



# HBF builds new CRM with help from Hart Square

***New system enables Home Builders Federation to improve member engagement***



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**Catherine Wilson,**  
IT and Digital  
Manager, HBF

**T**he Home Builders Federation (HBF) is the representative body of the home building industry in England and Wales. Its member firms, which range from multi-nationals to small companies, account for around 80 percent of all new homes built in England and Wales in any one year.

The ability to manage communications and interactions with its members is crucial to HBF’s operations. To achieve that, the organisation had been using a Customer Relationship Management (CRM) system, but it was no longer regarded as fit for purpose, specifically:

- Not all teams were using it, with information being stored in different systems and Excel spreadsheets. This resulted in data loss and made it impossible to get an overview of individual member engagement
- The CRM was unreliable, slow and not being properly supported by the supplier, so any new changes or updates were costly and time-consuming

- There was little or no integration with the other systems, e.g. for events
- It was difficult to get a full picture of member companies’ structures and the number of individual members actively engaged

## Key services

- Requirements gathering for new CRM
- Business case proposal
- Invitations to Tender for new CRM system
- Vendor shortlisting and selection
- Implementation services and support



**“Having put in the new CRM system prior to having to move all the office to remote working has been a godsend and made the transition so much easier”.**

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IT and Digital  
Manager  
HBF

### Single source of information

Catherine Wilson, HBF's IT and Digital Manager, takes up the story: “There was an urgent need to create a single source of information which was reliable and held all the associated information for each member contact. We also wanted to enable members can carry out self-service via the member area on our website and ensure a much more personalised and tailored experience, while cutting down significantly on administration time.”

Towards the end of 2018 HBF started to look at replacing its current CRM system. “I attended a breakfast briefing hosted by Hart Square to learn about best practice in CRM projects,” explained Catherine Wilson. “I was impressed and subsequently invited them to give their view of our system. They agreed it wasn't fit for purpose, so we decided to look for a new CRM supplier and asked Hart Square to help us.”

Hart Square set out to help HBF deliver on its key objectives by advising on:

- The selection of a replacement CRM system to meet HBF's strategic goals
- A project budget with a high degree of confidence following analysis of HBF's needs
- Suppliers and project options based on project requirements
- Timescales for the replacement of the CRM system
- A strategic CRM selection process to appoint a new CRM supplier

### Building a business case

Hart Square organised and hosted a series of group workshops involving all HBF's departments to gather requirements for the new CRM. “It was really useful to have an external third-party to help us through this process,” added Catherine Wilson, “It helped us focus on what we wanted and it helped us build a business case for

investment to take to our board.”

With approval received, Hart Square worked with HBF to produce a detailed ITT (Invitation to Tender) document which was sent to a list of CRM suppliers provided by Hart Square. Catherine Wilson added: “Six different suppliers responded to the ITT and Hart Square organised three consultation meetings with each of them before each vendor was invited to present their solution to us. It was a bit like a dating process, trying to find the right match!”

The supplier list was whittled down to four, who each did a final pitch. “We asked them all the same questions so we could compare like-for-like. It helped us rule out what we didn't want from a system.”

### Implementation support

In the end, HBF opted for Microsoft Dynamics CRM provided by Bluelight, a Microsoft Partner. With the decision made and approved by the board in early 2019, Hart Square was invited to help HBF with the implementation. “We didn't have the internal resources to project manage the implementation ourselves. We were so impressed with the help that Hart Square had given us that it made sense to keep them on board to see the project through. I'm glad we did as they were a great mediator between us and the CRM supplier.”

Hart Square worked very closely with key HBF stakeholders throughout the project, managing them through the different stages to enable them to successfully migrate from the old CRM to the new system.

“Hart Square led us through data migration testing and worked with Bluelight to ensure that improvements to the system could be made before go-live,” explained Catherine Wilson. “They coordinated a number of third-parties to ensure necessary upgrades were carried out to our website and finance system to ensure they would work within the new CRM environment.”

A relatively short implementation timeline had been set, starting in March 2019 with a project go-live date in October. “It was a swift turnaround, but Hart Square helped us deliver the new CRM on time and slightly under budget, which was great,” said Catherine Wilson.

### Key benefits

- Expert guidance on replacing existing CRM
- Expertise on CRM vendors
- Management of ITT process and vendor selection
- Members will have better access to online services