



ACTION ON HEARING LOSS

A national charity since 1911

Action on Hearing Loss listens to Hart Square's CRM advice



“Hart Square has in-depth technical knowledge, a good understanding of the marketplace and of the issues facing the charity sector.”

Dan Pegler,
Head of IM&T
AOHL

Action on Hearing Loss (AoHL) is the UK's national charity, supporting people who are confronting hearing loss, deafness and tinnitus. Its work includes providing high-quality support and care and is also funding research to find a cure for deafness.

High level of engagement

Ensuring a high level of engagement with donors and other stakeholders is seen as critical to AoHL's operations. David Steadman, Executive Director, Fundraising and Marketing at AOHL, takes up the story: “Over recent years we have been reasonably good at managing the data we hold, but we recognised that we could do better. There was an opportunity to move from a data siloes, where parts of our data are managed in particular areas of the charity, to a much more centralised approach. To make that possible, we needed a strategy.”

Key services

- Business Process Review
- CRM assessment and integration
- Project Management
- Ongoing implementation support

AoHL had recently implemented two CRM (Customer Relationship Management) systems – The Raisers Edge and Microsoft Dynamics. David Steadman explained: “Hart Square had been working with us on an operational level for a while and had implemented CRM in one area of our charity. We wanted them to come in and take a more strategic view of the issues and opportunities related to CRM and integration with our other systems.”

Mapping opportunities

With a complicated data environment, Hart Square interviewed AoHL's data owners and stakeholders in departments across the UK to review working practices, how data systems related to each other, and what was needed. “They pulled together the results, used their own experience of developing CRM strategies for charities and came up with a set of recommendations,” said David Steadman. “They helped us map both the challenges and opportunities.”

Hart Square audited the 50-plus systems used to record stakeholder-related information across the charity and carried out a stakeholder mapping exercise to understand the 150-plus audiences the charity interacts with.

Also, with the growing importance around data protection compliance and governance – not least with the impact of



“The last thing we want is people who can just talk data, they need to be able to interact with humans, which is what Hart Square does really well.”

David Steadman,
Executive Director,
Fundraising and
Marketing at AOHL,

impending GDPR (General Data Protection Regulation) - Hart Square assessed the charity’s approach towards compliant data usage and management.

Developing a methodology

David Steadman added: “Working with Hart Square, we established a steering group from all relevant areas of the charity to help guide the CRM strategy. Working collaboratively, we ensured it was backed by the whole organisation. We developed a methodology which we are going to use over the next few years to drive how all our systems integrate with each other.”

In parallel, AoHL has been working with Hart Square to develop a data warehouse that can sit behind the charity’s main systems, providing for the first time a single source of information to help AoHL understand all its relationships.

Top level alignment

David Steadman stressed the value of having Hart Square’s involvement in the project: “Our senior management team has different levels of understanding of data, so bringing in a third-party organisation like Hart Square to put together a substantial piece of strategy

work meant we were able to get alignment at the top level. I don’t think we could have done that were it not for the CRM strategy work Hart Square did.”

Hart Square was further contracted by AoHL to undertake the implementation of the CRM project. “The implementation phase started in March 2018 and, in the run up to the GDPR deadline in May 2018, Hart Square helped identify what was needed to comply with the new legislation,” explained David Steadman.

Deeper view of relationships

Implementation is viewed as a long-term process, according to David Steadman. “It can’t be done overnight. We have already made good progress in bringing together volunteering, email and fundraising data from disparate systems into one place, so we can now get a deeper view of our relationships.”

AoHL is planning to complete the project by the March 2020. “Hart Square is enabling us to get some ‘quick wins’ now before we get into the chunky work on our data warehouse,” said David Steadman. “That is the single biggest piece that will really make this project fly.”

Interacting with humans

He is clear about the benefits Hart Square has brought to the project: “Hart Square has in-depth technical knowledge and a good understanding of the marketplace and the issues. Through being able to deal with people at different levels of the organisation, they have allowed us to reach a common understanding of what we need to do. The last thing we want is people who can just talk data, they need to be able to interact with humans, which is what Hart Square does really well.”

He concluded: “In the long term, this project will profoundly change the way we relate to people who are in our community. Our overall strategy is to bring as many of the 11 million people who have hearing conditions into an ongoing relationship with us. We’ll be more effective at generating income from donations and ensuring that more people benefit from our services through being able to access our information more easily.”

Key benefits

- Expert guidance on implementation and use of two CRM systems
- Solutions meeting strategic goals
- Providing more streamlined processes