



Helping Helplines consolidate data systems following merger

The Organisation
Helplines Partnership

Market Sector
Membership organisation

Organisation Size
14 staff

Dynamics CRM Implementation

Project timeline



April 2014

June

June

September

November

December

February 2015

SmartImpact appointed

Plan approved/
commenced

Specification completed

CRM system build completed

Integration completed

Testing

Go live

Company Overview

Helplines Partnership facilitates high quality service delivery to callers by providing training, contact solutions, a Helplines Quality Standard, tailored support and information resources.

They raise the profile of the telephone helpline sector by representing their members' interests and influencing the social policy agenda. They give providers of helpline services a voice to help them build sustainability and promote excellence, choice and accessibility for everyone.



Solution Summary

Development and implementation of Microsoft Dynamics CRM system, including:

- Consolidating data from numerous systems inc. CiviCRM, MS Access and Joomla website
- Full integration with Sage finance system, i.e. customers, invoices, payments, credit notes, receipts, etc.
- Membership management via **SmartMembership** module
- Integration with new website

" We're now all singing from the same hymn sheet, using the same system to record contact data and working less in silos across the business. We feel more confident in the system than previous ones, we can trust the information.

We're now using data in a much more marketing-driven way, communicating with members more easily about events, segmenting our members and generally using data much more proactively.

Microsoft Dynamics CRM is a very good and very cost effective way of operating a CRM. We're all able to see the same information in the one place."

Gary Hicks, Head of Information Systems, Helplines Partnership



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The Challenge

Helplines Partnership was formed out of the merger of three separate associations, resulting in data stored in a number of different systems, using different terminology and fields. *“All this data had to be analysed and somehow merged together into one system and still make sense to all users,”* explains Gary Hicks, Head of Information Systems.

“Not only that, we wanted to integrate the resulting system with our brand new website (being built at the same time) and our Sage finance system.”

Helplines Partnership’s complex membership subscription levels also had to be taken into account, with different cost structures and grades all needing to be considered.

Helplines Partnership knew they wanted to use Microsoft Dynamics, *“We knew the familiarity of Microsoft products would make the learning curve easier for staff when getting to know the system. The Microsoft aspect was also important as we were moving away from third-party outsourced IT support and moving to Microsoft Office 365 at the same time. Basically, we were doing it all at once!”*

Luckily, Helplines Partnership met **SmartImpact**.

Our Solution

“One of our biggest concerns was making sure we found the right CRM supplier,” admits Gary. *“As a charity the cost was very much top of mind and we wanted to get it right first time. We even looked at outsourcing to India before finding SmartImpact.”*

Through working closely with Gary and his team we identified all the requirements and issues likely to arise, developing a scope that all parties agreed with. All the different systems and types of data were analysed and migration methods worked out for each. In addition, all the platforms requiring integration were identified and an overall plan developed.

Our data migration experience also proved invaluable to Helplines. We were able to consolidate and merge databases and Excel spreadsheets from the three original organisations smoothly without losing the integrity of any of the data.

Testing was a concern for the Helplines team, *“We’re a small team and did wonder how we would find the time to do all the testing required without taking people away from their day jobs but we managed it without any major issues. The testing also proved to be a good training ground and I’m sure this has contributed to how well the staff have adopted the new system.”*

Using our **SmartMembership** module provided Helplines with a membership specific CRM solution capable of managing subscriptions & renewals, committees and groups and marketing & events.

The project was not without its issues, though, with staff changes on both sides during the project.

“Admittedly it wasn’t easy with people changes on both sides, including our web developer just before we were due to go live, but Charbel has been very good in helping and fixing things for us.”

Summary

Helplines Partnership now has a Microsoft Dynamics system in place, using our **SmartMembership** module and all integrated with their new website and Sage system.

“We now have one system that we’re confident in that everyone records data into, which allows us to be much more proactive with marketing and communicating with our members.”

Talking specifically about Microsoft Dynamics, Gary says, *“Overall, Dynamics is very good and a very cost effective way of operating a CRM. We’re all able to see the same information in the one place. You can end up with different packages in different places, unable to get joined up intelligence from it all. Dynamics has given us the flexibility to do something with all this data.”*

“SmartImpact has been very friendly, very easy to work with and very helpful. We very much appreciate everything they’ve done for us!”

Going forward Helplines has further plans for their CRM, *“We still want to create an API that allows our finance system to have a real-time connection with Dynamics. For various reasons we currently have a process that moves the data between the two systems using CSV files but this is something we will do at a later stage.”*

Overall, **SmartImpact**’s experience with data consolidation and the membership sector made for a winning combination for the Helplines Partnership.

About SmartImpact

We are experts in providing Microsoft Dynamics CRM solutions for organisations where members are central to their operations.

Our products are built using Microsoft Dynamics CRM and SharePoint to form the core solution, which we then customise to meet your full needs.

To find out how we can help you contact us on: **0845 544 2043**, info@smartimpact.co.uk or visit us at www.smartimpact.co.uk

We provide a full range of services including:

- Design, configuration, implementation and support
- Failing project rescue and re-launch
- Performance tuning
- Reliable website and third party platform integration
- Quality testing and training



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