



Hart Square prepares London Borough for CRM selection

New solution will help London Borough of Tower Hamlets to provide better customer experience

The London Borough of Tower Hamlets (LBTH) is one of the UK's most culturally vibrant and diverse areas. The borough is densely populated, with over 300,000 people living within eight square miles at the heart of London's East End. It includes a number of London's famous attractions including the Tower of London, Tower Bridge and Billingsgate Fish Market and is also home to a business centre such as Canary Wharf.

Transformation programme

As part of its transformation programme, LBTH wanted to rapidly improve the online experience for its

Key services

- Requirements gathering for new CRM
- Technology roadmap
- Business case proposal
- Invitations to Tender for new CRM system

customers, but it was hampered by an existing CRM (Customer Relationship Management) system that was out of support.

Shazia Hussain, Divisional Director Customer Services, takes up the story: "Our plan was to embark on a long-term project to introduce a new CRM, but we also sought an interim solution for 12 months to secure the operational reliability of the business. We didn't really understand the process and the resources required, so we needed experienced consultants to help us map out our journey."

Local government

In January 2019, independent CRM consultants Hart Square were invited in to discuss LBTH's challenges. "We recognised that Hart Square typically deliver CRM consultancy services and had no alignment to any CRM provider, enabling us to receive independent advice.

"We were very impressed with their people when they came in to see us, they were very practical in terms of what they could do and are vendor-independent. We were confident from the beginning that they were an organisation we could work with."



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Shazia Hussain,
Divisional Director
Customer Services,

Core projects

Hart Square proposed two core projects for the new CRM:

1. **A Business Case and Roadmap**
2. **Requirements Gathering and Vendor selection**

“Essentially, the business case would help us understand the options available to us in order to achieve our strategic goals,” explained Shazia Hussain. “There had been previous attempts to make a decision regarding the CRM that were unsuccessful, so we needed to feel confident we were on the right path and importantly making the right decision.”

Hart Square organised a series of weekly meetings with key stakeholders in LBTH, discussing and documenting their key requirements, and mapping out what good might look like from a CRM perspective – specifically, what would work best, and what it would cost.

Consultant ‘fatigue’

“Like many councils, we can get consultant ‘fatigue’, where lots of consultants come in to review things and staff get fed up being asked the same questions. The great thing about Hart Square is they always ask ‘the intelligent question’. They really get to the heart of the matter without alienating people, which was very reassuring.”

The resulting tactical options and roadmap report included:

- Clarity on the interim options for LBTH for its CRM requirements, including costs, resourcing, risks and benefits
- Recommendations for the resourcing and tools required to meet the strategy
- Production of high-level budgets for the next year based on the strategy
- Production of a one-year roadmap for all projects, decision points, timescales, resourcing and suppliers.

“It was a very thorough exercise by Hart Square. We then presented their business case to the board, outlining how this project would meet our transformation programme,” added Shazia Hussain.

Target operating model

Absolutely crucial to transformation at LBTH is a target operating model, and

specifically how a new CRM would deliver against it. (A target operating model is essentially a blueprint for aligning an organisation’s strategic objectives and operating capacities).

“The new CRM will be a key enabler in achieving a target operating model. Hart Square had that front and centre of their proposal and enabled us to get board approval,” said Shazia Hussain.

Invitation to Tender

With this first stage completed, Hart Square was invited to tender for the next stage – CRM vendor selection. “Hart Square came back with a proposal for the next phase and, out of three contenders, they won. They demonstrated they had the knowledge and experience, and were very competitive on cost,” added Shazia Hussain.

Hart Square created an Invitation to Tender (ITT) document outlining LBTH’s requirements for the new CRM. “Hart Square spent a lot of time with key stakeholders within the Council, one-to-one and in workshops, to prepare the ITT – they were very thorough,” said Shazia Hussain. LBTH is now about to go out to tender and plans to have a new CRM vendor partner in place by April 2020, with a view to going live around late summer 2020. Shazia Hussain said: “With councils, you make decisions, but things can be delayed and there are kinds of things to deal with, such as procurement and resourcing. However, with Hart Square’s help and support, I have confidence that we are doing things appropriately. Their expertise has been the biggest benefit.” She concluded: “I would highly recommend Hart Square, they are absolutely brilliant, all the people I have worked with there are fantastic.”

Key benefits

- Expert guidance on replacing CRM
- Expertise on CRM vendors
- Management of ITT process
- Solutions selected to meet target operating model
- Customers will have better access to online services