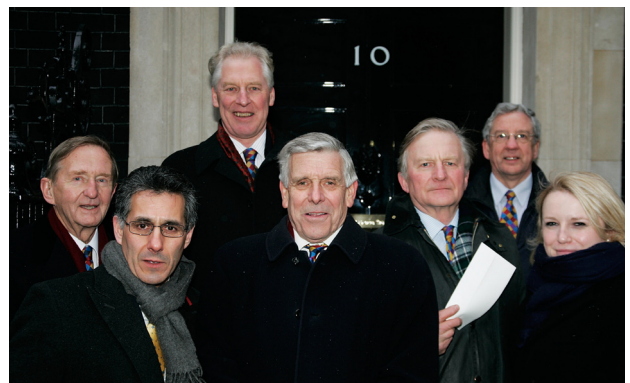


Harlequin enables more strategic ways of working at the Forces Pension Society

Three years ago, the Forces Pension Society (FPS) started a project to modernise their processes and management reporting capabilities. With an ever increasing membership and an aim to attract more serving personnel, it was apparent that a flexible and robust membership management system was essential for this highly active and important organisation.



Andrew Scott, back right, and the FPS team deliver a petition to the Prime Minister

Background to organisation: when members join FPS, whether they have a Navy, Army or RAF Pension, they are assured of receiving advice to help them get the best pension to which they are entitled. The objects of FPS are:

- To secure equitable pension conditions for all ranks of all three Services both serving and retired, their widows, widowers, partners, civil partners and dependants, that recognise the unique commitment they make to our country.
- To campaign for the resolution of legacy issues which disadvantage Service pensioners.
- To advise and assist members of the Society on day-to-day Service pension problems and related issues.

The Society is funded by its members. It is an independent not-for-profit company.

Size of database: 41,000 individual records and 25,500 memberships

Previous system: bespoke database.

Andrew Scott, Membership Secretary, shares how Harlequin has helped the FPS realise their modernisation ambitions.

Why did you need a new database?

In 2008, due to increasing demand for our services, we made plans to be more business-like in our main activities. At a strategic level, the management team would ask for information that was hard to obtain; the database was difficult to manipulate and as our marketing programme became more sophisticated we needed better access to more reliable data. The system is critical to the successful evaluation of the many marketing initiatives we undertake.

What system did you have before?

A son of one of our members had written a bespoke database for us with a basic word processing application built-in. It did a great job at the time; however, with our growing membership and changing needs it was time to upgrade.

What process did you follow – from research to implementation?

One of our consultants had heard good things about Harlequin and invited them in to give a demonstration – this was in the March. So convinced, we made up our minds immediately. The installation of a test database took place one month later. Over the subsequent weeks we worked with Harlequin to map out our data requirements and make some adjustments to our set up. After training, we went live in the summer. From the early days, when we had basic questions, to now, when we aspire to get the

maximum from our data, the support team are always ready to help.

Tip: As well as solving immediate problems, try to think well in advance of what you will need your system to do in future. Ask other organisations how they tackled this.

Do you have any insights to help others during this process?

There will always be things you wished you included in the initial set up; certain fields, alerts, reports. To reduce these, try to think well in advance of what you would like your system to do in the future. Not only that, try to anticipate the needs of others engaged in the business who can utilise the data. Harlequin helped here and quickly resolved any issues. Also remember as time goes on, your needs - and therefore your system needs - will always evolve so look for flexibility and regular upgrades from a supplier.

Why did you choose Harlequin?

Firstly, the demonstration was totally reassuring. The conversation was clear and straightforward: “(Tom) This is what we’ve got”, “(Me) Can it do this?”, “(Tom) Yes, and this is how.” In fact, Tom was able to resolve most of our issues live on the screen and it was clear the system was adaptable enough to work for some of our more specific requirements. Secondly, we liked the fact that Harlequin is an established, smaller organisation like ours. We felt confident they would deliver. Thirdly, the software was good value and fitted the bill.

“The system is very flexible. We have increased confidence in managing our data and making strategic decisions.”

Case Study

Forces Pension Society CRM and Membership Management



How do you use the system?

- **Contact management:** along the top of contact records is a set of tabbed windows, adapted to our terminology. Here we store and access data including name, contact details, rank, service number, service, duration of service, decorations, referral source, membership type, renewal date, payment log and much more. All correspondence is recorded against the contact, including email. We can also link contacts together to have clear visibility of the relationship between members.
- **Membership management:** now, many subscriptions come via the website – particularly from serving personnel. Transferring data from the web form to the database is a swift process for the team, mainly automated. Alerts are set against records that ensure we carry out key tasks at the right time: following up at the end of free periods, issuing renewals and reminders...
- **Finance:** linking to the membership income fields in the software, each month a file is created for our BACs run. The system automatically updates records and rolls on new dates.
- **Management reporting:** using the reporting tools, we can analyse our data and present it in different formats to our management: new and lapsed members, income, types of new service personnel, registration methods...

Tip: Identify someone internally who has the most skills to lead the project and make use of any data experts you know.

Do you have any best practice tips to share?

Follow up Direct Debit cancellations: when these are flagged up in our monthly BACs file, we are quick to contact members to correct any problems.

Target lapsed members: recently we extracted a list of lapsed members and sent them a survey to try and understand the 'lapse' issue in more detail. The response was very useful. Many simply had



FPS recruitment event with Senior Cadets

forgotten to renew, so we are addressing our reminder process.

Consider online registration: via an import file written by Harlequin, we are able to import information from our web application form straight into the system. We can check the quality of data before it is transferred.

What are the biggest benefits the system has brought to your organisation?

- **More efficient, modern ways of working:** as well as the web link for members, Harlequin integrates with Microsoft software. Moving away from paper files has been transformative – we have created many electronic templates and have a complete communications log for members. We can also work from home on the system.
- **Faster access to strategic insights:** through the flexible reporting functionality, we can now quickly answer management requests for information. We can also supply accurate raw data to colleagues, including the marketing director, for direct marketing purposes, for example. And we are better able to provide accurate and timely evaluative analysis.
- **More streamlined membership management:** our process with Alerts

“ The Harlequin team has delivered a system that has solved our problems. ”

in the software ensures key actions are not overlooked.

- **More members registering online:** the move to the online application process, away from the paper process, has seen an influx of new members. The impact of the web link with our online form and the Harlequin database has been huge.
- **Better customer service:** the system holds a wealth of integrated data, which helps us respond to member queries and resolve issues more efficiently.

What three words best describe Harlequin?

Adaptable, reliable, problem-solvers.

Find out more about Harlequin Software

For details of our forthcoming regional events or to book a demonstration at your office or enquire about pricing please visit www.harlequinsoftware.co.uk or call us on **01672 541541**.