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# CITMA puts its mark on membership management

*Hart Square provides help and support for new integrated CRM and website*



**“Data migration went very well due to all the early planning we did with Hart Square”**

**Keven Bader,**  
Chief Executive,  
CITMA

**T**rade marks are valuable business assets – and it’s the role of the Chartered Institute of Trade Mark Attorneys (CITMA) to support and promote the legal professionals that protect them.

Founded in 1934 and chartered in 2016, CITMA is a professional membership organisation who supports its members and the wider trade mark and designs profession. It helps to shape law and practice nationally and globally. It represents over 1,600 members, including trade mark attorneys, paralegals, those in training and support roles, as well as barristers and solicitors with a trade mark or design interest.

### Inspire and educate

With regular events, seminars and webinars, CITMA aims to inspire, educate and challenge its members. However, its existing Customer Relationship Management

(CRM) system and website were not up to supporting its ambitions, as Keven Bader, CITMA’s Chief Executive, explained:

“We were having a number of problems with our CRM, and integration with our website was pretty much non-existent. In addition, our website provider stopped supporting

### Key benefits

- Expert guidance on CRM and website
- Shortlisted appropriate vendors
- Managed vendor selection process
- Solutions met strategic goals and deadlines
- Improved member services



# CITMA

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their built-in content management system, so we needed to review our infrastructure and find better solutions.”

CITMA had worked with Hart Square on a previous project and, in spring 2017, invited them in to create a business case for the new CRM and website. “Hart Square already knew our organisation, they had previously conducted interviews with the team and our members, so they were able to ‘hit the ground running’. They were able to outline what our challenges were, where we were deficient and where we needed to make improvements. That made it much easier and faster to put the business case for our board together.”

### Clear roadmap

Keven Bader is honest about the approach that had been taken with its previous CRM and website systems: “We jumped in feet first because we were required to move quickly to a new system. This time round, I was able to use Hart Square’s business case and technology roadmap and say to the board, ‘Look, these experts have put this together, the requirements and costs are realistic, and we need this level of investment’. That was a fundamental first step in our journey.”

### Driving the selection process

The business case, approved by CITMA’s board, recommended that CITMA go for a new CRM and website simultaneously, as one project.

“Ideally we wanted to go for a one-stop solution using the same supplier, or two

separate suppliers with a proven working relationship,” explained Keven Bader. “Hart Square, with its knowledge and independent view of the market, helped us identify six suppliers that would fit in with our specific requirements.”

### Creating an ITT

In January 2018, Hart Square created an ITT (Invitation to Tender) document to be sent out to the six potential CRM and web providers, and project managed the whole process. “It was a very fast turnaround in terms of vendor selection,” said Keven Bader. “By March we had completed the selection process and kicked off the implementation project immediately.”

A smooth process of data migration to the new systems was vital to the speed and success of the project. “Data migration went very well due to all the early planning we did with Hart Square and the new provider. It meant we were assured that only good quality data would be loaded into the new CRM.”

He added: “It would have been difficult to meet the aggressive timeframe if not for Hart Square’s help in putting together the documentation and driving the process forward. We also leveraged Hart Square’s implementation support to manage a tight timetable for going live, which they helped to make happen by the deadline of October 2018.”

### Seamless experience

With the new CRM and website live, Richard Hayward, CITMA’s Head of Communications, is clear about the benefits to the organisation: “We want our digital channels to promote IP (Intellectual Property) and the Trade Mark Attorney profession and attract new people to the site. The homepage is therefore more focused towards the general public. We are offering richer content that will inform, educate and entertain the public about why it is so important to get professional legal advice on their IP rights and strategy.”

He added: “Using our website should be a seamless experience. Processes for event booking, membership renewals and updating member details have all been made simpler. We’ve also built in personalisation – once logged in members will see a homepage that tailors content based on specific areas of interest and relevance.”

### Key services

- Business case and roadmap
- Invitations to Tender (CRM and website)
- Vendor Selection
- Project Management
- Implementation support Key benefits
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- Improved member services