

# Royal College of Midwives gets 360° view of its membership

**Hart Square helps with selection and implementation of new CRM and website CMS solutions**



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**Chris Truman,**  
Operations  
Director, RCM

**T**he Royal College of Midwives (RCM) is the ‘voice of midwifery’. Established in 1881, today it is the only professional organisation and trade union dedicated to representing the interests of midwives in the UK.

RCM strives to operate in an open and transparent way and be accessible to members. An important part of that involves gaining better insights into its 48,000 members through the implementation of improved technology and processes.

## RCM360 project

Chris Truman, Operations Director at RCM, explained: “In 2017, we embarked on the

RCM360 project, with the aim of getting a 360° view of our members. The key objective was to gain more insights into what they wanted and how they work so that we could better tailor our products and services for them.”

With an outdated website and near end-of-life CRM (Customer Relationship Management) system in use, the RCM360 project

involved selecting and implementing a replacement CRM solution and a website CMS (Content Management System) to manage its new website.

RCM spent some 18 months talking to different suppliers of replacement systems. “While we confirmed a direction of travel in moving towards a Microsoft Dynamics CRM, we had heard some horror stories from other organisations about budgets and implementation times doubling and issues with requirements not being clearly defined,” said Chris Truman.

## Technology roadmap

He added: “We asked Hart Square to bring its sector knowledge and extensive CRM and CMS experience to the table. They came in and helped us put together a technology roadmap, gather requirements from our team and evaluate project timeframes and budgets for implementation. In terms of costs, Hart Square came up with ‘Rolls Royce’, ‘Middle of the Road’ and ‘Budget’ options.”

Following the requirements gathering at RCM, Hart Square put together a business case for the new CRM and CMS. “Up to this point, we had been constrained by the systems we were using. Basically, Hart Square threw everything in the air and challenged how we worked – it was more of a ‘year zero’ approach to how we could be more efficient in our processes.”

With the business case approved, Hart Square was invited to help with the vendor

## Key services

- Requirements gathering
- Business case document and proposal
- Technology roadmap
- Invitations to Tender for CRM and CMS
- Managing vendor selection process for CRM and CMS
- Implementation of CRM and CMS
- Project Management



### THE ROYAL COLLEGE OF MIDWIVES

selection process. “We had around 20 of RCM’s staff involved in the project,” explained Chris Truman. “Hart Square produced a tender document, which was signed off, and then ran

the two days of presentations from vendors, involving the 20 in the project team. It was a huge co-ordination effort which Hart Square managed very efficiently, and they helped our team to reach a unanimous decision – selecting Microsoft Dynamics CRM from Trillium and Umbraco CMS.”

#### Biggest project yet undertaken

At the conclusion of the vendor selection process, RCM engaged Hart Square for the implementation of the CRM and CMS. “This was the biggest project we have ever done in terms of size, scale and costs,” said Chris Truman. “We don’t have an internal project management resource, so we wanted to employ Hart Square as an external resource, given all the work they had done with us previously, to see the project through.”

Hart Square was asked to provide project services to manage and deliver the multiple interlinked projects within RCM360. Given the strategic and business-critical nature of the projects, it was vital that the lowest-risk and best-value options were selected and then executed successfully.

Chris Truman added: “Hart Square provided a project manager on-site to work across all the projects to deliver in close collaboration with the RCM project and management teams. We had challenges internally in terms of time and resources, so Hart Square helped us to manage and document everything and used their expertise

and experience to hold our hand throughout the process.”

#### Implementation goals

Key activities in the implementation included:

- **Liaising with suppliers and ensuring successful implementation of both CRM and CMS**
- **Managing and cleansing data and ensuring integration between existing systems (e.g. finance) and the CRM and CMS**
- **Reviewing the email marketing system and integrating with the new CRM**
- **Ensuring integration of all aspects of the website with the CRM**

Working together, Hart Square and the RCM project team enabled completion of the RCM360 project by the planned delivery date of Q1 2019. Chris Truman said: “A key benefit of working with Hart Square is their experience of roll-outs with similar organisations. They provide a lot of support, care and encouragement and they can be very honest and upfront about things, which really helped keep us focused.”

#### Clear benefits

In terms of outcomes for the membership, the new website and CRM is enabling RCM to tailor information for individuals, such as training courses for students, as well as regionalise its content and cater for various classes of membership. “More personalised information means we can make members aware of all the benefits of membership and the wide range of services and products we can provide. We’re getting the message across much more effectively,” said Chris Truman.

He added: “We’ve had a lot of really good feedback, both internally and externally. We’re currently working through further improvements with Hart Square’s help, but it’s all very positive and is a leap forward in terms of where we were. We also have a very clear roadmap from Hart Square as our needs change and evolve.”

He concluded: “Hart Square helped us deliver the project on budget and within the planned timeframe. We are very impressed by their people – they are very knowledgeable and we would definitely use them again.” ■

#### Key benefits

- Expert guidance on business process change
- Expertise on CRM and CMS vendors
- Management of vendor selection process
- Solution meets organisation’s RCM360 vision and requirements
- RCM gets improved 360° view of its membership