## St Helen's
### An exceptional school

### About St Helen's School

- Member of The Girls' Schools Association
- Based in Northwood, North West London
- Established in 1899
- Student body aged 3-18
- More than 1,100 students

### Goals

- Manage network of alumnae and parents (relationship management)
- Enable development of events and activities
- Allow for long-term growth and development

### Approach

- Access thankQ CRM offers robust database structure
- Accurately store new and disorganised data
- Ability to segment database for effective targeting
- Fluid approach under constant development

### Results

- Robust and reliable database
- Development Office given autonomy and control
- Improvements in relationship management, events and activities
- Excellent support and after sales
- Scope to support future growth and long-term development

# St Helen's School invests in development

St Helen's School is a leading independent girls' day school and member of The Girls' Schools Association. The school was established in 1899 and today educates students between the ages of 3 and 18. In order to support its ongoing and long-term development strategy, St Helen's School needed a way to manage its relationships with alumnae and parents. The school's Development Office was new and clearly had a lot of work to do.

## The Challenge

St Helen's School identified the need for a solution that could add formal and reliable structure to the Development Office's work. This would allow for more effective relationship building and management, support events and activities and aid development in the longer term of future activities such as fundraising. The existing solution was to use an Excel spreadsheet, which did not support the increasingly complex nature of the task at hand. The new solution would need to be highly functional, offer ease of access and use, and be compliant with all data protection and other legislation.

The size and scope of the school's network, as well as the Development Office team's work, meant that many informal meetings and introductions took place. "I meet people all the time," Zoe Baines, Development Director at St Helens School, says, "and it's difficult to retain all that information and keep relationships quite personal." The solution would need to be equipped to store this sometimes scattered data quickly and accurately for the future use of Zoe and her colleagues.

Events and activities have played a crucial role in the school's development. The team at St Helen's School knew that in order for their efforts to have maximum impact, they would need to be able to segment contacts in highly specific ways so that communications and events planning could target the right person for the right occasion.

The long-term needs of the school were also of paramount importance. Though the development strategy had been clearly defined, it was impossible to foresee the sort of requirements that may arise in the medium to long term, and thus it would be vital that the solution offered adaptability and flexibility in the face of future uncertainty. The school's new software would need to have the capacity to develop as the school develops.

## The Solution

St Helen's School decided to invest in Access thankQ CRM, from Access Group. This software, specifically designed for the not-for-profit (NFP) sector, offered the Development Office at St Helen's School a clear solution to the challenges faced, as it:

The Development Office now has the autonomy to manipulate and extract the sort of information they need, in a highly organised and dependable way.

- provided a robust and powerful database that could handle the complexity of the school's network, offering serious flexibility and customisability without sacrificing ease of access or use.
- had the capability to immediately and accurately store new data and information, of the sort that may arise during an unplanned phone call or informal meeting.
- had the sophistication to enable segmentation of individual stakeholders based on numerous criteria, allowing Zoe and her team to plan and execute more effective events and activities by targeting the right people.
- was under constant development by Access Group, with the needs of the NFP and schools sectors in mind; it would be capable of growing and developing in tune with St Helen's School itself.

## The Result

Thanks to Access thankQ CRM, the school now had the means to design and populate a database of its key stakeholders, particularly alumnae and parents. The result for Zoe has been a total transformation of how St Helen's School and its Development Office can manage its relationships and ultimately develop for the future.

The software has placed the power in the hands of Zoe and her team: "My 'wow' moment was how versatile that system is," she says, "It was then that I realised that whatever we needed the system to do, it would be flexible enough that we could create it ourselves." The Development Office now has the autonomy to manipulate and extract the sort of information they need, in a highly organised and dependable way.

In addition, Zoe has come to appreciate the emphasis that Access Group puts on its after sales service. Day to day, this is invaluable as Zoe knows that she can depend on prompt and effective support whenever she may need it. This is even more vital when considering the long-term and strategic nature of her work at the Development Office: "Access are making sure that they are listening to the school sector, and constantly looking at ways to make the system more time effective and user friendly for us," concludes Zoe.

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**About Access**

Access Group is an established software solutions provider to the not-for-profit sector. We help organisations improve performance, increase cost efficiency, and make the most of their funds by delivering integrated organisation-wide solutions. Solutions that enable you to fully manage your CRM, membership and fundraising, run your finances, projects and documentation, as well as streamline your entire HR and talent management process.

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