

Bond achieves data compliance and sustainability

Hart Square provides technology roadmap and expertise to benefit membership body



Michael Wright,
Director of
Membership and
Communications

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With a focus on helping to create a more just and sustainable world, Bond unites and supports a diverse network of over 450 civil society organisations. Its key goals are to influence governments and policy-makers, connect groups and members and strengthen the skills of people in the sector.

Challenge of GDPR compliance

In common with many non-profit organisations, Bond is facing the challenge of compliance with new EU General Data Protection Regulation (GDPR), designed to harmonise data privacy laws across Europe.

Michael Wright, Director of Membership and Communications, takes up the story: “In preparing for GDPR, we recognised that our systems and data were not in a good state. We had no real sense of the most up-to-date data we held – we were working in information silos and had limited policies around retention and deletion of data.”

In May 2016, Bond engaged Hart Square to look at what the organisation was

lacking in terms of data protection and compliance with GDPR.

“Their experts came in and interviewed people in the organisation about how they used and stored data,” explained Michael Wright. “Their Data Governance report identified the issues we were having and took us through data protection principles that we should be adhering to. It also facilitated further conversations about how we could further improve our systems.”

In fact, Hart Square identified a number of systemic problems at Bond, with systems (such as web and CRM) not talking to one another. What was needed was a more integrated environment to enable a clearer view of the levels of engagement with members.

Business Case and Roadmap

“Hart Square revealed to us that the challenges we faced were bigger than GDPR compliance,” said Michael Wright. “Their experts worked with us to devise a Business Case and a Roadmap for technology improvement and integration that would benefit our organisation and our members.”

He added; “It was essential for us to have an independent Business Case to present to our management team – internally we have to compete for funds, so we needed to demonstrate the rationale around what we were trying to achieve. The technology roadmap underpinned everything, outlining the technology direction we needed to take over the next few years.”

Reconfiguration and integration

With a plan in place, Hart Square was asked in May 2017 to undertake a Phase One implementation, focused on system reconfiguration and integration across three of Bond’s key systems: Salesforce CRM (Customer Relationship Management), Drupal Web CMS (Content Management System) and FinancialForce.

Key services

- Business Case and Technology Roadmap
- Configuration, integration and implementation of technology (CRM, CMS, finance)
- Project management across key aspects of the project (data protection/GDPR, project planning and management, supplier relations, integration)
- Post-implementation plan to overcome challenges and risks identified (e.g. user adoption)
- Salesforce CRM system improvements
- Website integration – two sites with each other and other systems.





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“The challenges were immense, with several disparate elements not joined up,” said Michael Wright. “We have two websites – the main Bond website and the members’ site - that didn’t talk to each other and were not integrated with the CRM or finance systems. In addition, the members’ site was built on an earlier version of Drupal that was no longer supported.”

He added: “We didn’t have the required capacity or expertise to deliver on the various aspects of the project - data protection/GDPR, project planning and management, supplier relations, integration, and so on. So, one of Hart Square’s experts came to work in our offices to guide us through these processes.”

Integration of the Salesforce CRM and Drupal CMS was a crucial part of the first phase. “Membership processing and events in the CRM were simply not integrated with the website, but Hart Square’s expertise and experience really helped in making that happen.”

He added: “Working with two different suppliers of the CRM and CMS has its challenges. Having Hart Square’s expert here, helping us to work with and challenge the suppliers was crucial to this stage of the project. It’s something we didn’t have the time or experience to do.”

Project management

Hart’s Square’s project management experience and skills have benefited the Bond project. Michael Wright explained:

“One thing our COO and myself agreed on is that we would never embark on a project like this without external project management expertise. Hart Square’s project management has proved invaluable – they’ve been here driving things forward, liaising with suppliers and getting us to work together.”

He added: “I think without Hart Square’s help the project would have taken at least 12 months. They helped deliver this phase of the project within six-months and within 10% of the £150,000 budget – that’s very impressive.”

Project management is also helping with user adoption of the Salesforce CRM. “Up until now it has been an issue – i.e. only one person in the organisation used the CRM,” said Michael Wright. “With Hart Square’s help we are devising an internal communications strategy and roll out. Our intention is to get most of our 30 staff on board - It’s a complete cultural change and not insignificant, but we need to do it to benefit member service and interaction.”

He added: “There’s no doubt in my mind that our decision to use Hart Square for project management is one of the best we have ever made.”

Summary

In terms of Bond’s overriding goal – to ensure GDPR compliance – Michael Wright is clear: “I believe that, through the work we have done with Hart Square, we are now ahead of many organisations in our sector in terms of being GDPR compliant.”

He added: “Hart Square brought our systems into the 21st century. They have done a fantastic piece of work for us, and the roadmap they created for us will continue to guide us going forward. Their people are all delightful to work with, they really understand membership organisations and all the different scenarios, and they provide really practical tips on how to get things done. They’re very professional and good at hand-holding through processes, and there’s no ‘flannel’.”

He concluded: “We wanted to improve our business decision making, support our members better and improve our levels of engagement with them, as well as maximise income across the board. Hart Square has enabled us to achieve all of those things – and more.” ■

Key benefits

- Single view of data and membership
- Reduced amount of redundant data in CRM and CMS
- Bookings now coming in from website to the CRM
- Better GDPR compliance and sustainability
- More robust online technology (Drupal 7)
- More consistent experience for stakeholders
- Increased user adoption of CRM
- Better capture of sales opportunities
- New policies in place - data protection, privacy policy, communication guidelines