

Third Sector Leaders

**ACEVO**

Association of Chief Executives of Voluntary Organisations

# **Power to Your People – The Death and Rebirth of CRM**

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**S** **O** **C** **A** **L**™  
*Social Wear*

# Agenda

- Overview of ACEVO
- Customer Relationship Management
- CRM in the third sector
- ACEVO's story

# Overview ACEVO

- 2000 third sector leaders:
  - **Connect** – events, online
  - **Development** – leadership courses, masterclasses
  - **Support** – helplines, information
  - **Represent** – lobbying

# CRM – what is it?

- “The discipline of organising business resources to enhance and personalise each customer encounter as part of a long-term strategy of profitable retention” *Institute of Direct Marketing*
- “The coherent management of contacts and interactions with customers” *The Chartered Institute of Marketing.*
- “Customer relationship management (CRM) is not just the application of technology, but is a strategy to learn more about customers' needs and behaviours in order to develop stronger relationships with them” *www.businesslink.gov.uk*

# CRM – not just a database

## CRM defined narrowly and tactically

CRM is about the implementation of a specific technology solution project.

## The CRM continuum

CRM is the implementation of an integrated series of customer-oriented technology solutions.

## CRM defined broadly and strategically

CRM is a holistic approach to managing customer relationships to create shareholder value.

(Payne, 2006)

# CRM – customers first

- Essentially it means putting the customer/ beneficiary first



...which is what the third sector is great at!

# CRM & the third sector

- Even more important in third sector:
  - Improved services
  - More needs met
  - Income increased
  - Donations increased



# What the sector does right

- There are great examples of:
  - Collecting feedback
  - Integrated communications
  - Personalised contact & content
  - Good intelligence management
  - Using web 2.0 ‘social CRM’

[nct] For all the Facebookers..... - Message (HTML)

Message

Reply to All Forward Respond

Delete Move to Folder Create Rule Other Actions

Block Sender Safe Lists Not Junk Junk E-mail

Categorize Mark as Unread Options

Find Related Select Find

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

nct@yahoogroups.com on behalf of belinda phipps [belindaphipps@btinternet.com] Sent: Fri 26/02/2010 10:58:00 AM  
nct\_announce@yahoogroups.com  
NCT Coffee; NCT-SWF@yahoogroups.com; Chairs; NCT main Group; SanJima

Subject: [nct] For all the Facebookers.....

NCT Big Weekend 2010 has it's own group on Facebook... please join and the chat started....

[Non-text portions of this message have been removed]

[Reply to sender](#) | [Reply to group](#)  
[Messages in this topic \(1\)](#)

RECENT ACTIVITY:

View Members 2

Post Your Group [Start a New Topic](#)

\*\*\*\*\* NCT ENQUIRY LINE 0870 444 8707 \*\*\*\*\*

start

Customer relation... RE: My presentati... Microsoft PowerPo... Deleted Items - Mi... [nct] For all the Fa...

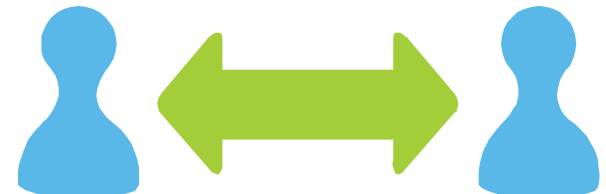
- “I undertook a Marathon in May and got contact providing hints and tips for the race & fund raising. I actually felt supported rather than the initial contact from some charities who the next time you hear from them just want the sponsorship money you have raised”

*Comment online following an article in Marketing Week*

# CRM & the third sector

- Opportunities

- Increasing satisfaction with services/products through enhancing offering
- Reaching more stakeholders through more targeted content
- Income generation
- Can save money in longer term



# CRM & the third sector

- Social media opportunities
  - User generated content provides insight and ability to connect with users
  - Can raise profile & income



# CRM & the third sector

- Challenges
  - Cost of software & investment
  - Connecting systems internally and to website
  - Technological world changing quickly – can be running to catch up

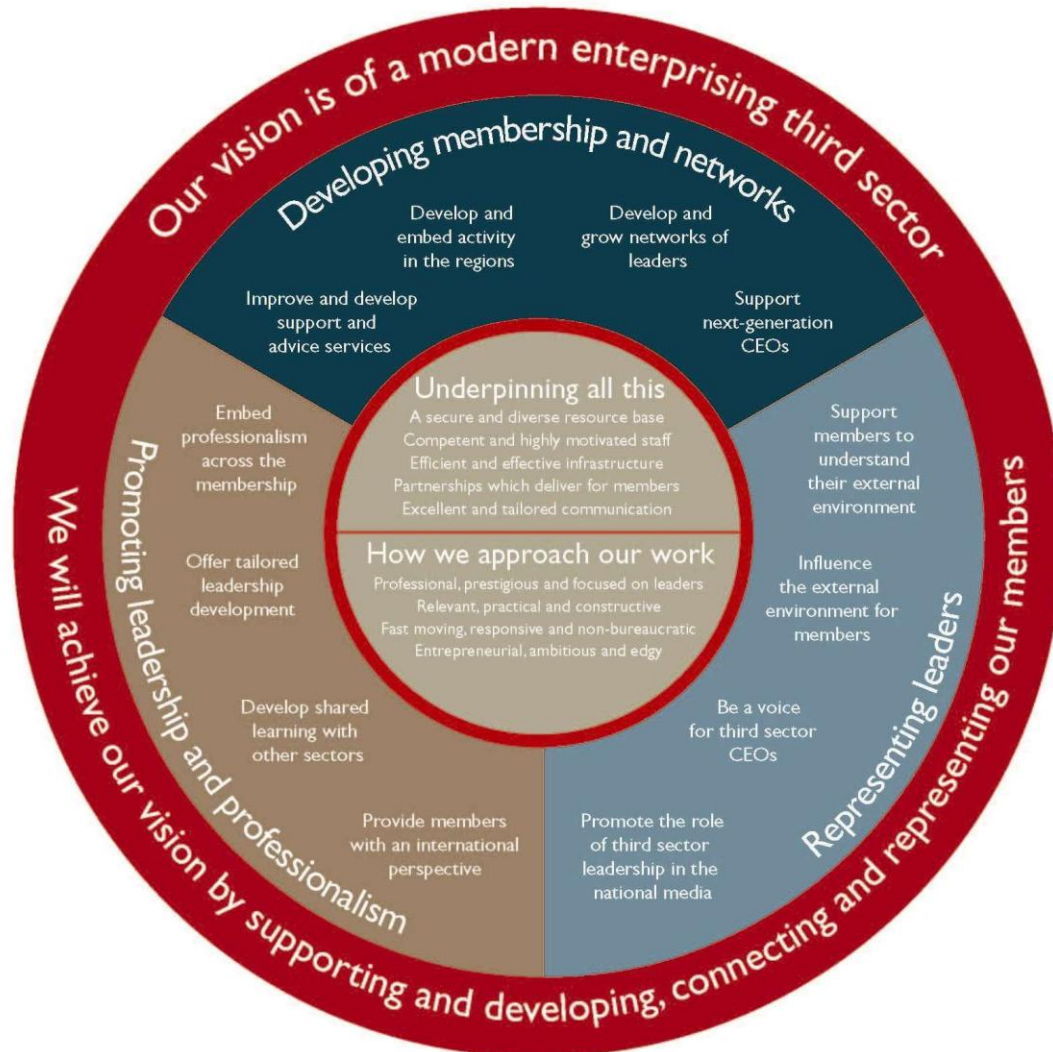


# CRM & the third sector

- Challenges
  - Personalisation – moving from business to business to business to consumer
  - Lack of resource internally
  - Culture change – CRM carries some bureaucracy



# ACEVO's story



# ACEVO's story

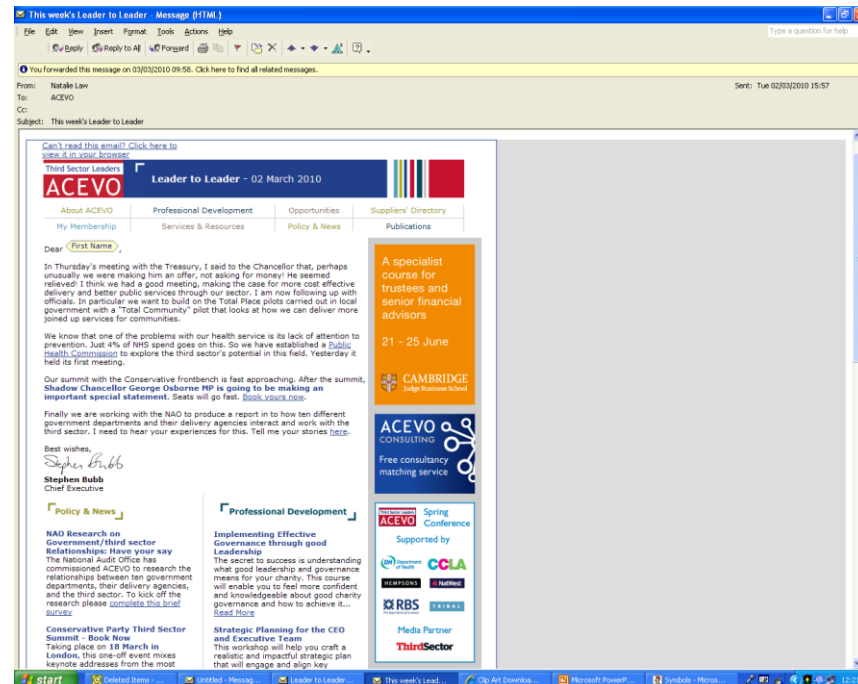
- Objectives of our CRM strategy
  - Deliver better value to members
  - move from mass to niche contact
  - Generate further income
  - Save time internally

# ACEVO's story

- Needed a new database
  - Started looking for new database 07
  - Installed Raisers' Edge Sept 08
  - Website front end launched Nov 09

# ACEVO's story

- We can now:
  - Measure activity on & offline
  - Allow members to connect online
  - Send more personalised messages
  - Keep all information in one place



# ACEVO's story

- Next steps
  - Enhance online experience
  - Transfer all information into the database
  - Keep staff focused on importance

# ACEVO – lessons learned

- CRM is a on-going project
- It is culture + technology
- All staff need to understand their role

# ACEVO – database experience

- When choosing product visit orgs that are very similar to yours
- Get key staff buy-in
- Start with the technology and be willing to change your processes to fit
- Invest in additional project management from the beginning
- Look at internal resource – suitable?

# Thank you

- Questions?

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# Thank you