



HART SQUARE HELPS EPILEPSY ACTION SELECT A NEW TECHNOLOGY PARTNER

OVERVIEW

CHALLENGES

- Epilepsy Action's current fundraising CRM was no longer fit for purpose or supported by the original vendor
- There was two concurrent CRM systems running
- There was a significant number of manual processes and workarounds which were time consuming

OUTCOMES

- Detailed requirements gathered from across Epilepsy Action
- Production of Invitation to Tender document, detailing project objectives
- Epilepsy Action selects a new technology partner with confidence

KEY SERVICES

- Requirements Gathering
- Invitation to Tender document
- Technology Partner Selection

Epilepsy Action is a national charity in the UK dedicated to supporting the 600,000 people and their families living the UK with epilepsy. They support people living with epilepsy through a range of activities including high quality and accessible services, raising awareness across the UK, and carrying out vital research to improve outcomes for people.

To carry out their day-to-day work Epilepsy Action required a new modern highly functional CRM, integrated with other systems, to replace their legacy CRM systems. Epilepsy Action have embarked on this strategically important project to overcome the following challenges:

- Their current fundraising CRM was no longer fit for purpose and not supported by the original vendor
- To were two concurrent CRM fundraising & helpline systems running
- There are a significant number of manual processes and workarounds which were very time consuming
- Epilepsy Action wanted to gain a better understanding of customer journeys to provide more tailored support, which was proving difficult with the current systems.

As this was an important strategic project, Epilepsy Action were working to a tight deadline with increased pressure to ensure that the core requirements were clearly documented and understood to select the right system and technology partner. As Jon Eaton, Director of Digital Services at Epilepsy Action explains, "We found ourselves in a fairly typical but very unpleasant situation. We had tried to run a transformation project but had ended up a bit stuck."

GATHERING REQUIREMENTS

Hart Square were engaged to run a series of workshops with teams from across Epilepsy Action to identify their requirements and challenges. Hart Square ran 10 workshops and met with 31 people from across the organisation to gather the requirements. These were then collated into a tender document which described Epilepsy Action's background, the project objectives, information about the data to be migrated and any third-party systems to be

integrated with. The tender document was reviewed by the team and the requirements were prioritised to identify what needed to be delivered for a minimum viable product.

SELECTING THE RIGHT PARTNER

Hart Square defined and ran the partner selection process, engaging with the partners involved and facilitating meetings between them and the Epilepsy Action team. Due to the Covid pandemic, the selection process was run virtually with all partners presenting and engaging with the team remotely.

This method naturally created challenges, but partners and Epilepsy Action have adapted to working remotely. It was imperative to Epilepsy Action that they found a partner who was the right fit for them and understood the complex needs of the charity, as well as identifying a solution which integrated with the existing systems. Additional time was allocated to meetings and communication during the selection process to confirm and ensure everyone was comfortable and fully informed to make the decision.

MAKING THE DECISION

Hart Square ensured that, although the decision-making meeting was also held remotely, there was full discussion and consideration of each partner's performance throughout the selection process. This included a review of the engagement meeting, the partners' response to the tender document, the technical demonstration, and the final presentation. Each partner was assessed against Epilepsy Action's selection criteria which had been drawn up and shared at the beginning of the process.

The team at Epilepsy Action were confident that their preferred partner was a good match in terms of their ways of working and cultural fit. Additionally, the team were reassured that the partner could deliver the highly functional CRM system required to meet the charity's needs and future growth ambitions.

Hart Square's input was valued through the process as Jon Eaton summarises "Hart Square have been an incredibly helpful partner to Epilepsy Action and me personally. As the senior stakeholder undertaking a strategic review, it was so helpful to be able to have allies to question and validate my thinking. Hart Square were very good at coaching me in how to deliver difficult messages across the organisation as we reset the project and appointed new suppliers. They helped us to form a new project team and to align everyone's interests. We were so keen to retain their input after our ITT process that we appointed them as external project managers for us in the delivery." ■



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**Jon Eaton,
Director of
Digital Services,
Epilepsy Action**