



THE PROSPECT LOOKS GOOD FOR MODERNISING MEMBERSHIP ENGAGEMENT

HART SQUARE HELP PROSPECT SELECT A NEW TECHNOLOGY PARTNER

OVERVIEW

CHALLENGES

- Processes were inefficient as there were a number of teams carrying out similar tasks
- Reporting was difficult as data was held in two different CRM systems
- Difficulty in making informed decisions as did not have a single source of information

OUTCOMES

- Expertise on the cost and options for technology solutions
- Aligned expectations with technology suppliers, on the requirements for the Prospect
- Prospect selects new technology partner

Prospect is a trade union which supports and represents more than 150,000 members who work as scientists, engineers, tech experts and in other specialists' roles. They support their members by offering career advice as well as financial and legal support.

In 2017, Prospect and BECTU, a media and entertainment union, merged. With the growth in membership, Prospect acquired an additional CRM. This created several on-going challenges:

- Reporting was difficult as data was held in different systems which made it challenging to make informed decisions on where to spend resources
- Processes were inefficient as there were a number of teams carrying out similar tasks
- There were two separate websites with externally facing member portals

SINGLE SOURCE OF INFORMATION

Joanne Rowe, Director of Business Services at Prospect explained "The main problem was that we had two separate CRM systems which did not talk to each other, nor did they have a link to the finance system. Work was having to be doubled up as the processes were so very different. As it was difficult to make informed decisions on where to spend our time and resources, we wanted one database as a single source of information."

COST AND OPTIONS FOR TECHNOLOGY

Aspiring to overcome these challenges to modernise their engagement with their members, Prospect engaged with Hart

KEY SERVICES

- Cost and Options for Technology
- Requirements Gathering
- Invitation to Tender (ITT) document
- Technology Partner Selection



“Hart Square have been a great support throughout the process, there is always someone within the team that you can go to for additional support.”

Joanne Rowe
Director of Business Services
Prospect

Square to advise on the potential options and associated costs for technology solutions. Options included integrating current systems, rationalising them, or going to the market for a CRM replacement. Helping the team define and agree their strategic priorities aligned expectations of the outcome of the project, setting a solid foundation for project success.

UNDERSTANDING REQUIREMENTS

Once the strategic direction had been agreed, Hart Square undertook a series of requirement gathering workshops across all of Prospect’s relevant departments. Having gathered requirements for new digital technology across the organisation, the project team reviewed them holistically, prioritised and collated them within an Invitation to Tender document. This document translated Prospect’s objectives and needs for a new technology, into an informative brief, ready to go to market.

Due to the national lockdown in the Spring of 2020, the project was paused for a period of 6 months. As there had been significant disruption for Prospect during this period,

the requirements were reviewed and refreshed once national restrictions began to be lifted and the project restarted, to ensure they remained aligned with Prospect’s needs.

SELECTING THE RIGHT PARTNER

The selection process was well structured and allowed Prospect to develop their understanding of what modern technology could offer them. “Meeting with the potential partners went well and Hart Square were really organised, allowing us to get out of it what we wanted” explained Joanne Rowe.

The selection process itself was delivered in a hybrid form. Prospect met many potential partners virtually however, due to the scale of investment and the importance of the project to their future, Prospect were keen to meet some of the partners in person. As Joanne Rowe explained, “It isn’t just about the technology, it is about the people. So we were keen to meet potential partners throughout the process where we could.”

With a new partner selected she added, “Hart Square have been a great support throughout the process, there is always someone within the team that you can go to for additional support. It’s been really valuable to have a view from someone outside of our organisation who can always see the ‘wood from the trees’ to guide you in the right direction.” ■