CRM Case Study
Forces Pension Society

Forces Pension Society uses Harlequin CRM to manage their membership and provide a service to the military community.

Forces Pension Society is an independent, not-for-profit organisation that acts as a pension watchdog for the entire military community.

It provides exclusive access to Forces Pension Consultants who provide individual guidance through the complexities of the Armed Forces pension schemes

The society is funded by its membership of 64,000 of which 40,000 are paid subscribed members.

Forces Pension Society has been using Harlequin CRM since 2008 and have subsequently expanded the system to add the Events and Merchandise modules.

We spoke to Charlotte Cooper the Head of Membership and Paddy Butler the Deputy Head of Membership.

Who uses Harlequin CRM at Forces Pension Society?

Our main users are the membership team and the pension team which consists of thirteen people in total.

How do you use it?

In the membership team we use Harlequin extensively on a daily basis and it is a vital part of ensuring we can perform our role. Our daily routine begins with running an import from our website which gives us info in four separate cohorts; new membership applications, renewals or rejoiners, amendments to records such as change of address and facilities information which includes donations to Forces Pension Society Charity fund. Our membership team colleagues then process anything from twenty to over fifty new entries every day. Throughout the day we are also answering phone calls from members and constantly updating our CRM.

In the communications tab we note all communications which gives us an essential record of each conversation.

We can also import banking details through BACS access pay and then update our records on our CRM cancelling direct debits or updating bank details.

For quality assurance purposes we run two data queries a month which check for rogue payments and duplicate entries which can be acted on.

We have had a working relationship with Harlequin since 2008 and that in itself shows how we have built a lot of mutual respect.

What 3 words describe Harlequin Software?

- Efficient
- Friendly
- Concientious

In the pension team we use Harlequin CRM in a more simplified way by using it to log all communications under the communications tab. Every email and phone call is logged and the content recorded for future use. We would also update records with revised military exit dates which will directly affect the pension details but we leave all personal information updates to be actioned by the membership team.

What are the main benefits of Harlequin CRM for you?

In the pension team it is really helpful to have a full record of communications that we can easily refer back to. We have members that can exit the military from age 40 and start receiving their forces pension but it could be a further 15 years or more until the next communications are needed with us when they hit another age milestone. With such a time lapse it's essential we can keep an audit trail of our previous communications so that we can recall the information promptly.

What are your plans for the future and what additions would you like to see?

Our big focus this year is membership and how we enhance our membership experience. The pension team are very data driven so we would like to add extra information about our members to improve our correspondence with them. We need to understand and record why the individual has signed up for membership and develop our initial communications to streamline this. For instance, some of our members sign up for advice during a divorce but others could join needing advice due to a medical discharge and how that will affect their pension.

In the future we hope to be able to prompt our members at key age milestones, as a reminder to apply for the pension scheme benefits. In addition, a reminder service to alert our members to apply for their state pension at 67 would be a good additional service that we would like to offer.

When a member joins online the information is then imported and extracted to our database, an ability to have instant membership via a proposed API protocol will be an advantage as the member can instantly join and receive communication from us rather than waiting until the next working day for us to process the transaction.

What is your experience of customer care from Harlequin?

If we don't have the skill set ourselves, we ask for help and our queries are answered promptly. We would say we have a good collaborative relationship with Harlequin and enjoy the regular visits. We have had a working relationship with Harlequin since 2008 and that in itself shows how we have built a lot of mutual respect.

Please contact us

See our software in action in an on-site demo or have an online taster tour.

We can provide you with an indication of costs to help you scope your project.