

Success Story

A SINGLE VIEW OF INFORMATION & RELATIONSHIPS, IMPROVED INTELLIGENCE AND ENHANCED MARKETING

Workbooks has brought each department of the company together.



“WE CAN NOW MONITOR AND EVALUATE ALL OF OUR DATA, AT THE CLICK OF A BUTTON.”

Natalie Worth - Head of Finance and Administration

INTRO

Chartered Accountants' Benevolent Association (CABA) is a charity that provides a holistic service supporting Chartered Accountants in need of financial support, counselling, advice or information, as well as providing stress management and wellbeing training.

They have been supporting current and former members of the Institute of Chartered Accountants' in England and Wales (ICAEW) and their dependent family members since 1886 and now employ in excess of 50 people.



SINGLE VIEW OF ALL DATA



ENHANCED MARKETING CAPABILITIES



IMPROVED DONOR INTELLIGENCE

UNMANAGEABLE SYSTEM

Prior to Workbooks, CABA had been using a bespoke Access based system. They used this to process and track beneficiary applications, manage training courses and events and to store and monitor donations made to the charity.

Natalie Worth, Head of Finance and Administration, commented, “although our bespoke system did the job, over time the system was becoming increasingly unmanageable and it was no longer possible to easily extract the information we needed”.

Some of the key pain points for CABA included the inability to record and track interactions and relationships. As all their data was stored on different databases they could not easily identify if a beneficiary had received support in the past nor at a glance if they were a member of the ICAEW.

Furthermore, over time the system had become so complex that employees often left fields blank and would instead turn to their own ways of working, recording data across a multitude of databases and excel spreadsheets. This inevitably led to many instances of duplicated and/or missing data.

“WE CAN NOW MONITOR AND EVALUATE ALL OF OUR INFORMATION, AT THE CLICK OF A BUTTON ... WITH WORKBOOKS WE NOW HAVE A FULL UNDERSTANDING OF ALL THE DIFFERENT STAKEHOLDERS AND THE RELATIONSHIP THEY HAVE WITH CABA.”

Natalie Worth - Head of Finance and Administration

A PERFECT FIT

With the number of applications and demand for the services offered by CABA growing, the management team recognised they needed a more efficient solution and began their search for a CRM vendor by inviting 31 specialist and generalist CRM vendors to tender.

“We were looking for a solution that helped us effectively manage good, clean data, was simple to use and would be quickly adopted by our whole team. Workbooks enabled us to do this.” commented Kath Haines, CEO.

STRUCTURED IMPLEMENTATION

Due to the unique nature of CABA’s business, a key component of the implementation was customising the system to meet the business needs of the charity.

Workbooks Consultants spent several days migrating CABA’s existing data and customising the solution in a way that would allow CABA to capture all the information they required, whilst remaining a quick and easy system to learn and use.

This included the definition of a comprehensive payment schedule that not only enables CABA to identify a beneficiary's eligibility for payment, but also enables them to track and manage the frequency and amount of payments to those beneficiaries.

The Workbooks application supports payment schedules in multiple currencies, in a format that can be exported into CABA's Sage accounting system.

The Workbooks Consulting team took a structured approach to this implementation, and following the customisation worked with 'key user groups' in a series of User Acceptance Testing sessions.

The purpose of this testing was to ensure primarily, the customised system was fit for purpose and would provide CABA with at least the functionality of their previous system.

Moreover the testing effectively ensured the confidence of key user groups that Workbooks would meet their needs. Following some further fine tuning of the system and three days of User Training the CABA team were up and running.

"Considering the amount of customisation that was required, the implementation process was fairly painless. The staff at Workbooks were extremely professional and flexible with our training needs and made getting to grips with Workbooks really easy. The only pain for us came from the cleanliness of our data, which was more of an internal issue" explained Natalie Worth.

"WE CHOSE WORKBOOKS BECAUSE OF ITS EASE-OF-USE, FLEXIBILITY AND BREADTH OF FUNCTIONALITY AND IT HAS DEFINITELY MET OUR EXPECTATIONS."

Kath Haines - CEO

SIGNIFICANT BENEFITS

Workbooks has delivered benefits across all areas of the business and CABA are now using the system to process and track applications from beneficiaries, from the opening of a new case right the way through to close, using the Workbooks Cases functionality.

In addition, CABA are also using Workbooks to store information relating to donations made to the charity.

Using Workbooks, CABA can monitor the demographics of those that most frequently donate, and in turn use this information to target marketing campaigns. CABA even uses Workbooks as a mechanism for reclaiming gift aid from the Inland Revenue.

Natalie Worth further explains, "The ability to collect accurate management information, quickly, has been one of the most significant advantages for us – we can now monitor and evaluate all of our information, at the click of a button.

What's more, with Workbooks we now have a full understanding of all the different stakeholders and the relationship they have with CABA. It really is great!" Kath Haines, concluded "We are delighted with the progress we have made since implementing Workbooks. We chose Workbooks because of its ease-of-use, flexibility and breadth of functionality and it has definitely met our expectations."

About

INDUSTRY

Trade Association & Professional Bodies

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

March 2010

TECHNOLOGY

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- Workbooks Business

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