

## CASE STUDY

# The Salvation Army Is Now Streets Ahead With StayinFront CRM

### *New multi-dimensional view maximises donor opportunities*

#### ➤ PROFILE

> **Client:** The Salvation Army is one of Australia's largest and best known organisations, providing food, clothing, temporary accommodation, jobs and training opportunities for those in need.

> **Challenge:** To develop an integrated supporter relationship management solution for The Salvation Army's Australia Eastern Territory fundraising operations.

> **Solution:** A sophisticated CRM solution combining integrated StayinFront CRM and StayinFront Analytics, StayinFront eBusiness, StayinFront Opportunity Management and StayinFront Marketing Center.

> **Result:** A single view across all supporter-related activities, streamlined processing of donations, improved coordination of supporter communications, better use of resources, and seamless integration with other operational software systems.

The Salvation Army (TSA) had been managing its donor operations with what was described by its Supporter Relationship Management Program Director, John Herring, as "basically a good electronic receipt system but little else."

The organisation was struggling with a proliferation of manual processes, distributed databases and silos of information; inconsistencies in the ability to capture and view vital donor information; and inadequate tracking and reporting capabilities which made it difficult to assess the success of campaigns.

TSA was also seeking to make a cultural shift: a move from a single-dimensional 'donor' system that focused on donations to a multi-dimensional view of the entire level of contribution a 'supporter' makes to TSA including volunteering, committee membership, community and business influence along with their interests and motivations.

TSA required an integrated CRM system that would allow the simplification of donation processing and reconciliation, improve the coordination of its supporter communications and provide seamless integration with a number of its other business software systems.

TSA engaged a third party organisation, Customer Connect Australia (CCA), in a consulting and project management capacity to guide it through the entire program. This included a review of all its supporter-related processes to ensure a focus on improving the experience a supporter encounters with TSA. CCA also provided direction to the process of identifying the most suitable software supplier and provided education and training for all staff. CCA has continued to liaise between StayinFront and TSA at every stage of the project.

After an intense investigation process John Herring said: "The StayinFront offer was a stand out in the whole selection process.

"All our research backed up our first impressions and then, in StayinFront's RFP response, we saw all the detail. We also liked the way StayinFront is well organised and disciplined in its approach. And we received good references from its user sites."

TSA is using the comprehensive, high level capabilities of StayinFront CRM to better manage donor information, donations, segment-based appeals and collections. TSA's solution relies on four core StayinFront modules: StayinFront CRM, StayinFront Opportunity Management, StayinFront Marketing Center and StayinFront eBusiness.

The first stage of the new system went live at the beginning of July 2008. The new StayinFront integrated CRM and Analytics system has been running with a high degree of reliability ever since.

#### *StayinFront Analytics: At the core of the new system's success*

StayinFront CRM with integrated Analytics takes full advantage of any information recorded in the system by creating a loop between analysis and action. TSA can now



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dynamically explore any of its customer or operational data and compare sets of disparate information.

“While we had to first establish the reporting model and are currently developing and refining our reports, the capability of StayinFront Analytics to drill down to all levels provides enormous benefits. Being able to develop a report that shows comparative information at any point in time reduces the need to generate, store and distribute multiple reports for each divisional office or user as we had to in the past,” Herring said.

The core CRM team at TSA head office creates and distributes the StayinFront Analytics-generated reports. Any of the 100 donor support and management staff on the StayinFront system can then modify and use them to their needs.

This has both facilitated improvements in business processes and timeliness of responses. TSA no longer waits for month-end reporting. It can investigate the data, pick up errors, run exception reports and create action items for each group of errors to be corrected.

Herring says they are getting increasingly better and more accurate data with which to work: “StayinFront Analytics has significantly reduced overall administration time, with reports that once took a day to produce now taking just minutes.

“We also have visibility across all interactions that our key frontline staff have with supporters. That means we can support them as they set priorities, help them plan their calls and understand their workload. This allows our teams to accurately measure performance and results, revise activities and make a case for additional resources based on real information,” he said.

John Herring's team created 250 reports in the first few months of operation: “We've already seen how easy it is to turn our data into effective action, and we've only just scratched the surface of what the new system can do for us.”

#### *Changing processes for faster responses*

During the most recent Victorian bushfire and Queensland flood disasters, TSA received a record flow of donations online. “With our previous system, we'd still be processing the donations six months on. Integration between TSA's web site and the new CRM system allows receipts to be immediately issued online along with automated processing of online donations.

“Using the CRM system, the lag time from receiving a donation to issuing a receipt has reduced from an average of two weeks to next day posting,” Herring said.

StayinFront Opportunity Management helps TSA identify and manage potential large corporate or individual donations. This means that TSA optimises its efforts with limited resources by providing a consistent but respectful approach to its major supporters.

“This module is a very valuable tool and we will soon be in a position to fully utilise it to help us work in a more disciplined way. It will be able to supply information we've not had access to before, such as what level of income we can expect in a specified number of months and from what effort,” Herring said.

Without access to information you can't develop effective strategies

The power of CRM to segment and better manage mass communications such as mail campaigns is exemplified by TSA's

use of StayinFront Marketing Center.

“We can look at campaign performance and become more cost effective. In a recent mailing, we were able to identify supporters who had not responded to donation requests for some time and exclude them in the present drive. This not only reduced production and mailing costs by 9%, but also allowed us to employ a strategy to contact those people with a message designed to re-activate as many of them as possible.

“This is all basic stuff but if you don't have access to the information you can't make these improvements in communications with supporters and improve cost effectiveness,” Herring said.

As part of the growing maturity of TSA's use of StayinFront CRM functionality and its expanding vision for use within the organisation, TSA has recently completed its Door Knock module. TSA's annual Door Knock Appeal is one of the largest in Australia and many months of preparatory work is involved prior to the Appeal each May.

This capability provided the structure behind the drive: it enabled management of the day, the volunteers, counting house activity, banking and tracking of all activities on the day.

“As a charity with finite resources we need to be able to identify the most 'beneficial areas' to collect so that we can maximise the efforts of our volunteer collectors and give them the satisfaction of seeing good results for their donation of their time in assisting us to raise funds. The implementation of a common system also supports TSA's efforts to exercise outstanding stewardship over the Door Knock in the area of funds management, volunteer management, privacy and data protection.

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"Until now, our Door Knock Appeal volunteer lists have resided in multiple database systems. As the Door Knock module is rolled out over the next few years we will be able to manage this key annual activity more effectively. Accurate counting house and banking reports and the ability to keep the media informed of the Appeal's success are some of the many key benefits the system brings. Importantly, the new system ensures compliance with privacy regulations by managing all information centrally. TSA can also follow up with, report back to and build on our volunteer support base, for future years," Herring said.

#### *A new vision for the future*

He described how TSA's relationship management vision and cultural view has changed: "This is now a supporter-centric operation, a two-way street where we can increasingly understand our supporters' interest in and involvement with TSA. The new model will enhance our overall mission of caring, social welfare and rehabilitation."

John Herring sees enormous potential for further developing the partnership with StayinFront and its flagship products: "The system has already given us far more than we envisaged."

#### **About StayinFront**

*StayinFront is a global leader in the development, delivery and support of leading CRM and decision support tools. On-demand or on-premise, StayinFront provides the rich functionality, fast deployment and easy to use tools that your teams need to sell more and manage better.*

*StayinFront has been chosen globally as a strategic partner by many of the world's top consumer goods companies and StayinFront solutions have been implemented in over 65 countries in 25 languages.*

*Headquartered in Fairfield, New Jersey, StayinFront has offices in the United Kingdom, Ireland, India, Australia, Singapore and New Zealand. For more information, visit [www.stayinfront.com](http://www.stayinfront.com).*



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