



Hart Square helps supporter engagement at The Children's Society

Hart Square's expertise enables Society to shortlist and select a new CRM

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Head of Data Services, TCS

The Children's Society (TCS) is a national charity that works with the country's most vulnerable children and young people. It was founded in London in the late 19th Century by Sunday school teacher Edward Rudolf, who saw first-hand the effects of child poverty. Today, TCS endeavours - through campaigning, commitment and care - to give every child the greatest possible chance in life.

The right technologies

Attracting and keeping supporters is a challenge for any charity, and it is particularly difficult if the right technologies and process are not in place, as Cyrus Bulsara, Head of Data Services at TCS explained: “A couple of years ago we embarked on a supporter engagement strategy, putting supporters at the heart of the work we do and working with them to try and achieve the best outcomes for children and young people. This involved the implementation of a change programme to ensure staff were ‘skilled up’, as well as a technology audit, including our existing Customer Relationship Management (CRM) system.”

Specific challenges included:

- No single integrated view of interactions with individuals and organisations
- Difficulties in tracking and reconciling financial information
- Inability to measure the impact of marketing programmes
- Campaigns not data-driven
- Cumbersome processes to onboard new volunteers

“These business-critical challenges were affecting the operational capacity of most of our business areas,” added Cyrus. “In addition, our existing CRM system's lack of usability was a substantial barrier to achieving our strategic goals for growth and supporter engagement.”

Preparing the business case

Having interviewed staff to ascertain their needs, the decision was made to replace the CRM - a decision compounded by the fact that the supplier was no longer updating the software, “so it had a limited shelf life anyway”, according to Cyrus.

In May 2018, it was decided to start the preparation of a business case for a new CRM to put to the trustees, as well as an Invitation to Tender (ITT) for CRM suppliers. Cyrus said: “I had been to a few presentations organised by Hart Square and recognised their experience and expertise in the sector, so after some discussions I invited them in to help us select the new CRM system.”

In order to prepare the business case, Hart Square helped organise and run a series of workshops. Cyrus added: “Hart Square came in and met with all of our different teams, going through in detail what they needed from a new CRM system. They produced an extensive and detailed requirements document, checking and clarifying each section with us. This informed the business case for change, which was initially presented to our project group and then to the trustees to secure investment in the project.”

Within the business case, Hart Square was able to include estimates of the costs for the project which later on “proved to be accurate”, according to Cyrus. “They were also able to articulate some of the deficits we had in terms of our CRM-based activities compared with other non-profit organisations.”

Managing vendor selection

The approved business case informed the ITT and Hart Square was engaged to manage the vendor selection for the

Key benefits

- Expert guidance on CRM vendors
- Shortlisted appropriate vendors
- Managed vendor selection process
- Solution meets organisation's strategy and vision



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project. “Because Hart Square had worked with us on our requirements, it was logical that they worked with us on the vendor selection” said Cyrus. “They recommended four CRM vendors we should consider, and for fairness we decided to include the incumbent supplier as well.”

Hart Square sent out the ITT to the shortlisted providers and organised an initial engagement meeting between each one and the project group. Suppliers were then invited to submit their proposals, which Hart Square reviewed and provided analysis on. Vendors were then invited back to present their solutions.

“Hart Square were excellent in getting responses to all our queries from vendors,” added Cyrus. “They organised all the meetings and set up the agendas – it was all very smooth, so we didn’t have to do a lot of work ourselves. They really helped us develop our thinking in terms of what the technology could do to achieve our strategy and vision.”

With vendor presentations to the project group underway, members of the group were asked to score each supplier based on agreed criteria. In the end, the field was narrowed down to two solutions: Microsoft Dynamics CRM from M-hance and Salesforce CRM from Giveclarity.

“Hart Square helped us overcome the challenges of struggling to make a decision between the Salesforce and Microsoft Dynamics providers. It was a very close decision, but Hart Square enabled us to focus on the key factors to reach a consensus,” said Cyrus.

Having called back both vendors to do another presentation, the project group made a final selection – Microsoft Dynamics from M-hance.

Thorough process

“It was important for us to prove to the trustees that everything had been done properly to justify the investment in the CRM project,” said Cyrus. “Thanks to Hart Square we had thorough documentation as well as accurate costings. We are now awaiting final sign off to go ahead with the project. As and when we get that, we will talk to Hart Square again about helping us with the implementation.”

Cyrus is clear about the benefits of Hart Square’s help. “They worked very closely with us and were able to draw out the detailed functionality of the CRM and what it could deliver. Their experts are very easy to work with and really get down to the ‘nitty gritty’ of what people want. They made sure we kept on top of all our actions – if I had had to do that myself it would have taken a lot of my time.”

He concluded: “As well as successfully helping us with our project, it is clear that from the meetings and presentations I attended initially that Hart Square is all about educating the sector. I think that is a very positive thing to be doing.” ■

Key services

- Requirements gathering
- Business case document and proposal
- Invitations to Tender for CRM
- Managing vendor selection process
- Project Management