

# case study

## The Brief

Founded in 1894, the Chartered Society of Physiotherapy (CSP) has over 50,000 members. With a long-term goal that more people should benefit from quality physiotherapy services, the CSP leads the development of the profession as well as providing trades union representation.

The Society had recognised for some time that it needed to improve the way it provided services, and particularly its understanding of members, in order to deliver information and products more closely suited to individual needs. The CSP's IT systems were inflexible and reinforced outdated ways of working. To address this issue the Society had decided to look at Contact Relationship Management (CRM), building their approach to member and stakeholder relations with new IT and business process improvements.

In an operating environment that was becoming ever more challenging, it was important that the CRM project should be delivered successfully, enabling the organisation to realise the potential benefits. Previous experience of large IT projects had not always been good, with significant time overruns often being a feature. With CRM, the Society took the view that it needed to establish the project properly and use it as an exemplar for how to do things well in the future.

E AND H were commissioned in 2012 to lead the initiation phase of the project, ensuring that it had a firm foundation and that everything needed for a successful delivery was in place.

Subsequently E AND H were commissioned to manage project delivery and, finally, to manage the follow-on phase and the transition from project to 'business as usual' in the organisation.

## Approach

E AND H's first task was to put in place an appropriate governance and decision-making structure for the project – CSP's management structure was functionally based whereas CRM would be completely cross-cutting.

In parallel, E AND H led a structured benefits-based approach to identifying and agreeing the objectives, desired outcomes and potential scope of what would be clearly a programme of work rather than just an IT project. This early work, the outcome from which was a 'benefits dependency map' led to the production of an options analysis and initial Programme Brief. This provided the framework for the CSP to reflect on the likely risks, costs and timescales, leading to a decision to phase the delivery, starting with a project to implement CRM alongside the CSP's current systems. The project, reflecting both the technical integration and culture changes needed, was named 'Adapt'.

*'CSP now has in place a model of good practice for successful project delivery'*



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# case study

## Approach cont.

Initiation work streams, led by CSP staff under E AND H guidance, were established to inform the content of the project. A key area, led by E AND H, was procurement of a CRM IT system. E AND H established a robust and structured process, incorporating identification of potential suppliers, development of tender documentation, evaluation of bids, a 'proof of concept' pilot with the preferred supplier, and pre-contract negotiations.

E AND H's structured approach and professional challenge throughout the initiation, together with the consistent support of the CSP's Finance Director and Project Sponsor, Stuart DeBoos, enabled the team to remain focused, ensured adherence to good practice and built confidence across the CSP of their ability to achieve a successful outcome.

At the end of the initiation phase, the CSP had a Microsoft Dynamics CRM supplier in place, an approved Project Initiation Document (PID), a delivery team, an agreed budget and detailed delivery plans. Plans included all the non-IT areas necessary for successful implementation, including a 'People Project' to address the culture and behavioural changes needed, development of a data management strategy, and a communication and engagement plan to ensure everyone was kept informed.

E AND H provided 'hands-on' management for the project delivery, utilising good practice approaches, including effective management of risks, issues and the inevitable changes that occurred. Overall, this very challenging and complex project, integrating three systems and touching almost every part of the organisation, was completed within budget and the new systems went 'live' within two weeks of the planned date.

## Benefits

Having data and information about contacts accessible to all staff, a more joined-up approach and an increased understanding of member needs, are helping CSP achieve its objectives for the profession.

CSP members now benefit from an improved website, with much more control over the information they receive, improved responses to enquiries and a more consistent approach to administration.

The Society is able to make use of a key asset – its data – to influence policy and decision-making as well as to improve services. The introduction of Dynamics CRM has also improved efficiency in many areas, improving communication and hand-offs between teams and reducing errors. Data related risks have significantly reduced.

Additionally, CSP now has in place a model of good practice for successful project delivery, which is being used in other projects, and a much improved capacity for cross-functional and collaborative approaches.



## Chartered Society of Physiotherapy – Implementing CRM



***“E AND H’s experience and expertise enabled us to scope out and plan our CRM project properly, establishing a robust approach that enabled us to deliver successfully, on time and within budget. It would have been a real challenge for the CSP to deliver such a large, complex and cross-functional project without their support.”***

**Stuart DeBoos, Finance Director and Project Sponsor, Chartered Society of Physiotherapy**

***“E AND H’s management and facilitation skills helped us to resolve some really challenging issues.”***