

Not for profit manages fundraising and bequests programs with Sage CRM



Customer

The Kidney Support Network (KSN)

Industry

Non-profit

Location

Australia

Solution

Sage CRM

The Kidney Support Network (KSN) is a Queensland-based organisation that provides a range of quality support services for people and families affected by chronic kidney disease. Its activities include kidney disease education, information and resources, dialysis transport, accommodation for transplant patients and their families, a support line and friendly calls, support groups, medical equipment, newsletters and op shops.

The not-for-profit organisation has an 800-strong membership and a committed state-wide network of 250 volunteers. To carry out its programs, KSN relies heavily on the money raised through its corporate sponsorships, donations and other fundraising activities.

Earlier this year, in an effort to bring greater focus to its fundraising, KSN employed 12-year fundraising veteran, Sharna Aquilina, to take on the role of Bequests Officer.

Member information is critical

When Aquilina arrived at KSN one of the first things she realised was that the organisation's member database was sadly inadequate for the needs of a professionally managed bequest program. If she was to contact members and supporters, and encourage them to provide financial assistance to KSN, she would need to be able to track relationships by, for example, noting any programs that the potential donor may be involved in. She would need to monitor how when and why any interactions occur, plus the outcomes of those interactions. In short, she required a good customer relationship management (CRM) system.

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Sharna Aquilina
Bequests Officer
The Kidney Support Network (KSN)

Challenge

KSN's current member database could not fulfil the requirements of the organisation. They needed to be able to track and monitor relationships and interactions with potential donors.

Solution

Sage CRM gave KSN the easily customisable, cost effective solution that they required. The intuitive solution linked with Outlook so they are able to send emails straight from the software, automating a lot of business critical activity.

Results

With Sage CRM, KSN are able to collate ten times more information about members than they had before, allowing them to immediately start a relationship with members. Utilising the invaluable information contained within sage CRM, Staff can easily develop targeted communications and campaigns.

‘It’s only been four months since I started using Sage CRM. Even though the list of things I want to achieve keeps evolving, everything that I want to do, the software has the capacity to do it. I’m so happy with this system.’

Sharna Aquilina
Bequests Officer
The Kidney Support Network (KSN)

“I knew what we needed to get out of the system so I went on the search for a suitable database. I briefly considered a CRM that is used by lots of charities, but I knew we didn’t have lots of money and this particular software required lots of support,” Aquilina explains.

Aquilina carried out a couple of trials with different software packages but none quite suited KSN’s needs. “All of them looked really good but I had to also judge our capabilities. Cost and complexity were issues,” she notes.

The answer is in the cloud

Aquilina mentioned her research to a community organisation associated with KSN, where a colleague’s recommendation led her to Act Today, an Australian specialist in CRM solutions. After discussing KSN’s requirements, the company suggested she consider Sage CRM, a cloud-based solution that was fast to deploy, intuitive to use and extremely price-competitive compared to many alternative on-premise solutions.

The prospect of relying on software hosted by another organisation didn’t faze Aquilina in the least. “We have few IT capabilities in-house and rely on a volunteer for help. Therefore, cloud software appealed because if there ever was a problem with the system, it would be someone else who had to deal with it. Initially, security was my biggest concern but once I had been reassured on this point, I was fine with the idea.

“When I took a good look at Sage, it had everything I needed like the ability to customise the software, it was really intuitive, it linked with Outlook so we could send emails straight from the software and it automated a lot of activity. It was far better than our previous database. The other thing was its price. It was brilliant,” she smiles.

Four months down the track

With Act Today’s help, Aquilina soon set up the software. Member details were loaded up, and privacy and security measures put in place. “Act Today were amazing. I kept asking - and still do - “Can we do this? Can we do that?” They always say it’s no problem and we’ve been able to keep customising as we go,” Aquilina says.

The CRM system is now being used extensively at KSN. The information within is invaluable for designing bequest campaigns, making appeal and follow-up calls, and to record the services members access.

“The other database used within KSN doesn’t have many capabilities other than recording a member’s name and address. It has very, very basic information. With Sage CRM we’ve been able to collate ten times more information about members than we ever had before. This has allowed me to go in and immediately start a relationship with our members,” she notes.

Another facility offered by Sage CRM that has impressed Aquilina is the ability to quickly develop reports. Staff can easily develop targeted communications simply by running highly specific queries such as all members using the transport service.

Given the success of the software project, KSN may expand the use of Sage CRM beyond bequests activity and into the wider organisation so that when the time is right, they can quickly and easily incorporate all of the other member, customer and donor information contained within KSN.

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About Sage CRM

Over 14,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

