Case Study

Harlequin CRM is central to the Bigger, Bolder, Better strategy at the Police Dependants' Trust

In the first year of using Harlequin CRM, Damian Chapman, Head of Communications & Fundraising at the Police Dependants' Trust shares how they are building valuable datasets, delivering on best practice and creating a progressive information culture. In the next 12 months, they plan to flex the system to the max, and design even more templates and workflows.

About the charity:

The Police Dependants' Trust's sole mission is to care for those who suffer harm as a result of their policing role.

For over 50 years, they have been a lifeline to those who live with the physical and psychological impact of protecting the public; tackled the gaps in wellbeing for serving colleagues; and honoured the sacrifice of colleagues killed on duty by caring for loved ones left behind.

Every year, over 40,000 officers are injured on duty, some of them catastrophically. Thanks to the generosity of the public and police community, the Trust provides the practical, emotional and financial support they need to rebuild their lives.

Charity information:

www.pdtrust.org
@thepdtrust
Registered in England and Wales (1151322) and Scotland (SC0047767).

What were your business drivers for investing in Harlequin CRM?

In 2017, the charity launched a new drive to be Bigger, Bolder, Better - with a proactive approach to double the support we provide, triple our engaged audience, and double our voluntary income. We needed a CRM system fit for our future fundraising strategy that underpinned rigorous data standards and ensured compliant ways of working.

What process did you follow in selecting a new system?

We reviewed 23 different suppliers against a detailed needs assessment - the three that closest met our needs were invited to meet the charity before a final selection by an all-staff panel and subjected to thorough due diligence before trustee approval.

Why did you choose Harlequin?

I've used many charity CRM systems in previous roles; however, Harlequin was clearly the right fit for the Trust. Firstly, as it is a local installation our highly sensitive data can work behind an encrypted network, essential for our data security requirements. We could also 'open the box' and easily start to work on the system straight away.

Tip: Scope out the best practice processes that you want to root in the system before you import data.

Our decision was driven by need not budget; however, with Harlequin we got all the functionality required including the Volunteers, Events and Design modules, and this was still very competitive on price. Finally, it was the people who made Harlequin stand out.

How have you used the software in your first year?

We started with a clean installation of the Harlequin system and chose to import data on a case by case basis rather than migrating the stale data we had in various spreadsheets. The wider team had no experience of CRM and there were no processes around data standards or proactive fundraising. In the first year, this all had to evolve. Now we have over 6,500 records and 430 indicators to help categorise contacts including communications preferences. For B2B, allcontacts are linked to a parent record.

We use the system as much as possible on a daily basis. It is not just Donor information - we store all contacts and organisations that are valuable as part of a dataset, and now have a series of data quality criteria at the heart of our approach - quality in, through, and out!

The flexibility of the Design module means we can capture information unique to us – in one central location.

> " Harlequin CRM's Design module is worth its weight in gold. "

Web: www.harlequinsoftware.co.uk
Email: enquiries@harlequinsoftware.co.uk
Tel: 01672 541541

Harlequin Software

So far we have implemented best practice processes around Vulnerable Donors and consent for Wealth Screening, and are even building in our Data Protection Impact Assessments for all direct marketing activity. We also use the built-in Consent tool to address informed consent vs legitimate interest under GDPR.

We also used the Events module for our Upbeat! conference. Tracking registration, streams and paticipation. This module made event management so much easier than in previous years and we even saw a 100% activation rate by using Harlequin to send out joining instructions!

What are the key benefits so far?

Harlequin CRM is enabling us to embrace the opportunity the whole charity sector is facing: to be exemplary when it comes to data processing, capturing information and building trusted relationships:

- *We are building a clearer picture of who we have in our audience sphere.*

- *We are providing a quality experience that our supporters deserve.*

- *We have confidence around our compliance for the future.*

Have you best practice examples?

We actively use the system to achieve best practice; the Design module is worth its weight in gold for this.

Vulnerability process: some of our supporters donate out of a moral sense of duty. As some of these people can be vulnerable, we have devised a comprehensive process underpinned by a specifically designed template. Through this, we can identify our vulnerable donors and record every interaction and decision with casenotes, and then send it for review by our CEO and Trustees.

> **Tip:** Create a checklist of what you want from a system now and in the future - make your system future-proof where possible.

Wealth screening: we analyse our data looking at average gift size and highest gift amount. We use a specially designed wealth screening template and external service to help understand our major donors better. Before any information is processed, we check the donor has consented to wealth screening in a specifically designed template recording our decisions for data processing.

What is your view of customer service at Harlequin?

Compared to other server-based CRM systems, there is a genuine commitment to evolving the software and regular updates are issued from the developers - I've had four updates in the last twelve months, and they're hungry for new ways to improve the system - a rare quality!

What advice would you give to a charity implementing a new CRM system?

Create a checklist of what you want from a system now and in the future - make your system future-proof where possible. From the get-go, scope out the best practice processes that you want to root in the system. Also consider your reporting and integration requirements. Your supplier should be a key advisor at this stage. Only import once complete.

> *There is a genuine commitment to evolving the software at Harlequin.*

What are your plans for the future in relation to Harlequin?

Each year we reevaluate our suppliers in respect of current needs and requirements for the following 12 months. Harlequin sailed through this rigorous process and the year ahead will certainly test the breadth of Harlequin CRM's shoulders.

We are expanding the team, and bringing in community fundraising, direct mail and challenge events. The system will be used extensively on a daily basis for different campaigns and events.

With the Design module, we are creating many more templates and workflows to underpin best practice.

Personally, I plan to be an active member of the Harlequin user group, driving the software forward for the wider benefit of the community of users.

What three words best describe Harlequin?

Approachable, flexible, logical.