

CRM in Not for Profit Organisations

Traditionally CRM or Customer Relationship Management Solutions have been seen as tools for commercial enterprise, aiming to increase sales and ultimately profit. Although the functionality in CRM packages undoubtedly supports the commercial activities of business it is worth exploring how the same features can be used to equally good effect in a Not For Profit (NFP) or Charity environment.

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CRM Systems in Not for Profit Organisations

Introduction

Traditionally CRM or Customer Relationship Management Solutions have been seen as tools for commercial enterprise, aiming to increase sales and ultimately profit. Although the functionality in CRM packages undoubtedly supports the commercial activities of business it is worth exploring how the same features can be used to equally good effect in a Not For Profit (NFP) or Charity environment.

At the heart of any CRM system lies the concept of managing contacts. In essence the need to manage contacts is the same for the NFP organisation, however contacts can take different forms. Be they donors, beneficiaries or members, the need to communicate with these stakeholders in an appropriate manner is critical.

This Whitepaper aims to highlight the functionality available in CRM packages and how to realise their benefits for the NFP sector.

This Whitepaper will be useful for any organisation where the drive for profit is not the only consideration including:

- Charities
- Membership Organisations & Trade Associations
- Government Bodies e.g. Sector Skills Councils
- Housing Associations
- Social Enterprises
- Governing Bodies for sports and similar activities

Consolidating Information

Organisations often suffer because information about stakeholders is held within different 'silos'. For example one employee will have a spreadsheet of contacts for a newsletter, another an Outlook directory of donors, a third an Access database of people who participated in activities. In addition financial information is held in a separate accounting system. All these silos add layers of complexity and duplication, with cross-referencing and updating only possible through exhaustive and often manual processes.

How to tell if this is relevant to your organisation:

- Does your organisation have more than one repository of information?
- If information needs changing can all updates be done in one place?
- Do some people in your organisation have access to 'better' information than others?

How CRM would help:

Put simply a CRM solution offers a single location for all of your information, with duplication becoming a thing of the past. Information you already have, can be imported from existing silos, a standard activity within a typical CRM implementation.

This new single view of information will enable easy to-use information sharing across your organisation. In some instances sharing information may not be appropriate, perhaps an organisation with beneficiaries may not wish for all of its employees to have access to potentially confidential information. A CRM system will offer you extensive and flexible security that gives the benefits of operating within one system while restricting access to data as appropriate.

Consolidating Information – The Key Benefits:

- Access to appropriate information for all
- Save Time – No 'hunting' for information
- Save Time – No duplicating effort to add or amend data

Managing Communications

Your organisation needs to communicate with a wide range of people. In a charity this could include beneficiaries, donors and volunteers. In sporting associations it's all about competition organisers, competitors and corporate sponsors. It is vital that communication to these different stakeholders is both timely and appropriate. Whether this is via e-mail, letter, telephone or a combination of all these methods. Further, in order to communicate effectively your employees need to be able to see what has already been said, by whom and when. Improving operational efficiency is also of importance, wherever possible your organisation should be able to automate the production and sending of communications.

How to tell if this is relevant to your organisation:

- Do your stakeholders always receive every communication that's relevant to them?
- Can you easily identify every contact that falls into a particular category? e.g. all donors in the West Midlands.
- Can you see a complete history of the communication made to any stakeholder by any member of your organisation?

How CRM Would Help:

A good CRM system will manage, automate and record all of the communications. CRM solutions are extremely flexible in allowing you to better store and structure your data. Enabling you to identify and 'group' individuals or organisations such that they receive relevant communications. Bringing together information silos in a structured manner, offers flexibility in communicating with the right people in the appropriate manner.

A CRM solution should also automate and streamline your communication activity. On a simple level this will include fast and simple to use mail-merge facilities and integration to your telephone system. On a more sophisticated level workflows can be set up to carry out your communication tasks for you. For example when an interested party enters information on your website, they can automatically receive an e-mail welcoming them, with the CRM system setting an alert for a follow up call by a member of your staff.

Many modern CRM solutions also offer integrated HTML e-mailing facilities, enabling the sending of engaging newsletters personalised and with trackable links so that you can see who opened the newsletters and what was of interest to them.

CRM solutions will also record each and every communication your organisation has with every contact. At a glance it is possible to see all communications with an individual and judge whether you are communicating with them appropriately.

Managing Communications – The Key Benefits

- Communicate more effectively through targeting communications
- Save time and effort through automation
- Have visibility with complete communications history

Improving Results

In a commercial enterprise, results are typically equated with sales, within NFP organisation results may be equated to something else, for example donations received or membership numbers. The processes that your organisation employs to achieve these results, however, has much in common with those of a for profit based organisation. For example if someone has donated to you once how can they be encouraged to donate more regularly? This is all about customer retention. If you have an additional service you could provide to a member, this may be equated to cross-selling. In both examples to achieve the results you require, you need to have relevant information to hand and processes in place to manage the activities.

In the same way that a business sets and measures targets for selling, NFP organisations set targets for desired outcomes. Without the correct measurement tools it will be very difficult to see if you are meeting these targets and what activities are helping you most to achieve them.

How to tell if this is relevant to your organisation:

- Can you see within minutes if your organisation is meeting targets?
- Can you set and monitor targets for individuals in your organisation
- Can you easily select stakeholders and react to them based on previous activity?
- Can you map results to marketing activity?
- Do you know what's worked and what hasn't

How CRM Would Help

One of the most important things that CRM can offer is information that brings you closer to your stakeholders. For example, if an individual has signed up for a newsletter or participated in an event your CRM system will make you aware of this participation, so that you can contact them regarding making regular donations. Further you can identify and select those who had attended a seminar and invite them to buy related services from you, making the most from every contact and their touch points with your organisation. This same functionality can also help your organisation identify and approach beneficiaries who may be in need of a service that you have available.

A CRM solution will also mean that you can determine how your organisation is performing against the targets you have set. Pipeline management functionality can monitor and report upon targets for the whole organisation, the teams within it, or even down to individual performance. The pipeline functionality will also allow you to forecast contributions, particularly important for a charity where tomorrow's good works are dependent on the funds you can make available.

Implementing and managing marketing campaigns is key to achieving your targets. It can be difficult to determine what works effectively and what doesn't. A good CRM system will offer you functionality to measure both the effectiveness of campaigns, and the individual activities within campaigns. For example in a campaign to raise awareness of an issue you would be able to link each response from your target audience to a particular activity, say an e-mail, letter or telephone call. Reporting tools within the CRM system can then offer intelligence on which method was most effective and which produced the best results at the lowest cost.

Improving Results – The Key Benefits

- Get better results through knowing your stakeholder better
- Always know if your organisation and the individuals within it are on target.
- Forecast results to help you decide on the future.
- Get more for marketing money by establishing the most effective methods.

Conclusion

Hopefully this whitepaper has given you a flavour of the benefits CRM can provide to your organisation. In writing it we have attempted to touch upon the issues that most NFP organisations have in common. Of course each organisation operates in an individual way and there will be areas of functionality that CRM offers that would be of relevance to your organisation but have not been covered here.

That CRM is at least as relevant to NFP Organisations as for commercial businesses should now be evident. At the end of this document is a little information about the CRM products and services that we provide and we would of course be very happy to talk to you about these and show them to you.

A Quick Word - CRM and the Current Economic Climate

"We are at an extraordinary period of history. It is a time of crisis and unprecedented uncertainty, even fear; but it is also a time of opportunity for change and profound transformation"

Klaus Schwab, Chairman, World Economic Forum 2009

The current Global Economic Downturn is undoubtedly affecting business and NFP organisations alike. While the economists are issuing daily and conflicting reports on how deep it will be and how long it will last, the natural reaction can be to pull up the drawbridge and put all plans on hold. For many this might not look like the right time to be investing in a CRM system. However charities, NFP organisations and multi-national companies **all** have to look to their survival and this means making sure that your organisation is ahead of the competition. With costs to be cut and efficiencies found, organisations are turning to business software and CRM applications in particular to drive

through the kind of operational improvements needed to survive and accelerate out of the downturn. By optimising revenue generating activities at a lower cost to your organisation, CRM is uniquely positioned to assist you during the challenging time ahead.

About Elite

As a Sage Business Partner for over a decade Elite Business Services is dedicated to bringing organisations the software they really need to operate more effectively and meet their targets. We are not only a software reseller, we offer our customers a wide range of services to ensure that they have a solution that fully meets their needs and offers them the best possible ownership experience.

About Sage CRM Products

Elite are pleased to offer two products from the Sage CRM offering ACT! and Sage CRM.

Sage 50 ACT!

ACT is the number 1 selling contact management solution that continues to dominate the market by bringing the latest, most intuitive technology to organisations across the globe and to its 2.8 million users.

ACT! will enhance operational efficiency by allowing you to work smarter and faster so that you have time to focus your attention on the core activities of your organisation. The important knowledge ACT! provides will help you to make decisions that will support and grow your organisation.

Key ACT! Capabilities and Benefits include:

- Keep all your important relationship details in one place for quick, organised access to the information you need.
- Manage interactions at the organisation or person level for a complete view of all the relationships you have with an organisation
- Find the exact relationship details you need instantly using powerful search capabilities in an easy to use format.
- Monitor daily responsibilities for you and your team by scheduling and tracking activities
- Communicate consistently and successfully so you are always top of mind with your stakeholders
- Gain insight into the performance of your organisation using dashboards and reports for more informed decision making.
- Integrate ACT! with common applications including Microsoft Office, Lotus Notes and Accounting Solutions

Sage CRM

Sage CRM is an internet based CRM solution designed to bring the real benefits of CRM to your organisation. It's designed to be easy to use and deploy, affordable and packed with useful features.

Sage CRM uses industry leading technology to encourage better practice and efficient information exchange throughout your organisation. With Sage CRM, you can quickly analyse, manage and synchronise sales, marketing and customer care activities across all points of contact. Key benefits Sage CRM can bring to your organisation:

- Ultimate flexibility, Sage CRM can readily be developed to work in the way your organisation works.
- Internet based solution for better access from the home, office or on the road, by P.C. Laptop or Mobile Phone.
- Extensive workflow capabilities to automate activities
- Full management of marketing campaigns to monitor spend and success
- Sophisticated levels of security, only those with relevant access permissions will ever see confidential information
- Part of the Sage 200 suite Sage CRM will integrate fully with Sage 200 accounts and can also be integrated with other accounting and business management solutions
- Advanced and user friendly reporting tools to give you better intelligence
- Full Outlook integration
- Modern look and feel that's easy to learn and intuitive

For More Information

Please Contact:

Elite Business Services
55 Barkers Butts Lane
Coventry
CV6 1DU
T: 0800 731 3490
E: info@elitebusinessservices.co.uk
W: www.elitebusinessservices.co.uk