



RSE advances knowledge of CRM with Hart Square

The Royal Society of Edinburgh (RSE), Scotland's National Academy, contributes to the social, cultural and economic wellbeing of Scotland through the advancement of learning and useful knowledge.

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Graeme Herbert,
Deputy Chief Executive

Established in 1783, it has since then drawn upon the considerable strengths and varied expertise of its Fellows, of which there are currently around 1600, drawn from disciplines including science and technology, arts, business and public service.

With its existing Customer Relationship Management (CRM) not being ‘fit for purpose’, the society’s Deputy Chief Executive, Graeme Herbert, decided to investigate alternatives. He explained: “We have a diverse range of activities across the RSE. We had been using our existing CRM for about 10 years, but it did not meet our current business needs and there was a loss of confidence in its use across the organisation.”

Direction of travel

In an effort to find a replacement system, Graeme attended a CRM breakfast session hosted by Hart Square. He said: “At that point I felt that they could potentially help us, so I attended another briefing eight months later which developed

from a conversation into a more formal engagement.”

Hart Square immediately set up a series of workshops with the society’s 45 employees to identify RSE’s business requirements. “Hart Square really engaged with all staff, which resulted in a business case report and roadmap which we took to our trustees,” explained Graeme. “This basically confirmed what we had thought, i.e. we needed a new CRM. But more importantly, it gave us the direction of travel we could take.”

Key services

- Business case and roadmap
- Invitation to Tender
- Vendor Selection
- Project Management
- Implementation support





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Having discussed with the RSE some options on possible costs, Hart Square used the business requirements it had gathered to create an Invitation to Tender (ITT) for the new CRM, which was sent out to six vendors (the incumbent provider was also invited to tender).

Facilitating vendor presentations

All potential vendors were invited in for first-stage informal discussions with the RSE. “Hart Square then set up and facilitated the formal presentations with all of them,” said Graeme. We ended up with two shortlists, for proprietary ‘out of the box’ solutions, and non-proprietary. Using their tried-and-tested methodology and expert knowledge of the technologies, Hart Square helped us select a solution, which was CiviCRM from Compucorp, a non-proprietary system”

With the vendor decision made in June 2018, the RSE is working with Hart Square in the implementation phase. The project

started in August 2018, with a go-live expected in around 12 months.

Graeme describes Hart Square attributes: “They are very good and have never said ‘That’s something we can’t do’, everything has been very well accommodated. Their documentation is very easy to understand, and their people are all really personable and easy to work with.”

Confidence building

Graeme explained that confidence in Hart Square built over time. “From the first two breakfast sessions I attended, through to the business case and vendor selection, I became more and more confident that Hart Square would deliver for us - and that’s exactly what they have done.”

He added: “Thanks to Hart Square’s contribution, the new CRM we selected is very much in line with our current needs, and we expect it to support our strategic aims and developments over the years ahead. Key aspects of it will be establishing online portals for our Fellows and the public, and within the latter, creating an online grants application process for what is a major area of RSE public activity. Our aspiration is that the new CRM will enhance how people connect with us, Fellows and the general public alike.”

Graeme concluded: “I have no hesitation in giving Hart Square a great referral.”

Key benefits

- Provided a technology roadmap
- CRM in line with customer needs
- Solutions meeting strategic goals
- Strengthened relationship with Fellows