

RES gets economics right with new CRM and CMS



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Leighton Chipperfield,
CEO at RES

Founded in 1890 to promote the study of economic science, The Royal Economic Society (RES) is one of the world’s oldest and most prestigious economic associations. The Society publishes The Economic Journal and The Econometrics Journal, holds an annual international conference and supports the education and career development of economists.

With over 4,000 individual members, RES was until a couple of years ago a largely decentralised organisation, not directly employing staff but contracting out various functions. Leighton Chipperfield, CEO at RES, explained: “We work with an external publisher to produce and disseminate our two prestigious journals, and the same company has until recently hosted our society website and managed our membership.

He added: “As part of RES’s new strategy, we felt it was important to upgrade our website, and to manage it ourselves via a Content Management System (CMS). We also wanted to bring membership management in-house through a new Customer Relationship Management (CRM) system. We knew we had various avenues open to us and were seeking expert guidance on the right options for an organisation of our size.”

Business requirements

Hart Square won the tender to advise RES and provided the organisation with a ‘roadmap’ for going forward. “Hart Square came in to gather our business requirements and recommended a route forward for the choice of both the website CMS and CRM,” said Leighton Chipperfield.

He added: “They helped us evaluate the different options. The project was on a tight timescale, as the contract with the current publisher expires at the end of 2018, so we had to move quickly. Hart Square helped define our requirements, and what we might want from a CMS and CRM over the medium and long-run.

Choice of one supplier

In a report and presentation to RES’s

working group and trustees, Hart Square evaluated the differences between having two separate suppliers of CMS and CRM, or just one. “That was really helpful for us,” said Leighton Chipperfield. “A big factor in making a decision was our scale - we have only half-a dozen staff, so one vendor, with a single point of contact to manage, seemed to be the right way to go. In end we selected Oomi CRM for Non-Profits.”

He added: “Some solutions looked good on paper but were a poor fit culturally. Hart Square was really good at picking up on that, but they didn’t steer us towards one solution or another.

Preparing for launch

RES now plans to launch its new website and CRM system before the end of the 2018. “We are exactly where we wanted to be at this stage in the project,” said Leighton Chipperfield. “Hart Square continues to support us in the implementation, and we have their project management skills in place to keep us and the supplier on track.” He is clear about the benefits of working with Hart Square: “They have helped us find a CRM solution that will improve our value proposition to members. Communicating economics to the wider world is at the core of our new strategy, and the new website will be at the forefront of this.

Leighton Chipperfield concluded: “I like the fact that Hart Square are not too big, and you can talk to the senior management team. I trust what they say and I appreciate their impartiality.”

Key services

- Business case and roadmap
- Invitations to Tender (CRM and CMS)
- Vendor Selection
- Project Management
- Implementation

Key benefits

- Expert guidance on CRM and CMS
- Shortlisted appropriate vendors
- Kept client and suppliers on track
- Solutions meeting strategic goals
- Provided a new way of working