



# Hart Square enhances the Royal Society of Medicine's operations



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**Mark Johnstone,**  
Finance Director



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**E**stablished in London in 1805, The Royal Society of Medicine (RSM) is today one of the UK's major providers of postgraduate medical education. As a charity it provides a broad range of educational activities and opportunities to medical and other healthcare professionals, with a mission to advance health, through education and innovation.

## World-class resources

While the RSM's members can make use of its range of world-class resources, available both online and at its London headquarters, the Society realised its CRM (Customer Relationship Management) system and website CMS (Content Management System) were not meeting the organisation's needs.

### Key services

- Business Process Review
- Invitations to Tender (CRM and CMS)
- Vendor Selection
- Project Management
- Implementation support

website CMS and needed to either make a significant investment in it or start again. Also, our CRM system had been in place for eight years and required a lot of work-arounds.”

An initial meeting with Hart Square at its annual TechSmart conference led to further discussions at the RSM in January 2017. “It was clear that Hart Square could provide an independent view of where we were and what we needed to do from a strategic perspective, and recommend a way forward,” said Mark Johnstone.

## Business strategy and process review

Hart Square's experts were invited to the RSM to interview senior directors and staff and review business strategy and processes. “Hart Square looked at what was working well and not so well and, after evaluating their findings, recommended we replace both our CRM and CMS. They looked at how we could integrate and automate workflows and improve the customer journey through our website, and outlined a business case and technology roadmap, addressing both bottom-up and top-down business requirements”, commented Mark Johnstone.



## case study - membership body



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In July 2017 Hart Square ran an Invitation to Tender (ITT) process and helped the RSM shortlist six vendors. Mark Johnstone explained: “Hart Square managed the entire process and attended meetings with vendors. We were considering two possible models: separate CRM and CMS vendors, or a single provider of one integrated solution.”

### **Making the case**

This process led to Mark Johnstone making a financial case to the RSM’s Council of trustees for a £900,000 investment in one integrated system to be delivered by Felinesoft, incorporating MS Dynamics365 CRM and Umbraco CMS, as well as ongoing project management services from Hart Square.

The proposal was approved by the trustees and go live is scheduled at the beginning of 2019. Mark Johnstone said: “There is a huge amount of work being done by

Hart Square’s project team, Felinesoft and the internal team of key users at the RSM, We are on track so far, and going live is the first major step in a 10-year plan to improve these systems as we become more customer-centric and increase engagement with the RSM’s members and other customers in the services we provide.”

### **Increased self-service**

He added: “The integration between the website CMS and the CRM will drive substantial workflow efficiencies, whereby tasks will be automated, and we can provide customers and our members with more personalisation and increased levels of self-service.”

The RSM also anticipates enhanced revenues through promoting its resources more effectively. “Our website will become a portal for a growing portfolio of new digital education content, which we are working on separately,” explained Mark Johnstone.

He concluded: “Sometimes organisations like ours think their problems are unique - but Hart Square has seen and dealt with them many times before. They quickly understood our requirements and combined their not-for-profit experience and knowledge of CRM and website CMS systems. Their day-to-day project management is great and their high-level management expertise has also been a huge benefit to us.”



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### **Key benefits**

- Expert guidance on CRM and CMS
- Shortlisted appropriate vendors
- Kept client and suppliers on track
- Solutions meeting strategic goals
- Providing more streamlined processes