



## Introductory Sessions – Branch Town Hall

**15<sup>th</sup> December 2020**

# Project and Change Framework

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# Who we are

Hart Square

Our team

# Who are Hart Square?

HartSquare

*We are specialist CRM and technology consultants*

In a nutshell, we provide independent consultancy services to help you with your CRM and technology challenges and advise on how to make your systems work smarter for you.

Focusing purely on the non-profit sector, our clients include unions, professional membership bodies, trade associations, charities, voluntary organisations, healthcare and education bodies.

[www.hartsquare.co.uk](http://www.hartsquare.co.uk)

HartSquare

# Our Team



**Matt Dunphy**

**Senior Business  
Change Consultant**

Fórsa's Change  
Manager



**Chris Gilbert**

**Head of Technology  
and Services**

Fórsa's Project  
Sponsor



**Allen Reid**

**Director of Client  
Services**

Fórsa's Account  
Director



**Ian McGregor**

**Business Change  
Consultant**

Fórsa's dedicated  
Project Manager for  
Partner Selection

# Why we are here

Project mission and vision

The benefits the project will bring

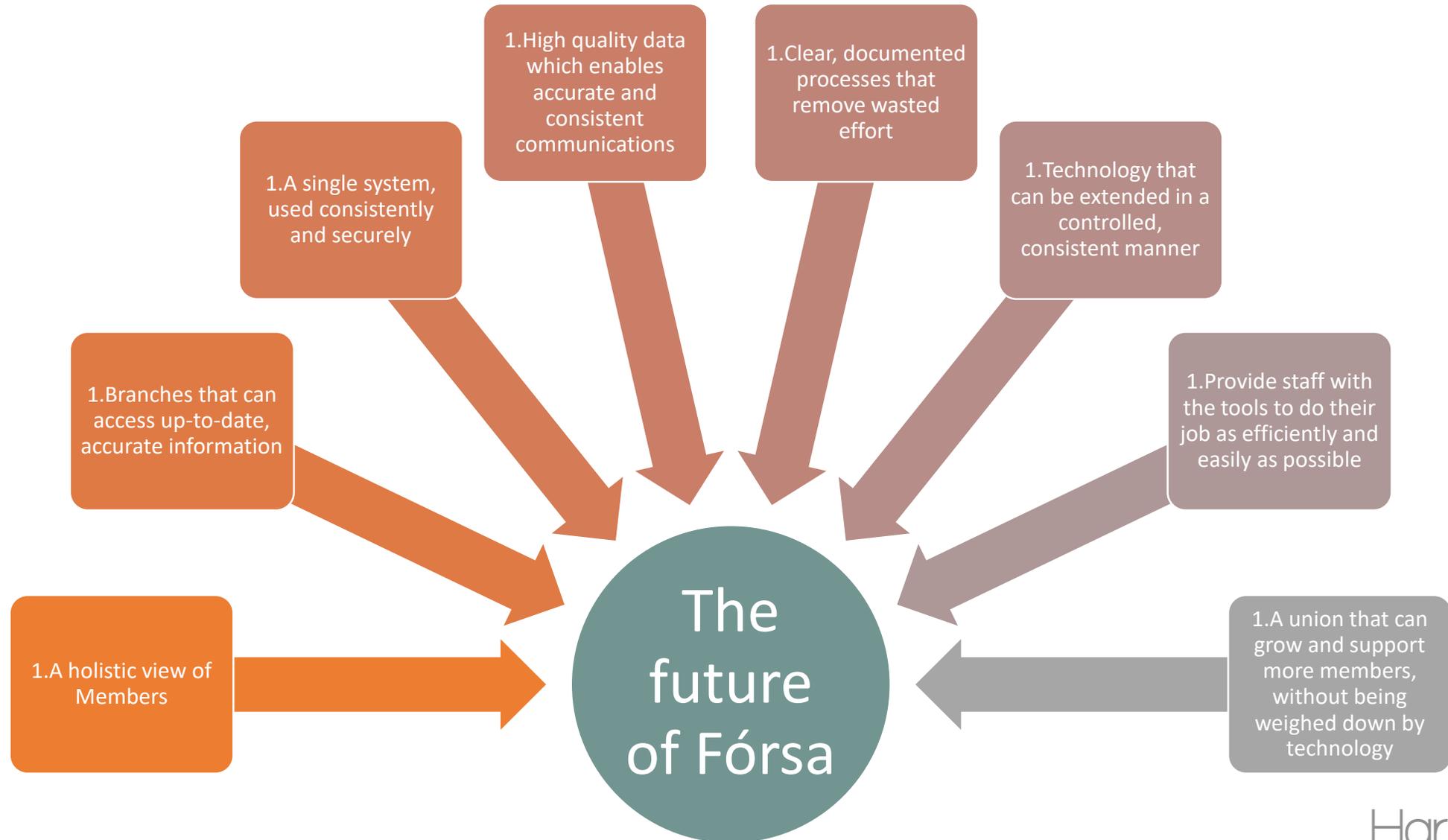
Our work with Fórsa to date

To help Fórsa select and implement a single, streamlined standardised membership system in 2021

This is in keeping with Fórsa's own strategic vision, to be -

- ⑩ A union where members feel valued
- ⑩ A union where activists feel empowered
- ⑩ A union where staff feel heard and involved

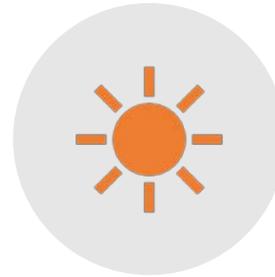
# The benefits



# Our work with Fórsa to date



Spring 2020 – The business case for change



Summer 2020 – Planning and initial preparations

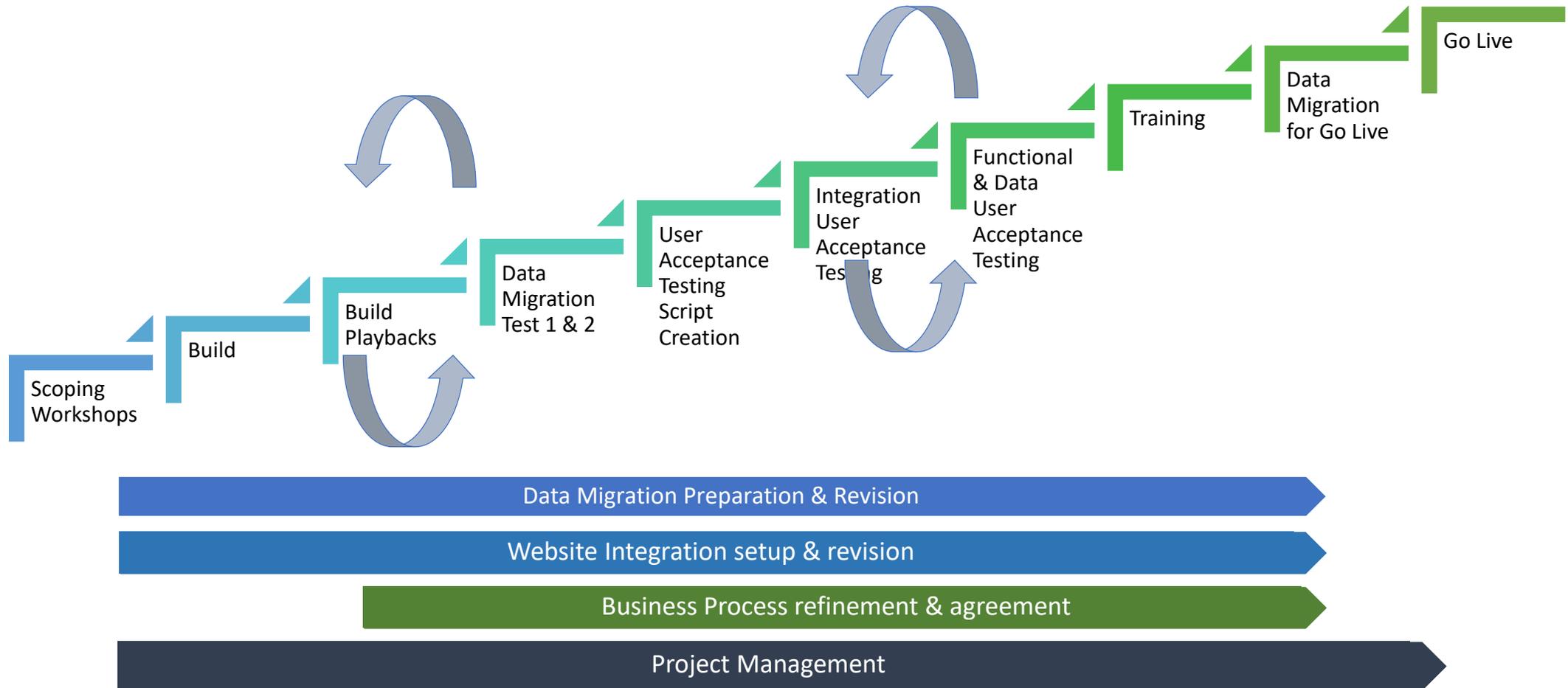


Autumn/Winter 2020 – More preparation and technology selection Project



Jan 2021 – The implementation project begins

# The nuts & bolts of implementations



By January, Fórsa will have selected a technology partner for the implementation, and we will have set the project up together so it can begin successfully

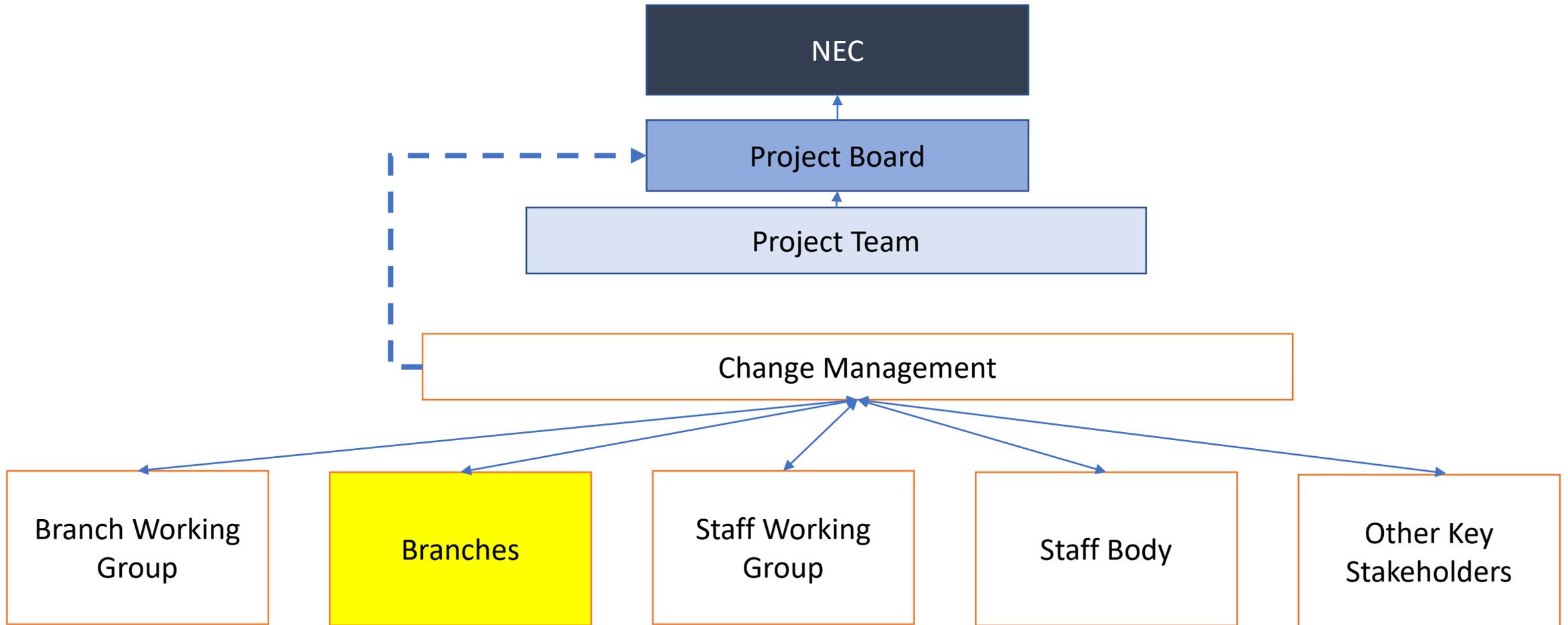
# Why you are here

The change network

Your role

Expected time required

# Fórsa's change network



# The role of the Fórsa Branch Working Group

To be –

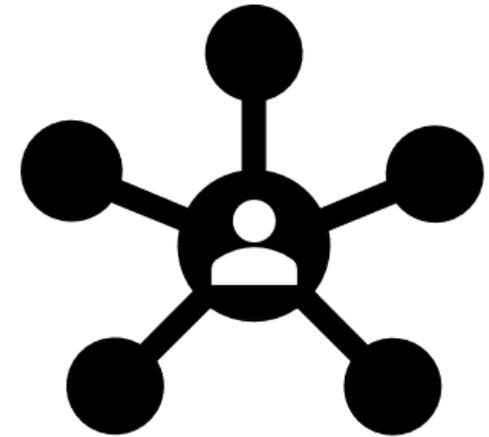
- ❖ Ambassadors for the project and the changes it will bring
- ❖ A point of information between the Project Team and Branches
- ❖ A participant in project activity at key stages
- ❖ A source of feedback on how the change is going, suggestions for improvement



## The role of Branches

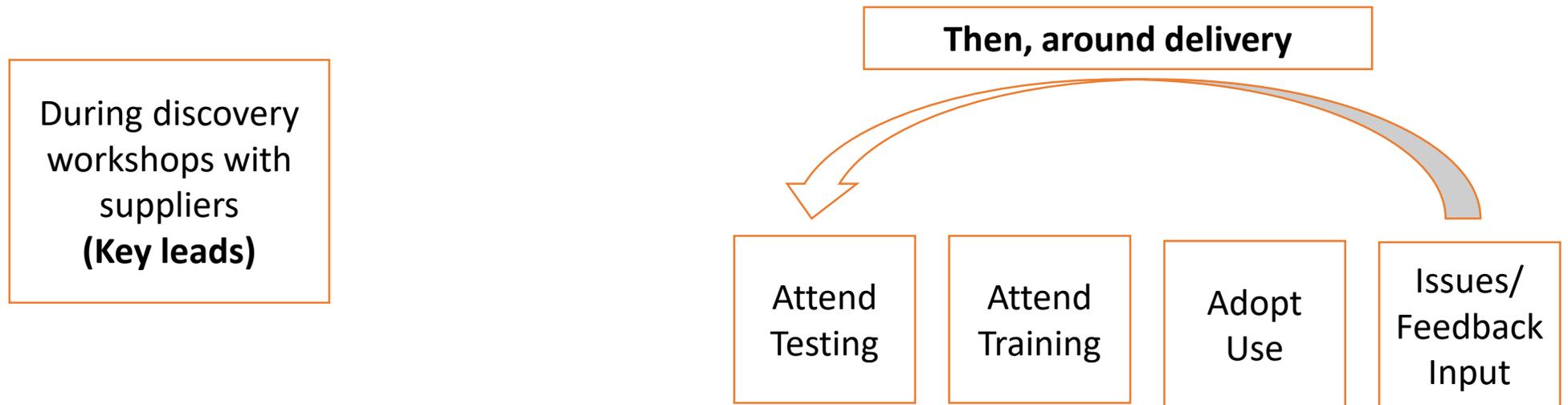
To be –

- ❖ Proactive in communication with the Working Group and Fórsa during the project
- ❖ Nominate participants in any required workshops, testing or training events
- ❖ Available to share key information required which helps the project's data leads
- ❖ Open in any feedback on concerns and suggestions about the changes next year



# Expected time required – All Branches

## Branch time required



Ongoing updates from champions and management, lighter involvement in process improvement and design

# What's ahead

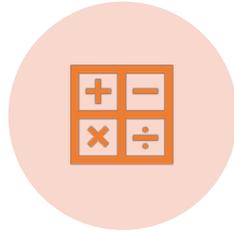
Understanding change

Project Headlines

# Common change barriers



Understanding of the change being undertaken



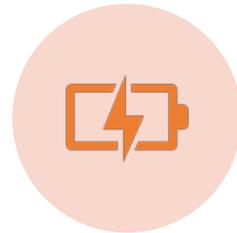
Negativity, resistance



A failure to fully involve those with a stake in the change



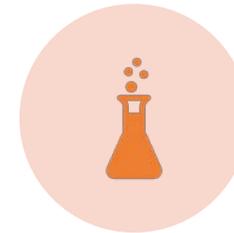
Poor, inadequate communication



Lack of resources and commitment to the change

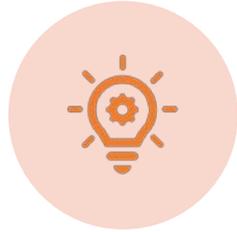


External pressures – e.g. changes in government, changes in priorities

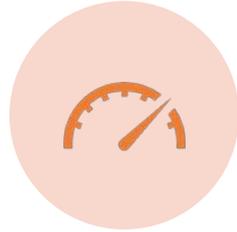


Negative past experiences of change

# Positive drivers for the Fórsa change



There is a desire for change



There is a sense of urgency about 2021



Technology change fits the wider Fórsa strategic plan



There is a drive for long term new ways of working



There has been firm approval and support for the business case



Change management is understood and has been planned



The Branches will be actively involved.

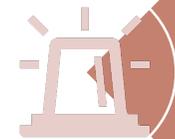
# Key messages



This is one of many key changes being made by Fórsa



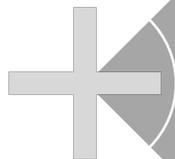
Lots of aspects of Fórsa working will not change



This is must do change in 2021



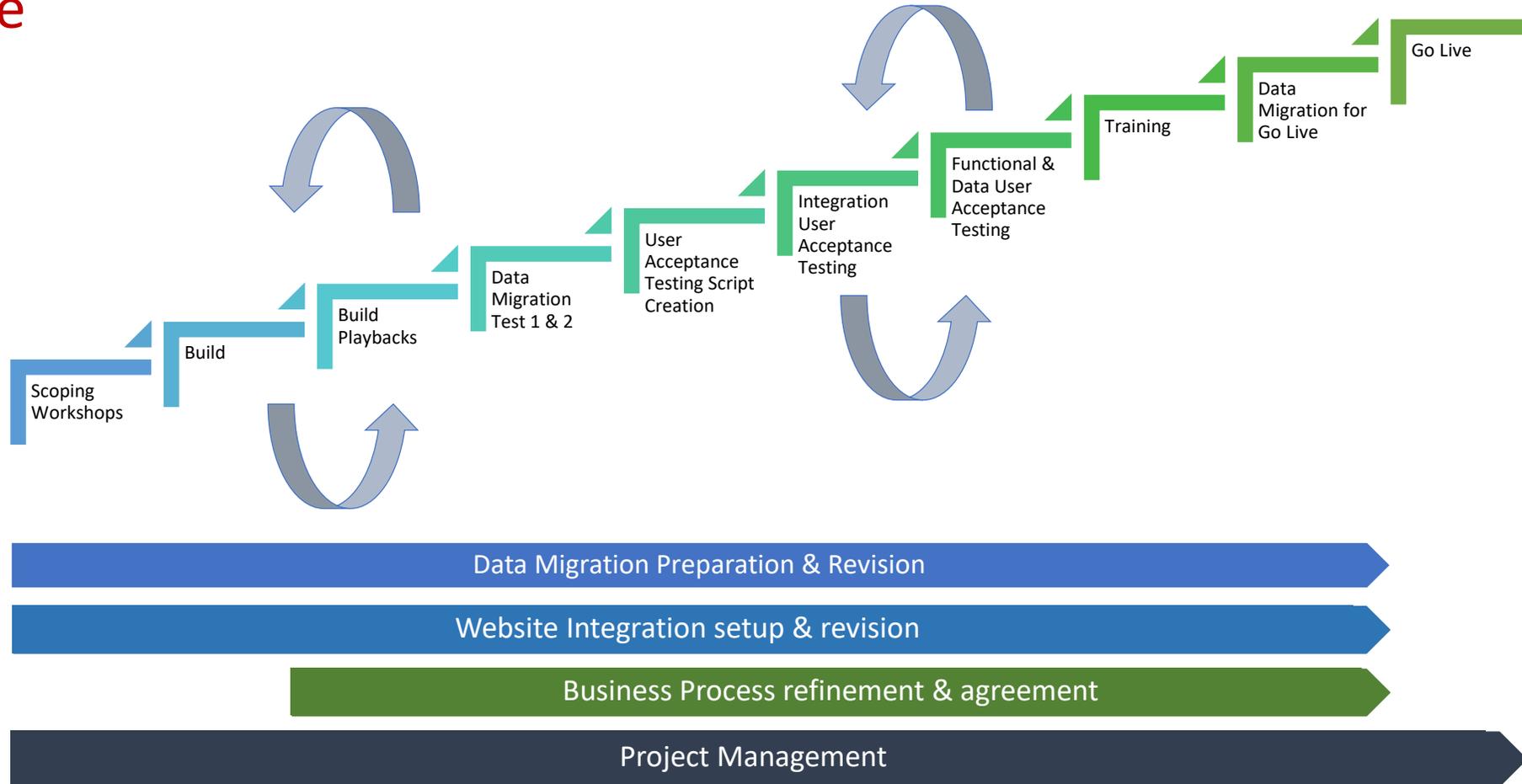
We need your help. The support and involvement of Branches is essential to the project success (particularly at design and testing phases)



New technology will be different, we will help with that change above all

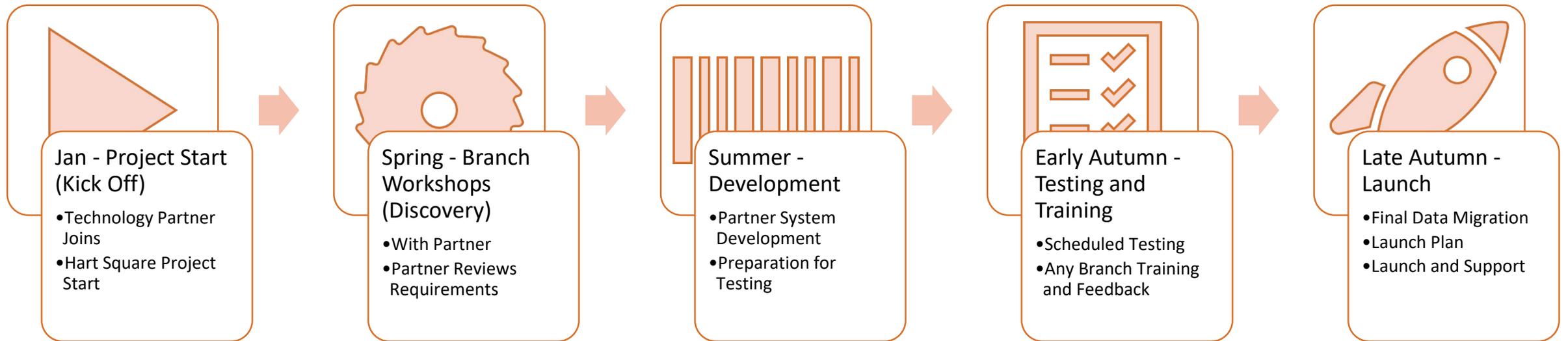
# The nuts & bolts of a system implementation

## The example



# Fórsa's system implementation

## Simple View



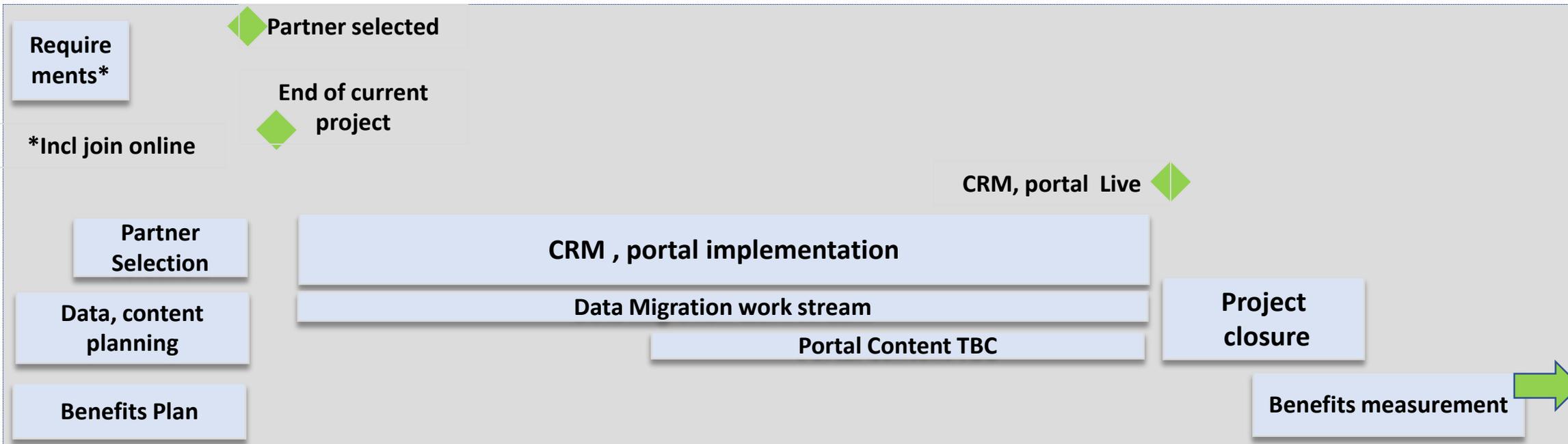
2020

2021

Sep > Oct > Nov > Dec > Jan > Feb > Mar > Apr > May > Jun > Jul > Aug > Sep > Oct > Nov > Dec

Entire programme of work

Main project, workstreams



Supportive work streams



# Questions and Next Steps

# Branch – Key Next Steps

1. Branch data survey

2. All – main meeting schedules

3. All – confirmation of technology partner

4. All - Project Kick Off update