Tailored CRM Increases Productivity and Enhanced Client Experience

Client :   Sheffield Royal Society for the Blind
Vertical Market : Not for Profit, Third Sector
Requirement :   To effectively manage sensitive client communications. To consolidate information in order to offer relevant services to their clients and track trends to generate more funding for their clients.
Solution: GoldMine Premium Edition

Benefits to Sheffield Royal Society for the Blind of GoldMine delivered by Caltech :

- A single, common system that consolidates information and IT systems
- Management have real-time visibility of what is happening in the organisation
- Created a solution that was customized to fit its organisation
- Management buy-in has aided user adoption, which has resulted in greater efficiencies and enhanced client experience
- More effective reporting helps support funding bids for services
- A solution that has increased productivity by improving data quality

"The biggest benefit of GoldMine is its flexibility. You don't have to have great computer skills to use it and it works." Steve Hambleton, General Manager

Background

Sheffield Royal Society for the Blind (SRSB) is the primary independent provider of services to local sight impaired people, even those not yet registered as blind or partially sighted. Founded in 1860, SRSB is based at a newly built centre in Mappin Street, Sheffield. This completely independent charity is funded entirely from local sources, donations and legacies. Services are provided by a dedicated and highly motivated team of paid staff and volunteers and most of their services are provided at no charge to the client.

Organisational Challenges

SRSB was using a legacy system that was no longer giving them the capability it required. SRSB wanted to manage clients and the communication that it had with its clients, effectively. It was important that the functionality of a new CRM system would have the capability to offer the best information to its clients.

Proposed Solution

SRSB contacted Caltech, one of the UK's leading providers of CRM systems.

Caltech proposed GoldMine as the solution that would meet SRSB's needs as the solution can be tailored to do what SRSB wanted to achieve, and would also give further capability beyond managing clients. GoldMine is a powerful CRM solution which SRSB identified it would use to track numerous contacts such as suppliers, volunteers and donors and to record details of the visually impaired service users.

"One of the influencing factors in selecting GoldMine was its flexibility and how SRSB could customize it to suit their own individual requirements." Says Hambleton

Caltech spent time with SRSB to find out what they required, designed the first implementation and then worked with SRSB to train and ensure that SRSB were getting the expected benefits. All information from the legacy system was imported by Caltech into GoldMine.

GoldMine Capability

Hambleton, states,

"When we started to use GoldMine we recognized that there was a lot more to gain from it, so we added supporters and volunteers to our data capture. This has given SRSB the capability to record important vital information, such as the hours that the volunteers work for SRSB. This information is used in the annual report and estimated costs associated of how much this activity would have cost if they have been paid."

"Using CRM we are able to identify trends within our client base and use this information to generate more support or funding." Steve Hambleton, Sheffield Royal Society for the Blind

Hambleton continues,

"We hold lots of data in GoldMine now about our volunteers, such as references, CRB checks and the way that a volunteer may prefer to work; or the work they like to carry out. This is incredibly useful to retain volunteers."

"GoldMine holds information about how many times a client comes into the centre, the activities that they participate in, and how often they visit us or use the resources. This is important for SRSB to ensure that we are offering clients a great service, meeting several contracts SRSB have with the local authority, and offering more facilities. We also have the capability to engage with clients who may not have been to the centre for a while."

Easy Communication

SRSB use GoldMine to email relevant information to clients.

Fundraising and Marketing Manager, Coggin agrees,

"The information is easily segmented and we are able to send the relevant messages to those clients. This is important to demonstrate we care. Each email is sent to a personalised name which really does make a difference to our clients."

"GoldMine allows SRSB to send out over 3,000 newsletters, to our clients' specification, quickly and simply." Sue Coggin, Sheffield Royal Society for the Blind

Secure Data

SRSB opted for terminal services rather than frequent synchronisation for remote users, to ensure that secure data wasn't compromised. Terminal services is a secure access for remote users which security validates each user as they access information. This is a secure way to access GoldMine without holding sensitive data on lap tops.

Hambleton adds,

"The office is as paperless as we can make it. We don't have to search for bits of paper or filing that we used several months ago. All documents are scanned or saved in word. The documents are linked to the relevant clients' records and if we want to find information it is easily found."

"Our CRM solution gives us usability. It is accessible and user friendly for volunteers with just a little training." Sue Coggin, Fundraising and Marketing Manager

What's next?

Tapi Link is being installed during November 2009, this will present callers' details on screen when a client or volunteer calls into SRSB. If that client has a particular person they like to liaise with they can, SRSB will immediately see if they have any issues or are waiting for information, and when they last came to the centre. This will really empower SRSB to quickly help clients and give them the best speed of service.

About Caltech

Established in 1999, Caltech has become one of the UK's leading suppliers and implementers of Customer Relationship Management software (CRM). Based near Leeds, it works with clients to manage their customer contact strategies, operational processes and daily business functions in order to maintain audience loyalty, increase awareness and ultimately drive sales. This is achieved by recommending, implementing, developing and integrating a variety of cutting edge database technologies that are most suited to the brief in hand, including; Microsoft Dynamics CRM, GoldMine, HEAT and ACT! By Sage.

Caltech is able to tailor every system to the specific needs of its clients whether it is an SME or large blue chip organisation and regardless of their IT capability. Long term and successful integration is when CRM works best so Caltech, unlike many of its competitors, is not just a supplier – the team works on an ongoing basis with every client to develop specific systems so they work hand in hand with existing software, from accountants systems to telephony packages, which can be adapted to meet ever changing needs.

Current Caltech clients include; Simply Biz, TNT, the NHS Information Centre and Hays Travel. Customer service is at the very heart of everything Caltech does – it sees clients as partners and is committed to meeting and exceeding expectations in the most effective way possible, leaving a real sense of confidence.

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