Harlequin Software underpins multiple teams and complex data needs at The Poppy Factory

When Melanie Waters joined The Poppy Factory as Chief Executive she had ambitious plans to create a new employability service for disabled veterans, establish a fundraising department and build a business development function. Now, as the historic charity continues to evolve, Harlequin CRM serves as its central hub, helping to manage and maximise complex relationships with reliability, integrity and ease-of-use.

Background to charity: For nearly 90 years, The Poppy Factory in London has been making poppies, crosses and wreaths for the Royal Family and the Royal British Legion's annual Remembrance Day appeal. Since 2007, The Poppy Factory has also been placing disabled veterans of all ages and from a variety of Armed Forces backgrounds into jobs beyond the Factory and all around the UK.

Set up: Harlequin runs in a Citrix environment with 11 site based and remote users.

Used in: service delivery, fundraising, business development and finance.

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Melanie Waters, Chief Executive of The Poppy Factory shares insights on why they needed a new system, the implementation process and how they are getting on with Harlequin.

Why did you need a new charity management system?

We didn't have a proper system and had been making use of Word, Excel and Access. The charity was rapidly growing as we had established a new fundraising department from scratch, a business development function as well as our 'Getting you back to work' service. Disabled veterans and donor numbers started off small but we fast realised that as numbers grew we would need to protect the integrity of our records, cross-reference a lot of information and ensure the data would work for us – rather than us being a slave to information. We needed to be smart about managing and protecting our data, as well as developing relationships sensitively across teams.

What process did you follow?

We knew we weren't experts in IT, so recruited a volunteer project manager with a strong IT procurement background who went about defining the parameters of the system needs in a comprehensive document. This was an iterative process that involved talking to all those who would use the system. We then researched providers, being mindful of not revealing our budget. Harlequin was recommended by an existing client. We invited three suppliers to the office, and spent a whole day with each looking at what was on offer. We evaluated how the software met the brief, its look-and-

feel and functionality - as well as the people themselves. We then took up references and did a site visit to an existing client's site.

Why did you choose Harlequin?

Harlequin's approach to customer service shone out – we knew we could work with them in the long term. The software was clearly versatile and easy-to-use, and could do the most against our requirements document without too much compromise. They were also honest about what the system couldn't do as yet and took onboard development ideas. Affordability was also relevant and Harlequin stood out for quality and value. We also felt most confident that Harlequin could manage our finance needs appropriately, and link with our Sage system.

We also felt assured of Harlequin's experience of working cross-sector, especially in NHS charities and hospices, which also have sensitive data and deal with multiple relationships. CRM has to be broad and manage complex relationships with reliability, integrity and a degree of ease-of-use. The other providers found it hard to think beyond their own sales processes. One really didn't listen and went down the road of trying to maximise their quote. Harlequin's agenda was about meeting our needs.

> " *Harlequin's approach to customer service shines out and the software is versatile and easy-to-use.* "

> **Tip:** *Create a comprehensive requirements document otherwise you risk 'creep' from your original specification.*

How does your organisation use Harlequin?

- **Service delivery:** our Employability Consultants are key users of the system, recording client information, communications and employment options, which means a range of interfaces with clients, mentors and employers need to be carefully and sensitively managed. Workflows in template screens have been designed so clients receive a consistent experience.

- **Fundraising:** private individuals, corporates, major donors, trusts, legacies and events are all managed on the system, as well as everyday fundraising such as donation management, Gift Aid and thanking. All donor records have been built from scratch on the system, including setting up relationships; indicators are being used to define interests for segmentation and targeting appeals.

> " We continue to be impressed with how Harlequin work as a team; they have a real customer ethos. "

What are the main benefits?

- **Integration:** we have a unified system that works across our organisation.

- **Centralisation:** all data and communications are in one place delivering a complete picture of clients, donors and potential supporters.

- **Relationships:** we can develop relationships with clients and donors sensitively and effectively, whilst managing our cross-over of data.

- **Reporting:** now we can readily report on data accurately for management and financial analysis, avoiding a lengthy manual process.

- **Streamlined:** we provide a consistent and quality service to disabled veterans and have clear processes for donation management.

- **Evidence:** we have more confidence in compiling funding bids and case studies, with quicker access to supporting information on the system.

- **Forecasting:** we can forecast in fundraising to show potential income as well as actual income.

Did you have any challenges?

We knew it would be a complex project, even so we underestimated the amount of time the project would take in its entirety; this wasn't a major problem as we could be flexible with time. However, this could have affected momentum and people's expectations internally, so we made sure to maintain regular communications with everyone involved.

What are your plans for the future?

The software was a significant investment so we need to make the most of it. Harlequin will easily cope with the capacity we aspire to achieve in terms of the number of veterans and donors. We will keep in touch with Harlequin about our business plans and will be active members of the user group. We aim to maximise our use of the system and avoid getting stuck in routines that could limit how we operate. We also hope to use the software to best manage our 5,000 tour visitors a year and organise the annual Field of Remembrance which involves Regimental Associations booking plots. Our 'Donor Journey Pathway' will also be designed in template workflows.

What advice do you have for others implementing a new system?

Create a comprehensive requirements document otherwise you risk 'creep' from your original specification. Also, involve anyone who is likely to use the software in some way when you are scoping your needs. Very early on, collect all the data you have about contacts and take the time to thoroughly cleanse it.

What is your experience of customer care from Harlequin?

We continue to be impressed with how Harlequin work as a team - they have a real customer ethos and service mentality, rather than it just being about a product. During the go-live process, we never felt remote from Harlequin and they were responsive to our evolving needs – we felt in safe and experienced hands. Ongoing training and support is high quality and personable.

What three words best describe Harlequin?

Versatile, customer-centric, fulfilling.

> **Tip:** *Use an iterative process to compile your requirements document, ensuring to speak to all potential users.*

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

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