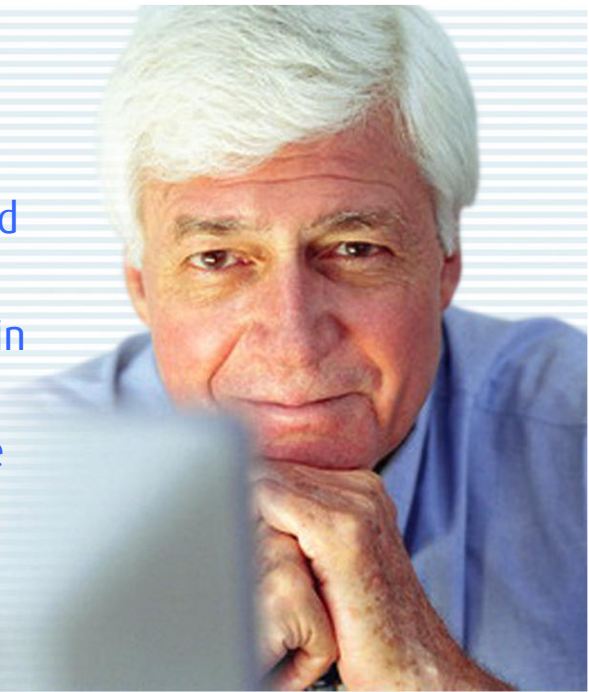


Case Study

"We have the ability to track our marketing spend and the opportunities that arise from our campaigns, ensuring we become more targeted in future approaches. The solution has worked so well, that we are embarking on phase two of the project for our Policy & Community Services division who have similar requirements "

Liz Fryers, Director of Finance & Personnel, Age Concern Northern Ireland



Age Concern Northern Ireland is the only regional age organisation governed by Northern Ireland Trustees who seek to represent the interests of older people.

For over 30 years they have been providing essential support services to older people including day and domiciliary care, advice & information services, community development and health promotion programmes, and the provision of an effective lobbying voice on behalf of older people.

Age Concern Northern Ireland are committed to reducing poverty and fighting disadvantage, defeating ageism and recognising diversity, addressing social exclusion and promoting more effective and responsive public services for older people.

Key Objectives

In order to keep up with donations and different charitable contributors, the Age Concern team decided to commission a CRM system.

The key objectives were to:

- Create a database to track interactions with the key contacts that support the charity such as business members.

- Track the potential members/donors to the organisation.
- Have detailed profiling of clients as there are many different types of members within Age Concern.
- Track their marketing spend and analysing the success of campaigns and events.

Solution

Xperience implemented a solution that has brought real business benefits to the Income Generation team at Age Concern. They now have a database on which to monitor all of their interactions with their key contacts.

Results

Through Xperience implementing the ProspectSoft CRM system the following results were achieved.

- The team now have one central source to track interactions with the key people in their network.
- They can create quotations for donations that are received.
- Documentation can be stored centrally under the relevant person in the database ensuring the whole team have access to important documents.
- They have been able to profile the different types of members and patrons to the charity.

- Internal processes are now smoother, giving a more professional feel to the organisation.
- With the help of Campaign Manager, they have become more targeted in their approach to marketing and can create mail merges to their target audience quickly and easily.

Key Facts

- Industry: Charity
- No of staff: 40
- Accounting System: Opera II
- No Previous CRM System

CRM System Details

- No of sites: 1
- No of network users: 6
- No of modules: 13
- No of mobile users: 9

More Case Studies available at:

www.prospectsoft.com/users

Key Features

- **Configurable** for many sizes and types of organisation with multiple functional modules
- **Fully scalable** from entry-level to enterprise-wide solution
- Sales force, marketing and field service **automation**, all with management escalation
- **Dynamic integration** with **Microsoft Office** giving full document management
- **B2B** and/or **B2C customer relationship management** within one system
- **Dynamic analysis** and **detailed management reporting** on customers and suppliers, sales, service or products

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