

Key software solutions for the VCS

What's available, and how it can be used to improve operational performance

Contact Management Systems & Customer Relationship Management



Introduction

This report was commissioned by the ICT Hub and CITA have developed these resources in partnership with the VCS.

What is a database, why do I need one and how can it help improve performance?

To gather information for a report from paper records can take a long time. Client information, telephone numbers, addresses and records of interactions with clients can all be stored electronically and hence can be recalled in an instant. The trick is to store the data in such a way that it is easily recovered in a form that makes sense – an old IT saying is Garbage In, Garbage Out (GIGO).

Databases can be very simple – a list of customer names and telephone numbers on a spreadsheet (Contact list) – easy to use and easy to update. To develop a database you need to know your *exact* requirements before you start – you need to know exactly what you want to get out of it. This is the hardest part of the process, once requirements are identified key features are easily identified.

Any organised information forms a database, the software that runs the database system on a computer is called a development tool or a platform e.g. Microsoft Access is a database development tool. To produce detailed reports a more advanced kind of a database is required, one you can ask questions (query). Access is a part of the Microsoft Office suite and is one such database platform.

To make an Access database user friendly, reliable and accessible across an office is tricky and probably beyond the skill level of the “average” computer user. Typically the office “expert” or a volunteer will be behind the development and maintenance of such systems. Microsoft Excel could also be developed into a more advanced database by such technically minded people. Both systems, however, have their limitations and do rely heavily on internal expertise to keep functioning.

The advantage of a home made database is that it will do exactly what you want it to, the disadvantage is a lack of flexibility and scalability. There are other more complex databases and so more complex development tools are used to form the database systems, e.g. Oracle, SAP, Microsoft CRM. Internal expertise in such systems is rare and external expertise comes at a premium. Commercial database designers can create bespoke or tailored systems using any number of database platforms (Oracle, MySQL, PHP, Quark), these are major undertakings, can take a considerable amount of time and can be expensive.

Open Source offers free licensing (e.g. Sugar, Civi) but in many cases the expertise to support and develop the systems is not free and the end package can cost as much as a commercial product.

There is a scale of databases, depending on the functions and features that are required, from a simple list to contacts lists, document management and on to a full blown

Customer Relationship Management system (CRM) with many advanced features.

Contact Management

Contact Management (CM) systems allow groups to keep track of contacts, customers and/or clients and can, typically, be used by more than one person at a time.

Many people use address books within their mail client software (e.g. Outlook). These can be very useful but are tricky to share, normally cannot cope with individuals that are associated with more than one group, and/or documents associated with interactions.

CM systems can be useful tools to plan and undertake mail shots. Many systems exist that extend the features or interact with Outlook to provide the extra functions and features required. Web based (hosted) CM systems are available which have the added advantage of being accessible away from the office and hence make home working easier.

CM systems can have other additional features such as shared diaries, mail merging and tracking.

Customer Relationship Management (CRM)

CRM systems allow advanced manipulation and reporting of data. They can be little more than a CM system or have all the features required to run and operate a complex and large scale operation (e.g. Progress, ThankQ). Many are modular and can build up to complex systems.

CRM systems allow for flexible recording of customer interactions. This can improve “customer service” considerably and be invaluable in providing statistics to funders and report against targets. CRM come in many “flavours”, they can lean towards fundraising, membership or contacts. Some of the commercially based systems can be sales orientated, many interact with financial packages to assist in financial management. They can be network based or available via the internet (hosted) or a combination of both.

Security of the information is a vital consideration, consider this and insist on robust backing up procedures when making choices.

Prices vary from free to many thousands. The free systems rely on groups having the expertise, time and/or training budget to configure and bend the system to suit their needs. Bespoke systems remain the best choice but are far out of reach for the average VCO, tailored systems offer an interesting potential.

The commercial concept of “cheap” seems to fall somewhere between £3000 and £5000, with significant on costs (20% - 30%). Some suppliers offer discounts or limited free licences to the VCS but typically recoup costs by other means. Be careful to ask if training is included in the price or comes at an additional cost. There are relatively few genuinely low cost solutions.

CRM systems tend to be environments that a user works within on their PC. E-mail and calendar functions can be a bit of a change from the Microsoft Outlook environment often used.

It is possible to adapt an existing database or use Outlook as an elementary CRM, however they are limited and probably would not do what you want them to in the longer term.

At the far end of the database scale lies the Management Information System (MIS), these products are industrial strength tools that are far beyond the reach of the intended target group for this report.

Case Study – The Peace Factory

The Peace Factory are based in a large four bed roomed house just outside Dungannon, Northern Ireland. They offer a holistic approach to health and well being including a wide range of complementary therapies. They have moved towards “rural outreach” and more recently establishing a Confidential counseling service. They promote individual tailored training by supporting people to look at their talents and aptitudes in a new/creative way. If people are at a stage to access their own desired training they support them to overcome the obstacles, which might be; lack of funding, confidence, encouragement, health issues or simply moral, peer support. They had a requirement to provide monthly, quarterly, and annual reporting on all their participants, programmes/services, activities,

training and outputs to substantiate their grants. In addition they were required to report on the make up of their users, geography, types of services accessed and demanded.

These reports whether qualitative and quantitative, had been difficult to collate, monitor and score. This had always been done manually and was laborious and arduous to complete. Funders do not have one agreed approach to this task and there is often too many disparities existing between the various bodies. It is also the case that these funding bodies’ non-financial requirements change from year to year.

While there are several financial software packages in the market to help groups monitor their budgets, there were ‘none’ we identified to allow them to monitor & evaluate the ‘non-financial’ aspects of their work. With the pressure to deliver programmes, seek further funding, fill in timesheets, co-ordinate staff diaries, evaluate their work - then it amounted to a lot of time behind the desk and too much paperwork!

They learnt through one of their funders that Cúnamh ICT had developed a very unique database called eMonitoring which would ‘take the hassle out of monitoring & evaluation’. It has been piloting the system with 10 other CVS groups whose activities and reporting requirements were similar.

With funds secured they had eMonitoring installed and under a support contract received one-to-one training for a year. eMonitoring takes a technology-based approach to cataloguing and monitoring the work,

thus freeing up more time for actual delivery of programmes and services. It gives other office functions such as mail wizards, contact\correspondence logs but most of all provided **ALL** the funding bodies with the confidence that their grant aid packages were being put to their proper use. It now allows them to record thousands of hard and soft indicators on users and activities and produces customised reports in minutes – not 3-4wks trawling through folders, filing cabinets and lever arch file! They found it to be easy to use and requires little maintenance – all updates are downloaded through their website.

They, like a lot of community groups, are constantly reminded by funding bodies and the statutory and governmental departments of the need for effective monitoring and evaluation. They found that eMonitoring gives the flexibility of setting up and measuring their own organisational aims & objectives, to import and evaluate activity outcomes, and to setup participant feedback questionnaires. There is even a section to setup and record equal opportunities data.

A recent development is 'Soft Monitoring'. Something they understand to be a key part of funders' new 'non-financial' requirements. They can now measure the stages of a participant's progress with them and can use this information to improve activities making a case for better investment into what they do.

They have a tool that provides a paperless environment, allows them to put all their contacts in one place and generally make all the

monitoring & evaluation aspects of their work much, much faster, easier and more enjoyable. One thing is they now think twice on the impact their work has in the community. The only slight issue is that they didn't earmark sufficient time at their end to the training, to get the full benefit. The main plus has been an increase in confidence in staff feeling "on top" of the work. More organised, more time for clients and belief in what they do based on experience and underpinned by the efficient collation of facts.

In their opinion "for the price now you pay for eMonitoring you more than make it up on wasted time spent doing monitoring reports, whilst improving your own programmes & services. What seemed impossible because of the workload became second nature and will be our biggest selling point. Tools like eMonitoring should be made available to all CVS groups as part of their funding. We were lucky to acquire the grant aid for its purchase/support, but not everyone may be in that position".

Case Study – Chesterfield Law Centre

Chesterfield Law Centre offers free, confidential legal help, advice and representation to individuals and groups in Chesterfield and North East Derbyshire. They also provide signposting to other agencies, self help information fact sheets and helpline information.

Volunteers run the reception, for phone and drop-in enquiries. This provides work experience, which

helps volunteers move into paid work or further learning opportunities.

Information had been held individually by case workers, and given out to clients on an individual basis. There was no central pool of information and so no standardised approach to information provision.

It was decided that a centralised database could provide information, so that the volunteers could offer clients a first level of response, freeing case workers to work directly with clients.

Anne Frazer, the administrator, was given the role to research what was needed. With the help of High Peak CVS, contactLINK was identified. She downloaded a demo version to trial.

Anne spent over 6 months making sure it covered everything, regularly contacting the supplier, ITsorted, with questions, and finding many more things that they'd need. "I realised I didn't know exactly what we wanted until I really started to experiment with it."

The supplier imported names and basic contact details from Word documents, and training was provided to key staff – including discussions on how best to set up and use the features for their organisation and processes, as well as a plan for rolling it out over the whole organisation.

The volunteers were trained in the use of the system by the staff over the following weeks.

The benefits are that; volunteers now provide initial level support and signposting to clients. Case workers spend more time providing advice in their specialist areas, staff generally have more time, more clients can be seen and served, faster and more efficiently, all paid staff now share their contact information.

They are very happy with services provided by ITsorted, and note that the installation was easy and the system works well. Having data transferred for them was a great help.

It did, however, take the Law Centre much longer than expected to enter the remaining data from paper sources. Their advice is to, "Allow twice the amount of time you think it's going to take, have a strategy to get people on board and engaged with the system and to stay engaged with it. Work out ways of encouraging staff to use the database and store information they collect on it". In the words of one of the managers, "if you don't use it, you'll lose it!".

Training is essential – both initially and regular refreshers, to keep skills up-to-date as well as simply encouraging the effective use of the database.

www.chesterfieldlawcentre.org.uk

	Comparison Table	Cost	Ease of use	Set up
ACT	Half way house to full CRM, diaries, document management, tracking and configurable reporting www.act.com	£££	**	***
CharityLog	Hosted volunteer based CRM www.charitylog.co.uk/index.php	££££	**	*
Contact Link	Low cost Access based network CM system www.itsorted.org.uk	££	**	*
eMonitoring	Access based, peer to peer, fully functional networked CRM - www.emonitoring.org	£££	**	**
eVol	Fully featured hosted CRM/MIS developed for WVCO. www.e-vol.co.uk – a good bench mark.	££££	**	*
Kiss	Network based CM plus membership & donations www.kissoftwaresolutions.com	££	***	***
Lamplight	Hosted CM service, can be customised. Can log details of interactions and report www.lamplightdb.co.uk	£££	***	***
Myoffice.net	Low cost hosted system, a range of services to full CRM http://www.myoffice.net/	££	***	****
OfficeZilla	Free web based CM system, can be used to share diaries - www.officezilla.com	£	****	****
Zoho	Free web based systems, many features www.zoho.com	£	****	****
Salesforce	10 free licences for charities – sales orientated needs extensive setup www.salesforce.com	££££	**	*
Sugar CRM	Open source (free licence) – sales orientated but needs extensive setup www.sugarcrm.com/crm	£	**	*
volbase	Access based, network CRM www.volbase.co.uk	££££	**	*

<u>Cost</u>	<u>Ease of use</u>	<u>Set up</u>
£ Free	* Extensive training needed	* Specialist setup required
££ Under £100	** Some training required	** Expert user setup only
£££ up to £500	*** Requires use of a manual	*** Setup for experienced users and/or practitioners
££££ £thousand plus	**** Easy – no training required	**** Very easy