the database structure enabled us to achieve significant improvements.”

### Key services provided

- Data analysis
- Data collation
- Business process review and documentation
- Streamlining business processes
- CRM review and audit
- CRM configuration
- Website integration
- Test planning and management
- CRM project management
- Technical development, configuration and report writing
- Customised Training.