

BHTABritish
Healthcare
Trades
Association

Hart Square enables BHTA's 'virtual' CRM selection

ITT created 'in lockdown' for British Healthcare Trades Association



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Dr Simon Festing
CEO, BHTA

With its vision of "Better health, better care, better value", the British Healthcare Trades Association (BHTA) is the longest standing healthcare association in the UK. Its members – almost 500 companies employing over 17,000 people – make or sell healthcare and assistive technology products that help people live more independently.

To better serve the needs of its members, BHTA decided to embark on a major new project to replace its current CRM (Customer Relationship Management) system and enable improved integration with its the website, finance system and email campaign system.

Key services

- Requirements gathering for new CRM, completed 'virtually'
- Invitations to Tender (ITT) for new CRM system, completed 'virtually'
- Vendor selection suggestions

Dr Simon Festing, BHTA's CEO, explained: "The existing CRM system was no longer supported by the supplier and there was an element of risk associated with running the business on an unsupported system. It was not delivering for many operational needs and was a hindrance to meeting our strategic goals."

New CRM system

BHTA recognised that there were many manual processes being carried out by staff at BHTA that could be brought into a new CRM system. "We were using a number of different systems which were not connected, which was causing inefficiencies across the organisation. The website was not integrated into the CRM, so we knew this had to be addressed to better serve members' needs in the future," added Dr Festing. "We also wanted to offer more personalised and tailored communications and interactions with members to help boost membership in certain areas."

Dr Festing joined as CEO of BHTA in March 2020 and wanted to immediately start the process of scoping, defining and selecting a new CRM solution that would best meet the organisation's requirements, while having clarity on the budget and resources required to deliver the project with the lowest risk.





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“I know from experience that these CRM projects can drag on forever and I knew I wanted to get things started straight away. Hart Square is well known for advising on CRM projects in the not-for-profit space - I like their degree of independence and I decided to bring them in for this project.”

Lockdown strikes

Hart Square’s task was to help BHTA assess its needs for the new CRM and create an Invitation to Tender (ITT) as the first phase of the project.” This had to be done fairly quickly,” said Dr Festing. “I had a Board meeting arranged for the end of April and needed to get Hart Square’s assessment in time for that. Unfortunately, what we didn’t foresee was the impact of the lockdown imposed by the government due to the Covid-19 crisis.”

The question facing BHTA and Hart Square was: “Can the project requirements gathering for the ITT continue despite the lockdown.” The answer was, “Yes”.

“I believe we were the first of Hart Square’s clients to undertake this kind of complex CRM project ‘virtually’, i.e. conduct all the requirements gathering online with all our key stakeholders. In fact, we had time for just one face-to-face meeting before the lockdown, then it all went virtual.”

Video conferencing

Requirements gathering online by Hart Square involved coordinating and inviting the right people from BHTA to discuss their needs and answer questions using video conferencing. “The whole process was run by Hart Square who, as well as talking to key members of staff, were also able to screen-share essential documentation. We had to ensure the necessary degree of prioritisation for this project and

allocate the teams’ time so that they could contribute effectively.”

The purpose of requirements gathering was to understand operational needs, challenge assumptions and agree the appropriate level of ambition for the future. These detailed requirements were captured and input into a comprehensive ITT document which could be sent out to preferred suppliers and enable a rapid, low-cost CRM selection process.

The ITT would also provide support for BHTA’s board approval in a timely manner, to include outline costs, resource requirements and a technology ‘roadmap’ to support the BHTA in its decision-making processes.

“Given the strategic and business-critical nature of the project and the budgets required it was vital that the optimum lowest-risk and best-value options were selected,” added Dr Festing.

Rapid delivery

What impressed Dr Festing and his team at BHTA was the rapid progress of the project. “Working with Hart Square we completed the first phase of the project, delivering the ITT within very tight deadlines, in about a month and a half,” he explained. “Under normal circumstances that would be regarded as fast - in lockdown, was very impressive.”

He added: “Personally I’m excited about the ‘new normal’ way of working. Hart Square demonstrated that we can go into any complex project like this virtually, and get it done.”

With plans afoot to send the ITT out to prospective vendors, Dr Festing and his team are looking forward to what might be achieved with the new CRM: “We’ll be able to integrate with various website functions, and establish a vendor portal which will allow membership renewals and better integration with our finance system. We’ll also be able to focus on retention of our members and enable them to do more online.”

On working with Hart Square, Dr Festing concluded: “Hart Square is a very professional organisation, they are very enthusiastic and get to the point very fast, which was very important for me in terms of the success of this project.”

Key benefits

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