

# Hart Square provides backbone to BOA's CRM and website

**New CRM and website CMS ensure improved services to members**



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**Liz Fry,**  
Director of Finance,  
BOA

**T**he British Orthopaedic Association (BOA) is the Surgical Specialty Association for Trauma and Orthopaedics in the UK. The charity was founded in 1918 – it now has over 4,700 members worldwide and is a pivotal organisation within the British surgical scene, representing some 40% of the total surgical workforce.

As a membership organisation it cares for patients and supports surgeons by focusing on excellence in professional practice, training and education and research.

Support for its members was, however, a challenge due to an outdated CRM (Customer Relationship Management) system, as Liz Fry, Director of Finance, explains: “We had an existing CRM, but not everyone was using it and we were not getting adequate support from the

vendor when we wanted to issue our 2018 membership renewals. It was time for a change.”

## Key objectives

BOA's key objectives were to:

- Replace its existing CRM system
- Improve integration between its CRM, website, and email marketing system
- Improve user take-up to make the system a true “enterprise” CRM
- Introduce automation and workflow to reduce manual work and wasted time
- Improve the quality of the data on individual contacts and organisations
- Ensure compliance with emerging GDPR requirements
- Create a single reliable source of data on its membership

Liz Fry added: “This was a big challenge and we decided we needed some external expertise and support. Hart Square were recommended to us, we met them and they took us through what they could do for us.”

In August 2018, Hart Square initiated a requirements gathering exercise to work with BOA's team to identify what was needed for the new CRM. “Up until this point we had been working with three different databases – a membership database, a donor database and one that was managed externally,” explained Liz Fry. “This, together with other smaller databases and spreadsheets on personal laptops, meant

## Key benefits

- Expert guidance on replacing existing CRM
- Expertise on CRM and CMS vendors
- Management of vendor selection process
- Solutions meet BOA's deadlines and objectives
- BOA now has better view of its membership
- BOA members can take advantage of self-service



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that we couldn't coordinate any of this information, and we faced potential issues with forthcoming GDPR compliance.”

Having gathered requirements for the potential new CRM, Hart Square invited members of the BOA team to its TechSmart event in November 2018. “This was a great opportunity to meet some of the CRM technology vendors face-to-face who might be able to help us.”

Hart Square subsequently helped put together a tender document and provided a shortlist of CRM vendors to send it to. Subsequent meetings and presentations led to the selection of Bluelight CRM.

### **Added website requirement**

“When we selected the CRM, we realised that our website was no longer fit for purpose,” said Liz Fry, “We asked Hart Square to help select a new website and CMS (Content Management System) provider. They created the tender document, shortlisted the vendors and arranged meetings before we made a final decision – which was to go with Pixl8.”

She added: “We didn't really know enough about CRM or CMS and what was out there - we couldn't see the wood for the trees

really, so it was great to have Hart Square say, ‘Well, these are the best companies that can deliver for you.’”

### **Hart Square delivered across what was effectively a three-phase project:**

- **Phase 1** - CRM launched in October 2018, on time and on budget
- **Phase 2** - member online portal launched in November 2018, virtually on time and on budget
- **Phase 3** - full website integrated with CRM launched in March 2019, just one week late and on budget.

“Critically, we needed the online member portal to go live in November 2018 to allow the automation of member renewals,” said Liz Fry. “That was delivered on time, which ensured that we were able to get the income in early.”

She added: “The integration of the CRM and website was delivered, and that was required to be live no later than April 2019 to allow bookings for our Annual Congress to open. All of that happened successfully.”

### **Benefits to members and staff**

Liz Fry believes there are benefits both to members and staff at BOA: “Now, not just finance and membership use CRM, everyone here does. We're able to give our members a much better experience when they contact us, whether it's membership services or registering for events. We have everything in one place. Our new online portal also means we have moved into the 21st Century, enabling members to self-service their requirements without the need to contact us.”

“Throughout the project Hart Square kept us honest in terms of the deliverables,” added Liz Fry. “They reminded us of our deadlines, kept us on target and pushed us when we needed it. I think we did really well to achieve a new CRM and website in one year!”

She concluded: “I really enjoyed working with Hart Square, their consultants are great to work with and became members of the team. It was more like a partnership really – I would recommend them to anybody looking to achieve a successful project.” ■

### **Key services**

- Requirements gathering for CRM and CMS
- Invitations to Tender for CRM and CMS
- Managing vendor selection process for CRM and CMS
- Implementation of CRM and CMS
- Implementation of new member portal
- Project Management