



Not For Profit Organisation

Framework Housing Association

is a registered charity that 'opens doors to homeless and vulnerable people' to slightly misquote the strapline in their logo. Based in Nottingham, they help homeless people, prevent others from becoming homeless and support people to live independently.

Existing CRM Pitfalls:

- Outdated
 - Difficult to access remotely
 - User un-friendly
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New System Requirements:

- Cloud-hosted
 - Easy to use
 - Third party app integration
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How a charity eliminated fundraising processing mistakes with new NFP CRM

To help them achieve their goals, Framework has recently chosen to implement The Access Group's **thankQ CRM** system. The Constituent Relationship Management software designed specifically for not-for-profit organisations will be used by Framework to manage their relationships with supporters.

Problem

Framework's previous CRM system had been in place, stored on internal servers, for over a decade. It was difficult to access from the organisation's different sites, was outdated and not very user-friendly, particularly for those who only needed to use the system once or twice a day. Not only that, the system relied on manually inputting the large amount of Direct Debit payments and regular donations that Framework receive. In short, it was simply no longer fit for purpose.

Research

The specification for the new system was written by Alex Phillips, Team Planning & Monitoring Co-ordinator for Fundraising & Communications at Framework. He first worked with Framework's IT department to compile a list of what they each wanted from a new system.

Perhaps their most pivotal requirement was that the new system had to be cloud-based. Hosting it online rather than on internal servers would allow staff to access it more easily, wherever they may be, and would save the IT department having to frequently upload new versions of the software.

From here, Alex visited the **Institute of Fundraising's (IoF)** website and researched what systems some of Framework's competitors were using in order for him to gather a list of potential suppliers. It was on the IoF's website that Alex first became aware of The Access Group, and thankQ CRM.

Alex then invited selected suppliers, including their existing system's supplier, to tender. The Access Group were, of course, one of several to respond.

thankQ Benefits:

- Eliminates payment entry errors
 - Minimal IT maintenance
 - Log on easily, anywhere
 - Safe from hardware attacks
 - Send bulk emails, save on post!
 - Manage communication consents
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Decision

After much deliberation, the decision to award the contract to thankQ came down to the fact that it most closely matched Framework's requirements, whilst also offering a range of added benefits:

- thankQ is available as a cloud-based system meaning even the recent bad weather would be no excuse for staff not to log on as it is as easy at home as in the office.
- Its seamless integration with external applications such as JustGiving and social media, which Framework was using separately before, aided Access' cause somewhat.
- Framework was impressed with thankQ's familiarity with Microsoft Word that makes the system highly intuitive from the beginning.
- The integration with MailChimp would help them in their aim to focus more on digital communications and save huge amounts of money on post in the process!
- Regular payments could be processed in batches that would save time and make spotting mistakes much easier.

Implementation

Framework looked to implement thankQ in March 2017 and were fully up and running by June. Alex had spent some time prior to the implementation to assess what data they had, export it out of their system and manipulate it to make the transition smoother but, as is often the case, there was a little more to do afterwards.

And with one eye on the impending introduction of GDPR, Alex and Framework saw an opportunity to create a new database that was not only ready to import into thankQ but that would be compliant from the off.

Since going live, however, Alex has been impressed with how little maintenance thankQ requires.

“ *The IT Department had VERY little to do with it, which pleased them immensely!* ”

“ *As you work in batches, you always know what the right number of payments should be. It is very difficult to make a mistake.* ”

Alex Phillips,
Team Planning & Monitoring Co-ordinator
for Fundraising & Communications
at Framework

Training

Alex comments that the training provided by Access “was great” and that Framework invested in making sure all members of the team, including volunteers, were involved from the outset rather than expecting a few individuals to pass on their knowledge.

Despite its user-friendliness, thankQ inevitably does things differently to Framework’s previous system thus ensuring that training was required but this was expected.

Asked how the IT team got involved with the implementation and how they found it Alex responded, “IT had VERY little to do with it, which pleased them immensely!”

Use

Approaching the first anniversary of the go-live, the team have had time to assess the move to thankQ and, we are pleased to say, have all found it to be much more user friendly:

- *“Adding a new contact used to take 10 minutes or so but can now be done in one minute or less”*
- *“Everything I need is there in front of me, including permissions. It’s straight forward”*
- *“thankQ has significantly improved data entry speed, freeing up staff’s time to do other things”*

For Alex, though, the biggest benefit is to his own workload, “Previously, a lot of my time would be spent picking up mistakes that staff or volunteers had unknowingly made when helping with the financial processing, in order to balance the books. The old system made it hard to check if you had made a mistake and so were often only picked up, painstakingly, at the end of the month. Hundreds of payments would have to be checked to find a single error. thankQ prevents that. As you work in batches, you always know what the right number of payments should be. It is very difficult to make a mistake. Very simple things like that make life a lot easier!”

“ *thankQ does not have a short shelf life, it's constantly improving.* **”**

Alex Phillips,
Team Planning & Monitoring Co-ordinator
for Fundraising & Communications
at Framework

In December, a real justification of using cloud-based software was demonstrated when the organisation's servers were hit with a malware attack. The finance department, alone, lost two months' worth of data, across different sites, and it took them a considerable amount of time to recover. Being hosted in the cloud, Framework's fundraising was not impacted whatsoever.

“This really drove home the advantage of having a cloud based system, particularly as it hit during the busiest time of year for us” states Alex.

With the GDPR deadline now just a few weeks away, Framework are way ahead of the curve. They were not scared to destroy incomplete contact data or where they could not prove they had consent. In fact, it encouraged them to go back out to their database and reconnect with their supporters, obtaining new information, email addresses and permissions. They collected data via paper forms and on their website, admittedly losing some donors but maintaining the high value ones. They were even complimented on their approach to gathering consent.

Future

Framework's plan is to continue a move towards a more digital approach, starting with a new website in 2019, and thankQ will play an integral part in this.

Alex would like to build on the integration with thankQ, adding online payments to the new website and sees lots of opportunities going forward as thankQ “does not have a short shelf life, it's constantly improving.”



About The Access Group:

The Access Group is a leading provider of integrated business management software. Our portfolio spans ERP, finance, HR, Payroll, Recruitment, warehousing, business intelligence, professional service automation and manufacturing.

More than 10,000 UK businesses and not-for-profit organisations use products and services provided by Access to improve their performance, profitability and drive growth.

The Access Group is one of the fastest growing UK software developers. Our on-going commitment to excellence, customers and employees, has also placed us among the UK's top employers.

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