Lichfield Cathedral achieves cultural change and united operations with Harlequin Software

Challenged with multiple datasets and duplicate records, Patricia Collins the Director of Fundraising at Lichfield Cathedral wanted a centralised CRM & fundraising system to integrate information, maximise supporter relationships and gain greater insights into campaign success. Harlequin is now a central part of Cathedral life and disperate elements have joined together to give a complete picture of fundraising.

Background to charity: Lichfield is the only medieval Cathedral in the UK with three spires, representing the Holy Trinity. It is one of the oldest places of Christian worship in Britain and the burial place of the great Anglo-Saxon missionary Bishop, St Chad. Many treasures are contained within its walls, including the 8th century Gospel Book known as the St Chad's Gospels (believed to be the oldest book still in regular use for its original purpose), an 8th century carving of an angel believed to be the corner stone of Chad's coffin, contemporaneous items from the Staffordshire Hoard, and some of the finest Renaissance Flemish painted glass in existence, the Herkenrode windows.

Region: Diocese of Lichfield from Oswestry to Burton-on-Trent to West Bromwich to Leek, as well as Stoke-on-Trent, Walsall and Telford.

Previous system: Access and Excel

Size of database: c8000

System use: CRM, Campaigns, Events, Planned Giving, Major Donors, Grants, Legacies, Volunteers

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Tom Ellis, Managing Director at Harlequin, spoke with Patricia Collins, Director of Fundraising, about the Cathedral's requirements for new charity management software and the benefits it brings.

Why did you need a new charity management system?

We held contact information in different spreadsheets on various computers - we needed a comprehensive and cost-effective system that would unite all this data so that everyone could access a single, shared view of Cathedral life. Our £3.7M appeal to save the East End of the Cathedral was underway and a new system would help to take fundraising to the next level and also transform the wider operational efficiency of the organisation.

What did you use before Harlequin?

We recorded all donations and regular payments on Excel spreadsheets and had a lot of historical data on Access. The Dean's PA and others also had lists of contact details that were used to send out invitations for lectures and receptions. Therefore, we had supporters entered several times on different systems, which was not as effective as we wished.

What process did you follow to select a new database?

From using various CRM packages, I knew what we needed to achieve. I was aware of several key charity software suppliers, so I rang my associates in other parts of the country and asked for recommendations. After web research, I contacted six suppliers for an initial conversation and then invited three here to demonstrate their systems.

Why did you choose Harlequin?

Complete solution: *we evaluated each solution on functionality, value for money and ease-of-use - and Harlequin came top. Harlequin offers the complete package in terms of the software and service they deliver. As an established, independent provider, I have confidence they will be here in five years time and that the system will continue to evolve.*

Focus on being user-friendly: *it was evident that not only is the software user-friendly, but that the people from Harlequin themselves are patient and personable. Harlequin took the time to understand our needs and what we aimed to achieve.*

> " We evaluated each solution on functionality, value for money and ease-of-use, and Harlequin came top. "

Tip: Do a full analysis of both the organisation's and users' needs; a new system will enable you to do much more than you first envisage.

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How are your needs met?

Fundraising management: our East End Appeal is set up as a campaign on the system so we can monitor and report on performance; we associate grants and donations against the target, as well as our 'Give A Lasting Gift' supporters who sponsor images within the Herkenrode glass windows. We also manage fundraising for choir tours, as well as our events, regular givers and legacies on the software – and of course Gift Aid.

Operational management: we are beginning to manage our volunteers on the system, for instance those who help with Christmas events or carry out tours, as well as our regular attendees who undertake flower arranging and meet-and-greet duties. Recent staff changes mean this function will tend to be used more once they are trained on the system.

What benefits has Harlequin brought to your organisation?

Improved efficiency: we now avoid the embarrassment and cost of using duplicate data. When planning events and issuing invitations, people can be in lots of categories but we now only send them one item of correspondence. Advent is our busiest time of the year for various events - the system speeds up mailings enormously.

Complete contact history and enhanced relationships: a central database has enabled us to standardise information and hold a full communication history against each record. It is essential we hold supporters' donations confidentially and we can restrict the view of this information to selected fundraising staff only; at times it is also expedient to be able to restrict who can contact certain donors.

Importantly, having contact information that all our users can access means that we no longer run the risk of offending the families of the bereaved.

Cultural change: we now work in a more uniform and consistent manner and follow certain processes to maintain our contacts.
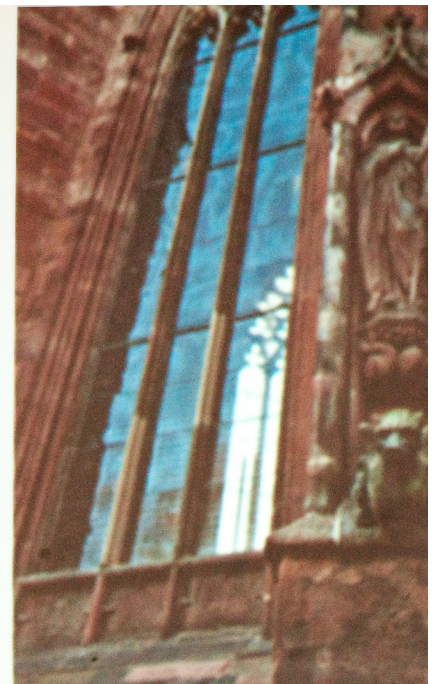
As the system is easy to use, and because we receive excellent support from the team at Harlequin, we feel confident about the software and are keen to use it as much as possible – this in turn improves fundraising and relationships with everyone involved with the Cathedral.

What advice do you have for others looking for a new charity database?

Be aware that those governing your organisation may be conservative in their view of what you require and that they will view the system and associated costs with a high level of scrutiny.

Ensure that new charity software will prove to be value for money as mistakes are expensive. However, also be aware that a new system will enable you to do much more than you initially envisage.

What is your experience of customer care from Harlequin?

I have confidence in Harlequin as the people I deal with own the company and understand the charity sector; they are not a large, generic, software conglomerate.

If our administrator reaches an impasse, she is able to speak directly to those who designed the system, who she has met, rather than a faceless call centre.

Everyone on the coalface of customer service at Harlequin is friendly, patient and informed.

> " With Harlequin we can see the campaign building and the disparate elements now come together to build a complete picture. "

What three words best describe Harlequin?

Accessible, efficient and unifying.

> **Tip:** Seek recommendations from your counterparts in other organisations and ensure to ask about the ongoing customer service they receive from their software provider.

Find out more about Harlequin Software

To book a demonstration at your office please call us on 01672 541541 or visit www.harlequinsoftware.co.uk